

Appendix A – Secured Items Matrix

| | Secured Item Name | Type | Object / Location in Program |
|---|--------------------------------------|---|--|
| General (Core) | System Options (Core) | Menu Bar Control | Tools Options All user-defined field titles "- Customers, Inventory Items, Job Sites, Pool Info, Spa Info |
| | Common Lookup Codes | Menu Bar | Reference Lookup Codes |
| | | Form | Tax Rates form |
| | | Form | Customer Discounts form |
| | | Form | Customer Anniversaries form |
| | | Form | Shipping Methods form |
| | | Form | Payment Terms form |
| | Form | Comments form | |
| | User Defined Field Pick List Options | Menu Bar | Reference User Defined Field Picklist Options |
| | | Form | User-Defined Customer Fields form |
| Form | | User-Defined Job Site Fields form | |
| Form | | User-Defined Pool Info Fields form | |
| Form | | User-Defined Spa Info Fields form | |
| Cities, States & Countries | Form | Cities, States & Countries forms | |
| | Menu Bar | Reference Cities | |
| | Menu Bar | Reference States | |
| | Menu Bar | Reference Countries | |
| QuickBooks Settings | Control | System Options form::QuickBooks page | |
| | Control | Inventory Items form::QuickBooks page | |
| | Control | Product Categories form::QuickBooks controls | |
| | Control | Other (Non-Inventory) Items form :: QuickBooks controls | |
| | Control | Frequently Performed Labor form::QuickBooks controls | |
| | Control | Suppliers form::QuickBooks Vendor Name textbox | |
| Telephone Calls | Form | Telephone Log form | |
| | Menu Bar | Tools Telephone Call logger | |
| | Menu Bar | Customers Log a Phone Call | |
| | Control | Customers form::Telephone Calls page | |
| POS | POS Station Open | Menu Bar | Workstation Open POS Station |
| | POS Station Closeout | Menu Bar | Workstation Close POS Station |
| | POS Options | Form | POS Options form |
| | | Menu Bar | Tools Options |
| Unlock a Workstation | Process | Unlock a User-Locked POS Station | |
| Cash Drawer | Cash Drawer Log Report | Menu Bar | Reports Cash Drawer Log Report |
| | Open Cash Drawer | Menu Bar | Workstation Open Drawer |
| | | Control | POS Entry Form::Open Drawer button POS Return Form::Open Drawer button |
| | Adjust Cash Drawer Contents | Menu Bar | Workstation Adjust Cash Drawer Contents |
| | Verify Cash Drawer Contents | Menu Bar | Workstation Verify Cash Drawer Contents |
| Override Max. Cash Payout to Check or Debit | Control | Cash Drawer Contents Adjustment form::Amount | |

| | Secured Item Name | Type | Object / Location in Program |
|--------------------------------|---|---|---|
| Purchasing | Vendors Data Entry | Form | Manufacturers data entry form |
| | | Menu Bar | Purchasing Vendors Manufacturers |
| | | Form | Suppliers data entry form |
| | | Menu Bar | Purchasing Vendors Suppliers |
| | Vendors Selected for Use | Form | Select Manufacturers to be Used in the System form |
| | | Form | Select Suppliers to be Used in the System form |
| | | Menu Bar | Purchasing Vendors Select Pre-Defined Vendors |
| | Supplier Pricing | Control | Inventory Items form::Suppliers Page |
| | Purchase Order Entry | Form | Purchase Orders form |
| | | Menu Bar | Purchasing Purchase Orders |
| | | Form | Purchase Order Generator form |
| | | Process | Parts Wizard "Add to Purchase Order" option |
| | | Menu Bar | Purchasing Generate Purchase Orders |
| | Purchase Order Receiving To-Be-Ordered List | Control | Purchase Orders form::Receiving page |
| | | Form | To-Be-Ordered List form |
| | Menu Bar | Purchasing 'To be Ordered' List | |
| | Process | Parts Wizard "Add to <i>To-Be-Ordered-List</i> " option | |
| Purchasing Reports | Menu Bar | Purchasing Reports | |
| | Menu Bar | Reports Purchasing | |
| | Control | Report Catalog form::Purchasing page | |
| | Control | Purchase Orders form::Reports button | |
| Inventory | Inventory Item Entry | Form | Inventory Items form |
| | | Menu Bar | Inventory Inventory Items (Core) |
| | | Menu Bar | File Inventory Items (POS) |
| | | Process | Parts Wizard "Add to Inventory" option |
| | Product Category Options | Control | Product Categories form::VIP Points spinner |
| | | Control | Product Categories form::Display in Job Site |
| | | | Equipment PickList checkbox |
| | | | Product Categories form::Diagnostics grid |
| | Non-Inventory (Other) Item Entry | Form | Other Items form |
| | | Menu Bar | Service Other (Non-Inventory) Items |
| | | Menu Bar | Sales Other (Non-Inventory) Items |
| | Selling Prices | Page | Inventory Items form::Pricing Page |
| | | Control | Other Items form::Price textbox |
| | Price Override | Control | POS Entry Form::Price Override button (F7) |
| | | Control | Service Jobs Form::Service Details Page::Parts & Labor Page::Price Column |
| | | Control | Sales Orders Form::Details Page::Price Column |
| | Kits & Cases - Assemble | Process | Assemble Kits & Cases |
| | Kits & Cases - Break Apart | Process | Break Kits & Cases Apart |
| | Warehouses | Form | Warehouses form |
| | Menu Bar | Inventory Warehouses | |
| Inventory Counts & Adjustments | Control | Inventory Items form::Inventory Page | |
| | Form | Inventory Adjustments form | |
| | Form | Inventory Counts form | |
| | Misc | Inventory Count Entry on-the-fly | |
| Inventory Transfers | Form | Inventory Transfers form | |
| Inventory Reports | Menu Bar | Inventory Reports | |
| | Menu Bar | Reports Inventory | |
| | Control | Report Catalog form::Inventory page | |
| | Control | Inventory Items form::Reports button | |

| | Secured Item Name | Type | Object / Location in Program | |
|------------------------|---|--|---|---|
| Inven. | Print Inventory Item Bar Code Labels | Form Menu | Inventory Item Bar Codes to Print form Inventory Print Bar Code Labels (Core) | |
| | Pricing Profiles | Form | Pricing Profiles form | |
| Customers | Customer Data Entry | Form Menu Bar Menu Bar | Customers form File Customers (POS) Customers Customers (Core) | |
| | Customer Account Details | Control Control | Customers Form::Billing/Service Profile Page::Discount Code, Payment Terms, Max Acct Balance, Do Not Accept Checks POS Entry Form::Item Discount button (F8) | |
| | Customer Credit Limit Override | Process | Override Customer Max Acct Balance (Invoice Entry) | |
| | Override "Do Not Accept Customer Check" Warning" | Process | Override "Do Not Accept Checks" in Invoice Payment" | |
| | Customer Alerts | Form Control Control | Customer Alert form Customers Form::Details Page::Alerts... button Customer Code textbox::Alert button | |
| | Customer Mail Merge | Form Menu Bar Form Menu Bar Form Menu Bar | Customer Mail Merge form Customers Mail Merge Do Mail Merge Form Letters form Customers Mail Merge Form Letter Maintenance Merge Tags form Customers Mail Merge View Merge Tags | |
| | Customer Reports | Menu Bar Menu Bar Control Control | Customers Reports Reports Customers Report Catalog form::Customers page Customers form::Reports button | |
| | Service | Job Sites | Form Menu Bar Menu Bar | Job Sites form Service Job Sites Customers Job Sites |
| | | Service Jobs | Form Menu Bar Process | Service Jobs form Service Service Jobs Parts Wizard "Add to Service Job" option |
| | | Service Routes | Form Menu Bar | Service Routes form Service Service Routes |
| Job Types | | Form Menu Bar | Job Types form Service Job Types | |
| Trucks & Equipment | | Form Menu Bar | Trucks & Equipment form Service Trucks & Equipment | |
| Labor Definitions | | Form Menu Bar | Labor Definitions form Service Labor Definitions | |
| Selling Prices - Labor | | Control | Labor Definitions form::Type radio buttons, Rate textbox | |
| Water Analysis Entry | | Form Menu Bar Control Control | Water Analysis form Service Water Analysis Service Jobs form::Service Details page::Water Analysis page Job Sites form::Water Analysis page | |

| | Secured Item Name | Type | Object / Location in Program |
|------------------------|--|--|--|
| Service | Water Analysis Picklist Options | Form | Water Sample Colors form, Water Sample Clarity form |
| | | Menu Bar | Service Picklist Options |
| | Service Job - Questions & Answers Service Job - Min. Deposit Override | Control Process | Job Types form::Questions & Answers page Used in "New Job" wizard |
| Sales | Sales (POS & Order Entry) | Form | Sales Order Entry form |
| | | Menu | Sales Order Entry (Core) |
| | | Form | Point-of-Sale Entry form |
| | | Menu | POS Sales (Point-of-Sale) |
| | | Process | Parts Wizard "Add to Sale" option |
| | Customer Purchase History | Misc | Customers Form::Purchase History page |
| | Customer Purchases-to-Date Initial Value | Control | Customers Form::Purchase History page::Set Initial Value button |
| | Layaways | Menu Bar | POS Layaways Layaway History |
| | | Control | Layaways form controls on page 2 |
| | | Control | POS Entry Form::Layway Sale button (Shift-F12) |
| | Layaway Voiding | Menu Bar | POS Layaways Void/Cancel a Layaway |
| | Layaway Payment Entry | Menu Bar | POS Layaways Customer Payment |
| Layaway Reports | Menu Bar | POS Layaways Reports | |
| Coupons | Form | Coupons form | |
| | Menu Bar | Sales Coupons | |
| Gift Certificates | Form | Gift Certificates form | |
| | Menu Bar | Sales Gift Certificates | |
| Sales Reports | Menu Bar | Sales Reports | |
| | Menu Bar | Reports Sales | |
| | Control | Report Catalog form::Sales page | |
| Receivables | Invoice History | Form | Invoice History form |
| | | Menu Bar | Accounts Receivable Invoice History |
| | | Control | Customers form::Purchase History page::View/Edit... button |
| | | Control | Invoice Payment form::View/Edit Invoice Details button |
| | Void an Invoice | Control | Invoice History form::Void button |
| | Invoice Payment Entry | Process | Invoice Payment form |
| | | Menu Bar | Accounts Receivable Customer Payment |
| | | Control | Invoice History form::Payments page |
| | | Control | Customers form::Purchase History page::Payment... button |
| | Customer Payment History | Form | Customer Invoice Payment form |
| Menu Bar | | Accounts Receivable Customer Payment History | |
| Close Invoices | Control | Invoice History form::Close button | |
| | Menu Bar | Accounts Receivable Close an Invoice | |
| Print Statements | Menu Bar | Accounts Receivable Print Statements | |
| Add Customer Late Fees | Control | Print Statements form::Calculate & Print Late Payment Fee checkbox | |
| | Control | Customer Invoice Payment form::Calculate Late Fee button | |
| | Control | Customer Invoice Payment form::Late Fee column | |

| | Secured Item Name | Type | Object / Location in Program |
|------|---------------------|---------------------------------|--|
| Rec. | Receivables Reports | Menu Bar Menu Bar Control | Accounts Receivable Reports Reports Accounts Receivable Report Catalog form::Purchasing page |