

User Permissions - Orders And Invoicing

The Order & Invoice permissions determine how a user can interact with existing orders and the Infusionsoft billing features. They apply to users who are responsible for creating manual orders, managing existing orders, invoicing customers, and updating billing information. They also apply to the user who is responsible for integrating your merchant account with Infusionsoft. To access these User Permissions, go to **Admin > Users** and click **Edit Permissions** next to the user you would like to modify.

Orders & Invoicing

These permissions control a user's ability to manage credit card information, set up merchant accounts, sales tax tables, etc...

- **Can edit credit cards:** This permission controls access to customer credit card information. If it is set to *No*, the user will not see a clickable credit card link (e.g., Visa) or the *Add Credit Card* button when viewing a contact's order history.
- **Can charge credit cards:** This permission controls the ability to add an order payment, regardless of the payment method. If it is set to *No*, the user will not see the *Add Payment* button when adding a new order or viewing an existing order record. In addition, the user will not be able to process a refund. If the *Can charge in bulk* invoice permission is set to *Yes*, the user will still be able to charge invoices in bulk.
- **Can manage merchant accounts:** This permission controls the ability to add or edit merchant accounts. If it is set to *No*, the user will receive an *access denied* message when trying to add or edit a merchant account through *E-Commerce > Settings* or through *E-Commerce Setup > Payment Options*. The user can still view the merchant account list in various areas of the system and select a merchant account when processing a payment.
- **Can manage sales tax:** This permission controls the ability to add or edit sales tax percentages. If it is set to *No*, the user will receive an *access denied* message when trying to add or edit sales tax information through *E-Commerce > Settings* or through *E-Commerce Setup > Taxes*.

Invoice

These permissions control the ability to send and manage customer invoices.

- **Can send:** This permission controls the ability to send invoices to clients. If it is set

to *No*, the user will not see the *Preview Invoice* or *Send Invoice* buttons when viewing a customer's order.

- **Can see account summary:** This permission controls the ability to view the account summary for individual contacts. If it is set to *No*, the user will not see order and balance due totals when viewing a contact record or the *Show Invoices* button.
- **Can charge invoices in bulk:** This permission controls the ability to run autocharges for a list of invoices. If it is set to *No*, the user will not see the option to *Attempt Charge for Invoices* in the *Actions* drop down menu when viewing a list of invoices (i.e., through the failed invoice report.)
- **Can manage failed invoices in bulk:** This permission controls the ability to manage failed invoices (e.g. void invoices and remove them from the customer's subscription plan.) If it is set to *No*, the user will not see the option to *Manage Failed Invoices* in the *Actions* drop down menu when viewing the *Failed Invoice Report*.

Order

These permissions control the ability to view, add, edit & delete order records. These permissions *do not* include access to subscription programs that involve recurring billing.

- **Can view all records:** This permission controls the ability to view individual order details. If it is set to *No*, the user can view a list of orders and will have access to a contact's order history, but will receive an *access denied* message when trying to click into an order to view it.
- **Can edit all records:** This permission controls the ability to edit existing orders. If it is set to *No*, the user can view a list of orders and click into an order to view its details, but will only be able to save changes to the orders they created. If the *Can delete* permission is set to *Yes* the user can still delete orders.
- **Can add all records:** This permission controls the ability to manually create new orders. If it is set to *No*, the user will not see the option to *Add an Order* in the *Orders* menu or click the *Add Order* button when viewing a contact's order history.
- **Can search all records:** This permission controls the ability to search for a list of orders. If it is set to *No*, the user will not see the option to *View Orders* in the *Orders* menu.
- **Can delete:** This permission controls the ability to delete existing order records. If it is set to *No*, the user will not see the *Delete* button when viewing individual order records.
- **Can see order tab on person record:** This permission controls access to the order history for individual contacts. If it is set to *No*, the user will not see the *Orders* tab when viewing a contact record and so will not be able to view, add, edit, or delete

orders from there; however, the user may be able to view lists of orders and edit order records from these lists, if the other order permissions allow.
