

# Recommended permissions: vet nurse/technician role



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Name

Recommended Vet Nurse/Technician

Is Key Role

Toggle All

## Financial

### Invoice

- Disable/Restore
- Approve
- Unapprove
- Approve Credit Notes
- Change Staff Member
- Change Standard Price
- Change Price/Discount
- Change Dispense Fee
- Unapprove Already Sent

### Invoice Expense

- Remove Invoice Line
- Remove Billing Trigger Line

### Payment

- Disable/Restore
- Edit

### Customer Order

- Approve
- Unapprove
- Approve Customer Orders When Balance Is More Than 2 Months Old

### Estimate

- Disable/Restore

### Sales Template

- Add/Edit
- Disable/Restore
- Approve
- Unapprove

### Recurring Invoice

- Add/Edit
- Disable/Restore
- Approve
- Unapprove

### Purchase Order

- Disable/Restore
- Approve
- Unapprove
- Purchases Don't Require Clients

### Inventory Adjustment

- Disable/Restore
- Approve
- Unapprove

### Payment Method

- Delete Payment Methods
- Delete Payment Terms
- Edit Payment Methods
- Edit Payment Terms
- Delete Contact Associations

## Administration

### Tags

- Create New Tags
- Apply Tags
- View Product Details

### Product

- Disable Products
- Restore Products
- Restore Inherited Products
- Add New Products
- Edit Products
- Importer
- View Cost Price
- Change Sell Price
- Change Sell Price When Receiving Invoice
- Merge Products

### Product Group

- Add/Edit
- Disable/Restore

### Wellness Plan

- Add/Edit
- Disable/Restore
- Edit Free/Discount Amounts on Used Benefits

### Wellness Plan Benefit

- Add/Edit
- Disable/Restore
- Convert Discounts to Benefit Discounts

### Wellness Plan Membership

- Add/Edit
- Disable/Restore
- Pause/Unpause memberships
- Cancel memberships with consumed benefits
- Override memberships cancellation fee

### Contact

- Disable/Restore
- Contact Importer
- Change Credit Status
- Edit Vet Contacts

### Treatments

- Diagnostics
- Disable Discharge Summaries
- Enable / Disable Animals
- Create Image Map Categories

### Species

- Add/Edit
- Disable/Restore
- Merge

### Breed

- Add/Edit
- Disable/Restore

## Clinical

### Clinical Record

- Clinical Record
  - Add/Edit
  - Disable/Restore

### Clinical Exam

- Health Status
  - Add/Edit
  - Disable/Restore

### Pertinent History

- Add/Edit
- Disable/Restore

### History

- Add/Edit
- Disable/Restore

### Physical Exam

- Add/Edit
- Disable/Restore

### Assessments

- Add/Edit
- Disable/Restore

### Plan

- Add/Edit
- Disable/Restore

### Additional Information

- Add/Edit
- Disable/Restore

### Diagnostics and Treatments

#### Medication

- Add/Edit
- Disable/Restore
- Allow user to refill medications
- User can dispense medications

#### Therapeutic / Procedure

- Add/Edit
- Disable/Restore

#### Diagnostic Request

- Add/Edit
- Disable/Restore

#### Diagnostic Result

- Add/Edit
- Disable/Restore

#### Diagnostic Interpretation Request

- Add/Edit
- Disable/Restore

## Standard Of Care

- Edit Standard Of Care
- Change Next Due
- Add/Remove For Patients

## Appointments

### Appointments

- Delete
- Appointment Booking Groups
  - Add/Edit
  - Disable/Restore
  - Update Booking Group on Appointment Type
  - Add/Edit/Disable Appointment Statuses

## Documents

- Edit Documents
- Delete Documents

## Templates

- Add/Edit Templates
- Edit Shorthand

## Attachments

- Delete Attachments
- Delete Attachments for Diagnostic Results

## Online Booking

- Add Guides for Online Booking

## Login Restrictions

- Allow user to login from any IP.

## Feature Requests

- View Feature Request
- Add Feature Request
- Edit Feature Request
- Disable/Restore Feature Request

## Teams

- Approve Product Containers
- Unapprove Product Containers
- Delete Product Containers
- Price Adjustment Reason
  - Add/Edit
  - Disable/Restore
- Change Serial Numbers
- Set Financial Lockdown Date
- Inventory Order
  - Add/Edit
  - Disable/Restore
  - Approve
  - Unapprove
- Sell Below Cost
- Credit Limits
  - View Credit Limits
  - Add/Edit Credit Limits
  - Disable Credit Limits

- Disable/Restore
- Merge
- Animal Colour
  - Add/Edit
  - Disable/Restore
  - Merge
- Users
  - Add/Edit Users
  - User Permissions
  - Edit Commission Percentages
- Roles
  - Add/Edit/Disable Roles
  - Add/Edit/Disable Key Roles
  - Assign Roles
  - Assign Key Roles
  - Add/Edit Calendar Planning Guides
  - Use Records Dashboard
- Price Adjustment Rules
  - Add/Edit Price Adjustment Rules
  - Restore Price Adjustment Rules
  - Restore Inherited Price Adjustment Rules
- Manage Resource
- Change User Division
- System Settings
- Add / Edit Master Problems
- Add/Edit Clinical Summary Names
- API Administration
- Merge Records
- Export Communications
- Communication Task
  - View Communication Tasks
  - Add/Edit Communication Tasks
- Scheduled Reporting Task
  - View Scheduled Reports
  - Add/Edit Scheduled Reports
- Tag Task
  - View Tagging Tasks
  - Add/Edit Tagging Tasks
- Event Group
  - Add/Edit
  - Disable/Restore
- Time/Clock
  - View Time Clock
  - Edit Time Clock
- Standard Operating Procedures
  - Edit Standard Operating Procedures
- Sidebar
  - Show Alerts/Metrics Tab on Sidebar
- Central Structure
  - Add/Edit

- Vaccinations**
- Vaccination
  - Add/Edit
  - Disable/Restore
- In Clinic Notes**
- In Clinic Notes
  - Add/Edit
  - Disable/Restore
- Hospital Notes
  - Add/Edit
  - Disable/Restore
- Addendums
  - Add/Edit
  - Disable/Restore

- Communication**
- Discharge Summary
  - Add/Edit
  - Disable/Restore
- Clinical Summary
  - Add/Edit
  - Disable/Restore

- Other**
- Master Problems
  - Add/Edit
  - Disable/Restore
- Image Map Note
  - Add/Edit
  - Disable/Restore
- Imaging Report
  - Add/Edit
  - Disable/Restore

- Team**
- Add/Edit
- Disable/Restore
- Team Member
  - Add/Edit
  - Disable/Restore
- Clinical Record Assignee
  - Add/Edit
  - Disable/Restore
  - Change Roles
- Role Title
  - Add/Edit
  - Disable/Restore
  - Merge

### Tasks

- User Task
  - Add/Edit
  - Disable/Restore
- User Task Comment
  - Add/Edit
  - Disable/Restore

# Recommended permissions: **manager role**



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## Name

Recommended Manager  Is Key Role

Toggle All

### Financial

#### Invoice

- Disable/Restore
- Approve
- Unapprove
- Approve Credit Notes
- Change Staff Member
- Change Standard Price
- Change Price/Discount
- Change Dispense Fee
- Unapprove Already Sent

#### Invoice Expense

- Remove Invoice Line
- Remove Billing Trigger Line

#### Payment

- Disable/Restore
- Edit

#### Customer Order

- Approve
- Unapprove
- Approve Customer Orders When Balance Is More Than 2 Months Old

#### Estimate

- Disable/Restore

#### Sales Template

- Add/Edit
- Disable/Restore
- Approve
- Unapprove

#### Recurring Invoice

- Add/Edit
- Disable/Restore
- Approve
- Unapprove

#### Purchase Order

- Disable/Restore
- Approve
- Unapprove
- Purchases Don't Require Clients

#### Inventory Adjustment

- Disable/Restore
- Approve
- Unapprove

#### Payment Method

- Delete Payment Methods
- Delete Payment Terms
- Edit Payment Methods
- Edit Payment Terms

Delete Contact Associations

Assign Product Categories

### Administration

#### Tags

- Create New Tags
- Apply Tags
- View Product Details

#### Product

- Disable Products
- Restore Products
- Restore Inherited Products
- Add New Products
- Edit Products
- Importer
- View Cost Price
- Change Sell Price
- Change Sell Price When Receiving Invoice
- Merge Products

#### Product Group

- Add/Edit
- Disable/Restore

#### Wellness Plan

- Add/Edit
- Disable/Restore
- Edit Free/Discount Amounts on Used Benefits

#### Wellness Plan Benefit

- Add/Edit
- Disable/Restore
- Convert Discounts to Benefit Discounts

#### Wellness Plan Membership

- Add/Edit
- Disable/Restore
- Pause/Unpause memberships
- Cancel memberships with consumed benefits
- Override memberships cancellation fee

#### Contact

- Disable/Restore
- Contact Importer
- Change Credit Status
- Edit Vet Contacts

#### Treatments

- Diagnostics
- Disable Discharge Summaries
- Enable / Disable Animals
- Create Image Map Categories

#### Species

- Add/Edit
- Disable/Restore
- Merge

#### Breed

- Add/Edit
- Disable/Restore

### Clinical

#### Clinical Record

- Clinical Record
  - Add/Edit
  - Disable/Restore

#### Clinical Exam

- Health Status
  - Add/Edit
  - Disable/Restore

#### Pertinent History

- Add/Edit
- Disable/Restore

#### History

- Add/Edit
- Disable/Restore

#### Physical Exam

- Add/Edit
- Disable/Restore

#### Assessments

- Add/Edit
- Disable/Restore

#### Plan

- Add/Edit
- Disable/Restore

#### Additional Information

- Add/Edit
- Disable/Restore

#### Diagnostics and Treatments

##### Medication

- Add/Edit
- Disable/Restore
- Allow user to refill medications
- User can dispense medications

##### Therapeutic / Procedure

- Add/Edit
- Disable/Restore

##### Diagnostic Request

- Add/Edit
- Disable/Restore

##### Diagnostic Result

- Add/Edit
- Disable/Restore

##### Diagnostic Interpretation Request

- Add/Edit
- Disable/Restore

### Standard Of Care

- Edit Standard Of Care
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- Add/Remove For Patients

### Appointments

#### Appointments

- Delete
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  - Add/Edit
  - Disable/Restore
  - Update Booking Group on Appointment Type
  - Add/Edit/Disable Appointment Statuses

### Documents

- Edit Documents
- Delete Documents

### Templates

- Add/Edit Templates
- Edit Shorthand

### Attachments

- Delete Attachments
- Delete Attachments for Diagnostic Results

### Online Booking

- Add Guides for Online Booking

### Login Restrictions

- Allow user to login from any IP.

### Feature Requests

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- Add Feature Request
- Edit Feature Request
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### Teams

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- Price Adjustment Reason
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  - Disable/Restore
- Change Serial Numbers
- Set Financial Lockdown Date
- Inventory Order
  - Add/Edit
  - Disable/Restore
  - Approve
  - Unapprove
- Sell Below Cost
- Credit Limits
  - View Credit Limits
  - Add/Edit Credit Limits
  - Disable Credit Limits

- Merge
- Animal Colour
  - Add/Edit
  - Disable/Restore
  - Merge
- Users
  - Add/Edit Users
  - User Permissions
  - Edit Commission Percentages
- Roles
  - Add/Edit/Disable Roles
  - Add/Edit/Disable Key Roles
  - Assign Roles
  - Assign Key Roles
  - Add/Edit Calendar Planning Guides
  - Use Records Dashboard
- Price Adjustment Rules
  - Add/Edit Price Adjustment Rules
  - Restore Price Adjustment Rules
  - Restore Inherited Price Adjustment Rules
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- Change User Division
- System Settings
- Add / Edit Master Problems
- Add/Edit Clinical Summary Names
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  - Add/Edit Tagging Tasks
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  - Add/Edit
  - Disable/Restore
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  - View Time Clock
  - Edit Time Clock
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  - Edit Standard Operating Procedures
- Sidebar
  - Show Alerts/Metrics Tab on Sidebar
- Central Structure
  - Add/Edit

- Vaccinations
  - Add/Edit
  - Disable/Restore
- In Clinic Notes
  - Add/Edit
  - Disable/Restore
- Hospital Notes
  - Add/Edit
  - Disable/Restore
- Addendums
  - Add/Edit
  - Disable/Restore

- Communication
  - Discharge Summary
    - Add/Edit
    - Disable/Restore
  - Clinical Summary
    - Add/Edit
    - Disable/Restore
- Other
  - Master Problems
    - Add/Edit
    - Disable/Restore
  - Image Map Note
    - Add/Edit
    - Disable/Restore
  - Imaging Report
    - Add/Edit
    - Disable/Restore

- Team
  - Add/Edit
  - Disable/Restore
- Team Member
  - Add/Edit
  - Disable/Restore
- Clinical Record Assignee
  - Add/Edit
  - Disable/Restore
  - Change Roles
- Role Title
  - Add/Edit
  - Disable/Restore
  - Merge

### Tasks

- User Task
  - Add/Edit
  - Disable/Restore
- User Task Comment
  - Add/Edit
  - Disable/Restore

# Recommended permissions: **reception** role

## Name

Recommended Reception  Is Key Role

Toggle All

### Financial

#### Invoice

- Disable/Restore
- Approve
- Unapprove
- Approve Credit Notes
- Change Staff Member
- Change Standard Price
- Change Price/Discount
- Change Dispense Fee
- Unapprove Already Sent

#### Invoice Expense

- Remove Invoice Line
- Remove Billing Trigger Line

#### Payment

- Disable/Restore
- Edit

#### Customer Order

- Approve
- Unapprove
- Approve Customer Orders When Balance Is More Than 2 Months Old

#### Estimate

- Disable/Restore

#### Sales Template

- Add/Edit
- Disable/Restore
- Approve
- Unapprove

#### Recurring Invoice

- Add/Edit
- Disable/Restore
- Approve
- Unapprove

#### Purchase Order

- Disable/Restore
- Approve
- Unapprove
- Purchases Don't Require Clients

#### Inventory Adjustment

- Disable/Restore
- Approve
- Unapprove

#### Payment Method

- Delete Payment Methods
- Delete Payment Terms
- Edit Payment Methods
- Edit Payment Terms
- Delete Contact Associations

### Administration

#### Tags

- Create New Tags
- Apply Tags

#### View Product Details

#### Product

- Disable Products
- Restore Products
- Restore Inherited Products
- Add New Products
- Edit Products
- Importer
- View Cost Price
- Change Sell Price
- Change Sell Price When Receiving Invoice
- Merge Products

#### Product Group

- Add/Edit
- Disable/Restore

#### Wellness Plan

- Add/Edit
- Disable/Restore
- Edit Free/Discount Amounts on Used Benefits

#### Wellness Plan Benefit

- Add/Edit
- Disable/Restore
- Convert Discounts to Benefit Discounts

#### Wellness Plan Membership

- Add/Edit
- Disable/Restore
- Pause/Unpause memberships
- Cancel memberships with consumed benefits
- Override memberships cancellation fee

#### Contact

- Disable/Restore
- Contact Importer
- Change Credit Status
- Edit Vet Contacts

#### Treatments

- Diagnostics
- Disable Discharge Summaries
- Enable / Disable Animals
- Create Image Map Categories

#### Species

- Add/Edit
- Disable/Restore
- Merge

#### Breed

- Add/Edit
- Disable/Restore

### Clinical

#### Clinical Record

- Clinical Record
- Add/Edit
- Disable/Restore

#### Clinical Exam

- Health Status
- Add/Edit
- Disable/Restore

#### Pertinent History

- Add/Edit
- Disable/Restore

#### History

- Add/Edit
- Disable/Restore

#### Physical Exam

- Add/Edit
- Disable/Restore

#### Assessments

- Add/Edit
- Disable/Restore

#### Plan

- Add/Edit
- Disable/Restore

#### Additional Information

- Add/Edit
- Disable/Restore

#### Diagnostics and Treatments

##### Medication

- Add/Edit
- Disable/Restore
- Allow user to refill medications
- User can dispense medications

##### Therapeutic / Procedure

- Add/Edit
- Disable/Restore

##### Diagnostic Request

- Add/Edit
- Disable/Restore

##### Diagnostic Result

- Add/Edit
- Disable/Restore

##### Diagnostic Interpretation Request

- Add/Edit
- Disable/Restore

### Standard Of Care

- Edit Standard Of Care
- Change Next Due
- Add/Remove For Patients

### Appointments

#### Appointments

- Delete
- Appointment Booking Groups
- Add/Edit
- Disable/Restore
- Update Booking Group on Appointment Type
- Add/Edit/Disable Appointment Statuses

### Documents

- Edit Documents
- Delete Documents

### Templates

- Add/Edit Templates
- Edit Shorthand

### Attachments

- Delete Attachments
- Delete Attachments for Diagnostic Results

### Online Booking

- Add Guides for Online Booking

### Login Restrictions

- Allow user to login from any IP.

### Feature Requests

- View Feature Request
- Add Feature Request
- Edit Feature Request
- Disable/Restore Feature Request

### Teams

- Approve Product Containers
- Unapprove Product Containers
- Delete Product Containers
- Price Adjustment Reason**
  - Add/Edit
  - Disable/Restore
- Change Serial Numbers
- Set Financial Lockdown Date
- Inventory Order**
  - Add/Edit
  - Disable/Restore
  - Approve
  - Unapprove
- Sell Below Cost
- Credit Limits**
  - View Credit Limits
  - Add/Edit Credit Limits
  - Disable Credit Limits

- Merge
- Disable/Restore
- Animal Colour**
  - Add/Edit
  - Disable/Restore
- Merge
- Users**
  - Add/Edit Users
  - User Permissions
  - Edit Commission Percentages
- Roles**
  - Add/Edit/Disable Roles
  - Add/Edit/Disable Key Roles
  - Assign Roles
  - Assign Key Roles
- Add/Edit Calendar Planning Guides
- Use Records Dashboard
- Price Adjustment Rules**
  - Add/Edit Price Adjustment Rules
  - Restore Price Adjustment Rules
  - Restore Inherited Price Adjustment Rules
- Manage Resource
- Change User Division
- System Settings
- Add / Edit Master Problems
- Add/Edit Clinical Summary Names
- API Administration
- Merge Records
- Export Communications
- Communication Task**
  - View Communication Tasks
  - Add/Edit Communication Tasks
- Scheduled Reporting Task**
  - View Scheduled Reports
  - Add/Edit Scheduled Reports
- Tag Task**
  - View Tagging Tasks
  - Add/Edit Tagging Tasks
- Event Group**
  - Add/Edit
  - Disable/Restore
- Time/Clock**
  - View Time Clock
  - Edit Time Clock
- Standard Operating Procedures**
  - Edit Standard Operating Procedures
- Sidebar**
  - Show Alerts/Metrics Tab on Sidebar
- Central Structure**
  - Add/Edit

- Vaccinations**
- Vaccination**
  - Add/Edit
  - Disable/Restore

- In Clinic Notes**
- In Clinic Notes**
  - Add/Edit
  - Disable/Restore
- Hospital Notes**
  - Add/Edit
  - Disable/Restore
- Addendums**
  - Add/Edit
  - Disable/Restore

- Communication**
- Discharge Summary**
  - Add/Edit
  - Disable/Restore
- Clinical Summary**
  - Add/Edit
  - Disable/Restore

- Other**
- Master Problems**
  - Add/Edit
  - Disable/Restore
- Image Map Note**
  - Add/Edit
  - Disable/Restore
- Imaging Report**
  - Add/Edit
  - Disable/Restore

- Team**
  - Add/Edit
  - Disable/Restore
- Team Member**
  - Add/Edit
  - Disable/Restore
- Clinical Record Assignee**
  - Add/Edit
  - Disable/Restore
  - Change Roles
- Role Title**
  - Add/Edit
  - Disable/Restore
  - Merge

### Tasks

- User Task**
  - Add/Edit
  - Disable/Restore
- User Task Comment**
  - Add/Edit
  - Disable/Restore

# Recommended permissions: **veterinarian role**



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Name

Is Key Role  
 Toggle All

## Financial

- Invoice
  - Disable/Restore
  - Approve
  - Unapprove
  - Approve Credit Notes
  - Change Staff Member
  - Change Standard Price
  - Change Price/Discount
  - Change Dispense Fee
  - Unapprove Already Sent
- Invoice Expense
  - Remove Invoice Line
  - Remove Billing Trigger Line
- Payment
  - Disable/Restore
  - Edit
- Customer Order
  - Approve
  - Unapprove
  - Approve Customer Orders When Balance Is More Than 2 Months Old
- Estimate
  - Disable/Restore
- Sales Template
  - Add/Edit
  - Disable/Restore
  - Approve
  - Unapprove
- Recurring Invoice
  - Add/Edit
  - Disable/Restore
  - Approve
  - Unapprove
- Purchase Order
  - Disable/Restore
  - Approve
  - Unapprove
  - Purchases Don't Require Clients
- Inventory Adjustment
  - Disable/Restore
  - Approve
  - Unapprove
- Payment Method
  - Delete Payment Methods
  - Delete Payment Terms
  - Edit Payment Methods
  - Edit Payment Terms
  - Delete Contact Associations

## Administration

- Tags
  - Create New Tags
  - Apply Tags
  - View Product Details
- Product
  - Disable Products
  - Restore Products
  - Restore Inherited Products
  - Add New Products
  - Edit Products
  - Importer
  - View Cost Price
  - Change Sell Price
  - Change Sell Price When Receiving Invoice
  - Merge Products
- Product Group
  - Add/Edit
  - Disable/Restore
- Wellness Plan
  - Add/Edit
  - Disable/Restore
  - Edit Free/Discount Amounts on Used Benefits
- Wellness Plan Benefit
  - Add/Edit
  - Disable/Restore
  - Convert Discounts to Benefit Discounts
- Wellness Plan Membership
  - Add/Edit
  - Disable/Restore
  - Pause/Unpause memberships
  - Cancel memberships with consumed benefits
  - Override memberships cancellation fee
- Contact
  - Disable/Restore
  - Contact Importer
  - Change Credit Status
  - Edit Vet Contacts
  - Treatments
  - Diagnostics
    - Disable Discharge Summaries
    - Enable / Disable Animals
    - Create Image Map Categories
- Species
  - Add/Edit
  - Disable/Restore
  - Merge
- Breed
  - Add/Edit
  - Disable/Restore

## Clinical

- Clinical Record
  - Clinical Record
    - Add/Edit
    - Disable/Restore
- Clinical Exam
  - Health Status
    - Add/Edit
    - Disable/Restore
  - Pertinent History
    - Add/Edit
    - Disable/Restore
  - History
    - Add/Edit
    - Disable/Restore
  - Physical Exam
    - Add/Edit
    - Disable/Restore
  - Assessments
    - Add/Edit
    - Disable/Restore
  - Plan
    - Add/Edit
    - Disable/Restore
  - Additional Information
    - Add/Edit
    - Disable/Restore
- Diagnostics and Treatments
  - Medication
    - Add/Edit
    - Disable/Restore
    - Allow user to refill medications
    - User can dispense medications
  - Therapeutic / Procedure
    - Add/Edit
    - Disable/Restore
  - Diagnostic Request
    - Add/Edit
    - Disable/Restore
  - Diagnostic Result
    - Add/Edit
    - Disable/Restore
  - Diagnostic Interpretation Request
    - Add/Edit
    - Disable/Restore

## Standard Of Care

- Edit Standard Of Care
- Change Next Due
- Add/Remove For Patients

## Appointments

- Appointments
  - Delete
- Appointment Booking Groups
  - Add/Edit
  - Disable/Restore
  - Update Booking Group on Appointment Type
  - Add/Edit/Disable Appointment Statuses

## Documents

- Edit Documents
- Delete Documents

## Templates

- Add/Edit Templates
- Edit Shorthand

## Attachments

- Delete Attachments
- Delete Attachments for Diagnostic Results

## Online Booking

- Add Guides for Online Booking

## Login Restrictions

- Allow user to login from any IP.

## Feature Requests

- View Feature Request
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## Teams

- Approve Product Containers
- Unapprove Product Containers
- Delete Product Containers
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- Sell Below Cost
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  - Add/Edit Credit Limits
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- Merge
- Animal Colour
  - Add/Edit
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- Users
  - Add/Edit Users
  - User Permissions
  - Edit Commission Percentages
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  - Edit Standard Operating Procedures
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  - Add/Edit

- ### Vaccinations
- Vaccination
    - Add/Edit
    - Disable/Restore

- ### In Clinic Notes
- In Clinic Notes
    - Add/Edit
    - Disable/Restore
  - Hospital Notes
    - Add/Edit
    - Disable/Restore
  - Addendums
    - Add/Edit
    - Disable/Restore

- ### Communication
- Discharge Summary
    - Add/Edit
    - Disable/Restore
  - Clinical Summary
    - Add/Edit
    - Disable/Restore

- ### Other
- Master Problems
    - Add/Edit
    - Disable/Restore
  - Image Map Note
    - Add/Edit
    - Disable/Restore
  - Imaging Report
    - Add/Edit
    - Disable/Restore

- ### Team
- Add/Edit
  - Disable/Restore
  - Team Member
    - Add/Edit
    - Disable/Restore
  - Clinical Record Assignee
    - Add/Edit
    - Disable/Restore
    - Change Roles
  - Role Title
    - Add/Edit
    - Disable/Restore
    - Merge

### Tasks

- User Task
  - Add/Edit
  - Disable/Restore
- User Task Comment
  - Add/Edit
  - Disable/Restore



# Recommended permissions: groomer role

## Name

Recommended Groomer  Is Key Role

Toggle All

### Financial

#### Invoice

- Disable/Restore
- Approve
- Unapprove
- Approve Credit Notes
- Change Staff Member
- Change Standard Price
- Change Price/Discount
- Change Dispense Fee
- Unapprove Already Sent

#### Invoice Expense

- Remove Invoice Line
- Remove Billing Trigger Line

#### Payment

- Disable/Restore
- Edit

#### Customer Order

- Approve
- Unapprove
- Approve Customer Orders When Balance Is More Than 2 Months Old

#### Estimate

- Disable/Restore

#### Sales Template

- Add/Edit
- Disable/Restore
- Approve
- Unapprove

#### Recurring Invoice

- Add/Edit
- Disable/Restore
- Approve
- Unapprove

#### Purchase Order

- Disable/Restore
- Approve
- Unapprove
- Purchases Don't Require Clients

#### Inventory Adjustment

- Disable/Restore
- Approve
- Unapprove

#### Payment Method

- Delete Payment Methods
- Delete Payment Terms
- Edit Payment Methods
- Edit Payment Terms
- Delete Contact Associations

### Administration

#### Tags

- Create New Tags
- Apply Tags

#### View Product Details

#### Product

- Disable Products
- Restore Products
- Restore Inherited Products
- Add New Products
- Edit Products
- Importer
- View Cost Price
- Change Sell Price
- Change Sell Price When Receiving Invoice
- Merge Products

#### Product Group

- Add/Edit
- Disable/Restore

#### Wellness Plan

- Add/Edit
- Disable/Restore
- Edit Free/Discount Amounts on Used Benefits

#### Wellness Plan Benefit

- Add/Edit
- Disable/Restore
- Convert Discounts to Benefit Discounts

#### Wellness Plan Membership

- Add/Edit
- Disable/Restore
- Pause/Unpause memberships
- Cancel memberships with consumed benefits
- Override memberships cancellation fee

#### Contact

- Disable/Restore
- Contact Importer
- Change Credit Status
- Edit Vet Contacts

#### Treatments

- Diagnostics
- Disable Discharge Summaries
- Enable / Disable Animals
- Create Image Map Categories

#### Species

- Add/Edit
- Disable/Restore
- Merge

#### Breed

- Add/Edit
- Disable/Restore

### Clinical

#### Clinical Record

- Clinical Record
- Add/Edit
- Disable/Restore

#### Clinical Exam

- Health Status
- Add/Edit
- Disable/Restore

#### Pertinent History

- Add/Edit
- Disable/Restore

#### History

- Add/Edit
- Disable/Restore

#### Physical Exam

- Add/Edit
- Disable/Restore

#### Assessments

- Add/Edit
- Disable/Restore

#### Plan

- Add/Edit
- Disable/Restore

#### Additional Information

- Add/Edit
- Disable/Restore

#### Diagnostics and Treatments

##### Medication

- Add/Edit
- Disable/Restore
- Allow user to refill medications
- User can dispense medications

##### Therapeutic / Procedure

- Add/Edit
- Disable/Restore

##### Diagnostic Request

- Add/Edit
- Disable/Restore

##### Diagnostic Result

- Add/Edit
- Disable/Restore

##### Diagnostic Interpretation Request

- Add/Edit
- Disable/Restore

### Standard Of Care

- Edit Standard Of Care
- Change Next Due
- Add/Remove For Patients

### Appointments

#### Appointments

- Delete
- Appointment Booking Groups
- Add/Edit
- Disable/Restore
- Update Booking Group on Appointment Type
- Add/Edit/Disable Appointment Statuses

### Documents

- Edit Documents
- Delete Documents

### Templates

- Add/Edit Templates
- Edit Shorthand

### Attachments

- Delete Attachments
- Delete Attachments for Diagnostic Results

### Online Booking

- Add Guides for Online Booking

### Login Restrictions

- Allow user to login from any IP.

### Feature Requests

- View Feature Request
- Add Feature Request
- Edit Feature Request
- Disable/Restore Feature Request

### Teams

- Approve Product Containers
- Unapprove Product Containers
- Delete Product Containers
- Price Adjustment Reason
  - Add/Edit
  - Disable/Restore
- Change Serial Numbers
- Set Financial Lockdown Date
- Inventory Order
  - Add/Edit
  - Disable/Restore
  - Approve
  - Unapprove
- Sell Below Cost
- Credit Limits
  - View Credit Limits
  - Add/Edit Credit Limits
  - Disable Credit Limits

- Merge
- Animal Colour
  - Add/Edit
  - Disable/Restore
- Users
  - Add/Edit Users
  - User Permissions
  - Edit Commission Percentages
- Roles
  - Add/Edit/Disable Roles
  - Add/Edit/Disable Key Roles
  - Assign Roles
  - Assign Key Roles
- Add/Edit Calendar Planning Guides
- Use Records Dashboard
- Price Adjustment Rules
  - Add/Edit Price Adjustment Rules
  - Restore Price Adjustment Rules
  - Restore Inherited Price Adjustment Rules
- Manage Resource
- Change User Division
- System Settings
- Add / Edit Master Problems
- Add/Edit Clinical Summary Names
- API Administration
- Merge Records
- Export Communications
- Communication Task
  - View Communication Tasks
  - Add/Edit Communication Tasks
- Scheduled Reporting Task
  - View Scheduled Reports
  - Add/Edit Scheduled Reports
- Tag Task
  - View Tagging Tasks
  - Add/Edit Tagging Tasks
- Event Group
  - Add/Edit
  - Disable/Restore
- Time/Clock
  - View Time Clock
  - Edit Time Clock
- Standard Operating Procedures
  - Edit Standard Operating Procedures
- Sidebar
  - Show Alerts/Metrics Tab on Sidebar
- Central Structure
  - Add/Edit

- Vaccinations
  - Add/Edit
  - Disable/Restore

- In Clinic Notes
  - Add/Edit
  - Disable/Restore
- In Clinic Notes
  - Add/Edit
  - Disable/Restore
- Hospital Notes
  - Add/Edit
  - Disable/Restore
- Addendums
  - Add/Edit
  - Disable/Restore

- Communication
  - Discharge Summary
    - Add/Edit
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  - Clinical Summary
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- User Task
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  - Disable/Restore
- User Task Comment
  - Add/Edit
  - Disable/Restore