



## User Roles

*CPS Document 1.0*

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### *Version History*

<i>CPS Document Number</i>	<i>Date Issued</i>	<i>Prepared By</i>	<i>Purpose</i>
v1.0	7/3/19	EW, AR	First release

## Overview

The User Roles document provides a list of each rule and a brief description for applying user roles to employees, which is sometimes described by the term user permissions. With an understanding of these rules, you can allow some employees access to many options in the software, such as managers, while limiting other employees to only the options they need for doing their job.

## List of User Roles

### Billing

- Allows access to the Billing module on the home screen

### Cash Count

- Allows access to the cash count screen

### Cash Count Show Over Short

- Displays the Over Short amount on the cash count screen and in reports

### Change Customer Class

- Allows the user to be able to change a customer's class

### Change Customer Type

- Allows the user to be able to change a customer's type

### Check In/Out Inventory (CPS Air)

- Allows the user to check in/out inventory in CPS Air

### Check In/Out Inventory Approval (CPS Air)

- Allows the user to give approval to a check in/out list on CPS Air

### Currency Exchange Rate

- Allows the user to be able to access the currency exchange rate menu in the Options

### Customer

- Allows access to the Customer module on the home screen

#### Customer Credit Card Full Access

- Allows the user to have full editing privileges of a credit card on file in the Customer module

#### Customer Read Only

- Allows the user to access the Customer module but cannot make any changes to it.

#### Data Collection

- Allows access to the Data Collection module on the home screen

#### Delete Sale

- Allows the user to be able to delete a sale from the sale lookup screen

#### Email

- Allows access to the Email Marketing module on the home screen

#### Employee

- Allows access to the employee setup screen in Options

#### Enter Waste/Breakage Reason

- Allows the user the ability to enter a reason for a ruined product if the waste/breakage feature is enabled.

#### Extensions

- Allows access to the Extensions module on the home screen

#### F&B

- Allows access to the FB module on the home screen.

#### F&B Reports

- Allows access to the Reports button inside the FB module

#### Gift Card Expiration Date

- Allows the user to set an expiration date on a gift card

#### Handicap

- Allows access to the Handicap module on the home screen

#### Inventory

- Allows access to the Inventory module on the home screen

#### Inventory Read Only

- Allows the user to access the Inventory module, but cannot make any changes

#### Kiosk POS

- Allows access to the Kiosk module on the home screen

#### Lesson Book

- Allows access to the Legacy Lesson Book module on the home screen

#### Lesson Book Pro

- Legacy feature that is no longer used

#### Lesson Book V3

- Allows access to the current Lesson Book module on the home screen

#### Notification Center

- Allows access to the Notification Center module on the home screen

#### Options

- Allows access to the Options menu under Tools

#### Print Duplicate Receipt

- Allows the user to print a duplicate receipt in the sales lookup screen

#### Print Full Receipt

- Allows the user to print a full sheet receipt from the sales lookup screen

#### Private Billing

- Allows access to the Private Billing module on the home screen

#### Quick Sales Button

- Adds a quick access to the quick sale button menu under Tools

#### Quick Sales Button All Stores

- Allows access to modify quick sales buttons for all stores

#### Quick Sales Button Assigned Stores

- Allows access to only modify quick sales buttons in the stores that the user is assigned to

#### Report

- Allows access to the Reports module on the home screen

#### Report Scheduler

- Allows access to the report email scheduler under Tools to setup scheduled reports

#### Reports Sale Deleted

- Allows access to the Sales Deleted report

#### Reports Select Terminal

- Allows the ability to select multiple terminals in report filters

#### Reports Send Email

- Allows the ability to send the report to an email address from the Reports module

#### Reports Set Report List

- Allows the ability to modify which reports appear on the left-hand list in the Reports module

#### Reports View Monthly

- Allows the user to access the Monthly tab in the Reports module

#### Reports View OnDemand

- Allows the user to access the OnDemand tab in the Reports module

#### Reports View Today

- Allows the user to access the Today tab in the Reports module

#### Reports View Weekly

- Allows the user to access the Weekly tab in the Reports module

#### Reports View Yearly

- Allows the user to access the Yearly tab in the Reports module

#### Retail

- Allows access to the Retail module on the home screen

#### Returns day of Only

- Restricts the user to only be able to do returns in the same day

#### Sales

- Allows access to the Sales module on the home screen

#### Sales Returns

- Allows the ability to do returns

#### SH\_Mobile

- Allows the user the ability to log into StarterHut mobile

#### SH Mobile Access Setting

- Allows the user to be able to access the settings button in StarterHut mobile

#### SH Mobile Allow Block Booking

- Allows the user the ability to block a booking on StarterHut mobile

#### SH Mobile Book

- Allows the user the ability to make a booking on StarterHut mobile

#### SH Mobile Cancel Booking

- Allows the user the ability to cancel a booking on StarterHut mobile

#### SH Mobile Change Rate

- Allows the user the ability to change rate in StarterHut mobile

#### SH Mobile Move Booking

- Allows the user the ability to move a booking on StarterHut mobile

#### SH Mobile Set Caddy Grade

- Allows the user the ability to set a caddy on a tee time in StarterHut mobile

#### SH Mobile Set Cart

- Allows the user the ability to set a cart on a tee time in StarterHut mobile

#### SH Mobile Special Price Mode

- Allows the user to set a discount on a tee time on StarterHut mobile

#### SH Mobile Tee Off

- Allows the user to set a tee time as teed off on StarterHut mobile

#### StarterHut

- Allows access to the legacy StarterHut module on the home screen

#### StarterHut V3

- Allows access to the current StarterHut module on the home screen

#### Starterhut V3 Read Only

- Allows the user to access StarterHut but not make any changes

#### Tee Sheet (CPS Air)

- Allows the user to be able to access the tee sheet button on CPS Air

#### Timekeeper

- Allows access to the Timekeeper module on the home screen

#### Timekeeper Admin Access

- Allows access to the admin section of the Timekeeper module

#### Transaction Editor

- Allows access to the transaction editor feature on the sales screen

#### UPS

- Legacy feature that is no longer used

#### Web Report

- Legacy feature that is no longer used

#### Web Stores

- Allows access to the Webstore module on the home screen

#### Win Tee Sheet

- Legacy feature that is no longer used