

User privileges

Privileges	Definition
Basic	
Create Client	Create a new patient
Deactivate client	Mark patients inactive/deceased
Enter 3p payment	Enter insurance payments
Manage recalls	Create/edit patient recalls
Marketing	View marketing campaigns
Order new aid	Create a patient-specific hearing aid order
Receive payment	Receive patient payments/deposits
Return items	Return accessories/batteries/hearing aids/services
Scheduling	Create/view appointments
Sell items	Sell non-hearing aid items
Send email	Send emails
Send faxes	Send faxes
View client	Open a patient file
Administration	
Maintain aids and options	Create/edit hearing aids and options
Maintain document properties	Create/edit document categories and status
Maintain event types	Create/edit scheduling event types
Maintain insurers	Create/edit insurance companies
Maintain marketing groups	Create/edit marketing groups
Maintain orderable items	Create/edit orderable items
Maintain physicians	Create/edit family physicians
Maintain referrer types	Create/edit referrer types and referral sources
Maintain repair pricing	Create/edit manufacturer repair pricing
Maintain repair types	Create/edit repair types
Maintain service plan items	Create/edit service plans
Maintain text snippets	Create/edit text snippets*
Maintain users and roles	Create/edit users, privileges and reports
Manage templates	Create/upload templates
Pricing update	Accept Canadian-released catalog updates
Update prices	Update hearing aid prices and edit non-hearing aid items
View Dashboards	Access to view dashboards
View wholesales costs	View cost of goods
Accounting	
Accounts Payable	Enter vendor bills
Backdate accounting	Backdate accounting transactions
Clear undeposited payments	Enables 'Clear' button in 'Enter bank deposits'
Delete bank deposits	Delete saved bank deposits

Delete invoice	Delete an invoice from the 'Sales history'
Delete misc client credit	Delete credits
Delete refund	Delete refunds
Delete write-off	Delete a write-off from the 'Sales history'
Edit client payment	Edit/delete a patient payment
Edit misc client credit	Edit Credits
Edit return	Edit a return credit memo
Enter bank deposit	Enter bank deposits
Issue client refund	Create a patient refund
Issue misc client credit	Create a patient credit
Regenerate invoices	Enables 'Regenerate invoice(s)' button
Write off invoice	Write off a patient or insurer invoice
Advanced	
All	Option for <All> in location drop-down
All location as default	<All> location is the default location when first logging in
Cancel aid order	Cancel a patient-specific hearing aid order
Clear any claims	Clear Canadian-specific electronic claims
Create marketing campaigns	Create/edit marketing campaigns
Delete client audiology status	Delete a patient audiogram
Edit prescriber/fitter details	Edit the prescriber/fitter on hearing aid sale
Electronic billing	Electronic billing for Canadian clinics
View faxes	View fax outbox
Document Management	
Delete documents	Delete stored patient documents
Edit documents	Edit stored patient documents
Store documents	Save documents to patient 'Documents' tab
Unlock editable forms	Unlocked archived editable documents
View documents	View stored patient documents
Inventory	
Adjust stock	Add existing stock to inventory without posting to accounting system (Inventory --> Add stock)
Delete inventory	Delete items from inventory
Manage inventory	View/manage hearing aid inventory

*to grant a user the ability to add text snippet categories they need the "Maintain text snippets" and the "Maintain referrer types" permissions