Security Permissions Required for Pricing

As you implement pricing, you'll need to decide what level of permission to grant each of your user groups. Users fall into one of three types when it comes to pricing:

- Basic users with view-only permissions for event pricing details
- Schedulers with the ability to edit event pricing and generate invoices
- Pricing administrators who create and maintain rate groups, tax schedules, and rate schedules

To enable these permissions for a group of users, use <u>Series25 Group Administration</u> to set the following permissions. Each group also should receive the permissions of the group(s) above it.

| User Group | Group Permissions | (Minimum) Object Security Permissions |
|----------------|--|---|
| Basic Users | Basic: 4.0 View Pricing on Events | "View Only" rights on events |
| Schedulers | Basic: 4.1 <i>Edit Pricing on Events</i> Basic: 5.0 <i>View Payments on Events</i> Basic: 5.1 <i>Manage Payments on Events</i> Basic: 11.0 <i>View Organization Accounting Codes</i> | Be the event's Scheduler <i>OR</i> Basic: 4.1 <i>Edit Pricing on Events</i> i.e. "Edit, Copy, Delete" rights on events for full control of events you wish to edit the pricing "View Only" rights on invoice reports |
| Administrators | Administrative: 4.0 <i>Event Document Creation and</i> <i>Management</i> Administrative: 15.0 <i>Edit Organizations</i> Administrative: 15.2 <i>Edit Organization Accounting</i> <i>Codes</i> Administrative: 16.0 <i>Create and Copy Organizations</i> Administrative: 18.0 <i>Set up Pricing and Rate Groups</i> | |

It's best not to enable pricing for your users until you're ready to deploy it. Otherwise, users may be confused seeing incorrectly calculated prices while you're still setting up formulas. You can <u>set security for multiple groups at once</u> in Series25 Group Administration to hide pricing (Basic: 4.0 *View Pricing on Events* = **No**) for all but your power users and testers until setup is complete.