

Permissions to Fill Out eForms

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The ability to fill out and sign a custom form (eForm) is a separate permission that can be enabled/disabled per user basis.

The permission to be able to fill out and sign a custom form (eForm) is set up in the eForms module.

To setup the permission for deleting a form, follow the steps below:

1. Access the eForms module.
2. Access the Setup menu.
3. Access the Users menu.
4. Click on the username in question that requires the change.
5. Scroll all the way down and enable the permission 'Interactive Form'

The screenshot displays the 'Edit User Account' interface. On the left is a navigation sidebar with options: Home, Templates, Setup, Reports, Razvan, eForms, Support Center, Tasks, and Logout. The main content area is titled 'Edit User Account' and contains fields for Username, First Name, Middle Initial, Last Name, Phone (with separate fields for Phone # and ext.), Email, and User Role (set to Custom). Below these are checkboxes for Products: AlarmBiller, Time & Attendance, eForms, Sales Automation, and Sedona-X Mobile app. At the bottom, there is a 'Permissions' tab. Under the 'User Security Permissions' section, a list of permissions is shown: Design Form, Delete Form, Interactive Form (highlighted with a red box), E Forms Manager, and Send Form. To the right of the 'Interactive Form' checkbox, the text 'Ability to fill out and sign a form.' is visible.

Note: This permission requires the user to log out completely and log back in to take effect.