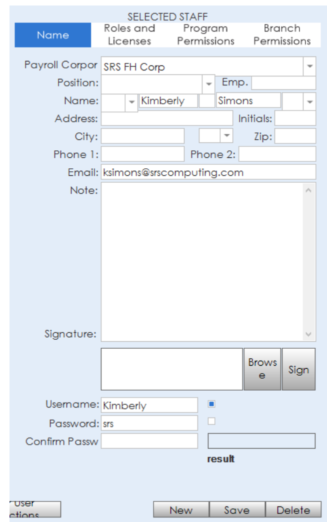
User Permissions

We’ve recently updated this tool to make access even more customizable than before. Now, you can restrict ANY field you’d like. The important thing to remember is – if you had user permissions set before this update, those changes won’t be lost or changed.

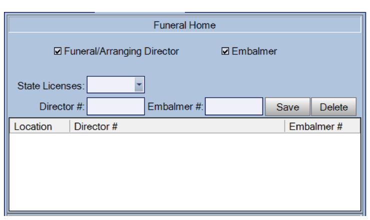
If you have more than one module with SRS, you can set the permissions in any of them. So, if you’re in our Crematory module and want to set permissions for Procession, you can do it! You can have certain staff in charge of different things, and they’ll only have access to information that you want them to have. This is also how you create administrators for SRS. Maybe you only want certain staff members to be able to see or change accounting information, including account balances. Maybe only certain staff members can take payments or give discounts.

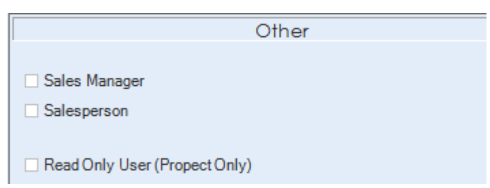
Here’s how to do it:



First, click on Settings, then go to the Crematory Staff tab. Learn the layout first. The table shows all of your staff members and their usernames to login. Click New to add a new staff member. You can enter or edit that person’s information on the right side. If you have their signature saved on your computer, click browse to upload it. Their login username and password can be changed as well.

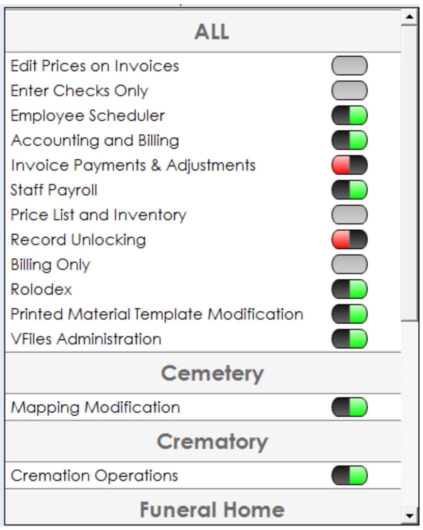
Under the Roles and Licenses tab, you can check whether they’re a Funeral or Arranging director, or an Embalmer. You’ll want these checked so their name will appear in the proper drop down to select them in each case. You can enter any state license numbers, and add as many as you want. They'll appear within the box. Select the appropriate boxes if they're a Sales Manager, Sales Person, or Read Only. Read Only means they won’t be able to make any changes, and being a Sales Manager makes them eligible for commissions and trust. Remember to hit Save!





Program Permissions is where we get into more detail! The checkboxes at the top determine access to different SRS modules. If you want this person to be able to access Funeral Home (Procession) and Crematory (Phoenix), check both boxes. An administrator will have access to EVERYTHING in Procession, or any other module, as well as changing someone else’s access. Check they’re Prospect Licensed if they have a login for that as well.

Under ALL, these are permissions for every module including Funeral Home, Cemetery, Crematory, and Prospect. We’ll go through each one individually, that way you know what you’re giving staff permission to!



- Edit Prices on Invoices lets staff edit the prices on an invoice, new or existing.
- Enter Checks Only works with Accounting. They can access the Accounts, Checks, and Accounts Payable tabs.
- Accounting and billing gives your staff members access to just that! If they're enabled for accounting and billing, they can view, edit, or adjust any accounts you have, and create or edit invoices. Also, this allows them to take payments and make adjustments.
- Staff Payroll grants access to your payroll within the business.
- Price List/Inventory gives a non-administrator permission to edit or view the price list and inventory. If a director is using Procession for arrangements, this should be turned on.
- Record Unlocking gives them permission to unlock a record if someone else is on that case. When someone is on a client case, it will lock so no one can make changes while it is already in use. Giving them permission to unlock records means they could simultaneously be in the same case as someone else. Also, record unlocking gives access to lock or unlock an invoice.
- Billing Only means this user can do anything in Billing, such as creating an invoice, take payments, give discounts, and trust and commissions.
- If rolodex is turned on, they can add, edit, or delete contacts in the rolodex.
- Printed Materials Template Modification lets them edit and create Global Templates for anything in Printed Materials, including prayer cards, letters, and obituary templates.
- VFiles Administration means this person can delete anything scanned or uploading into a case's Virtual Files.
- Under Cemetery, turn the Mapping Modification on if you want them to edit your geographical maps. They can add or delete sections, blocks, and graves.
- Turning on Cremation Operations identifies this user as a cremation operator.
- At Need/Preneed should be turned on if you require logins for Procession. If you want this person to assign tasks in E-View, make sure this is on. It will make their name appear in the staff dropdown when assigning tasks.
- Marketing is for those using Prospect, our CRM tool.
- Access to View All Leads lets this person view every lead in Prospect, not just those assigned to them.
- Add New Leads lets them do just that!
- Contact and Correspondence Deletion should be turned on if you grant this staff member access to delete any correspondence made with a lead, and their contact information.
- Correspondence Creation allows them to enter any notes from an email, phone call, or any communication they've had with that lead.

- Import Leads lets this person import leads from another SRS program, such as Procession, InStone, or Phoenix.

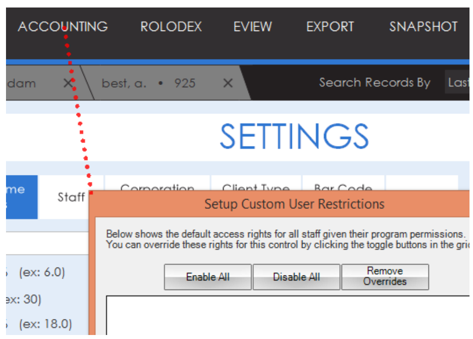
- Summary Printing enables this user to print a summary of correspondence for any specific user.

- Supporting Staff allows you access to import cases to other staff members.

- Utilities and Setup gives access to add, edit, or delete tasks, a chain of events, tags, statuses, and meetings.

- The Branch Permissions tab controls which branch this employee belongs to. For each program, select which branch you'd like for that person, or all of them.

We've also created a special tool for administrators that not only lets you restrict certain sections, but you can also restrict ANY field within your SRS modules! To do this, click Alter User Restrictions. Keep in mind, you have to be an administrator to do this! Now, you can navigate through every tab or page in SRS. Hovering over any field will let you see which staff member is restricted. You can change these restrictions by right clicking and granting or restricting access.



A few examples for these restrictions to be most efficient are:

- If you want a staff member to take payments, but not change the debit and credited accounts, those dropdowns will not be able to change.

- Case Number: You can set this up so staff members will be able to copy the number, but can't type in this field or click the generate button. That way, you know they'll never change.

To exit this setup mode, click Exit Restrict Mode at the bottom.

These permission are granted at your discretion, so it's up to you what your staff can do!