



CONNECT

# MSB Roll Call: User Roles and Permissions

PRESENTED BY: Bonnie Bennett

MySchoolBucks Sr. Implementation Specialist



## Recommended Default Roles

- District Security Admin (2-3)
- District Admin
- Store Admin
- Department Admin
- Reports Admin
- Store Clerk

# Who should be assigned each role?

- District Security Admin has the ability to create custom roles.
  - Assigns permissions/functionality to any custom role
  - This role can do and see everything in the district.
- District Admin is equal to the Security Admin EXCEPT for the creation of custom roles
- Store Admin should be assigned to a school secretary, bookkeeper, site admin. This role controls all aspects of a certain store
- Department Admin is used to break out reporting from the main Store
- Report Admin is normally for those who need district or store reports
  - Financial Office/Reconciliation
- Store Clerk is used with MSBA to take transactions

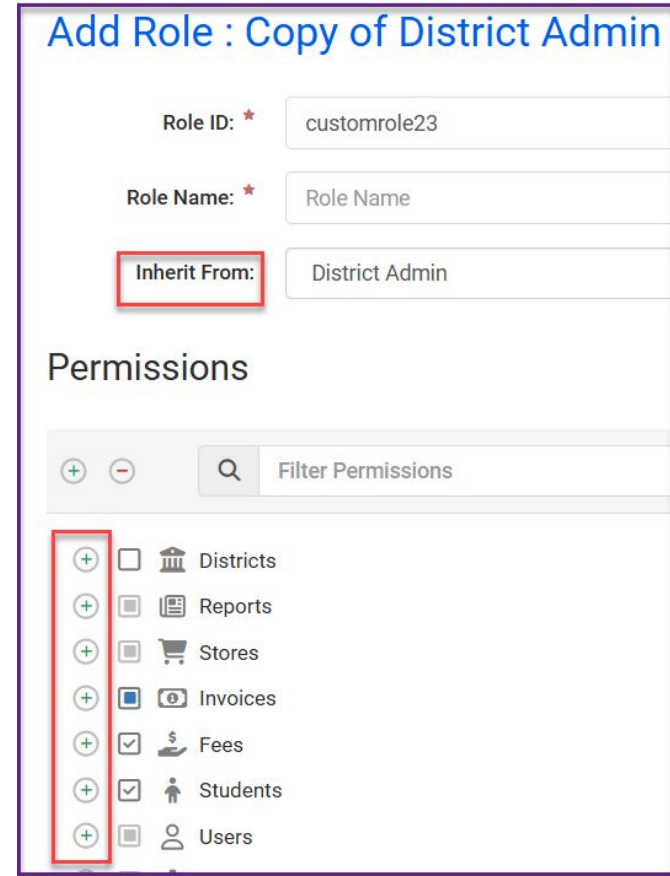
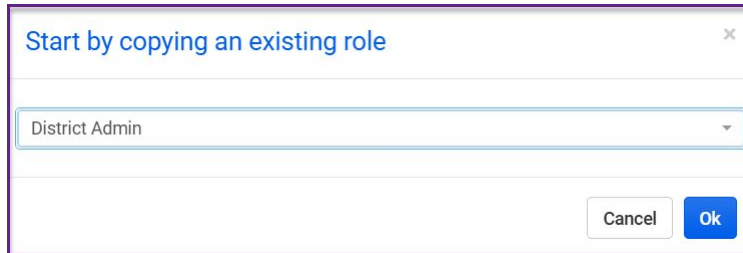
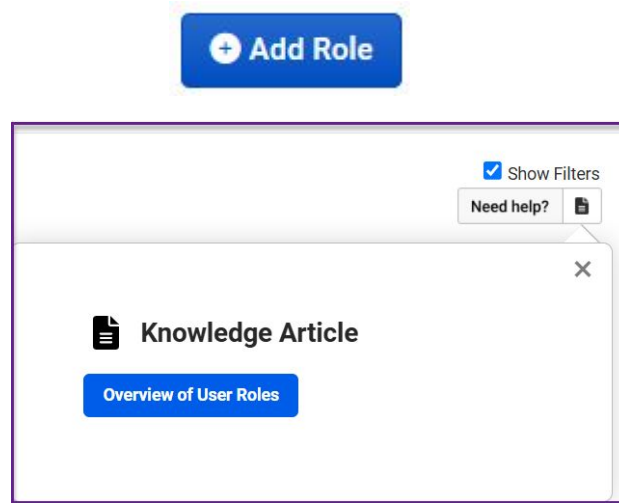
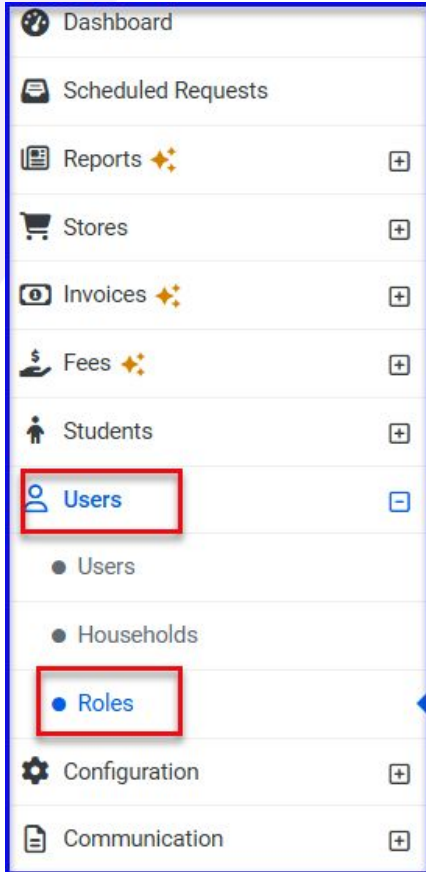
# Why create a custom role?

- When the default role does not include the functionality your admins require

**Store Admin** is the main role for Admins and is restricted from District-wide functions such as GL codes, Categories, Departments, Webforms, Invoice Templates and Fees

- When creating a custom role, best practice is to start with District Admin and remove permissions
- Think about the responsibilities your site admins have and the MSB access they need
- Can be changed at any time

# How do I create a custom role?



# What permissions do I choose?

## Reports:

 ☒  Reports

Permissions	List	View	Create	Edit	Delete	More Actions
<input checked="" type="checkbox"/> Balance Reports		<input checked="" type="checkbox"/>				
<input checked="" type="checkbox"/> MSBA Close Out Reports		<input checked="" type="checkbox"/>				
<input checked="" type="checkbox"/> Manual Payment Logs	<input checked="" type="checkbox"/>					
<input checked="" type="checkbox"/> Payment Batches	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>				<input checked="" type="checkbox"/> More...
<input checked="" type="checkbox"/> Payment Reports		<input checked="" type="checkbox"/>				
<input checked="" type="checkbox"/> Purchase Reports		<input checked="" type="checkbox"/>				
<input checked="" type="checkbox"/> Recent Data Transfers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>				
<input checked="" type="checkbox"/> Store Reports		<input checked="" type="checkbox"/>				
<input checked="" type="checkbox"/> Student Reports		<input checked="" type="checkbox"/>				
<input checked="" type="checkbox"/> Subscription Manage		<input checked="" type="checkbox"/>				
<input checked="" type="checkbox"/> User Reports		<input checked="" type="checkbox"/>				

# What do these permissions mean?

**Reports:** Red=district wide, Blue (X) = Meals Only

Reports			
Balance Reports	X		Report showing meal balances
MSBA Close Out Reports			Report for viewing MSBA collection amounts for reconciliation
Manual Payment Logs			Manual Payment Logs contain a record of all in-person payments that are applied to Invoices. The invoice payments are processed through Invoicing (Cashier).
Payment Batches			Required permission to see Deposit Reconciliation tool under reports. User account can be limited to specific gateways
Payment Reports			Grants access to the Payment Reports (Detail, Summary), Batch Reports (Detail, Summary), Deposit Reconciliation, G/L Transaction Report
Payment Transactions			Gives access to a list of transactions per gateway, how it was billed, charge amount and status.
Purchase Reports			Grants access to Reports Dashboard, User Logs and Cafeteria Purchase Reports. If removed, students/users will not appear under reports but Dashboard, Payments, Stores and Invoices will remain.
Recent Data Transfers	X		Grants access to Recent Data Transfers which show uploads and downloads from a Heartland Point of Sale System to MSB
Store Reports			Grants access to Orders, Sales Pricing/Inventory, Product Reports, and Customized Payment Export
Student Reports			Grants access to Student Report, Cafeteria Purchases, Account Balance Report and User Report
Subscription Manage	X		Access to Reports Dashboard, User Logs and Membership Report
User Reports			Grants access to Cafeteria Purchases, Account Balance Report and User Report

## Stores:

[illegible]



# What do these permissions mean?

**Stores:** Red=district wide, Blue = Meals Only

Store			
	Buttons		This is where you can design buttons that can be used to link your customers from a place outside of MySchoolBucks to one of the products in your store. Pay Express Buttons can be displayed in emails or on your own websites, and anyone who clicks on the button will be redirected to purchase that product on MySchoolBucks.
	Departments		District wide function where you can manage department information used to filter your district's financial reporting, provide daily summary emails, and update contact information available to parents with product and store-related questions.
	Discounts		Provides access to create, edit and delete discounts for Stores/products the admins have access to.
	GL Accounts		Provides access to add and edit the entire district's general ledger accounts used for accounting purposes.
	Graphics		Gives access to add and delete graphics in MSB at both the District and Store levels. Access can be granted at a district level or store level under More.
	Options		Leave blank
	Orders		This is where you can search for and view orders that have been made, cancel or approve orders that require approval, and set up refunds for payments that have already been processed.
	Pricing and Inventory		Ability to view, create, edit and delete pricing and inventory for a product
	Product Options		Ability to create multiple pricing options in a product
	Products		This page shows all your products and allows you to create, update, and remove any products you sell.
	Promo Codes		Functionality to create and use promo codes
	Store Group		Ability to combine more than one store into one report
	Stores		This is where you can manage your store's products, graphics, discounts, pricing & inventory, and orders along with toggling your store's active status within your district.
	Webform Reports		The Web Forms Report displays web form data submitted through the School Forms section of the website.
	Webform Submissions		Leave blank
	Webforms		This is where you can create and manage web forms used to collect information from parents as they purchase certain products.

# What permissions do I choose?

## Invoices:

Invoices							
Permissions	List	View	Create	Edit	Delete	More Actions	
<input checked="" type="checkbox"/> AutoPay Subscriptions	<input checked="" type="checkbox"/>					<input checked="" type="checkbox"/> More...	
<input checked="" type="checkbox"/> Cashier		<input checked="" type="checkbox"/>				<input checked="" type="checkbox"/> More...	
<input checked="" type="checkbox"/> Invoice Options		<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>			
<input checked="" type="checkbox"/> Invoice Templates	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> More...	
<input checked="" type="checkbox"/> Invoice Templates (New)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> More...	
<input checked="" type="checkbox"/> Invoices	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> More...	
<input checked="" type="checkbox"/> Invoices2.0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> More...	
<input checked="" type="checkbox"/> Reports		<input checked="" type="checkbox"/>					
<input checked="" type="checkbox"/> Schedules	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		

# What do these permissions mean?

**Invoices:** Red=district wide, Blue = Meals Only

Invoices			
	AutoPay Subscriptions		Provides access to user records of MSB Activities auto pay subscriptions and allows cancellation of a subscription.
	Cashier		Use Invoicing (Cashier) to apply a payment to an Invoice. This feature allows for cash, check, money order, or voucher payments; not credit card payments. It also allows you to waive fees on an invoice.
	Invoice Options		Invoice Options contain additional features related to Invoices, such as enabling or disabling invoice notification emails for the entire district.
	Invoice Templates		An invoice template is a set of invoice settings that can be reused to simplify the creation of invoices for Invoicing 1.0
	Invoice Templates (New)		An invoice template is a set of invoice settings that can be reused to simplify the creation of invoices for Invoicing 2.0.
	Invoices		This selection allows you to view, create, update, delete or waive invoices. These actions can be done on an invoice-by-invoice basis or in bulk for Invoicing 1.0
	Invoices 2.0		This selection allows you to view, create, update, delete or waive invoices. These actions can be done on an invoice-by-invoice basis or in bulk.
	Reports		Required for invoicing reporting under the expanded reports tab.
	Schedules		Schedules allow you to define a payment plan for invoices.

# What permissions do I choose?

## Fees:

Permissions	List	View	Create	Edit	Delete	More Actions
<input checked="" type="checkbox"/> Course Fee - Assess			<input checked="" type="checkbox"/>			
<input checked="" type="checkbox"/> Course Fee - Manage	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> More...
<input checked="" type="checkbox"/> Course Fee - Options		<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>		
<input checked="" type="checkbox"/> Course Fee - Report	<input checked="" type="checkbox"/>					
<input checked="" type="checkbox"/> Fees	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> More...
<input checked="" type="checkbox"/> School Fee - Assess			<input checked="" type="checkbox"/>			
<input checked="" type="checkbox"/> School Fee - Report	<input checked="" type="checkbox"/>					

# What do these permissions mean?

**Fees:** Red=district wide, Blue = Meals Only

<b>Fees</b>			
	Course Fees Assess/Manage/Options/Report		Provides access to the Course Fee Module which allows the district to assess invoices based on course enrollment. Course data is required to be integrated with MSB for this feature.
	Fees		This is where you create all invoice fees. Here you can set up the names of the items you are invoicing for, as well as the amounts that will be charged. Fees created here are used when creating your Invoice Templates. One or more fees can be added to a single template and each individual fee will act as a single item on your invoice.
	School Fees Assess/Options/Report		Permission to create, change the look back date and pull reports for invoices created using School Fees
			Assessing using School Fees allows MSB to remember who was previously assessed and only assessed new students to a school, grade, or group

# What permissions do I choose?

## Students:

Permissions	List	View	Create	Edit	Delete	More Actions
<input checked="" type="checkbox"/> School Groups	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/> Schools	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/> Student Group Properties	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/> Student Groups	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/> Students	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> More...

# What do these permissions mean?

**Students:** Red=district wide, Blue = Meals Only

<b>Students</b>			
	School Groups		This is where groups of schools can be created and managed.
	Schools		This is where schools are displayed.
	Student Group Properties		Leave blank
	Student Groups		This is where groups of students can be created and managed to be used for products and invoicing.
	Students		This is where student records are displayed. List and View necessary to use email function on Student SOA report. It is recommended Remove Create, Edit and Delete functions



# How to assign a role to a User

Toolbar > Users > Users > Add

## Create User

★ indicates required field

### User Information :

Login ID: ★	<input type="text" value="bonnie.bennett@e-hps.com"/>
Password: ★	<input type="password" value="....."/>
Confirm Password: ★	<input type="password" value="Confirm Password"/>
Security Question: ★	<input type="text" value="In what city did you attend high school?"/>
Security Answer: ★	<input type="text" value="Security Answer"/> Unknown
Security Role: ★	<input type="text" value="Parent"/>
Provider:	<input type="text" value="None"/>
Stores:	<input type="text" value="None"/>
Invoice Store:	<input type="text" value="None"/>
Departments:	<input type="text" value="None"/>
Schools:	<input type="text" value="None"/> do not fill in
Gateways:	<input type="text" value="None"/>
Data Consumer:	<input type="text" value="None"/>

### Contact Information :

First Name:	<input type="text" value="First Name"/>
Last Name:	<input type="text" value="Last Name"/>
Street Address:	<input type="text" value="Street Address"/>
	<input type="text" value="Street Address"/>
City:	<input type="text" value="City"/>
State/Province:	<input type="text" value="None"/>
ZIP/Postal Code:	<input type="text" value="ZIP/Postal Code"/>
Daytime Phone:	<input type="text" value="###"/> <input type="text" value="###"/> <input type="text" value="####"/>
Evening Phone:	<input type="text" value="###"/> <input type="text" value="###"/> <input type="text" value="####"/>
Mobile Phone:	<input type="text" value="###"/> <input type="text" value="###"/> <input type="text" value="####"/>
Email Address:	<input type="text" value="Email Address"/>

(Note: Your email address is held confidential. We will not send you unsolicited emails. A valid email address is required to receive payment confirmations.)





## District-facing Knowledge Article

[MySchoolBucks –  
Overview of User Roles](#)

# **Thank you**

The logo consists of a white circle containing the word "CONNECT" in a sans-serif font. The letter "N" is orange, while the other letters are purple. The background features abstract, flowing shapes in shades of purple, blue, orange, and pink, with small clusters of dots in corresponding colors.

**CONNECT**