

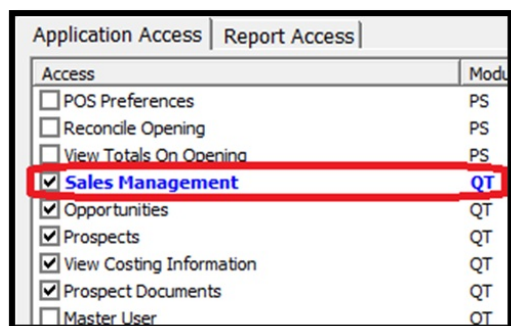
How to Provide User Access to the Quotes Tab in Jobs

10/18/2024 5:05 pm EDT

If you have a user that cannot access Quotes in Jobs, follow the process below. Usually there is a Quote option in the Job, located under Tools.

Resolution:

This is due to permissions in the User's User Group. Check the User Group that the user is assigned to and scroll down to the Sales Management permissions



Application Access Report Access	
Access	Module
☐ POS Preferences	PS
☐ Reconcile Opening	PS
☐ View Totals On Opening	PS
☒ Sales Management	QT
☒ Opportunities	QT
☒ Prospects	QT
☒ View Costing Information	QT
☒ Prospect Documents	QT
☐ Master User	QT

If the User Group that the user is assigned to does not have permission marked in Sales Management (QT) then they will not be able to access the Quotes tab in Jobs. Either add the access to their user group or move the user to a User Group that does have the proper access.

If the user is assigned to a User Group with the permissions, then go back to the user, remove the access to any groups they may be a part of, save the change, then add them back. Sometimes SedonaOffice doesn't recognize changes made to the Users but usually toggling the permissions in this way will resolve it.
