

Financials for Office 365

Full User vs Limited User Guide

Below are some of the pre-defined roles that are available on Financials for Office 365 for Limited Users, and the work tasks which they can fulfil:

In Financials for Office 365, there are multiple departments; therefore, owners may wish to limit what certain users can access and edit. Financials for Office 365 has two types of users available for the Standard and Premium Editions. These are:

- Full Users
- Limited Users

Full Access Users (\$99 per user for standard; \$159 per user for premium)

Full User Licenses allow full read and write capabilities to all of Financials for Office 365's functionality within their predefined role. Full Users are ideal for management of certain departments (such as sales managers, production planners, accounting managers, etc.). Many businesses to date have felt that full users are the most efficient as they can undertake a variety of tasks. However, this does not extend beyond their user's permission sets (For example, a sales order processor cannot post purchase orders or invoices to the GL).



In businesses where both full and limited users are being utilized, full users are vital to completing everyday processes such as approval of orders and invoices sent through by limited users.

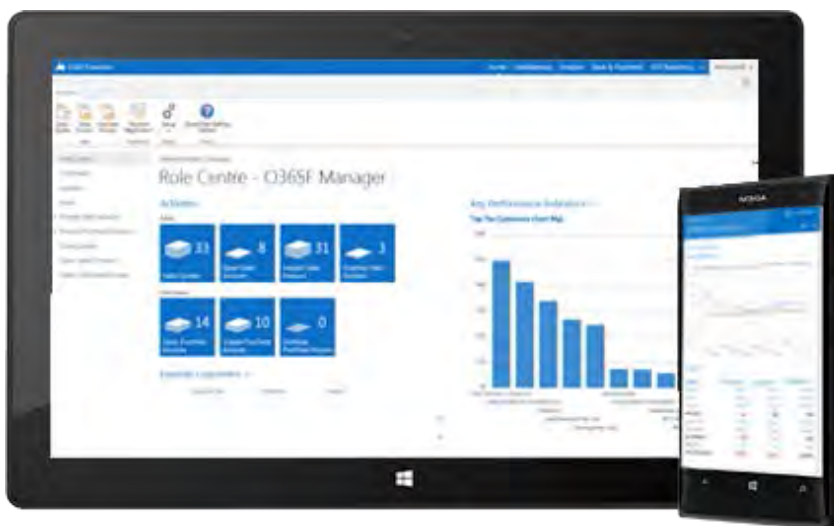
Limited Access Users (\$49 per user for standard and premium)

Limited User Licenses restrict access to Financials for Office 365. Limited Users have been designed to provide a lower-cost alternative for Financials, as they still allow employees in an organisation to efficiently fulfil their daily duties. Limited Users have full read capabilities, but limited ability to write to tables (access to 3 tables in total) and limited access to some of the functionality in Financials.

Limited users are not allowed to write directly or indirectly in regards to the following tables

- General Ledger Entries
- Permission Sets
- Permissions
- Access Control

As limited users can't post to certain tables, a full named user can approve the likes of their orders which are then posted to the G/L. The use of workflows between limited users and full users means more transparent processes to managers. Notifications sent between full and limited users mean that any urgent queries or approvals are clear to all Financials users.



Key Benefits of the Limited User

- Price of \$49 (more affordable pricing to utilize Financials)
- Extend the advantages of Financials across your business at a reasonable rate
- Enhanced communication and productivity for employees in your organisation through the likes of workflows and approval processes
- Ability to access Financials on-the-go as it is a mobile, cloud solution
- Same access rights to Office 365 (BI, Search, Workflow and Document Management/Storage)

Below are some of the pre-defined roles that are available on Financials for Office 365 for Limited Users, and the work tasks which they can fulfil:

Warehouse Worker

- Receive incoming goods in the warehouse
- Ensure inventory and stock counts are accurate
- Processing orders from the warehouse (Picking and Packing)
- Shipping Orders on Schedule



Mobile Salesperson

- Send sales quotes to customers on the go (on site; at your office; in the car etc.)
- Generate a sales order for a customer (to be approved by a manager if you wish)
- Create new customers
- Run sales reports (customer-order summary; sales statistics; customer item/sales etc.)



Receptionist

- Run reports for management
- Create reports in Excel (Jet Reports)
- Customize invoice layouts through Word
- Update customer or employee data
- Monitor delivery statuses on orders



Mobile Purchasing Agent

- Create purchase orders for vendors/suppliers in Financials for Office 365
- Track the delivery of orders more accurately
- Access to vendor/supplier details

