Solutions from SAP

SAP Business One 2007 A and
SAP Business One 2007 B

How to Define Authorizations

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How to Define Authorizations

Introduction

This document provides information about the authorization settings in the *Authorization* window in SAP Business One. Refer to the SAP Business One online help for comprehensive documentation of the Authorization function.

In the *Authorizations* window, you can determine the required authorizations for other users in your company.

You can also grant authorizations for creating, updating and deleting documents in the *Data Ownership Authorizations* window. Only a user defined as *Superuser* (*Administration* → *Setup* → *General* → *Users – Setup*) can access the *Authorizations* sub-menu and grant authorizations for other users.

A user defined as *Superuser* has *Full Authorization* to all SAP Business One modules and functions and it is not possible to modify these authorizations for this user.

Within a module, when different components have different authorizations, the module authorization is displayed as *Various Authorizations*. For example, in the Sales module, if the user has *Full Authorization* for the *s*ales quotation, but *No Authorization* for the s*ales order*, 'Sales' is displayed as *Various Authorizations*.

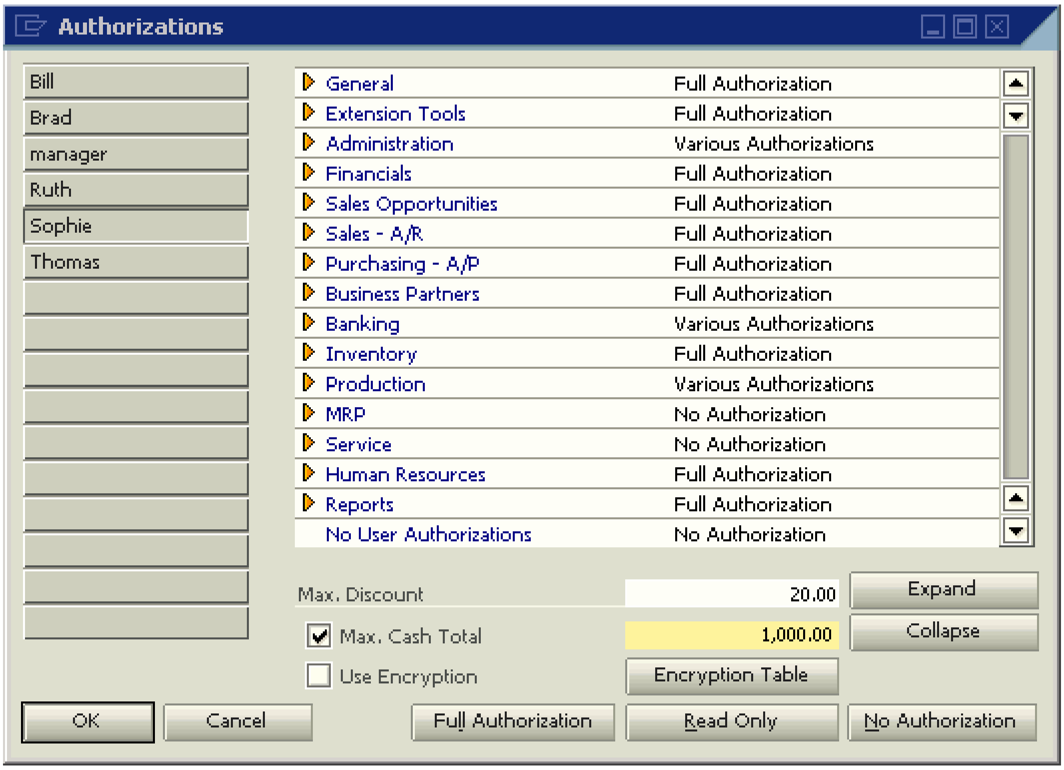
This document relates to a *Professional User* license. Other license types have a fixed set of authorizations.

This document is relevant for the United States localization. Authorizations for certain windows and functions described here may vary in other localizations.

Authorizations Window

To open the *Authorizations* window

1. From the *Main Menu* choose *Administration* → *System Initialization* → *Authorizations* → *General Authorizations*. On the left side is a list of all users defined in the company is displayed.



2. To define authorizations for a user, select the user from the list. The main pane of the *Authorizations* window contains a list of modules and functions. To expand its content, click next to a module or a function name.

The column to the right of the function names displays the authorization type granted for the module, window, function or action.

In the *Authorizations* window, the functions are listed in a hierarchical structure. If a row contains the *Expand* icon (), it indicates that the function contains additional functions at a lower level. The authorizations set at this level apply to all functions at a lower level. To set each lower level function individually, click to expand the hierarchy and set the authorizations for the specific function.

In this document, the expandable functions are emphasized with bold text.

Upon completing the definition of the general authorizations for a certain user, it is possible to copy his or her authorization profile to another user.

To copy authorizations for multiple users:

Ensure that the users are already defined in the company.

1. In the Authorizations window (*Administration* → *System Initialization* → *Authorizations)* click a user that has the required authorizations.

2. Without releasing the user's button, drag the mouse and drop it on the second user's name that requires the same autorizations.
3. Respond to the message "Copy the Autorizations of "first user" to "second user"?" by choosing “Copy”.

The second user will have the same autorizations as the first.

General Authorizations

Field Name	Description
General	• *Full Authorization* – The user can enter all *General* functions and make required changes or new settings. • *Read Only* – The user can view the data defined in all the *General* functions. • *No Authorization* – The user cannot access any option specified in the *General* functions. If *Read Only* authorization is selected for the entire list of *General* functions, functions for which the *Read Only* authorization is not available will automatically be set to *No Authorization*.
Send Message	• *Full Authorization* – The user can open the *Send Message* window *(File → Send → Send Message)* and send messages. • *Read Only* – The user can open the *Send Message* window but cannot send messages. Authorization for ‘Document Printing’ (see page 32) is required to send documents as email attachments. The email layout is defined in the document's printing properties. To save a distribution list when sending emails or SMSs, authorization for the Document Settings *(Administration ->System Initialization*) is also required. *Read Only* authorization gives the user the ability to view a saved distribution list. With *Full Authorization* the user can save a new distribution list.
Print Layout Designer	• *Full Authorization* – The user can use the *Print Layout Designer* functions such as *Modify Existing Print Templates* and *Create New Print Templates* for sales and purchasing documents.
Change Default Report	• *Full Authorization* – The user can change the default print layout currently defined for a certain document or report.

Field Name	Description
Query Print Layout	• *Full Authorization* – The user can open the *Query Print Layout* window and modify the user-defined query print template. To open a template, authorization is also needed for the Print Layout Designer. To open the Print Layout Designer, *Read Only* or *Full Authorization* is also required for the specific document or report. To print the query, authorization is required for 'Document Printing' in the Sales module. To create a new query print layout, *Read Only* or *Full Authorization* or higher is required for the Query Generator and 'Saved Queries – Group No. 1, 2, etc.'
Document Settings	• *Full Authorization* – The user can open the *Form Settings* window (*Tools* → *Form Settings*) and access the *Document* tab. To modify the settings in the *Table Format* and *Document* tabs, including changing and/or deleting fields at the row level in sales and purchasing documents, authorizations for the following are required: *Sales Employee Update (in Sales Reports)* *Modify Price Lists (*in the *Inventory* module*)* To provide a discount, the *Max. Discount* must be defined in the *Authorizations* window (at the bottom).
Edit Document Tables	• *Full Authorization* – The user can open the *Form Settings* window (*Tools* → *Form Settings*), access the *Table Format* and the *Row Format* tab, and make changes to the display of fields and columns.
Access to Confidential Accounts	• *Full Authorization* – The user can view G/L accounts marked as *Confidential (Financials* → *Chart of Accounts* → *Confidential field);* the user also must have *Read Only* or *Full Authorization* for the Chart of Accounts. • *No Authorization* – The user cannot view confidential G/L accounts in the Chart of Accounts or in any report that displays G/L accounts. In addition, confidential G/L accounts will not be displayed in any *Choose From* lists displaying G/L accounts.
Account Balances	• *Full Authorization* – The user can view the balances of G/L accounts in the Chart of Accounts and generate reports with account balance data); the user also must have *Read Only* or *Full Authorization* for the Chart of Accounts. • *No Authorization* – The user cannot view data on G/L accounts in financial reports such as the *General Ledger.*

Field Name	Description
BP Balances	• *Full Authorization* – The user can view the balances of business partners displayed in the *Business Partner Master Data* window and in the *Account Balance* window. *Read Only* or *Full Authorization* for business partner master data is also required. To open the account balance from a sales document, *Full Authorization* is needed for the sales order and delivery. • *No Authorization* – The user cannot view data for business partners or in financial reports such as the General Ledger. In addition, the *Account Balance* field in the *Business Partner Master Data* window displays **** instead of the actual balance. If a user who has no authorization to see BP balances must also be prevented from being able to see all documents relating to the BP by clicking on the (Show Graph) icon beside the *Account Balances* field, ensure that both *Sales Analysis* and *Purchasing Analysis* in the Authorizations window (Sales – A/R and Purchasing –A/P -> Sales Reports/Purchasing Reports) are set to *No Authorization*.
Unformatted Text	• *Full Authorization* – The user can export data in XML format. Authorization for the relevant functions and documents is also required. • *No Authorization* – The user cannot export data in XML format.
Export to MS–EXCEL	• *Full Authorization* – The user can export data to Microsoft Excel. Authorization for the related functions is also required, • *No Authorization* –The *Export to Microsoft Excel* icon is not active for the user. For a user who has no authorizations except for Export to MS-Excel, only the main menu and the MS Excel icon are active when opening SAP Business One. Note that the main menu is not exported to MS Excel.
Export to MS–WORD	• *Full Authorization* – The user can export documents, letters and reports to MS–Word. • *No Authorization* – The *Export to Microsoft Word* icon is not active for the user.
Period Status: Unlocked except Sales	• *Full Authorization* – The user can add documents even when the Posting Period status is *Unlocked Except Sales*. The user must have authorization to add the relevant document. • *No Authorization* – The user cannot add documents when the period status is *Unlocked except Sales*.

Field Name	Description
Period Status: Closing Period	• *Full Authorization* – The user can add documents even when the posting period status is *Closing Period*. The user must have authorization to add the relevant document. • *No Authorization* – The user cannot add documents when the period status is *Closing Period*.
PDF, Unformatted Text	• *Full Authorization* – The user can export data in the required format, either PDF or XML (these are assigned individually). Authorization for the relevant functions and documents is also required. • *No Authorization* – The user cannot export data in these formats.
Drag & Relate	• *Full Authorization* – The user can access and use the *Drag and Relate* tab functions *(Main Menu* → *Drag and Relate* tab*)*. Authorizations for specific *Drag and Relate* categories can be granted to different users. For example, a user can be authorized for *Sales – A/R* but not for *Financials*. • *No Authorization* – The *Drag and Relate* tab is not displayed in the Main Menu, even if the user has *Full Authorization* for the *Drag & Relate* subcategories. To provide authorization only for certain modules for *Drag & Relate* functions, grant *Full Authorization* to the *Drag & Relate* category, then set *No Authorization* for those modules from which the user should be excluded.
Sales A/R	• *Full Authorization* – The user can access and use the *Drag and Relate* tab functions for *Sales A/R*. • *No Authorization* – The user cannot use the *Drag & Relate* functions for the *Sales A/R* module. To open documents and the Item Master Data, either *Read Only* or *Full Authorization* for the business partner master data is also required.
Purchasing – A/P	• *Full Authorization* – The user can access and *use* the *Drag and Relate* tab functions for *Purchasing A/P*. • *No Authorization* – The user cannot use the *Drag & Relate* functions for the *Purchasing A/P* module. To open documents and the Item Master Data, either *Read Only* or *Full Authorization* for the business partner master data is also required.
Business Partners	• *Full Authorization* – The user can access and use the *Drag and Relate* tab functions for business partner information. • *No Authorization* – The user cannot use the *Drag & Relate* functions for business partner information. Business partner master data authorization is required to open activities, and *Read Only* or *Full Authorization* is also required to set up and use the payment terms *(Administration → Setup → Business Partners → Payment Terms).*

Field Name	Description
Inventory	• *Full Authorization* – The user can access and use the *Drag and Relate* tab functions for the *Inventory* module. • *No Authorization* – The user cannot use the *Drag & Relate* functions for inventory information. To open the *Item Master Data* or the *Bill Of Materials* windows, either *Read Only* or *Full Authorization* is required for item groups, warehouses and manufactures. *Read Only* or *Full Authorization* is also required for setup of the item groups, warehouses and manufacturers *(Administration → Set up → Inventory).*
Production	• *Full Authorization* – The user can access and use the *Drag and Relate* tab functions for the *Production* module. To open the production order from within the *Drag & Relate, Read Only* or *Full Authorization* is required. • *No Authorization* – The user cannot use the *Drag & Relate* functions for production information.
Financials	• *Full Authorization* – The user can access and use the *Drag and Relate* tab functions for the *Financials* module. Authorization is also required for the Chart of Accounts and the journal entry. • *No Authorization* – The user cannot use the *Drag & Relate* functions for financials information.
Service	• *Full Authorization* – The user can access and use the *Drag and Relate* tab functions for the *Service* module. *Read Only* or *Full Authorization* is required to open the service contract, service call and the customer equipment card. • *No Authorization* – The user cannot use the *Drag & Relate* functions for service information.
Renaming Fields	• *Full Authorization* – The user can open the *Change Description* window and change field names (CTRL+ double-click on a field name). Authorization for the relevant document is also required. • *No Authorization* – The user cannot open this window.
Change Log…	Users can open the *Change Log* window (*Tools → Change Log*) from various windows. • *Full Authorization* – The user can access the *Change Log* window. Authorization is also required for the relevant forms. • *No Authorization* – The user cannot open this window.
Organize My Menu	• *Full Authorization* – Allows the user to access the *Organize User Menu* window (*Tools → User Menu → Organize*) and customize the menu. • *No Authorization* – The user cannot open this window.
Cancel Document	• *Full Authorization* – The user can browse and display an existing document (for example, a sales quotation) and cancel it. (*Data → Cancel*). • *No Authorization* – The user cannot cancel documents.

Field Name	Description
Close Document	• *Full Authorization* – The user can browse and display an existing document (such as a sales quotation) and close it (*Data* → *Close*) if *Close* is an option for the document. • *No Authorization* – The user cannot close documents.
Translations	• *Full Authorization* – The user can open the *Translations* window (*Goto* → *Translate*) and translate field values into foreign languages. The *Multi-Language Support (Company Details, Basic Initialization tab)* must be selected for this option to be displayed. • *Read Only* – The user can open the *Translations* window and view field translations. • *No Authorization* – The user cannot open this window.
Future Posting Date in Documents	• *Full Authorization* –The user can enter a future posting date in sales and purchasing documents if *Allow Future Posting Date* is activated (*Administration* → *System Initialization* → *Document Settings).* • *No Authorization* – The user cannot enter future posting dates.

Customization Tool Authorizations

Field Name	Description
Customization Tools	• *Full Authorization* – The user can use all *Customization Tools* functions and make required changes or define new settings. • *Read Only* –The user can view the data defined in all of the customization tools. • *No Authorization* – The user cannot access any of the *Customization Tools.* If *Read Only* authorization is selected for all customization tools, functions for which the *Read Only* authorization is not available will automatically be set to *No Authorization*.
User-Defined Values - Setup	Authorization is required for the relevant windows. Authorization for the Query Manager is also required to select a query, by granting authorization in "*Saved Queries - Group No. X*" (*Reports* → *Query Generator* → *Saved Queries - Group No. X*). • *Full Authorization* – The user can create and search for user-defined values in many fields in SAP Business One (*Tools* → *Customization Tools* → *User-Defined Values).* • *Read Only* – The user can view existing formatted searches but cannot modify them. • *No Authorization* – The user cannot define or view formatted searches.
User-Defined Fields - Management	• *Full Authorization* –The user can view, modify and create user–defined fields (*Tools* → *Customization Tools* → *User–Defined Fields Management*). • *No Authorization* – The user cannot open this window.
Execute Commands	Relevant for Israel, Poland and Panama only. • *Full Authorization* –The user can access the *Execute Commands* window (*Administration* → *Utilities* → *Execute Commands*) and execute commands written as Macros. • *No Authorization* – The user cannot open this window.
User–Defined Object Registration	• *Full Authorization* – The user can access the *User-Defined Objects Registration Wizard* (*Tools* → *Customization Tools* → *Objects Registration Wizard*).The user can load DLL files that are created by partners for user-defined object's (that are also created by partners). This means that business logic, which is not part of the core application, can be added and activated through the application like any other built-in functions. • *No Authorization* – The user cannot view or open the wizard.

Administration Module Authorizations

Field Name	Description
Administration	• *Full Authorization* – The user can enter all *Administration* functions and make required changes or new settings. • *Read Only* –The user can view the data defined in the *Administration* module. • *No Authorization* – The user cannot access any of the functions in the *Administration* module. If *Read Only* authorization is selected for the entire *Administration* module, functions for which the *Read Only* authorization is not available will automatically be set to *No Authorization*.
Exchange Rates and Indexes	• *Full Authorization* – The user can open the *Exchange Rates and Indexes* window (*Administration* → *Exchange Rates and Indexes*) and enter relevant exchange rates. • *Read Only* – The user can view the data in the *Exchange Rates and Indexes* window. • *No Authorization* – The user cannot open the *Exchange Rates and Indexes* window. When *No Authorization* is granted for sales or purchasing documents and payments, or when a foreign or all currency business partner or item with a foreign price is selected, the user will not be able to enter an exchange rate in the *Exchange Rates and Indexes* window for that date. If the exchange rate is already defined for that date, this setting has no effect.
System Initialization	Controls user access to the functions in the *System Initialization* menu. The authorizations selected in the *System Initialization* row will apply to all system initialization functions. To set the authorizations for the individual system initialization functions, select the required authorization for each function as described below. • *Full Authorization* – The user can enter all functions located in the *System Initialization* menu and make changes or create new settings. • *Read Only* – The user can view the data defined in all the functions located in the *System Initialization* sub-menu. • *No Authorization* – The user cannot access any function located in the *System Initialization* menu.

Field Name	Description
Company Details	• *Full Authorization* – The user can enter the *Company Details* window and make required settings or modifications. • *Read Only* – The user can view the *Company Details* window • *No Authorization* – The user cannot open the *Company Details* window.
Allow Stock Release Without Item Cost	• *Full Authorization* – The user can activate the *Allow Stock Release Without Item Cost* checkbox (*Company Details* → *Basic Initialization* tab). Authorization for *Company Details* is required. • *No Authorization* – The user cannot activate this checkbox.
General Settings	• *Full Authorization* – The user can make changes or create new settings in all tabs of the *General Settings* window. To grant authorization to define default payment terms, authorization is also required for payment terms setup (*Administration* → *Setup* → *Business Partner* → *Payment Terms)* and *Read Only* authorization is also required for the price lists (in Inventory). • *Read Only* – The user can view the data defined in the various tab pages of the *General Settings* window. • *No Authorization* – The user cannot open the *General Settings* window.
Posting Period	This window can be opened by choosing *General Settings* → *Posting Periods* **tab** → *New Period* or by clicking a link arrow next to one of the posting periods in the table. • *Full Authorization* – The user can enter the *Posting Period* window and make settings or modifications. • *Read Only* – The user can *view* the *Posting Period* window. • *No Authorization* – The user cannot open the *Posting Period* window.
Change Period Status	• *Full Authorization* – The user can change the period status of the posting period, including locking it *(Administration* → *System Initialization* → *Posting Period* → *Posting Period* window*).* • *No Authorization* – The user is **unable** to change the period status.

Field Name	Description
Document Numbering	• *Full Authorization* – The user can enter the *Document Numbering* window and define a numbering series. This authorization is not required to use a defined numbering series in a sales or purchasing document. *Read Only* authorization is required for the relevant series when numbering series are used. The authorization is granted in the Series - Group No. X (*Administration → System Initialization → Series → Series - Group No. X*). • *Read Only* – The user can *view* the *Document Numbering* window • *No Authorization* – The user cannot open the *Document Numbering* window.
Document Settings	• *Full Authorization* – The user can enter the *Document Settings* window and make settings or modifications. In addition, *Read Only* or *Full Authorization* for the *Price Lists* is also required. • *Read Only* – The user *can* view the *Document Settings* window. • *No Authorization* – The user cannot open the *Document Settings* window.
Max. Under/Over Payment	• *Full Authorization* –The user can enter amounts in the *Under/Overpayment Amt Allowed* field for incoming/outgoing payments (*Document Settings → Per Document* tab). In addition, *Read Only* or *Full Authorization* for the price lists is also required. • *No Authorization* – The user cannot enter amounts in this field.
Allow Future Posting	• *Full Authorization* – The user can select or deselect the *Allow Future Posting Date* field (*Document Settings → General* tab). • *No Authorization* – The user *cannot* change this selection.
Print Preferences	• *Full Authorization* – The user can enter the *Print Preferences* window and make required settings or *modifications*. • *Read Only* – The user can *view* the *Print Preferences* window. • *No Authorization* – The user cannot open the *Print Preferences* window.
Opening Balances	• *Full Authorization* – The user can enter opening balances for G/L accounts, business partners and 1099. • *No Authorization* – The user cannot *access* these options.
G/L Accounts Opening Balance	• *Full Authorization* – The user can open the *G/L Accounts Opening Balance* window and record *data*. • *No Authorization* – The user cannot access this window.

Field Name	Description
Business Partners Opening Balance	• *Full Authorization* – The user can open the *Business Partners Opening Balance* window and record relevant data. • *No Authorization* – The user cannot access this window.
1099 Opening Balance	Relevant only for the United States localization. • *Full Authorization* – The user can open the *1099 Opening Balance* window and enter data. • *Read Only* – The user can view the *1099 Opening Balance* window. • *No Authorization* – The user cannot open the *1099 Opening Balance* window.
Numbering Series	• *Full Authorization* – The user can *open* the *Series* window (*Document Numbering* → *Right click* → *Row Details*), make settings and modify existing data. • *Read Only* – The user can view *the Series* window. • *No Authorization* – The user can *access* the *Series* window. If an authorization to the *Series* option is not granted, the user cannot access any document in SAP Business One. We recommend that you grant authorizations for series groups as described below. If *No Authorization* is granted to all groups in the numbering series, the user does not have access to any documents, even if the document numbering series has been defined correctly. If *Read Only* is granted at the header level, then *No Authorization* is granted to all the series groups and *Read Only* is only applied to locked series. In this case the series groups has *No* or *Full Authorization*.
Series Lock	• *Full Authorization* – The user can select *Lock* fields in the *Series* window. • *Read Only* – The user can view the *Lock* option but cannot apply it. • *No Authorization* – The user *cannot* view or select *Lock* fields.
Series – Group No.	• *Full Authorization* – The user can display and create documents assigned to this series group. • *No Authorization* – The user cannot access or create a document assigned to this group. This setting affects the use of the *Group* option in the numbering series set up.

Field Name	Description
Setup *General* *Financials* *Sales Opportunities* *Purchasing* *Business Partners* *Banking* *Inventory* *Service*	Select *Full, Read Only* or *No Authorization* for the different setup windows. **General**: Only Superusers can access the *Password* window, create and lock other users; access the *User Defaults* window and define the branches and departments. **Financials:** To define G/L Account Determination, authorization for *Sales - Allow Changes to Reconciliation Accounts* is required for the option *Allow changes to Control Accounts*. • Tax Codes: also provides authorization to define triangular deals and goods shipment. • Payment Terms: *Max. Discount* must also be defined (*General Authorizations* window at the bottom).
Data Import/Export	• *Full Authorization* – The user can perform all the data import and data export actions available in the *Data Import/Export* sub-menu. • *No Authorization* – The user cannot use this function.
Data Import	• *Full Authorization* – The user can perform all the data import actions available (*Data Import/Export* → *Data Import*), but only if the user also has authorization for the document or functions. • *No Authorization* – The user cannot use this function.
Data Export	• *Full Authorization* – The user can perform the data export actions available (*Data Import/Export* → *Data Export*). • *No Authorization* – The user cannot use this function.
Utilities	• *Full Authorization* – The user can use all the utilities located in the *Utilities* sub-menu. • *No Authorization* – The user cannot use any utility.
Period–End Closing	• *Full Authorization* – The user can open the *Period–End Closing* window and perform period–end closing transactions. • *No Authorization* – The user cannot open this window.
Year Transfer	This feature is available in certain localizations only. • *Full Authorization* – The user can open the *Year Transfer* window and perform year transfer *operations*. • *No Authorization* – The user cannot *open* this window.
Update Control Report	The *Update Control Report* opens automatically after the completion of an upgrade process. • *Full Authorization* – The user can view the *Update Control Report* and perform year transfer operations. • *Read Only* – The user can view the *Update Control Report* but cannot select the *Display Non–matching Quantities Only* checkbox. • *No Authorization* –The user cannot view the *Update Control Report*.

Field Name	Description
Check Document Numbering	• *Full Authorization* – The user can open the *Check Document Numbering* window and perform this operation. • *No Authorization* – The user cannot open this window.
Restore	• *Full Authorization* – The user can perform the restore options located in the *Utilities* sub-menu such as *Restore Wizard* and *Restore System* reports (Help → *Support Desk → Restore)*. • *No Authorization* – The user cannot perform any restore operations.
Approval Procedures	• *Full Authorization* – The user can *access* and update all the windows and reports located in the *Approval Procedures* menu. • *No Authorization* – The user *cannot* access any windows or reports related to this menu.
Approval Stages	• *Full Authorization* – The user can access the *Approval Stages* window, define new approval stages and modify existing ones. The user can also send documents to other users via the SAP Business One internal mail. The recipient requires *Read Only* or *Full Authorization*. They both require authorization for the relevant documents. • *Read Only* – The user can view *the Approval Stages* window. • *No Authorization* – The user cannot open the *Approval Stages* window.
Approval Templates	• *Full Authorization* – The user can access the *Approval Templates* window, define new approval templates, and modify existing ones. The user can also send documents to other users via the SAP Business One internal mail. The recipient requires *Read Only* or *Full Authorization*. They both require authorization for the relevant documents. To select queries for approval templates, authorization for the Query Manager is also required. • *Read Only* – The user can view the *Approval Templates* window. • *No Authorization* – The user cannot open the *Approval Templates* window.
Approval Status Report	• *Full Authorization* – The user can run the *Approval Status Report* and update approval statuses for related requests for approval. To view the document details of each document in the report, *Read Only* or *Full Authorization* is also required for that document. The user can also send documents to other users via the SAP Business One internal mail. The recipient requires *Read Only* or *Full Authorization*. To select queries for approval templates, authorization for the Query Manager is also required. To select queries for this report, authorization for the Query Manager is also required. • *No Authorization* – The user cannot open this report.

Field Name	Description
Approval Decision Report	• *Full Authorization* –The user can run the *Approval Decision Report* and update approval decisions for his related requests for approval. To view the documents listed in the report, *Read Only* or *Full Authorization* is also required for the relevant documents. The user can also send documents to other users via the SAP Business One internal mail. The “recipient” requires *Read Only* or *Full Authorization*. To select queries for approval templates, authorization for the Query Manager is also required. To select queries for this report, authorization for the Query Manager is also required. • *No Authorization* – The user cannot open this report.
Alerts Management	• *Full Authorization* – The user can open the *Alerts Management* window, define new alerts and update system alerts. To select queries for the alerts, authorization for the Query Manager is also required. • *Read Only* – The user can view the *Alerts Management* window. • *No Authorization* – The user cannot open the *Alerts Management* window.

Financials Module Authorizations

Field Name	Description
Financials	Controls user access for all functions in the *Financials* module. The authorizations selected in the *Financials* row will apply to all *Financials* functions. To set the authorizations for the individual functions, select the required authorization for each function as described in this table below. • *Full Authorization* – The user can enter all the functions specified in the *Financials* module and make required changes or new settings. • *Read Only* – The user can view the data defined in all the functions specified in the *Financials* module. • *No Authorization* – The user cannot access any option specified in the *Financials* module. If *Read Only* authorization is selected for the entire *Financials* module, functions for which the *Read Only* authorization is not available will automatically be set to *No Authorization*.
Chart of Accounts	• *Full Authorization* – The user can open the *Chart of Accounts* window, create new G/L accounts and modify existing ones. This includes access to the *Chart of Accounts* from other parts of SAP Business One, such as displaying BP balances in the business partner master data, or displaying balances in financial reports. *Read Only* – The user can view the *Chart of Accounts* window. • *No Authorization* – The user cannot open the *Chart of Accounts* window.

Field Name	Description
Account Code Generator	• *Full Authorization* – The user can open the *Account Code Generator* and generate G/L account codes when working with segmentation accounts. This authorization is also required to view balances in the *Chart of Accounts.* • *No Authorization* – The user cannot open this window.
Journal Entry	• *Full Authorization* – The user can open the *Journal Entry* window, add manual journal entries, modify active fields, view account balances, and perform all actions related to *Journal Entry*. The user can also modify the option such as *Confirm Unbalanced FC Entry* and *Allow Row Doc. Date Editing*. Authorization for the *Document Numbering Series Group No, X* and for documents that create journal entries (such as an invoice) is required. • *Read Only* – The user can view the *Journal Entry* window*.* • *No Authorization* – The user cannot open the *Journal Entry* window.
Update Posting Data	• *Full Authorization* – The user *can* update all the active fields in an existing journal entry, such as *Ref. 1, Indicator,* and *Project*. • *No Authorization* – The user cannot update any fields in an existing journal entry with the exception of the *Due Date* and the *Details* fields. A user with *No Authorization* for *Journal Entry* or *Update Posting* data cannot update the *Document Date* and the *Posting Date* fields in the journal entry rows even if the user is granted *Full Authorization* for these options. In a sales or purchasing document that generates a journal entry, some fields can be updated, such as the *Customer* or *Vendor Reference No* fields. However, this information is not updated automatically in the *Journal Entry* window, in fields such as *Ref. 2*. If the user does not have *Full Authorization* to update posting data, this data cannot be manually updated in the corresponding journal entry. In this case, the journal entry information does not match the sales or purchasing document.
Confirm Entry with Multiple Currencies	• *Full Authorization* – The user can select or deselect the *Block Multi Currency Journal Entry* checkbox (*Administration → System Initialization → Document Settings → Per Document tab → Journal Entry)*. Authorization for *Journal Entry* is also required. • *No Authorization* – The user cannot change the selection of the *Block Multi Currency Journal Entry* checkbox.

Field Name	Description
Confirm Unbalanced FC Entry	• *Full Authorization* – The user can select or deselect the *Block Unbalanced FC Journal Entry* checkbox (*Administration → System Initialization → Document Settings → Per Document tab → Journal Entry*). Authorization for *Journal Entry* is also required. • *No Authorization* – The user cannot change the selection of the *Block Unbalanced FC Journal Entry* checkbox.
Confirm Row Posting Date Editing	• *Full Authorization* – The user can select or deselect the *Block Posting Date Editing per Row* checkbox (*Administration → System Initialization → Document Settings → Per Document tab → Journal Entry*). Authorization for the journal entry is also required. • *No Authorization* – The user cannot change the selection of the *Block Posting Date Editing per Row* checkbox.
Allow Doc. Row Date Editing	• *Full Authorization* – The user can select or deselect the *Block Document Date Editing per Row* checkbox (*Administration → System Initialization → Document Settings → Per Document tab → Journal Entry*). Authorization for the journal entry is also required. • *No Authorization* – The user cannot change the selection of the *Block Document Date Editing per Row* checkbox.
Confirm SC Editing	• *Full Authorization* – The user can select or deselect the *Block Editing of Totals in System Currency* checkbox (*Administration → System Initialization → Document Settings → Per Document tab → Journal Entry*). Authorization for Journal Entry is also required. • *No Authorization* – The user cannot change the selection of the *Block Editing of Totals in System Currency* checkbox.
Journal Vouchers	• *Full Authorization* – The user can open the *Journal Vouchers* window, add journal vouchers, modify existing vouchers, delete vouchers and post journal vouchers to the accounting system. Authorization for *Journal Entry* and for the *Document Numbering Series - Group No. X* is also required. • *Read Only* – The user can view the *Journal Vouchers* window. • *No Authorization* – The user cannot open the *Journal Vouchers* window.
Posting Templates	• *Full Authorization* – The user can open the *Posting Templates* window, add new *templates* and update existing ones. • *Read Only* – The user can view the *Posting Templates* window. • *No Authorization* – The user cannot open the *Posting Templates* window.

Field Name	Description
Recurring Postings	• *Full Authorization* – The user can open the *Recurring Postings* window, add new recurring postings and update existing ones. *Read Only* or *Full Authorization* is required for the *Transaction Codes* (*Administration* → *Setup*→ *Financials* → *Transaction Codes)*. In addition, the *Display Recurring Postings on Execution* checkbox must be selected *(Administration* → *System Initialization* → *General Settings* → *Services tab*). • *Read Only* – The user can view *Recurring Postings*. • *No Authorization* – The user cannot open the *Recurring Postings* window. When the user logs onto the system, if the circumstances listed below occur, SAP Business One displays the error message "You are not permitted to perform this action: Recurring Postings." The *Display Recurring Postings on Execution* checkbox is *selected* (*Administration* → *System Initialization* → *General Settings* → *Services* tab). The user has *No Authorization* for *Recurring Postings.* There are recurring posting scheduled for execution.
Reverse Transactions	• *Full Authorization* – The user can open the *Reverse Transactions* window and cancel transactions scheduled to be reversed today. • *Read Only* – The user can view the *Reverse Transactions* window. • *No Authorization* – The user cannot open the *Reverse Transactions* window. When the user logs on, if the circumstances listed below occur, SAP Business One displays the error message "You are not permitted to perform this action: Reverse Transactions." The user has *No Authorization* for *Reverse Transactions*. There are reverse transactions scheduled to be cancelled today.
Exchange Rate Differences	• *Full Authorization* – The user can open the *Exchange Rate Differences* window, perform exchange rate difference transactions and save approved transactions. Authorization to update exchange rates is also required. An exchange rate must be defined for the day on which this report is run. • *No Authorization* – The user cannot open this window.

Field Name	Description
Conversion Differences	• *Full Authorization* – The user can open the *Conversion Rate Differences* window, perform exchange rate differences transactions, and save approved transactions. Authorization to update exchange rates is also required. (An exchange rate must be defined for the day on which this report is run). • *No Authorization* – The user cannot open this window.
1099 Editing	Relevant only to the United States localization. • *Full Authorization* – The user can open the *1099 Editing* window and update *1099 Forms, Boxes* and *Amounts.* • *Read Only* – The user can view the *1099 Editing* window. • *No Authorization* – The user cannot open the *1099 Editing* window.
Financial Report Templates	• *Full Authorization* – The user can open the *Financial Report Templates* window, design new financial report templates and update existing ones. • *No Authorization* – The user cannot open this window.
Budget	• *Full Authorization* – The user can access all windows and reports located in the *Budget* menu. • *Read Only* – The user does not have full access to the Budget windows, but has either *Read Only* or *No Authorization*. • *No Authorization* – The user cannot access any window in the *Budget* menu.
Budget Scenarios – Setup	• *Full Authorization* – The user can open the *Budget Scenarios – Setup* window, define new scenarios, update existing ones and import budget scenarios. • *Read Only* – The user can view the *Budget Distribution Method and Budget* windows. • *No Authorization* – The *user* cannot open the *Budget Scenarios – Setup* window.
Import Budget Scenarios	• *Full Authorization* – The user can use the *Import Scenario* option to import budget *scenarios*. • *No Authorization* – The user cannot use this function.
Budget Distribution Methods - Setup	• *Full Authorization* – The user can define new budget distribution methods and update existing ones in the *Budget Distribution Methods – Setup* window. • *Read Only* – The user can view the *Budget Distribution Methods – Setup* window. • *No Authorization* – The user cannot open the *Budget Distribution Methods – Setup* window.
Budget	• *Full Authorization* – The user can define and update budget amounts in the *Budget – Setup* window. • *Read Only* – The user can view existing budgets in the *Budget – Setup* window. • *No Authorization* – The user cannot open the *Budget – Setup* window.

Field Name	Description
Confirm Budget Deviation	• *Full Authorization* – The user can confirm a warning message regarding budget deviation in documents and journal entries (defined by choosing *Administration* → *System Initialization* → *General Settings* → *Budget* tab). The user can also add a document or a journal entry that causes a deviation from the budget as defined for the linked G/L account. • *No Authorization* – The user cannot confirm budget deviation warning messages.
Cost Accounting	• *Full Authorization* – The user can access all windows and reports located in the *Cost Accounting* menu, including *Profit Centers – Setup* and *Profit Center Report.* • *Read Only* – The user can view windows related to the *Cost Accounting* functions with the exception of the *Profit Center Report.* • *No Authorization* – The user cannot view any cost accounting related data.
Profit Centers - Setup	• *Full Authorization* – The user can define new profit centers and update existing ones. • *Read Only* – The user can view the profit centers defined in the company. • *No Authorization* – The user cannot open the *Profit Centers – Setup* window.
Distribution Rules - Setup	• *Full Authorization* – The user can define new distribution rules and update existing ones. • *Read Only* – The user can view the distribution rules defined in the company. • *No Authorization* – The user cannot open the *Distribution Rules – Setup* window.
Table of Profit Centers and Distribution	• *Full Authorization* – The user can display the *Table of Profit Centers and Distribution Rules* window and update distribution factors. • *Read Only* – The user can view the *Table of Profit Centers and Distribution Rules* window. • *No Authorization* – The user cannot open the *Table of Profit Centers and Distribution Rules* window.
Profit Center Report	• *Full Authorization* – The user can open the *Profit Center Report* window. • *No Authorization* – The user cannot open this window.

Field Name	Description
Financial Reports	• *Full Authorization* – The user can access and generate all the financial reports in all the categories such as *Trial Balance* and General *Ledger.* • *No Authorization* – The user cannot access or generate any of the reports specified in this sub-menu. You can grant *Full* or *No Authorization* to each individual report or globally to a group of reports located in a certain menu. For example, grant *Full Authorization* for *Aging* to apply this authorization to both the *Customer Receivables Aging* and the *Vendor Liabilities Aging* reports.
Accounting	• *Full Authorization* – The user can access and generate all the accounting reports such as *General Ledger, 1099 Report* and *Aging* reports. • *No Authorization* – The user cannot access and generate any of the reports located under this sub-menu.
G/L Accounts and Business Partners	• *Full Authorization* – The user can run the *G/L Accounts and Business Partners* report. • *No Authorization* – The user cannot generate this report.
General Ledger	• *Full Authorization* – The user can run the *General Ledger* report. • *No Authorization* – The user cannot generate this report.
Aging *Customer Receivables Aging* *Vendor Liabilities Aging*	• *Full Authorization* – The user can access and generate the aging reports. • *No Authorization for Aging* – The user cannot access or generate the reports located under this sub-menu.
Transaction Journal Report	• *Full Authorization* – The user can run the *Transaction Journal Report.* • *No Authorization* – The user cannot generate this report.
Transaction Report by Projects	• *Full Authorization* – The user can run the *Transaction Report by Projects* report. • *No Authorization* – The user cannot generate this report.
Document Journal	• *Full Authorization* – The user can run the *Document Journal.* • *No Authorization* – The user cannot generate this report.
1099/1096 Report	Relevant only for the United States localization. • *Full Authorization* – The user can run the *1099 Report*. • *No Authorization* – The user cannot generate this report.

Field Name	Description
Tax *Tax Report* *Input Tax Report* *Tax Reconciliation Report – Selection Criteria* *Tax Declaration Box Report*	• *Full Authorization* – The user can run the *Tax Reports.* • *No Authorization* – The user cannot generate these reports.
Financial	• *Full Authorization* – The user can access and generate all the financial reports such as *Balance Sheet* and *Cash Flow.* • *No Authorization for Financial* – The user cannot access or generate any of the reports located under this sub-menu.
Balance Sheet	• *Full Authorization* – The user can run the *Balance Sheet* report. • *No Authorization* – The user cannot generate this report.
Trial Balance	• *Full Authorization* – The user can run the *Trial Balance* report. • *No Authorization* – The user cannot generate this report.
Profit and Loss Statement	• *Full Authorization* – The user can run the *Profit and Loss Statement* report. • *No Authorization* – The user cannot generate this report.
Cash Flow	• *Full Authorization* – The user can run the *Cash Flow* report. • *No Authorization* – The user cannot generate this report.
Comparison	• *Full Authorization* – The user can access and generate all the comparison reports, such as *Balance Sheet Comparison* and *Trial Balance Comparison*. • A user with *No Authorization* cannot access and generate any of the reports located under this sub-menu.
Balance Sheet Comparison	• *Full Authorization* – The user can run the *Balance Sheet Comparison* report. • *No Authorization* – The user cannot generate this report.
Trial Balance Comparison	• *Full Authorization* – The user can run the *Trial Balance Comparison* report. • *No Authorization* – The user cannot generate this report.
Profit and Loss Statement Comparison	• *Full Authorization* – The user can run the *Profit and Loss Statement Comparison* report. • *No Authorization* – The user cannot generate this report.
Budget	• *Full Authorization* – The user can access and generate all the budget reports, such as *Budget Report* and *Trial Balance Budget Report.* • *No Authorization* – The user cannot access or generate any of the reports located under this sub-menu.

Field Name	Description
Budget Report	• *Full Authorization* – The user can run the *Budget Report.* • *No Authorization* – The user cannot generate this report.
Balance Sheet Budget Report	• *Full Authorization* – The user can run the *Balance Sheet Budget Report.* • *No Authorization* – The user cannot generate this report.
Trial Balance Budget Report	• *Full Authorization* – The user can run the *Trial Balance Budget Report.* • *No Authorization* – The user cannot generate this report.
Profit and Loss Statement Budget Report	• *Full Authorization* – The user can run the *Profit and Loss Statement Budget Report.* • *No Authorization* – The user cannot generate this report.

Sales Opportunities Module Authorizations

Field Name	Description
Sales Opportunities	• *Full Authorization* – The user can enter all the functions specified in the *Sales Opportunities* module and make required changes or new settings. *Full Authorization* is also required for the Sales Stages, as defined in the authorizations in *Administration* → *Setup* → *Sales Opportunity.* Authorization is required for *Close Document* (in General Authorizations), even if authorization is not provided for setup and viewing documents in these modules. Therefore in the *Sales Opportunity Stages* tab when closing a row (before opening a new row), the user first may have to close a document linked to that stage. • *Read Only* – The user can view the data defined in all the functions specified in the *Sales Opportunities* module*.* • *No Authorization* – The user cannot access any option specified in the *Sales Opportunities* module. If *Read Only* authorization is selected for the entire *Sales Opportunities* module, functions for which the *Read Only* authorization is not available will automatically be set to *No Authorization*.
Sales Opportunity	• *Full Authorization* – The user can open the *Sales Opportunity* window, add new sales opportunities and modify existing opportunities. • *Read Only* – The user can view the *Sales Opportunity* window*.* • *No Authorization* – The user cannot open the *Sales Opportunity* window*.*
Reports	• *Full Authorization* – The user can access and generate all the sales opportunity reports, such as *Management Reports, General Reports* and *Status Reports.* • *No Authorization* – The user cannot access or generate any of the reports located under this sub-menu.
Management Reports	• *Full Authorization* – The user can access and generate all the management reports, such as *Opportunities Forecast Report, Opportunities Forecast Over Time Report* and *Opportunities Statistics Report.* • *No Authorization* – The user cannot access and generate any of these reports.
General Reports	• *Full Authorization* – The user can access and generate all the general reports such as *Opportunities Report, Stage Analysis,* and *Source Distribution Over Time* report*.* • *No Authorization* – The user cannot access and generate any of these reports.

Field Name	Description
Status Reports	• *Full Authorization* – The user can access and generate all status reports, such as *Won Opportunities Report, Lost Opportunities Report, My Open Opportunities Report* and *My Closed Opportunities Report.* • *No Authorization* – The user cannot access or generate any of these reports.
Opportunities Pipeline	• *Full Authorization* – The user can access and generate the *Opportunities Pipeline* report, and open the *Dynamic Opportunity Analysis* window and the *Opportunity List.* • *No Authorization* – The user cannot access and generate this report.
Dynamic Opportunity Analysis	• *Full Authorization* – The user can access and run the *Dynamic Opportunity Analysis.* • *No Authorization* – The user cannot use this function.
Opportunity List	• *Full Authorization* – The user can open the *Opportunity List.* • *No Authorization* – The user cannot open this window.

Sales – A/R Module Authorizations

The following authorizations are required to create a sales document:

- Authorization for the specific document (such as a sales order)
- Authorization for the required numbering series (if possible, define a numbering series as the default, per user)
- Authorization for discount percentages should be defined if you use special prices or if you update prices manually. You must also define this at the row level.
- Authorization for price lists is required, especially if you update prices manually
- Authorization for row totals is required, especially if you update prices manually
- Authorization to modify the table layout, if required

Field Name	Description
Sales – A/R	• *Full Authorization* – The user can access all the windows and perform all the actions specified in the *Sales – A/R* module and make required changes or new settings. • *Read Only* – The user can view the data defined in all the functions specified in the *Sales – A/R* module. • *No Authorization* – The user cannot access any option specified in the *Sales – A/R* module. If *Read Only* authorization is selected for the entire *Sales – A/R* module, functions for which the *Read Only* authorization is not available will automatically be set to *No Authorization*.
Sales Quotation	• *Full Authorization* – The user can open the *Sales Quotation* window, add new documents and modify existing ones. • *Read Only* – The user can view sales quotation documents. • *No Authorization* – The user cannot open the *Sales Quotation* window.
Sales Order	• *Full Authorization* – The user can open the *Sales Order* window, add new documents and modify existing ones. In addition, the user is granted *Full Authorization* for the *Purchase Order Confirmation* window. • *Read Only* – The user can view sales order documents. In addition, the user is granted *Read Only* authorization for the *Purchase Order Confirmation* window. • *No Authorization* – The user cannot open the *Sales Order* window.

Field Name	Description
Purchase Order Confirmation	• *Full Authorization* – The user can work in the *Purchase Order Confirmation* window and create purchase order documents (providing the user has an authorization for the purchase order document). • *Read Only* – The user can view the *Purchase Order Confirmation* window. • *No Authorization* – The user cannot work in the *Purchase Order Confirmation* window.
Delivery	• *Full Authorization* – The user can open the *Delivery* window, add new documents and modify existing ones. • *Read Only* – The user can view delivery documents. • *No Authorization* – The user cannot open the *Delivery* window.
Return	• *Full Authorization* – The user can open the *Return* window, add new documents and modify existing ones. • *Read Only* – The user can view return documents. • *No Authorization* – The user cannot open the *Return* window.
A/R Down Payment Invoice	• *Full Authorization* – The user can open the *A/R Down Payment Invoice* window, add new documents and modify existing ones. The user can also update the payment means in the sales order. • *Read Only* – The user can view A/R down payment invoice documents. • *No Authorization* – The user cannot open the *A/R Down Payment Invoice* window.
A/R Invoice	• *Full Authorization* – The user can open the *A/R Invoice* window, add new documents and modify existing ones. • *Read Only* – The user can view *A/R* invoice documents. • *No Authorization* – The user cannot open the *A/R Invoice* window.
A/R Invoice + Payment	• *Full Authorization* – The user can open the *A/R Invoice + Payment* window, add new documents and modify existing ones. • *Read Only* – The user can view A/R invoice + payment documents. • *No Authorization* – The user cannot open the *A/R Invoice + Payment* window.
A/R Credit Memo	• *Full Authorization* – The user can open the *A/R Credit Memo* window, add new documents and modify existing ones. • *Read Only* – The user can view A/R credit memo documents. • *No Authorization* – The user cannot open the *A/R Credit Memo* window.

Field Name	Description
A/R Reserve Invoice	• *Full Authorization* – The user can open the *A/R Reserve Invoice* window, add new documents and modify existing ones. • *Read Only* – The user can view A/R reserve invoice documents. • *No Authorization* – The user cannot open the *A/R Reserve Invoice* window.
Document Generation Wizard	• *Full Authorization* – The user can access the *Document Generation Wizard* and create documents. • *No Authorization* – The user cannot use this function.
Document Draft	• *Full Authorization* – The user can open the *Document Drafts* window, open existing drafts, modify them and add them as genuine documents. • *Read Only* – The user can view document drafts. *Read Only* authorization will not allow a user to save a document as a draft *(File → Save as Draft).* • *No Authorization* – The user cannot open the *Document Drafts* window.
Document Printing	• *Full Authorization* – The user can print all the documents and reports in *SAP Business One* and access the *Document Printing* window. • *No Authorization* – The user cannot print (documents, reports or windows) via *SAP Business One.* The *Document Printing* authorization applies to all documents and reports. Note that this authorization is also required for sending document attachments in emails.
Dunning Wizard	• *Full Authorization* – The user can access the *Dunning Wizard,* define required parameters and print dunning letters. Authorization for Document Printing (see p. 32) is also required. • *No Authorization* – The user cannot use this function.
Execute a Dunning Run	• *Full Authorization* – The user can execute a dunning run. • *Read Only* – The user can view executed dunning runs. • *No Authorization* – The user cannot execute a dunning run. However, the user can select the option *Save Selection Parameter* and *Exit* in the dunning wizard.
Sales Reports *Sales Analysis*	• *Full Authorization* – The user can run the *Sales Analysis* report. • *No Authorization* – The user cannot run this report.
Backorder Report – Selection Criteria	• *Full Authorization* – The user can run the *Backorder Report.* • *Read Only* – The user can view the *Backorder Report.* • *No Authorization* – The user cannot generate the *Backorder Report.*

Field Name	Description
Tax Only	• *Full Authorization* – The user can select the *Tax Only* checkbox to mark a row in a sales document for tax payments and not for other purposes. • *No Authorization* – The user cannot select the *Tax Only* checkbox.
Change Row Amounts	• *Full Authorization* – The user can change prices and amount in the document rows. • *No Authorization* – The user cannot change item prices, row totals, and so on.
Change Sales Employee	• *Full Authorization* – The user can change the sales employee entered automatically in the document (either according to the selected customer or according to the document owner). • *No Authorization* – The user cannot select a different sales employee for the document.
Sales Employee Update	• *Full Authorization* – The user can change the sales employee selected in an existing document. • *No Authorization* – The user cannot the sales employee in existing documents.
Confirm Credit Line Deviation	If the customer has exceeded the credit limit (defined by choosing *Business Partner Master Data* → *Payment Terms tab* → *Credit Limit*), a system message is displayed with the warning “Customer has exceeded credit limit.” • *Full Authorization* – The user can approve system messages regarding the deviation from the credit limit by clicking *Yes,* thus enabling the customer to exceed the credit limit. • *No Authorization* – The user cannot approve such actions.
Confirm Debt Line Deviation	If the customer deviates from the commitment limit (defined for each customer by choosing *Business Partner Master Data* → *Payment Terms tab* → *Max. Commitment*), a system message is displayed with the warning “Customer has exceeded commitment limit.” • *Full Authorization* – The user can approve system messages regarding deviation from the commitment limit by clicking *Yes*, thus enabling the customer to deviate from the commitment limit. • *No Authorization* – The user cannot approve such actions.

Field Name	Description
Confirm Stock Limit Deviation	If inventory falls below the minimum level when issuing stock (defined by choosing *Document Settings* → *General* tab → *When Attempting to Release Stock Below The Minimum Level* → *Warning Only*), a system message is displayed with the warning "Inventory is under minimum per Item." This warning is also received when inventory falls below the minimum in the *Goods Issue* and *Inventory Transfer* documents. • *Full Authorization* – The user can approve system messages regarding deviation from the minimum stock level by clicking *Yes,* allowing the stock to fall below the minimum. • *No Authorization* – The user cannot approve such actions.
Partial Delivery	The user can select or deselect the *Partial Delivery* in *Sales Orders* checkbox. This determines whether the sales order can be copied partially to a target document. To set the default choose *Business Partner Master Data* → *Payment Terms* tab. • *Full Authorization* – The user can select or deselect the *Partial Delivery* checkbox in sales orders. • *No Authorization* – The user cannot change this definition in the document. The *Partial Delivery* checkbox is disabled.
Document Confirmation	The user can select or deselect the *Approved* checkbox in sales orders and purchase orders. This determines whether the Sales or purchase order is approved for copying to a target document. To set the default, choose *Administration* → *System Initialization* → *Document Settings* → *Per Document tab* → *Sales Order*/*Purchase Order*. • *Full Authorization* – The user can select or deselect the *Approved* checkbox in sales orders and in purchase orders. • *No Authorization* – The user cannot change this definition in the document. The *Approved* checkbox is disabled.
Documents with Zero Amounts	The user can add sales and purchasing documents with a zero total amount. The value in the *Total* field is 0 in these documents. The following documents can be added with a zero total amount: sales quotation, sales order, delivery, return, purchase order, goods receipt PO, and goods receipt. • *Full Authorization* – The user can add documents with a zero total amount. • *No Authorization* – The user cannot add such documents.
Allow Changes to Reconciliation Accounts	• *Full Authorization* – The user can select or deselect the *Allow Changing Control Accounts* checkbox (*Administration* → *Setup* → *Financials* → *G/L Account Determination* → *Sales/Purchase* tab). • *No Authorization* – The user cannot change this definition. The *Allow Changing Control Accounts* checkbox is disabled.

Field Name	Description
Gross Profit	• *Full Authorization* – The user can open the *Gross Profit* window and modify relevant data. • *Read Only* – The user can view the *Gross Profit* window. • *No Authorization* – The user cannot open the *Gross Profit* window. In addition, gross profit data is not displayed in reports (such as *Sales Analysis*) generated by a user with *No Authorization.*
Modify Posted A/R Documents	• *Full Authorization* - The user can modify fields at the row level after the sales documents have been posted. For example, the Owner can modify a row in a sales document which creates journal entries, such as a delivery, once the document has been posted. • *No Authorization* – The user cannot modify any field at the row level after the sales document has been posted. For example, the Owner of a sales document which creates a journal entry cannot modify a row once the document has been posted.

Purchasing – A/P Module Authorizations

In general, the following authorizations are required to create a purchasing document:

- Authorization for the specific document (such as a purchase order)
- Authorization for the required numbering series (If possible, define a numbering series as the default, per user.)
- Authorization for discount percentages should be defined if special prices are used or if the customer changes prices manually. This must also be defined at the row level.
- Authorization for price lists is required, especially if prices are updated manually.
- Authorization for row totals is required, especially if prices are updated manually.
- Authorization to modify the table layout, if required

Field Name	Description
Purchasing – A/P	• *Full Authorization* – The user can access all the windows and perform all the actions specified in the *Purchasing – A/P* module and make required changes or new settings. • *Read Only* – The user can view the data defined in all the functions specified in the *Purchasing – A/P* module. • *No Authorization* – The user cannot access any of the options in the *Purchasing – A/P* module. If *Read Only* authorization is selected for the entire *Purchasing – A/P* module, functions for which the *Read Only* authorization is not available will automatically be set to *No Authorization*.
Purchase Order	• *Full Authorization* – The user can open the *Purchase* Order window, add new documents and modify existing ones. In addition, the user is granted *Full Authorization* for the *Split Purchase Order* function. • *Read Only* – The user can view purchase order documents. In addition, the user is granted *Read Only* authorization for the *Split Purchase Order* function. • *No Authorization* – The u*ser cannot open the Purchase Order* window.
Split Purchase Order	The user can select or deselect the *Split PO* checkbox in the *Purchase Order → Logistics tab*. This determines whether the *purchase order* will be split into several "child" *purchase orders* according to the number of different warehouses selected in the document. To define the default setting, choose *Administration → System Initialization → Document Settings → Per Document tab → Purchase Order*. • *Full Authorization* – The user can select or deselect the *Split PO* checkbox in *Purchase Orders.* • *No Authorization* – The user cannot change this definition in the document. The *Split PO* checkbox is disabled.

Field Name	Description
Goods Receipt PO	• *Full Authorization* – The user can open the *Goods Receipt PO* window, add new documents and modify existing ones. • *Read Only* – The user can view goods receipt PO documents. • *No Authorization* – The user cannot open the *Goods Receipt PO* window.
Goods Return	• *Full Authorization* – The user can open the *Goods Return* window, add new documents and modify existing ones. • *Read Only* – The user can view goods return documents. • *No Authorization* – The user cannot open the *Goods Return* window.
A/P Down Payment Invoice	• *Full Authorization* – The user can open the *A/P Down Payment Invoice* window, add new documents and modify existing ones. • *Read Only* – The user can view A/P down payment invoice documents. • *No Authorization* – The user cannot open the *A/P Down Payment Invoice* window.
A/P Invoice	• *Full Authorization* – The user can open the *A/P Invoice* window, add new documents and modify existing ones. • *Read Only* – The user can view A/P invoice documents. • *No Authorization* – The user cannot open the *A/P Invoice* window.
A/P Credit Memo	• *Full Authorization* – The user can open the *A/P Credit Memo* window, add new documents and modify existing ones. • *Read Only* – The user can view A/P credit memo documents. • *No Authorization* – The user cannot open the *A/P Credit Memo* window.
A/P Reserve Invoice	• *Full Authorization* – The user can open the *A/P Reserve Invoice* window, add new documents and modify existing ones. • *Read Only* – The user can view A/P reserve invoice documents. • *No Authorization* – The user cannot open the *A/P Reserve Invoice* window.
Landed Costs	• *Full Authorization* – The user can open the *Landed Costs* window, add new documents and modify existing ones. • *Read Only* – The user can view landed costs documents. • *No Authorization* – The user cannot open the *Landed Costs* window.

Field Name	Description
Change Tax Amount Distribution	Relevant only for the United States localization The user can access the *Define Tax Amount Distribution* window, opened from sales and purchasing documents in the *Tax Amount (LC)* field or by choosing *Add Expenses* field → *Expenses* window → *Total Tax Amount* field. • *Full Authorization* – The user can open the *Define Tax Amount Distribution* window and change the distribution of the tax amount. • *Read Only* – The user can view the *Define Tax Amount Distribution* window. • *No Authorization* – The user cannot open the *Define Tax Amount Distribution* window.
Purchasing Reports *Purchase Analysis*	• *Full Authorization* – The user can run the *Purchase Analysis* report. • *No Authorization* – The user cannot run this report.
Tax Only	• *Full Authorization* – The user can select the *Tax Only* checkbox to mark a row in a purchasing document for tax payments and not for other purposes. • *No Authorization* – The user cannot select the *Tax Only* checkbox.
Modify Posted A/P Documents	• *Full Authorization* - The user can modify fields at the row level after the purchasing documents have been posted. For example, the Owner can modify a row in a document which creates journal entries, such as a Goods Receipt PO, once the document has been posted. • *No Authorization* – The user cannot modify any field at the row level in a purchasing document once it has been posted. For example, the Owner of a purchasing document, such as Goods Receipt PO, cannot modify the document after posting.

Business Partners Module Authorizations

Field Name	Description
Business Partners	• *Full Authorization* – The user can access all the windows and perform all the actions specified in the *Business Partners* module and make required changes or new settings. • *Read Only* – The user can view the data defined in all the functions specified in the *Business Partners* module. • *No Authorization – The* user cannot access any option specified in the *Business Partners* module. If *Read Only* authorization is selected for the entire *Business Partners* module, functions for which the *Read Only* authorization is not available will automatically be set to *No Authorization*.
Adding Business Partner	• *Full Authorization* – The user can add business partner master data from all business partner types: *Customer, Vendor* and *Lead. In addition, Read Only* authorization is required for Price Lists (see page 51). • *No Authorization* – The user cannot add business partners.
Adding Customer/Vendor Master Data	• *Full Authorization* – The user can add *Customer* and *Vendor* business partner master data. • *No Authorization* – The user cannot add *Customer* and *Vendor* business partners.
Adding Lead BP	• *Full Authorization* – The user can add *Lead* business partner master data. • *No Authorization* – The user cannot add *Lead* business partners.
Business Partner Master Data	• *Full Authorization* – The user can open and work in the *Business Partner Master* Data window, modify and view data and perform all the actions specified in this section, such as *Sales Order Balance* and *Set as On Hold.* • *Read Only* – The user can view the *Business Partner Master* Data window. If you select *Read-Only,* all the options listed in this section (such as *Delivery Balance*) will be set to *No Authorization.* • *No Authorization* – The user cannot open the *Business Partner Master Data* window.
Sales Order Balance	• *Full Authorization* – The user can view the sales order balance of the business partner. This balance is displayed in the *Orders* field. • *No Authorization* – The user sees asterisks instead of numbers: ****.

Field Name	Description
Delivery Balance	• *Full Authorization* – The user can view the delivery balance of the business partner. This balance is displayed in the *Deliveries* field. • *No Authorization* – The user sees asterisks instead of numbers: ****.
Change Sales Employee	• *Full Authorization* – The user can change the sales employee specified by choosing *Business Partner Master Data → General* tab. • *No Authorization* – The user cannot change the sales employee.
Active	The user can set an activity period for the business partner. When this activity period is over, it is not possible to create documents for this business partner. • *Full Authorization* – The user can select or deselect the *Active* checkbox (*Business Partner Master Data → General* tab). When the checkbox is selected, three additional fields are displayed allowing the user to define the activity period and to type comments. • *No Authorization* – The user cannot set an activity period for a business partner.
Set as On Hold	The user can set a business partner as *On Hold* for a certain time period. When a business partner is set as *On Hold*, it will not be possible to create documents for this business partner. • *Full Authorization* – The user can select or deselect the *On Hold* checkbox (*Business Partner Master Data → General* tab). When the checkbox is selected, three additional fields are displayed allowing the user to define the *On Hold* period *and* to type comments. • *No Authorization* – The user cannot set business partner as *On Hold*.
Business Partner Type	• *Full Authorization* – The user can search for and view specific types of business partners. • *No Authorization* – The user cannot search for specific types of business partners.
Customers, Vendors, Leads	• *Full Authorization* – The user can search for and view specific types of business partners. • *No Authorization* – The user cannot search for specific types of business partners.
Activity	• *Full Authorization* – The user can open the *Activity* window, add new activities and modify existing ones. • *Read Only* – The user can view the *Activity* window. • *No Authorization* – The user cannot open the *Activity* window.
Delete Activity	• *Full Authorization* – The user can delete an existing activity by choosing *Data → Remove.* • *No Authorization* – The user cannot delete activities.

Field Name	Description
Internal Reconciliations	• *Full Authorization* – The user can display, cancel and recreate external or internal reconciliations created for a specified range of business partners or G/L accounts and manage previous internal reconciliations. • *Read Only* - The user can view the *Reconciliation* and *Manage Previous Reconciliations* windows but not make any changes. • *No Authorization* – The user cannot view these windows.
Reconciliation	• *Full Authorization* - The user can display, cancel and recreate external or internal reconciliations created for a specified range of business partners or G/L accounts. • *Read Only* – The user can view the *Reconciliation* window but cannot make any changes. • *No Authorization* – The user cannot view this window.
Manage Previous Reconciliations	• *Full Authorization* – The user can display, cancel and recreate external or internal reconciliations created for a specified range of business partners or G/L accounts. • *Read Only* – The user can view the *Manage Previous Reconciliations* window but cannot make any changes. • *No Authorization* – The user cannot view this window.
Business Partner Reports	• *Full Authorization* – The user can open and run all the business partner reports. In addition, *Full* Authorization is required for *BP Balances* and *Account Balances,* and for *Accounting (Access to Confidential Accounts).* These are set in *General Authorizations.* To print these reports, *Full Authorization* is required for *Document Printing (Sales).* • *No Authorization* – The user cannot run these reports.
Activities Overview	• *Full Authorization* – The user can open and run all *Activities Overview.* • *No Authorization* – The user cannot run this report.
Inactive Customers	• *Full Authorization* – The user can open and run all *Inactive Customers.* • *No Authorization* – The user cannot run this report.
Dunning History Report	• *Full Authorization* – The user can open and run the *Dunning History Report.* • *No Authorization* – The user cannot run this report.

Banking Module Authorizations

Field Name	Description
Banking	• *Full Authorization* – The user can access all the windows and perform all the actions specified in the *Banking* module and make required changes or new settings. • *Read Only* – The user can view the data defined in all the functions specified in the *Banking* module. • *No Authorization* – The user cannot access any option specified in the *Banking* module. If *Read Only* authorization is selected for the entire *Banking* module, functions for which the *Read Only* authorization is not available will automatically be set to *No Authorization*.
Incoming Payments	• *Full Authorization* – The user can open all the windows located under the *Incoming Payments* sub-menu, add new *Incoming Payment* documents, view the *Check Register* and perform various actions in the *Credit Card Management* window. • *Read Only* – The user can view windows located under the *Incoming Payments* sub-menu. • *No Authorization* – The user cannot open any of the windows located under the *Incoming Payments* sub-menu.
Incoming Payments	• *Full Authorization* – The user can open the *Incoming Payments* window, add new *Incoming Payment* documents and modify existing ones. • *Read Only* – The user can view the *Incoming Payments* window. • *No Authorization* – The user cannot open the *Incoming Payments* window.
Cash Receipt	• *Full Authorization* – The user can use cash as the payment means (*Incoming Payments* → *Payment Means* window → *Cash* tab). • *No Authorization* – The user cannot use cash as the payment means in *Incoming Payments.*
Check Register	• *Full Authorization* – The user can open the *Check Register* window, view check data, update due dates, endorse and cancel checks. • *Read Only* – The user can view the *Check Register* window. • *No Authorization* – The user cannot open the *Check Register* window.

Field Name	Description
Credit Card Management	• *Full Authorization* – The user can open the *Credit Card Management* window, view credit card vouchers data, update references, endorse and cancel credit card vouchers. • *Read Only* –The user can view the *Credit Card Management* window • *No Authorization* – The user cannot open the *Credit Card Management* window.
***Deposit**s*	• *Full Authorization* – The user can open the *Deposit* window, deposit checks, credit card vouchers and cash to the bank or to a business partner. In addition, the user can view previous deposits, modify their data and even cancel deposits. This authorization also includes access to the *Postdated Credit Voucher* window, and the ability to deposit postdated check deposits. • *Read Only* – The user can view the *Deposit* window. • *No Authorization* – The user cannot open the *Deposit* window.
Deposit	• *Full Authorization* – The user can open the *Deposit* window, deposit checks, credit card vouchers and cash to the bank or to a business partner. In addition, the user can view previous deposits, modify their data and even cancel deposits. • *Read Only* – The user can view the *Deposit* window. • *No Authorization* – The user cannot open the *Deposit* window.
Outgoing Payments	• *Full Authorization* – The user can open all the windows located under the *Outgoing Payments* sub-menu, add new outgoing payment documents, process and view checks for payment and perform actions in the *Voiding Check for Payment* window. • *Read Only* – The user can view the windows located under the *Outgoing Payments* sub-menu. • *No Authorization* – The user cannot open any of the windows located under the *Outgoing Payments* sub-menu.
Outgoing Payments	• *Full Authorization* – The user can open the *Outgoing Payments* window, add new outgoing payment documents and modify existing ones. • *Read Only* – The user can view the *Outgoing Payments* window. • *No Authorization* – The user cannot open the *Outgoing Payments* window.

Field Name	Description
Checks for Payment	• *Full Authorization* – The user can open the *Checks for Payment* window, add new checks for payment documents, modify existing ones and cancel checks. • *Read Only* – The user can view the *Checks for Payment* window. • *No Authorization* – The user cannot open the *Checks for Payment* window.
Voiding Checks for Payment – Selection Criteria	• *Full Authorization* – The user can open the *Voiding Checks for Payment* window, void required checks and reprint them. • *Read Only* – The user can view the *Voiding Checks for Payment* window. • *No Authorization* – The user cannot open the *Voiding Checks for Payment* window.
Payment Drafts Report	• *Full Authorization – The* user can open the *Payment Drafts Report*, open existing drafts, modify them and add them as genuine documents. • *No Authorization* – The user cannot open the *Payment Drafts Report* window. The *Payment Drafts Report* authorization applies to both *Incoming* and *Outgoing Payments*.
Remove/Delete/Print Payment Drafts	• *Full Authorization* – The user can remove, delete and print the outgoing and incoming payment documents when they are in draft format. Authorization to add the outgoing and incoming payments as documents is controlled by the *Outgoing and Incoming Payment* authorizations. • *Read Only* – The user can view the *Payment Drafts Report* window. • *No Authorization* – The user cannot view the payment documents in draft format.
Checks for Payment Drafts	• *Full Authorization* – The user can open the *Checks for Payment Drafts* window, view existing checks for payments that were saved as drafts and save them as genuine checks. • *Read Only* – The user can view the *Checks for Payment Drafts* window. • *No Authorization* – The user cannot open the *Checks for Payment Drafts* window.
Payment System	• *Full Authorization* – The user can work with the *Payment Wizard,* access all its related definitions and execute payment runs. • *No Authorization* – The user cannot work with the *Payment Wizard.*

Field Name	Description
Payment Wizard	• *Full Authorization* – The user can work with the *Payment Wizard and* execute payment runs. • *No Authorization* – The user cannot work with the *Payment Wizard.*
Execute Payment Wizard	• *Full Authorization* – The user can execute payment runs, such as selecting the option *Execute* in the *Payment Wizard.* • *No Authorization* – The user cannot select this status.
Payment Run Defaults	• *Full Authorization* – The user can access the *Payment Run Defaults* window and changes required parameters. • *Read Only* – The user can view the *Payment Run Defaults* window. • *No Authorization* – The user cannot open the *Payment Run Defaults* window.
Bank Statements and External Reconciliations	• *Full Authorization* – The user can open all the windows specified in the *Bank Statements and Reconciliations* sub-menu, perform manual or automatic reconciliations, view *Link Invoices To Payment, Check And Restore Former Reconciliations*, and so on. • *No Authorization* – The user cannot open any of the windows located under the *Bank Statements and Reconciliations* sub-menu.
Process External Bank Statement	• *Full Authorization* – The user can access the *Process External Bank Statement* window, add new bank statements or update existing ones. • *No Authorization* – The user cannot open this window.
Reconciliation	• *Full Authorization* – The user can access the *Reconciliation* window, perform manual and automatic reconciliations and use the *Reconciliation Wizard.* • *No Authorization* – The user cannot open this window.
External Bank Reconciliation	• *Full Authorization* – The user can access the *External Bank Reconciliation* window from the *Manual Reconciliation* sub-menu, enter and view data. • *No Authorization* – The user cannot open this window.
Manage Previous Reconciliations	• *Full Authorization* – The user can access the *Manage Previous Reconciliations* window, open and check reconciliations. • *No Authorization* – The user cannot open this window.
Check and Restore Previous External Reconciliations	• *Full Authorization* – The user can access the *Check and Restore Former Reconciliations* window, open and restore reconciliations. • *No Authorization* – The user cannot open this window.

Field Name	Description
Check Number Confirmation	• *Full Authorization* – The user can access the *Check Number Confirmation* window and change the *Status* column. • *Read Only* – The user can view the *Check Number Confirmation* window. • *No Authorization* – The user cannot open the *Check Number Confirmation* window.

Inventory Module Authorizations

Field Name	Description
Inventory	• *Full Authorization* – The user can access all the windows and perform all the actions specified in the *Inventory* module and make required changes or new settings. • *Read Only* – The user can view the data defined in all the functions specified in the *Inventory* module. • *No Authorization* – The user cannot access any option specified in the *Inventory* module. If *Read Only* authorization is selected for the entire *Inventory* module, functions for which the *Read Only* authorization is not available will automatically be set to *No Authorization*. To perform inventory transactions, authorization for the relevant prices lists may also be required.
Item Master Data	• *Full Authorization* – The user can open and work in the *Item Master Data* window, modify and view data and perform all the actions specified in this section. • *Read Only* – The user can view the *Item Master Data* window. If you select *Read-Only*, all the options listed in this section (For example, *Set as On Hold*) will be set to *No Authorization.* • *No Authorization* – The user cannot open the *Item Master Data* window.
Active	The user can set a validity period for the item. When this validity period is over, it is not possible to create documents that include this item. • *Full Authorization* – The user can select or deselect the *Valid* checkbox (*Item Master Data* → *General* tab). When the checkbox is selected, three additional fields are displayed enabling the user to define the validity period and to type comments. • *No Authorization* – The user cannot set a validity period for an item.
Set as On Hold	The user can set an item as *On Hold* for a certain time period. When an item is set as *On Hold*, it is not possible to create documents including this item. • *Full Authorization* – The user can select or deselect the *On Hold* checkbox (*Item Master Data* → *General* tab). When the checkbox is selected, three additional fields are displayed enabling the user to define the *On Hold* period and to type comments. • *No Authorization* – The user cannot set an item as *On Hold*.

Field Name	Description
Valuation Method	• *Full Authorization* – The user can change the valuation method set for the item (*Item Master Data* → *Inventory Data* tab). • *No Authorization* – The user cannot change this definition.
Item Management	• *Full Authorization* – the user can access all the windows, perform all the actions relevant to the Item Management sub-menu, and make required changes or new settings. • *Read Only – The* user can view the data defined in all of the functions relevant to the *Item Management* sub-menu. • *No Authorization* – The user cannot access any option relevant to the *Item Management* sub-menu. If *Read Only* authorization is selected for the entire *Item Management* menu, functions for which the *Read Only* authorization is not available will automatically be set to *No Authorization*.
Serial Numbers	• *Full Authorization* – The user can open all the windows specified in the *Serial Numbers* sub-menu, add new serial numbers and update existing ones. • *No Authorization – The* user cannot open these windows.
Serial Numbers Management	• *Full Authorization* – The user can access the *Serial Numbers Management* window, view serial numbers selected in documents, update data *for* specific serial numbers or perform a sweeping update of several serial numbers. • *No Authorization* – The user cannot open this window. A user with *No Authorization* for *Serial Numbers Management* cannot select or define serial numbers in documents. For example, the user cannot right click in the *Quantity* field and select *Batch/Serial Numbers* in stock release documents or open the *Define Serial Numbers* window in stock receipt documents.
Serial Number Details	• *Full Authorization* – The user can access the *Serial Number Details* window, view serial numbers selected in documents, update data for specific *serial* numbers or perform a sweeping update of several serial numbers. • *No Authorization* – The user cannot open this window.
Batches	• *Full Authorization* – The *user* can open all the windows specified in the *Batches* sub-menu, add new serial number and update existing ones. • *No Authorization – The* user cannot open these windows.

Field Name	Description
Batch Management	• *Full Authorization* – The user can access the Batch *Management* window, view batch numbers selected in documents, update data for specific batch numbers or perform a sweeping update of several batch numbers. • *No Authorization* – The user cannot open this window. A user with *No Authorization* for *Batch Management* cannot select or define batch numbers in documents. For example, the user cannot right click in the *Quantity* field and select *Batch/Serial Numbers* in stock release documents or open the *Define Batches* window in inventory receipt documents.
Batch Details	• *Full Authorization* – The user can access the *Batch Details* window, view batch numbers selected in documents, update data for specific batch numbers or perform a sweeping update of several batch numbers. • *No Authorization* – The user cannot open this window.
Alternative Items	• *Full Authorization* – The user can access the *Alternative Items* window, define new alternative items for a certain item or even delete alternative item definitions. • *Read Only* – The user can view the *Alternative Items* window. • *No Authorization* – The user cannot open the *Alternative Items* window.
Business Partner Catalog Numbers	• *Full Authorization* – The user can access the *Business Partner Catalog Numbers* window, define new business partner catalog number for items, and update or delete catalog numbers. • *Read Only* – The user can view the *Business Partner Catalog Numbers* window. • *No Authorization* – The user cannot open the *Business Partner Catalog Numbers* window.
Global Update to BP Catalog Numbers	• *Full Authorization* – The user can access the *Global Update to BP Catalog Numbers* window and replace catalog numbers for a selected range of business partner and/or items. • *No Authorization* – The user cannot open this window.
Inventory Valuation Method	• *Full Authorization* – The user can access the *Inventory Valuation Method* window and update the costing method of items. • *Read Only* – The user can view the *Inventory Valuation Method* window. • *No Authorization* – The user cannot open the *Inventory Valuation Method* window.

Field Name	Description
Inventory Transactions	• *Full Authorization* – the user can access all the windows, perform all the actions available under the Inventory Transactions sub-menu, and make required changes or new settings. • *Read Only* – The user can view the data defined under all the functions in the *Inventory Transactions* sub-menu. • *No Authorization – The user cannot access any option in the Inventory Transactions* sub-menu. If *Read Only* authorization is selected for the entire *Inventory Transactions* sub-menu, functions for which the *Read Only* authorization is not available will automatically be set to *No Authorization*.
Goods Receipt	• *Full Authorization* – The user can open the *Goods Receipt* window, add new documents and modify existing ones. • *Read Only* – The user can view *Goods Receipt* documents. • *No Authorization* – The user cannot open the *Goods Receipt* window.
Goods Issue	• *Full Authorization* – The user can open the *Goods Issue* window, add new documents and modify existing ones. • *Read Only* – The user can view goods issue documents. • *No Authorization* – The user cannot open the *Goods Issue* window.
Inventory Transfer	• *Full Authorization* – The user can open the *Inventory Transfer* window, add new documents and modify existing ones. • *Read Only* – The user can view inventory transfer documents. • *No Authorization* – The user cannot open the *Inventory Transfer* window.
Initial Quantities, Inventory Tracking and Stock Posting	• *Full Authorization* – The user can perform all the actions available from the *Initial Quantities, Inventory Tracking and Stock Posting* windows. • *No Authorization* – The user cannot open this window.
Initial Quantity	• *Full Authorization* – The user can open the *Initial Quantity* window and record initial quantities for items. • *No Authorization* – The user cannot open this window.
Inventory Tracking	• *Full Authorization* – The user can open the *Inventory Tracking* window and record inventory quantities for items. • *No Authorization* – The user cannot open this window.
Stock Posting	• *Full Authorization* – The user can open the *Stock Posting* window and carry out inventory postings for items. • *No Authorization* – The user cannot open this window.

Field Name	Description
Cycle Count Recommendations	• *Full Authorization* – The user can open the Cycle *Count Recommendations* window • *Read Only* – The user can view the *Cycle Count Recommendations* window. • *No Authorization* – The user cannot open the *Cycle Count Recommendations* window.
Inventory Revaluation	• *Full Authorization* – The user can open the *Inventory Revaluation* window, change item prices or update inventory debit/credit amounts. • *Read Only* – The user can view previous *Inventory Revaluation* actions. • *No Authorization* – The user cannot open the *Inventory Revaluation* window.
Price Lists	• *Full Authorization* – The user can access all the price lists and windows located under the *Price Lists* sub-menu and make required changes or new settings. • *Read Only* – The user can view the data defined in all the price lists and windows located under the *Price Lists* sub-menu. • *No Authorization* – The user cannot access any price list or window located under the *Price Lists* sub-menu. If *Read Only* authorization is selected for the entire *Price Lists* sub-menu, functions for which the *Read Only* authorization is not available will automatically be set to *No Authorization*.
Price Lists	• *Full Authorization* – The user can access all price list groups displayed in the *Price List window,* make required changes and new settings. • *Read Only* – The user can view the different price lists displayed in the *Price List* window. • *No Authorization* – The user cannot access any price list displayed in the *Price List* window. A user with *No Authorization* for *Price Lists* is not able to view prices in the *Item Master Data* window. The *Price* field displays asterisks ****.

Field Name	Description
Price List – Group No. 1, 2, 3 and 4	The user can access price lists related to a certain group (*Inventory* → *Price Lists* → *Price Lists* → *Group*). • *Full Authorization* – The user can access all the price lists related to the group. • *Read Only* – The user can view the price lists related to the group. • *No Authorization* – The user cannot access any price list related to the group and the data of such price lists will be displayed as asterisks **** in the *Price Lists* window. A user with *No Authorization* for a certain price list group is not able to view its prices in the *Item Master Data* window. The *Price* field displays asterisks **** for restricted price list groups.
Last Evaluated Price	• *Full Authorization* – The user can view the *Last Evaluated Price.* • *No Authorization* – The user cannot view data in this price list. A user with *No Authorization* for the *Last Evaluated Price* cannot view its prices in the *Item Master Data* window. The *Price* field displays asterisks **** for this price list.
Last Purchase Price	• *Full Authorization* – The user can view the *Last Purchase Price.* • *No Authorization* – The user cannot view data in this price list. A user with *No Authorization* for the *Last Purchase Price* is not able to view its prices in the *Item Master Data* window. The *Price* field displays asterisks **** for this price list.
Item Cost	• *Full Authorization – The user can select Item Cost from the list of price lists.* • *No Authorization* – The user cannot view the *Item Cost* entry in the list of price lists. The authorization for price lists does not affect the *Item Cost* field in the *Item Master Data*, or in the sales or marketing documents. Therefore, the item cost can be viewed in other places even when blocked in the price lists.

Field Name	Description
Period and Volume Discounts	• *Full Authorization* – The user can access the *Hierarchies and Expansions* window, and define date and quantity dependant hierarchies and expansions for selected price lists. • *Read Only* – The user can view the *Hierarchies and Expansions* window. • *No Authorization* – The user cannot open the *Hierarchies and Expansions* window.
Special Prices	• *Full Authorization* – The user can access all the windows under the *Special Prices* sub-menu, add new data, modify existing data and perform various actions. • *Read Only* – The user can view the different windows under the *Special Prices* sub-menu • *No Authorization* – The user cannot access windows under the *Special Prices* sub-menu.
Special Prices for Business Partners	• *Full Authorization* – The user can access the *Special Prices for Business* Partners window, define special prices for business partners and modify existing data. • *Read Only* – The user can view the *Special Prices for Business Partners* window. • *No Authorization* – The user cannot open the *Special Prices for Business Partners* window.
Copy Special Prices to Selection Criteria	• *Full Authorization* – The user can access the *Copy Special Prices to Selection* Criteria window and copy special prices to a range of business partners and/or items. • *No Authorization* – The user cannot open this window.
Update Special Prices Globally	• *Full Authorization* – The user can access the *Update Special Prices Globally* window and perform a global update of special prices by changing the discount %, price or linked price list. • *No Authorization* – The user cannot open this window.
Discount Groups	• *Full Authorization* – The user can access the *Discount* Groups window and define special prices according to discount groups. • *Read Only* – The user can view the *Discount Groups* window. • *No Authorization* – The user cannot open the *Discount Groups* window.
Update Parent Item Prices Globally	• *Full Authorization* – The user can access the *Update Parent Item Prices Globally* window and update prices for parent and child items comprising bills of materials. • *Read Only* – The user can view the *Update Parent Item Prices Globally* window. • *No Authorization* – The user cannot open this window.

Field Name	Description
Pick and Pack	• *Full Authorization* – The user can access the *Pick and Pack Manager* and the *Pick List* windows. • *No Authorization* – The user cannot open these windows.
Pick and Pack Manager	• *Full Authorization* – The user can access the *Pick and Pack Manager* window, pick and release sales orders and pack item for delivery. • *No Authorization* – The user cannot open this window.
Pick List	• *Full Authorization* – The user can access the *Pick List* window, pick items and pack them for delivery. • *Read Only* – The user can view the *Pick List* window. • *No Authorization* – The user cannot open the *Pick List* window.
Inventory Reports	You can grant *Full Authorization* or *No Authorization* for all the inventory reports in SAP Business One.

Production Module Authorizations

Field Name	Description
Production	• *Full Authorization* – The user can enter all the windows located under the *Production* module and make new settings and modifications. • *Read Only* – The user can view the data in all the windows located under the *Production* module. • *No Authorization* – The user cannot access any window located under the *Production module*. If *Read Only* authorization is selected for the entire *Production* module, functions for which the *Read Only* authorization is not available will automatically be set to *No Authorization*.
Bill of Materials	• *Full Authorization* – The user can access the *Bill of Materials* window, define new bills of materials or modify existing ones. • *Read Only* – The user can view the *Bill of Materials* window. • *No Authorization* – The user cannot open the *Bill of Materials* window.
Production Order	• *Full Authorization* – The user can access the *Production Order* window, plan new production orders modify existing ones, release orders for production and close production orders at the end of the production process. • *Read Only* – The user can view the *Production Order* window. • *No Authorization* – The user cannot open the *Production Order* window.
Receipt from Production	• *Full Authorization* – The user can access the *Receipt from Production* window and release or receive quantities. • *Read Only* – The user can view the *Receipt from Production* window. • *No Authorization* – The user cannot open the *Receipt from Production* window.
Issue for Production	• *Full Authorization* – The user can access the *Issue for Production* window and release or receive quantities. • *Read Only* – The user can view the *Issue for Production* window. • *No Authorization* – The user cannot open the *Issue for Production* window.
Production Reports *Bill of Materials Report*	In the *Production Reports* section, you can grant *Full* or *No Authorization* for the *Bill of Materials Report*.

MRP Module Authorizations

Field Name	Description
MRP	• *Full Authorization* – The user can enter all the windows specified in the *MRP module.* • *Read Only* – The user can view only the *Forecasts* window. • *No Authorization* – The user cannot access any window specified in the *MRP* module. If *Read Only* authorization is selected for the entire *MRP* module, functions for which the *Read Only* authorization is not available will automatically be set to *No Authorization*.
Forecasts	• *Full Authorization* – The user can access the *Forecasts* window, define new forecasts or modify existing ones. • *Read Only* – The user can view the *Forecasts* window. • *No Authorization* – The user cannot open the *Forecasts* window.
MRP Wizard	• *Full Authorization* – The user can access the *MRP Wizard* window, define new forecasts or modify existing ones. • *No Authorization* – The user cannot use the wizard.
Order Recommendation Report	• *Full Authorization* – The user can access the *Order Recommendation Report* window, and create new purchase orders and production orders. • *No Authorization* – The user cannot open this window.

Service Module Authorizations

Field Name	Description
Service	• *Full Authorization* – The user can enter all the windows located under the *Service* module and perform the various actions available in this module. • *Read Only* – The user can view the data in all the windows located under the *Service* module. • *No Authorization* – The user cannot access any window located under the *Service* module. If *Read Only* authorization is selected for the entire *Service* module, functions for which the *Read Only* authorization is not available will automatically be set to *No Authorization*.
Service Call	• *Full Authorization* – The user can open the *Service Call* window, record new service calls and update existing ones. • *Read Only* – The user can view the *Service Call* window. • *No Authorization* – The user cannot open the *Service Call* window.
Special Service Call Authorizations	• *Full Authorization* – The user can perform all the actions available under the *Special Service Call Authorizations* sub-menu. • *No Authorization* – The user cannot perform any of these actions.
Change Status	• *Full Authorization* – The user can change the status of a service call by clicking the *Call Status* field in a service call and selecting a different status. • *No Authorization* – The user cannot change the status of a service call.
Define Statuses	• *Full Authorization* – The user can define a new status for a service call by clicking the *Call Status* field in a service call and selecting the option *Define New* to open the *Service Call Statuses – Setup* window. • *No Authorization – The user cannot change the status of a service call.*
Reopen	• *Full Authorization* – The user can reopen a service call and change its status from *Closed* to *Open* by clicking the *Call Status* field in a closed service call and selecting *Open.* • *No Authorization* – The user cannot reopen a service call.

Field Name	Description
Allow Service Without Contract	• *Full Authorization* – The user can record a service call for customers without a valid service contract. The following system message is displayed: *“Warning: No valid contracts exist for the customer*” The user can confirm the system message by choosing OK and record the service call. • *No Authorization* – The user cannot confirm the system message or process service calls for customers with no valid service contracts.
Allow Service Beyond Coverage Time	• *Full Authorization* – The user can record a service call that deviates from the coverage time defined in the service contract. The following system message is displayed*: “Warning Attempt to create a call out of coverage time”.* The user can confirm the system message by choosing OK and then process the service call. • *No Authorization* – The user cannot confirm the system message or process service calls *that deviate from the coverage time defined in the* service contract*.*
Allow Service Beyond Credit Limit	• *Full Authorization* – The user can record a service call for a customer that deviates from his credit limit (defined by choosing *Business Partners* → *Business Partner Master Data* → *Payment Terms* tab.) The following system message is displayed: *“Customer has passed credit limit”.* The user can confirm the system message by choosing OK and then process the service call. • *No Authorization* – The user cannot confirm this message or process service calls for customers who deviate from their credit limit. System messages regarding deviations from the credit limit are displayed only if the *Credit Limit* checkbox is selected (*Administration* → *System Initialization* → *General Settings* → *Sales* tab → *Customer Activity Restrictions*).
Customer Equipment Card	• *Full Authorization* – The user can access the *Customer Equipment Card* window, create new customer equipment cards and modify existing ones. • *Read Only* – The user can view the *Customer Equipment Card* window*.* • *No Authorization* – The user cannot open the *Customer Equipment Card* window.
Service Contract	• *Full Authorization* – The user can access the *Service Contract* window, define new service contracts and modify existing ones. • *Read Only* – The user can view the *Service Contract* window*.* • *No Authorization* – The user cannot open the *Service Contract* window.

Field Name	Description
Change Status	• *Full Authorization* – The user can change the status of a Service Contract by clicking the *Status* field (*Service Contract* → *General* tab), and selecting a status from the dropdown list. • *No Authorization* – The user cannot change the status of a service contract.
Solutions Knowledge Base	• *Full Authorization* – The user can access the *Solutions Knowledge Base* window, add new solutions and modify existing ones. • *Read Only* – The user can view the *Solutions Knowledge Base* window. • *No Authorization* – The user cannot open the *Solutions Knowledge Base* window.
Special Solutions Authorizations *Change Status*	• *Full Authorization* – The user can change the status of a *Knowledge Base* Solution by clicking the *Status* field in the *Solutions Knowledge Base* window, and selecting a status from the dropdown list. • *No Authorization* – The user cannot change the status of a *Knowledge Base Solution.*
Service Reports	You can grant *Full Authorization* or *No Authorization* for service reports.

Human Resources Module Authorizations

Field Name	Description
Human Resources	• *Full Authorization* – The user can open all windows and reports in the *Human Resources* module. • *Read Only* – The user can view the data in all the windows in the *Human Resources* module. • *No Authorization* – The user cannot access any window in the *Human Resources* module. If *Read Only* authorization is selected for the entire *Human Resource* module, functions for which the *Read Only* authorization is not available will automatically be set to *No Authorization*.
Employee Master Data	• *Full Authorization* – The user can access the *Employee Master Data* window, create new master data for company employees and modify existing ones. • *Read Only* – The user can view the *Employee Master Data* window. • *No Authorization* – The user cannot open the *Employee Master Data* window.
Human Resources Reports	You can grant *Full* or *No Authorization* for the human resources reports.

Reports Module Authorizations

Field Name	Description
Reports	• *Full Authorization* – The user can enter all the windows and reports specified in the *Reports* module. • *Read Only* – The user can view the data in all the windows specified in the *Reports* module. • *No Authorization* – The user cannot access any window specified in the *Reports* module. If *Read Only* authorization is selected for the entire *Reports* module, functions for which the *Read Only* authorization is not available will automatically be set to *No Authorization*.
Sales and Purchasing ***Open Items List***	• *Full Authorization* – The user can open the *Open Items List* report and view data regarding open documents and missing items • *No Authorization* – The user cannot open this window.
Sales Quotations *Sales Orders* *Deliveries* *Returns* *A/R Down Payments* *A/R Invoices* *A/R Reserve Invoices* *Purchase Orders* *Goods Receipt POs* *Goods Returns* *A/P Down Payments* *A/P Invoices* *A/P Reserve Invoices* *Missing Items*	You can grant *Full* or *No Authorization* for the different data options available for display in the *Open Items List* report.
Query Generator	• *Full Authorization* – The user can open the *Query Generator* window, create new queries, create and edit query categories, view all the user–defined queries and system queries. • *Read Only* – The user can view user–defined queries only. • *No Authorization* – The user cannot access the *Query Generator* and view queries.

Field Name	**Description**
New Queries	• *Full Authorization* – The user can open the *Query Generator* window and create new queries. When the user opens this window, a warning message is displayed. If the user selects *OK* and has *Full Authorization,* the *Query Manager* window opens. • *No Authorization* – The user cannot open the *Query Generator* window.
Create/Edit Categories	• *Full Authorization* – The user can open the *Create/Edit Categories* window *(Query Manager → Manage Categories*), create new categories for your queries or edit existing ones. • *No Authorization* – The user cannot open the *Create/Edit Categories* window.
Modify SQL Statement	• *Full Authorization* - The user can edit the SQL statement in the 'Display Query Structure' in the *Query Generator* window by clicking the pencil icon. • *No Authorization* - The user cannot edit the SQL statement in the query, but can view the text in the *Query Generator* window.
Saved Queries – Group (No. 1- 20)	The user can run queries related to each of the 20 authorization groups available in SAP Business One. Each query category can be linked to up to 20 authorization groups (*Query Manager → Manage Categories → Authorization Groups*). When linking query categories to different authorization groups it is possible to restrict certain users from running them. • *Full Authorization* – The user can run queries related to categories linked to this authorization group. For example, *Full Authorization for Saved Queries – Group No. 1* will allow the user to run queries related to query categories linked to authorization group number 1. • *Read Only* – The user can view queries related to this authorization group, but cannot save queries in categories linked to this group. • *No Authorization* – The user cannot view queries linked to this group, nor save queries in categories linked to this authorization group.
Query Wizard	• *Full Authorization* – The user *can* open the *Query Wizard* window and create new queries. • *No Authorization* – The user cannot use this wizard. A user with *No Authorization* for *New Queries* (see the *Query Generator* section) cannot open the *Query Wizard*.
Query Manager	• *Full Authorization* - The user can modify the query (the pencil is enabled) • *Read Only* - The query can be viewed but not edited (the pencil is disabled). • *No Authorization* - The user cannot open the Query Manager window.

User Authorizations

Field Name	Description
User Authorization	The user can grant authorizations for user-defined forms. • *Full Authorization* – The user can access all forms specified in the *User Authorization* section. • *Read Only* – The user can view the data in all forms specified in the *User Authorization* section. • *No Authorization* – The user cannot access any form specified in the *User Authorization* section. Authorizations for user–defined forms can be created by choosing *Administration* → *System Initialization* → *Authorizations* → *Additional Authorization Creator*. If no user-defined forms were created, the *User Authorization* title will be displayed as *No User Authorizations*. If *Read Only* authorization is selected for the entire *User Authorization* module, functions for which the Read Only authorization is not available will automatically be set to *No Authorization*.
XL Reporter Tools	• *Full Authorization* - The user can start the XL Reporter from the Tools menu, to compose or edit reports or change the XL Reporter settings. • *No Authorization* – The user cannot access the XL Reporter.
XL Reporter Reports	• *Full Authorization* – The user can access and run reports that have been generated and placed in the main menu by the XL Reporter. The user must be defined as *a Superuser to access the Report Composer and Report Designer* (*Administration* → *Setup* → *General* → *Users*). • *No Authorization* – The user cannot access reports generated by the XL Reporter.

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