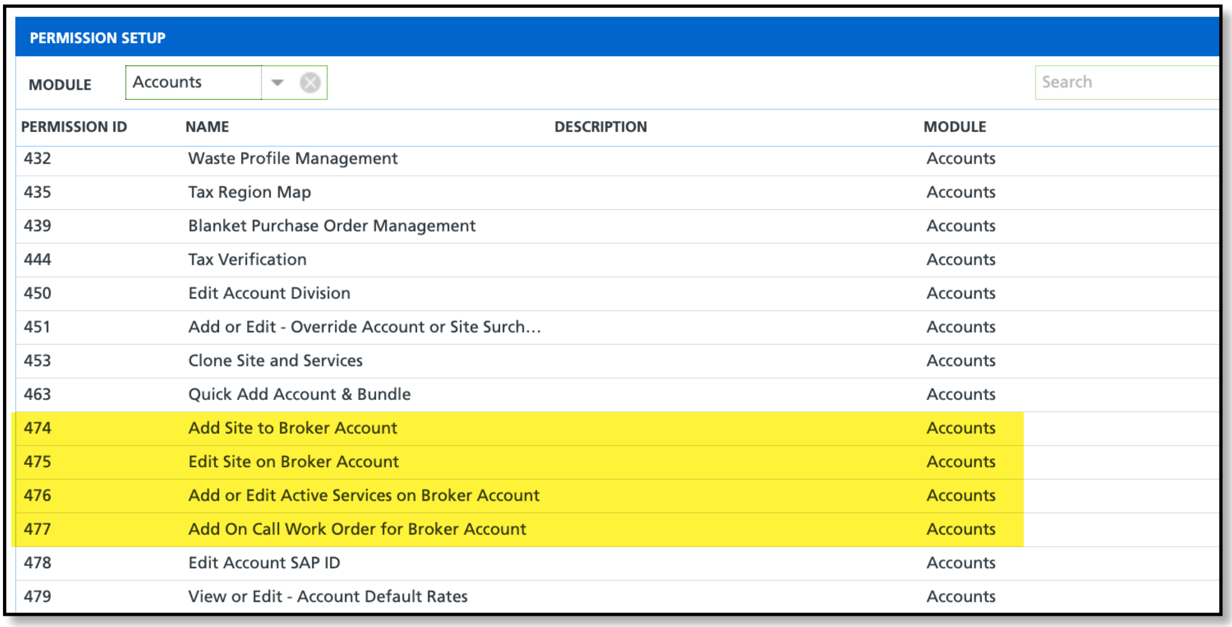
Broker Account Permissions (Setup) - New Permissions Added for Broker Accounts and Updates to Site Division Access (18051)

Last Modified on 05/20/2025 1:01 pm PDT

Broker Permissions

Four new broker permissions have been added to the Accounts module:

Permission	Description
Add Site to Broker Account (474)	Displays the Site, Clone Site, and Split Site into New Account menu items for accounts with the 'Broker' Account Class Type. Also controls access to the 'Add' option in the Site Search window.
Edit Site on Broker Account (475)	Displays the site's 'Edit' right-click option for accounts with the 'Broker' Account Class Type. To edit the site, users must also have the 'Edit Non-Prospect Site' permission.
Add or Edit Active Services on Broker Account (476)	Displays the 'Active Services' option in the account menu, calendar right-click menu and the Site Service 'Add' button for accounts with the 'Broker' Account Class Type.
Add On Call Work Order for Broker Account (477)	Displays the 'Create On Call Order' option in account menu, calendar right-click menu and site service right-click menu for accounts with the 'Broker Account Class Type.



PERMISSION ID	NAME	DESCRIPTION	MODULE
432	Waste Profile Management		Accounts
435	Tax Region Map		Accounts
439	Blanket Purchase Order Management		Accounts
444	Tax Verification		Accounts
450	Edit Account Division		Accounts
451	Add or Edit - Override Account or Site Surch...		Accounts
453	Clone Site and Services		Accounts
463	Quick Add Account & Bundle		Accounts
474	Add Site to Broker Account		Accounts
475	Edit Site on Broker Account		Accounts
476	Add or Edit Active Services on Broker Account		Accounts
477	Add On Call Work Order for Broker Account		Accounts
478	Edit Account SAP ID		Accounts
479	View or Edit - Account Default Rates		Accounts

Pathway: *Setup > System > Permissions*

Account and Site Division Access

The following logic updates have been applied to customer service account and site division access across all account class types:

Account Division Access

1. If the user does not have access to the account's division, the following menu items will be hidden:
   - Proposal and Contract
   - ACH Credit
   - Appointment
   - Manual Charge
   - Refund Request
   - Refund / Rebate Check
   - Task
   - Default Rates
   - External Account
   - Lead
   - Next Invoice Message
   - Vendor Invoice
   - Split Site into New Account
2. If the user does not have access to the account's division, the 'Add' menu icon will be hidden on the Orders, Quotes and Contracts section.

Account AR History Access

1. If the user does not have access to the account's division, the following are hidden
   - Toolbar button options: Invoice, Auto Apply, Balance Write Off and Wallet
   - Right-click options:
     - View Details / Adjust Invoice
     - Auto apply
     - Auto Apply to Next Invoice
     - Import Invoice
     - Record Chargeback
     - Refund Payment
     - Void Payment
     - Reverse/Transfer/Split
     - Reverse Invoice
     - Reverse Adjustment
     - Void / Reverse
     - Convert to Deposit
     - Convert to Payment

Site Division Access

1. If the user does not have access to the Site's division, the following logic applies:
   - Menu items: Active Service, On Call Order and Safety Profile are hidden.
   - The *View/Edit Site* right-click options for Site Service are disabled.
   - The 'Add' option for Active Services is hidden.
   - The following Active Services right-click options are hidden:
     - Edit
     - Reverse
     - Transfer
     - Link Parent Service
     - Create On Call Order
     - Add Site Service Discount
   - The following calendar right-click options are hidden:

- Add Active Service
- Create On Call Order