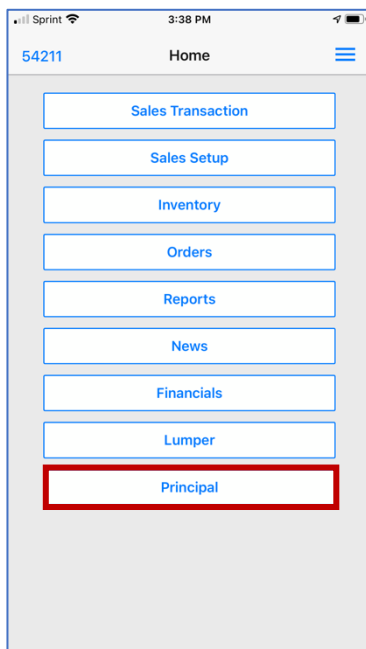


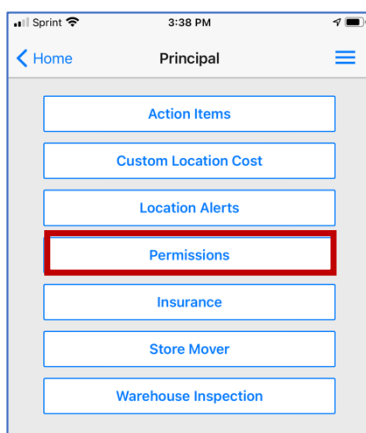
## SETTING UP LOCATION OPERATOR PERMISSIONS IN MYBUSINESS

Principal distributors can control what their location operators (LOs) can do and see in the MyBusiness app through the “Permissions” function. Here’s how to set up LO permissions:

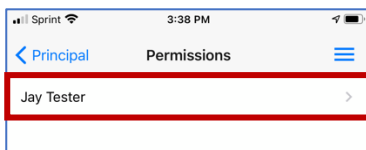
1. From your Home Page, tap on “Principal.”



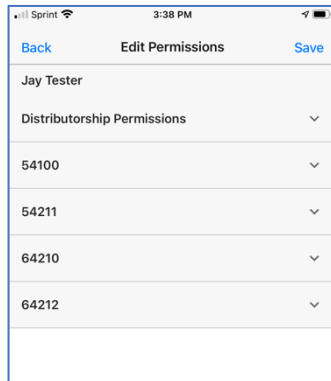
2. Then tap on “Permissions.”



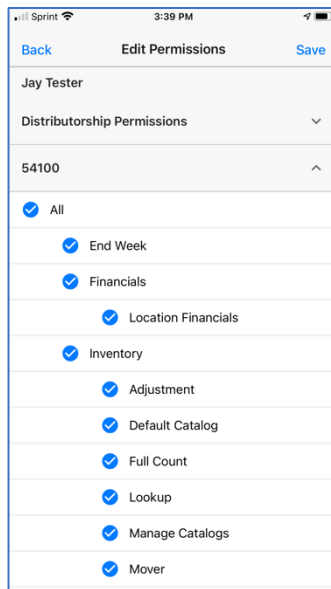
3. Next, tap on your name to access the list of LOs.



4. Tap on a location to set permissions.



5. Then you will see the “Edit Permissions” screen. Tap on any circle next to the permission name to turn on that permission for your location operator. Once tapped, the white circle will change to a blue circle containing a white checkmark, indicating that permission has been turned on.



6. When your permissions are set the way you want them, tap “Save” at the upper right of the screen.

Here is a list of all current permissions and a brief description of what they allow your location operator to do:

- ✓ **All**—grants user all below permissions for that location
- ✓ **End Week**—allows user to end their week early
- ✓ **Financials**—permits LOs to see the financial records of the distributorship
  - ✓ **Location Financials**—grants LOs permission to see financial records for the locations that are set
- ✓ **Inventory**—enables access to all inventory processes shown below
  - ✓ **Adjustment**—permits user to count at individual SKU level

- ✓ **Default Catalog**—enables user to change their default location for where inventory is incremented/decremented during the invoicing processes
  - ✓ **Full Count**—allows user to count their full inventory
  - ✓ **Lookup**—enables user to see their inventory catalog for their location
  - ✓ **Manage Catalogs**—allows user to edit their inventory catalog
  - ✓ **Mover**—permits user to move inventory between their catalogs
  - ✓ **Product Lookup**—enables a user to see products across all locations they have this permission to
  - ✓ **Transfer**—grants permission to a user to transfer inventory with other locations
- ✓ **Invoice Header**—allows view/edit permissions to create custom headers
  - ✓ **Edit**—permits user to edit but not create view custom headers
  - ✓ **View**—enables user to view but not create or edit custom headers
- ✓ **Invoices**—allows user access to create invoices
  - ✓ **Create**—grants user access to create invoices
  - ✓ **Manual Invoices**—grants user permission to invoice manually
  - ✓ **Void**—enables user to render an invoice void
- ✓ **Lumper**—This will only be on for those that have the lumper features active
  - ✓ **Presale Picker**— grants users access to the presale picking function within the lumper model.
- ✓ **Orders**—allows user to have permissions for all of deliveries and orders
  - ✓ **Deliveries**—allows user to apply load and report issues
    - ✓ **Apply Load**—allows user to apply load
    - ✓ **Report Issue**—grants user access to report an issue
    - ✓ **View**—permits user to see delivery status but not apply a load or report an issue
  - ✓ **Submit Order**—allows user to submit an order for that location
- ✓ **Products**—permits access to wraps and non-McKee items
  - ✓ **Edit**—enables user to create/edit wraps
  - ✓ **Non-McKee**—gives user access to create catalogs and SKUs for non-McKee items
  - ✓ **View**—gives user access to view but not to edit or create wraps or non-McKee SKUs
- ✓ **Promotions**—allows user to view, create and edit promotions
  - ✓ **Edit**—permits user to view, create and edit promotions
  - ✓ **View**—enables user to view promotions
- ✓ **Reports**—grants user access to all non-principal reports for that location
  - ✓ **Individual Reports**—enables user to see or not see report based on permission for that location. Current reports are here: <https://sales.mckee.com/content/mbs/reports/>
- ✓ **Special Pricing**—gives user all permissions for special pricing for that location
  - ✓ **Edit**—enables user to edit and create special pricing
  - ✓ **View**—allows user to view special pricing but cannot edit or create
- ✓ **Start of Day Messages**—enables user to receive start-of-day messages when they go to the “News” feature in MyBusiness
  - ✓ **Chargeback Messages**—allows an LO to receive messages notifying them of retailer fines or of promotional funds coming to them
  - ✓ **Financial Messages**—enables an LO to receive notifications of incentives coming their way or of money coming into or going out of their bank account(s)
  - ✓ **Other Messages**—permits LOs to see messages about changing conditions for their location such as changes to order night or SKUs coming in or going out of their catalog
- ✓ **Store Schedule**—gives user access to create a schedule for stores on that location
  - ✓ **Edit**—allows user to create/edit store schedule

- ✓ **View**—permits user to view schedule but cannot view/edit
- ✓ **Stores**—enables user to create stores
  - ✓ **Edit**—gives user ability to edit store info and apply special pricing/header to that store
  - ✓ **View**—permits user access to see existing stores