

SAP Business One How-To Guide



PUBLIC

How to Define Authorizations

Applicable Release:

SAP Business One 8.8

All Countries

English

September 2009

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Introduction

This document provides information about the authorization settings in the *Authorizations* window in SAP Business One. For more information about the authorization function, see the online help for SAP Business One.

In the *Authorizations* window, you can determine the required authorizations for the 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* submenu 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 the 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 you have *Full Authorization* for the sales quotation, but *No Authorization* for the sales order, *Sales* is displayed as *Various Authorizations*.

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



Authorizations Window

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.



Note

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

To open the *Authorizations* window, proceed as follows:

From the SAP Business One *Main Menu*, choose *Administration* → *System Initialization* → *Authorizations* → *General Authorizations*. The left side displays a list of all users defined in the company.

Subject	Authorization
▶ General	No Authorization
▶ Customization Tools	No Authorization
▶ Administration	Full Authorization
▶ Financials	Full Authorization
▶ Sales Opportunities	No Authorization
▶ Sales - A/R	Full Authorization
▶ Purchasing - A/P	No Authorization
▶ Business Partners	No Authorization
▶ Banking	No Authorization
▶ Inventory	No Authorization
▶ Production	Full Authorization
▶ MRP	No Authorization
▶ Service	No Authorization

To define authorizations for a user, select a user from the list.

Copying Authorization Profiles from One User to Another

After defining the general authorizations for a certain user, you can copy his or her authorization profile to another user.

Prerequisite

- Ensure that the users are already defined in the company.



Note

For more about defining users see the online help.

Procedure

To copy authorizations to multiple users:

1. In the *Authorizations* window, on the left side, select a user who has the authorizations that you want to copy.



Note

To check the authorizations for specific users, select a user and in the *Authorization* column, the permissions for the selected user are displayed.

2. Drag and drop the user name onto the name of the user to whom you want to copy the authorizations.
3. In the *System Message* window, choose the *Copy* button.
4. Choose the *Update* button, then choose the *OK* button.



The second user now has the same authorizations as the first.



The following behavior applies when changing authorizations in SAP Business One:






- When you change the authorization of a parent article, for example, from *No Authorization* to *Full Authorization*, the change is applied automatically to all the child authorizations below it.
- If you change the parent article to *Read Only*, and one or more of the child authorizations do not include the *Read Only* option, this child authorization is set with the value *No Authorization*.
- When you change an authorization that has a parent article, and that parent article represents an application window (for example, the authorization for the *Business Partner Master Data* window under *Business Partners* in the Authorizations tree), the parent article is not influenced and retains the same authorization it had before the child authorization was changed.
- When you change an authorization that has a parent article, and that parent article represents a menu entry in SAP Business One, but with no application window (for example, *Setup*, under *Administration* in the Authorizations tree) the following behavior applies:
 - If after the change of the child authorization, the values of the child authorizations below the specific parent article vary (for example, one child authorization is set to *No Authorization* and the other is set to *Full Authorization*), the parent article is set with the value *Various Authorizations*.
 - If after the change of the child authorization, all of the child authorizations of a specific parent article are set to the same value, the parent article is set to that value as well.

General Authorizations

The following modules and functions define the *General* authorizations:

Field Name	Description
<i>General</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can enter all <i>General</i> functions and make required changes or new settings. • <i>Read Only</i> – You can view the data defined in all the <i>General</i> functions. • <i>No Authorization</i> – You cannot access any option specified in the <i>General</i> functions. <p> Note</p> <p>If you select the <i>Read Only</i> authorization for the entire list of <i>General</i> functions, functions for which this authorization is not available are automatically set to <i>No Authorization</i>.</p>
<i>Send Message</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can open the <i>Send Message</i> window (<i>File</i> → <i>Send</i> → <i>Send Message</i>) and send messages. • <i>Read Only</i> – You can open the <i>Send Message</i> window but cannot send messages. <p> Note</p> <p>Authorization for document printing is required to send documents as e-mail attachments. The e-mail layout is defined in the document's printing properties.</p> <p>To save a distribution list when sending e-mails or SMS messages, you require authorization for the document settings (<i>Administration</i> → <i>System Initialization</i>). The <i>Read Only</i> authorization gives you the ability to view a saved distribution list. With full authorization, you can save a new distribution list.</p> <ul style="list-style-type: none"> • <i>No Authorization</i> – You cannot open the <i>Send Message</i> window.
<i>Print Layout Designer</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can use the Print Layout Designer functions, such as modifying existing print templates and creating new print templates, for sales and purchasing documents. • <i>No Authorization</i> – You cannot use the Print Layout Designer functions.
<i>Change Default Report</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can change the default print layout currently defined for a certain document or report. • <i>No Authorization</i> – You cannot change the default print layout currently defined for a certain document or report.

Field Name	Description
<i>Query Print Layout</i>	<ul style="list-style-type: none"> <i>Full Authorization</i> – You can open the <i>Query Print Layout</i> window and modify the user-defined query print template. <p> Note</p> <p>To open a template, you need authorization for Print Layout Designer.</p> <p>To open Print Layout Designer, you require <i>Read Only</i> or <i>Full Authorization</i> rights for the specific document or report.</p> <p>To print the query, you require authorization in the <i>Sales</i> module for document printing.</p> <p>To create a new query print layout, you require <i>Read Only</i> or <i>Full Authorization</i> or higher for the query generator and for <i>Saved Queries – Group No. 1, 2, and so on.</i></p> <ul style="list-style-type: none"> <i>No Authorization</i> – You cannot open the <i>Query Print Layout</i> window.
<i>Document Settings</i>	<ul style="list-style-type: none"> <i>Full Authorization</i> – You can open the <i>Form Settings</i> window (<i>Tools</i> → <i>Form Settings</i>) and access the <i>Document</i> tab. <p> Note</p> <p>To modify the settings in the <i>Table Format</i> and <i>Document</i> tabs, including changing and/or deleting fields at the row level in sales and purchasing documents, you require authorizations for the following fields:</p> <ul style="list-style-type: none"> <i>Sales Employee Update</i> <i>Price Lists</i> <p>To provide a discount, you must define the <i>Max. Discount</i> value in the <i>Authorizations</i> window.</p> <ul style="list-style-type: none"> <i>No Authorization</i> – You can open the <i>Form Settings</i> window (<i>Tools</i> → <i>Form Settings</i>), but you cannot access the <i>Document</i> tab.
<i>Edit Document Tables</i>	<ul style="list-style-type: none"> <i>Full Authorization</i> – You can open the <i>Form Settings</i> window (<i>Tools</i> → <i>Form Settings</i>), access the <i>Table Format</i> and the <i>Row Format</i> tabs, and make changes to the display of fields and columns. <i>No Authorization</i> – You can open the <i>Form Settings</i> window (<i>Tools</i> → <i>Form Settings</i>), but you cannot access the <i>Table Format</i> and the <i>Row Format</i> tabs.
<i>Access to Confidential Accounts</i>	<ul style="list-style-type: none"> <i>Full Authorization</i> – You can view G/L accounts marked as <i>Confidential</i> (<i>Financials</i> → <i>Chart of Accounts</i> → <i>Confidential</i> field); you also must have <i>Read Only</i> or <i>Full Authorization</i> rights for the chart of accounts. <i>No Authorization</i> – You 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 are not displayed in any <i>Choose From</i> lists displaying G/L accounts.
<i>Account Balances</i>	<ul style="list-style-type: none"> <i>Full Authorization</i> – You can view the balances of G/L accounts in the chart of accounts and generate reports with account balance data; you also must have <i>Read Only</i> or <i>Full Authorization</i> rights for the chart of accounts. <i>No Authorization</i> – You cannot view data about G/L accounts in financial reports, such as the General Ledger report.

Field Name	Description
<i>BP Balances</i>	<ul style="list-style-type: none"> <i>Full Authorization</i> – You can view the balances of business partners displayed in the <i>Business Partner Master Data</i> window and in the <i>Account Balance</i> window. You also require <i>Read Only</i> or <i>Full Authorization</i> rights for business partner master data. To open the account balance from a sales document, you need full authorization for the sales order and delivery. <i>No Authorization</i> – You cannot view data for business partners or in financial reports such as the General Ledger report. In addition, the <i>Account Balance</i> field in the <i>Business Partner Master Data</i> window displays asterisks (****) instead of the actual balance. <p> Note</p> <p>If users have no authorization to see business partner balances, you must also prevent them from seeing all documents relating to the business partner. Beside the <i>Account Balances</i> field, click  (<i>Show Graph</i>) and ensure that the <i>Sales Analysis</i> and <i>Purchasing Analysis</i> fields in the <i>Authorizations</i> window (<i>Sales – A/R</i> and <i>Purchasing –A/P</i> → <i>Sales Reports/Purchasing Reports</i>) are set to <i>No Authorization</i>.</p>
<i>Unformatted Text</i>	<ul style="list-style-type: none"> <i>Full Authorization</i> – You can export data in XML format. You also require authorization for the relevant functions and documents. <i>No Authorization</i> – You cannot export data in XML format.
<i>MS–EXCEL</i>	<ul style="list-style-type: none"> <i>Full Authorization</i> – You can export data to Microsoft Excel. You also require authorization for the related functions. <i>No Authorization</i> –The <i>Export to Microsoft Excel</i> icon  is not active for you. <p> Note</p> <p>If you have no authorizations except for <i>Export to MS-Excel</i>, only the main menu and the MS Excel icon are active when you open SAP Business One. Note that the main menu is not exported to MS Excel.</p>
<i>MS–WORD</i>	<ul style="list-style-type: none"> <i>Full Authorization</i> – You can export documents, letters, and reports to Microsoft Word. <i>No Authorization</i> – The <i>Export to Microsoft Word</i> icon  is not active for you.
<i>Period Status: Unlocked except Sales</i>	<ul style="list-style-type: none"> <i>Full Authorization</i> – You can add documents even when the posting period status is <i>Unlocked Except Sales</i>. You must have authorization to add the relevant document. <i>No Authorization</i> – You cannot add documents when the posting period status is <i>Unlocked Except Sales</i>.
<i>Period Status: Closing Period</i>	<ul style="list-style-type: none"> <i>Full Authorization</i> – You can add documents even when the posting period status is <i>Closing Period</i>. You must have authorization to add the relevant document. <i>No Authorization</i> – You cannot add documents when the posting period status is <i>Closing Period</i>.
<i>Launch Application...</i>	<ul style="list-style-type: none"> <i>Full Authorization</i> – The user can open the <i>Launch Application</i> window and run external applications. <i>No Authorization</i> – The user cannot open this window.


Field Name	Description
<i>Drag & Relate</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can access and use the <i>Drag & Relate</i> tab functions (<i>Main Menu</i> → <i>Drag & Relate</i> tab). You can grant authorizations for specific <i>Drag & Relate</i> categories to different users. For example, a user can be authorized for <i>Sales – A/R</i> but not for <i>Financials</i>. • <i>No Authorization</i> – The <i>Drag & Relate</i> tab is not displayed in the <i>Main Menu</i>, even if you have full authorization for the <i>Drag & Relate</i> subcategories. <p>To provide authorization for <i>Drag & Relate</i> functions for certain modules only, grant full authorization to the <i>Drag & Relate</i> category, and then set <i>No Authorization</i> for those modules from which the user should be excluded.</p>
<i>Sales A/R</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can access and use the <i>Drag and Relate</i> tab functions for <i>Sales A/R</i>. • <i>No Authorization</i> – You cannot use the <i>Drag & Relate</i> functions for the <i>Sales A/R</i> module. <p>To open documents and the <i>Item Master Data</i> window, you require either <i>Read Only</i> or <i>Full Authorization</i> rights for the business partner master data.</p>
<i>Purchasing – A/P</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can access and use the <i>Drag and Relate</i> tab functions for the <i>Purchasing A/P</i> module. • <i>No Authorization</i> – You cannot use the <i>Drag & Relate</i> functions for the <i>Purchasing A/P</i> module. <p>To open documents and the <i>Item Master Data</i> window, you also require either <i>Read Only</i> or <i>Full Authorization</i> rights for the business partner master data.</p>
<i>Business Partners</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can access and use the <i>Drag and Relate</i> tab functions for business partner information. • <i>No Authorization</i> – You cannot use the <i>Drag & Relate</i> functions for business partner information. <p>You require authorization for business partner master data to open activities, and <i>Read Only</i> or <i>Full Authorization</i> is also required to set up and use the payment terms (<i>Administration</i> → <i>Setup</i> → <i>Business Partners</i> → <i>Payment Terms</i>).</p>
<i>Inventory</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can access and use the <i>Drag and Relate</i> tab functions for the <i>Inventory</i> module. • <i>No Authorization</i> – You cannot use the <i>Drag & Relate</i> functions for inventory information. To open the <i>Item Master Data</i> window or the <i>Bill Of Materials</i> window, you require either <i>Read Only</i> or <i>Full Authorization</i> rights for item groups, warehouses, and manufacturers. You also require <i>Read Only</i> or <i>Full Authorization</i> for the setup of the item groups, warehouses, and manufacturers (<i>Administration</i> → <i>Set up</i> → <i>Inventory</i>).
<i>Production</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can access and use the <i>Drag & Relate</i> tab functions for the <i>Production</i> module. To open the production order from within the <i>Drag & Relate</i> tab, you require <i>Read Only</i> or <i>Full Authorization</i>. • <i>No Authorization</i> – You cannot use the <i>Drag & Relate</i> functions for production information.

Field Name	Description
<i>Financials</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can access and use the <i>Drag and Relate</i> tab functions for the <i>Financials</i> module. You also require authorization for the chart of accounts and the journal entry. • <i>No Authorization</i> – You cannot use the <i>Drag & Relate</i> functions for financials information.
<i>Service</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can access and use the <i>Drag and Relate</i> tab functions for the <i>Service</i> module. You also require <i>Read Only</i> or <i>Full Authorization</i> to open the service contract, service call, and customer equipment card. • <i>No Authorization</i> – You cannot use the <i>Drag & Relate</i> functions for service information.
<i>Renaming Fields</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can open the <i>Change Description</i> window and change field names (CTRL+ double-click a field name). You also require authorization for the relevant document. • <i>No Authorization</i> – You cannot open this window.
<i>Change Log...</i>	<p>You can open the <i>Change Log</i> window (<i>Tools</i> → <i>Change Log</i>) from various windows.</p> <ul style="list-style-type: none"> • <i>Full Authorization</i> – You can access the <i>Change Log</i> window. You also require authorization for the relevant forms. • <i>No Authorization</i> – You cannot open this window.
<i>Organize My Menu</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – Allows you to access the <i>Organize User Menu</i> window (<i>Tools</i> → <i>User Menu</i> → <i>Organize</i>) and customize the menu. • <i>No Authorization</i> – You cannot open this window.
<i>Cancel Document</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can browse and display an existing document, for example, a sales quotation, and cancel it (<i>Data</i> → <i>Cancel</i>). • <i>No Authorization</i> – You cannot cancel documents.
<i>Close Document</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can browse and display an existing document, for example, a sales quotation and close it (<i>Data</i> → <i>Close</i>) if <i>Close</i> is an option for the document. • <i>No Authorization</i> – You cannot close documents.
<i>Change Field Labels</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> - You can modify field names to match the terminology used in your company, enter new field descriptions, or change field formats. • <i>No Authorization</i> - You cannot modify field names, enter new field descriptions, or change field formats.
<i>Document Manual Numbering</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can set manual numbering for documents. • <i>No Authorization</i> - You cannot set manual numbering for documents.
<i>Translations</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can open the <i>Translations</i> window (<i>Goto</i> → <i>Translate</i>) and translate field values into foreign languages. The <i>Multi-Language Support</i> checkbox (<i>Company Details</i>, <i>Basic Initialization</i> tab) must be selected for this option to be displayed. • <i>Read Only</i> – You can open the <i>Translations</i> window and view field translations. • <i>No Authorization</i> – You cannot open this window.

Field Name	Description
<i>Future Posting Date in Documents</i>	<ul style="list-style-type: none">• <i>Full Authorization</i> –You can enter a future posting date in sales and purchasing documents if <i>Allow Future Posting Date</i> checkbox is selected (<i>Administration</i> → <i>System Initialization</i> → <i>Document Settings</i>).• <i>No Authorization</i> – You cannot enter future posting dates.



Customization Tool Authorizations

The following modules and functions define the *Customization Tools* authorizations:

Field Name	Description
<i>Customization Tools</i>	<ul style="list-style-type: none"> <i>Full Authorization</i> – You can use all the functions of the customization tools and make required changes or define new settings. <i>Read Only</i> – You can view the data defined in all the customization tools. <i>No Authorization</i> – You cannot access any of the customization tools. <div>  Note If you select the <i>Read Only</i> authorization for all the customization tools, functions for which this authorization is not available are automatically set to <i>No Authorization</i>. </div>
<i>User-Defined Values - Setup</i>	<p>You require authorization for the relevant windows. To have authorization to queries in the <i>Query Manager</i>, you must have authorization for the "Saved Queries - Group No. X" fields (<i>Reports → Query Generator → Saved Queries - Group No. X</i>).</p> <ul style="list-style-type: none"> <i>Full Authorization</i> – You can create and search for user-defined values in many fields in SAP Business One (<i>Tools → Customization Tools → User-Defined Values</i>). <i>Read Only</i> – You can view existing formatted searches but cannot modify them. <i>No Authorization</i> – You cannot define or view formatted searches.
<i>User-Defined Fields - Management</i>	<ul style="list-style-type: none"> <i>Full Authorization</i> – You can view, modify and create user-defined fields (<i>Tools → Customization Tools → User-Defined Fields Management</i>). <i>No Authorization</i> – You cannot open this window.
<i>Execute Commands</i>	<p>Relevant for Israel only.</p> <ul style="list-style-type: none"> <i>Full Authorization</i> – You can access the <i>Execute Commands</i> window (<i>Administration → Utilities → Execute Commands</i>) and execute commands written as macros. <i>Read Only</i> – You can access the <i>Execute Commands</i> window, but you cannot execute commands. <i>No Authorization</i> – You cannot open this window.
<i>User-Defined Object Registration</i>	<ul style="list-style-type: none"> <i>Full Authorization</i> – You can access the user-defined objects registration wizard (<i>Tools → Customization Tools → Objects Registration Wizard</i>). You can load DLL files that are created by partners for user-defined objects (that are also created by partners). This means that business logic, which is not part of the core application, can be added and activated throughout the application like any other built-in functions. <i>No Authorization</i> – You cannot view or open the wizard.



Administration Module Authorizations

The following modules and functions define the *Administration* authorizations:

Field Name	Description
<i>Administration</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can enter all <i>Administration</i> module functions and make required changes or new settings. • <i>Read Only</i> – You can view the data defined in the <i>Administration</i> module. • <i>No Authorization</i> – You cannot access any of the functions in the <i>Administration</i> module. <p> Note</p> <p>If you select the <i>Read Only</i> authorization for the entire <i>Administration</i> module, functions for which this authorization is not available are automatically set to <i>No Authorization</i>.</p>
<i>Exchange Rates and Indexes</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can open the <i>Exchange Rates and Indexes</i> window (<i>Administration</i> → <i>Exchange Rates and Indexes</i>) and enter relevant exchange rates. • <i>Read Only</i> – You can view the data in the <i>Exchange Rates and Indexes</i> window. • <i>No Authorization</i> – You cannot open the <i>Exchange Rates and Indexes</i> window. <p> Note</p> <p>When no authorization is granted for sales or purchasing documents and payments, or when a foreign or all currency business partner, or an item with a foreign price, is selected, you are not able to enter an exchange rate in the <i>Exchange Rates and Indexes</i> window for that date.</p> <p>If you have already defined an exchange rate for that date, this setting has no effect.</p>
<i>System Initialization</i>	<p>Controls your access to the functions in the <i>System Initialization</i> menu. The authorizations selected in the <i>System Initialization</i> row apply to all system initialization functions. To set authorizations for individual system initialization functions, select the required authorization for each function as described below:</p> <ul style="list-style-type: none"> • <i>Full Authorization</i> – You can enter all functions located in the <i>System Initialization</i> menu and make changes or create new settings. • <i>Read Only</i> – You can view the data defined in all the functions located in the <i>System Initialization</i> submenu. • <i>No Authorization</i> – You cannot access any function located in the <i>System Initialization</i> menu.
<i>Company Details</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can enter the <i>Company Details</i> window and make required settings or modifications. • <i>Read Only</i> – You can view the <i>Company Details</i> window. • <i>No Authorization</i> – You cannot open the <i>Company Details</i> window.

Field Name	Description
<i>Allow Stock Release Without Item Cost</i>	<p>This feature is available in certain localizations only.</p> <ul style="list-style-type: none"> <i>Full Authorization</i> – You can select the <i>Allow Stock Release Without Item Cost</i> checkbox (<i>Company Details</i> → <i>Basic Initialization</i> tab). Authorization for the <i>Company Details</i> window is required. <i>No Authorization</i> – You cannot select this checkbox.
<i>General Settings</i>	<ul style="list-style-type: none"> <i>Full Authorization</i> – You can make changes or create new settings on all tabs of the <i>General Settings</i> window. To grant authorization to define default payment terms, authorization is also required for payment terms setup (<i>Administration</i> → <i>Setup</i> → <i>Business Partner</i> → <i>Payment Terms</i>) and <i>Read Only</i> authorization is required for the price lists (in <i>Inventory</i>). <i>Read Only</i> – You can view the data defined in the various tab pages of the <i>General Settings</i> window. <i>No Authorization</i> – You cannot open the <i>General Settings</i> window.
<i>Cash Flow</i>	<ul style="list-style-type: none"> <i>Full Authorization</i> – You can define the global settings for assigning cash flow line items to cash flow relevant transactions. <i>Read Only</i> – You can view the settings of the <i>Cash Flow</i> tab. <i>No Authorization</i> – The <i>Cash Flow</i> tab is not displayed in the <i>General Settings</i> window.
<i>VAT Report Settings</i>	<ul style="list-style-type: none"> <i>Full Authorization</i> – You can define the general settings for the VAT report. <i>Read Only</i> – You can view the settings of the VAT report. <i>No Authorization</i> – The <i>VAT</i> tab is not displayed in the <i>General Settings</i> window.
<i>Posting Period</i>	<p>You open this window by choosing <i>General Settings</i> → <i>Posting Periods</i> tab → <i>New Period</i> or by clicking the link arrow next to one of the posting periods in the table.</p> <ul style="list-style-type: none"> <i>Full Authorization</i> – You can enter the <i>Posting Period</i> window and make settings or modifications. <i>Read Only</i> – You can view the <i>Posting Period</i> window. <i>No Authorization</i> – You cannot open the <i>Posting Period</i> window.
<i>Change Period Status</i>	<ul style="list-style-type: none"> <i>Full Authorization</i> – You can change the period status of the posting period, including locking it (<i>Administration</i> → <i>System Initialization</i> → <i>Posting Period</i> → <i>Posting Period</i> window). <i>No Authorization</i> – You are unable to change the period status.
<i>Document Numbering</i>	<ul style="list-style-type: none"> <i>Full Authorization</i> – You can enter the <i>Document Numbering</i> 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. You grant the authorization in the <i>Series - Group No. X</i> window (<i>Administration</i> → <i>System Initialization</i> → <i>Series</i> → <i>Series - Group No. X</i>). <i>Read Only</i> – You can view the <i>Document Numbering</i> window. <i>No Authorization</i> – You cannot open the <i>Document Numbering</i> window.

Field Name	Description
<i>Document Settings</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can enter the <i>Document Settings</i> window and make settings or modifications. You also require <i>Read Only</i> or <i>Full Authorization</i> rights for the <i>Price Lists</i>. • <i>Read Only</i> – You can view the <i>Document Settings</i> window. • <i>No Authorization</i> – You cannot open the <i>Document Settings</i> window.
<i>Max. Under/Over Payment</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can enter amounts in the <i>Under/Overpayment Amt Allowed</i> field for incoming/outgoing payments (<i>Document Settings</i> → <i>Per Document</i> tab). You also require <i>Read Only</i> or <i>Full Authorization</i> rights for the price lists. • <i>No Authorization</i> – You cannot enter amounts in this field.
<i>Allow Future Posting</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can select or deselect the <i>Allow Future Posting Date</i> checkbox (<i>Document Settings</i> → <i>General</i> tab). • <i>No Authorization</i> – You cannot change this selection.
<i>Print Preferences</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can enter the <i>Print Preferences</i> window and make required settings or modifications. • <i>Read Only</i> – You can view the <i>Print Preferences</i> window. • <i>No Authorization</i> – You cannot open the <i>Print Preferences</i> window.
<i>Report and Layout Management</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can work with the <i>Report and Layout Management</i> window. • <i>No Authorization</i> – You cannot open the <i>Report and Layout Management</i> window.
<i>Menu Structure</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can define the menu structure. • <i>No Authorization</i> – You cannot open the <i>Menu Structure</i> window.
<i>Opening Balances</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can enter opening balances for G/L accounts, business partners, and 1099 form or box. • <i>Read Only</i> – You can view the <i>Opening Balances</i> windows. • <i>No Authorization</i> – You cannot access these options.
<i>G/L Accounts Opening Balance</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can open the <i>G/L Accounts Opening Balance</i> window and record data. • <i>No Authorization</i> – You cannot access this window.
<i>Business Partners Opening Balance</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can open the <i>Business Partners Opening Balance</i> window and record relevant data. • <i>No Authorization</i> – You cannot access this window.
<i>1099 Opening Balance</i>	<p>Relevant only for the United States localization.</p> <ul style="list-style-type: none"> • <i>Full Authorization</i> – You can open the <i>1099 Opening Balance</i> window and enter data. • <i>Read Only</i> – You can view the <i>1099 Opening Balance</i> window. • <i>No Authorization</i> – You cannot open the <i>1099 Opening Balance</i> window.


Field Name	Description
<i>Numbering Series</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can open the <i>Series</i> window (right-click <i>Document Numbering</i> and choose <i>Row Details</i>), make settings, and modify existing data. • <i>Read Only</i> – You can view the <i>Series</i> window. • <i>No Authorization</i> – You cannot access the <i>Series</i> window. <p> CAUTION</p> <p>If authorization is not granted to the <i>Series</i> option, a user cannot access any document in SAP Business One. We recommend that you grant authorizations for series groups as described below.</p> <p>If <i>No Authorization</i> 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.</p> <p>If <i>Read Only</i> is granted at the header level, then <i>No Authorization</i> is granted to all the series groups and <i>Read Only</i> is applied only to locked series. In such a case, the series groups have <i>No Authorization</i> or <i>Full Authorization</i>.</p>
<i>Series Lock</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can select the <i>Lock</i> option for fields in the <i>Series</i> window. • <i>Read Only</i> – You can view the <i>Lock</i> option but cannot apply it. • <i>No Authorization</i> – You cannot view the <i>Lock</i> option for fields.
<i>Series – Group No. 1 - 10</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can display and create documents assigned to this series group. • <i>No Authorization</i> – You cannot access or create a document assigned to this group. <p> Note</p> <p>This setting affects the use of the <i>Group</i> option in the numbering series setup.</p>
<i>Setup</i> <i>General</i> <i>Financials</i> <i>Sales Opportunities</i> <i>Purchasing</i> <i>Business Partners</i> <i>Banking</i> <i>Inventory</i> <i>Service</i>	<p>Select <i>Full</i>, <i>Read Only</i>, or <i>No Authorization</i> for the different setup windows.</p> <p>General:</p> <p>Only superusers can access the <i>Password</i> window, create and lock other users; access the <i>User Defaults</i> window, and define branches and departments.</p> <p>Financials:</p> <p>To define G/L account determination, you require authorization for the <i>Sales - Allow Changes to Reconciliation Accounts</i> window, which lets you access the <i>Allow Changes to Control Accounts</i> option.</p> <ul style="list-style-type: none"> • Tax Codes: provides authorization to define triangular deals and goods shipment • Payment Terms: <i>Max. Discount</i> must also be defined (at the bottom of the <i>General Authorizations</i> window)
<i>Data Import/Export</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can perform all the data import and data export actions available in the <i>Data Import/Export</i> submenu. • <i>No Authorization</i> – You cannot use this function.


Field Name	Description
<i>Data Import</i>	<ul style="list-style-type: none"> <i>Full Authorization</i> – You can perform all the data import actions available (<i>Data Import/Export</i> → <i>Data Import</i>). <i>No Authorization</i> – You cannot use this function.
<i>Data Export</i>	<ul style="list-style-type: none"> <i>Full Authorization</i> – You can perform the data export actions available (<i>Data Import/Export</i> → <i>Data Export</i>). <i>No Authorization</i> – You cannot use this function.
<i>Utilities</i>	<ul style="list-style-type: none"> <i>Full Authorization</i> – You can use all the utilities located in the <i>Utilities</i> submenu. <i>No Authorization</i> – You cannot use any utility.
<i>Period-End Closing</i>	<ul style="list-style-type: none"> <i>Full Authorization</i> – You can open the <i>Period-End Closing</i> window and perform period-end closing transactions. <i>No Authorization</i> – You cannot open this window.
<i>Year Transfer</i>	<p>This feature is available in certain localizations only.</p> <ul style="list-style-type: none"> <i>Full Authorization</i> – You can open the <i>Year Transfer</i> window and perform year transfer operations. <i>No Authorization</i> – You cannot open this window.
<i>Update Control Report</i>	<p>The <i>Update Control Report</i> opens automatically after the completion of an upgrade process.</p> <ul style="list-style-type: none"> <i>Full Authorization</i> – You can view the Update Control report and perform year transfer operations. <i>Read Only</i> – You can view the Update Control report but cannot select the <i>Display Non-matching Quantities Only</i> checkbox. <i>No Authorization</i> – You cannot view the Update Control report.
<i>Check Document Numbering - Selection Cri</i>	<ul style="list-style-type: none"> <i>Full Authorization</i> – You can open the <i>Check Document Numbering</i> window and perform this operation. <i>No Authorization</i> – You cannot open this window.
<i>Data Archive Wizard</i>	<ul style="list-style-type: none"> <i>Full Authorization</i> – You can archive transactional data. <i>No Authorization</i> – You cannot open this window.
<i>Transfer Posting Correction Wizard</i>	<p>Relevant for certain localizations only.</p> <ul style="list-style-type: none"> <i>Full Authorization</i> – You can post corrections resulting from VAT changes, for amounts transferred from revenue or expense accounts to new accounts. <i>Read Only</i> – You can view only the <i>Selection Criteria</i> window of the wizard. <i>No Authorization</i> – You cannot open the <i>Transfer Posting Correction Wizard</i> window.
<i>Restore</i>	<ul style="list-style-type: none"> <i>Full Authorization</i> – You can perform the restore options located in the <i>Utilities</i> submenu, such as <i>Restore Wizard</i> and <i>Restore System Reports</i> (<i>Help</i> → <i>Support Desk</i> → <i>Restore</i>). <i>No Authorization</i> – You cannot perform any restore operations.


Field Name	Description
<i>Approval Procedures</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can access and update all the windows and reports located in the <i>Approval Procedures</i> menu. • <i>No Authorization</i> – You cannot access any windows or reports related to this menu.
<i>Approval Stages</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can access the <i>Approval Stages</i> window, define new approval stages and modify existing ones. You can also send documents to other users through SAP Business One internal mail. The recipient requires <i>Read Only</i> or <i>Full Authorization</i> rights. You both require authorization for the relevant documents. • <i>Read Only</i> – You can view the <i>Approval Stages</i> window. • <i>No Authorization</i> – You cannot open the <i>Approval Stages</i> window.
<i>Approval Templates</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can access the <i>Approval Templates</i> window, define new approval templates, and modify existing ones. You can also send documents to other users through SAP Business One internal mail. The recipient requires <i>Read Only</i> or <i>Full Authorization</i> rights. You both require authorization for the relevant documents. To select queries for approval templates, you also require authorization for the Query Manager. • <i>Read Only</i> – You can view the <i>Approval Templates</i> window. • <i>No Authorization</i> – You cannot open the <i>Approval Templates</i> window.
<i>Approval Status Report</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You 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, you require <i>Read Only</i> or <i>Full Authorization</i> rights for that document. You can also send documents to other users through SAP Business One internal mail. The recipient requires <i>Read Only</i> or <i>Full Authorization</i> rights. To select queries for approval templates or for this report, you also require authorization for the Query Manager. • <i>No Authorization</i> – You cannot open this report.
<i>Approval Decision Report</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can run the Approval Decision report and update approval decisions for your related requests for approval. To view the documents listed in the report, you require <i>Read Only</i> or <i>Full Authorization</i> rights for the relevant documents. You can also send documents to other users through SAP Business One internal mail. The recipient requires <i>Read Only</i> or <i>Full Authorization</i> rights. To select queries for approval templates or for this report, you require authorization for the Query Manager. • <i>No Authorization</i> – You cannot open this report.
<i>Alerts Management</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can open the <i>Alerts Management</i> window, define new alerts, and update system alerts. To select queries for the alerts requires authorization for the Query Manager. • <i>Read Only</i> – You can view the <i>Alerts Management</i> window. • <i>No Authorization</i> – You cannot open the <i>Alerts Management</i> window.


Financials Module Authorizations

The following modules and functions define the *Financials* authorizations:

Field Name	Description
<i>Financials</i>	<p>Controls your access to all functions in the <i>Financials</i> module. The authorizations selected in the <i>Financials</i> row apply to all <i>Financials</i> functions. To set authorizations for individual functions, select the required authorization for each function as described in this table.</p> <ul style="list-style-type: none"> • <i>Full Authorization</i> – You can enter all the functions specified in the <i>Financials</i> module and make required changes or new settings. • <i>Read Only</i> – You can view the data defined in all the functions specified in the <i>Financials</i> module. • <i>No Authorization</i> – You cannot access any option specified in the <i>Financials</i> module. <p> Note</p> <p>If you select <i>Read Only</i> authorization for the entire <i>Financials</i> module, functions for which the <i>Read Only</i> authorization is not available are automatically set to <i>No Authorization</i>.</p>
<i>Chart of Accounts</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can open the <i>Chart of Accounts</i> window, create new G/L accounts, and modify existing ones. This includes access to the <i>Chart of Accounts</i> window from other parts of SAP Business One. For example, you can display BP balances in the business partner master data or balances in financial reports. • <i>Read Only</i> – You can view the <i>Chart of Accounts</i> window. • <i>No Authorization</i> – You cannot open the <i>Chart of Accounts</i> window.
<i>Account Code Generator</i>	<p>This feature is available in certain localizations only.</p> <ul style="list-style-type: none"> • <i>Full Authorization</i> – You can open the <i>Account Code Generator</i> window and generate G/L account codes when working with segmentation accounts. You also require this authorization to view balances in the <i>Chart of Accounts</i> window. • <i>No Authorization</i> – You cannot open the <i>Account Code Generator</i> window.
<i>Journal Entry</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can open the <i>Journal Entry</i> window, add manual journal entries, modify active fields, view account balances, and perform all actions related to journal entries. You also require authorizations for the <i>Series – Group No. 1 - 10</i> field and for documents that create journal entries (such as invoices). • <i>Read Only</i> – You can view the <i>Journal Entry</i> window. • <i>No Authorization</i> – You cannot open the <i>Journal Entry</i> window.



Field Name	Description
Update Posting Data	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can update all the active fields in an existing journal entry, such as <i>Ref. 1</i>, <i>Indicator</i>, and <i>Project</i>. • <i>Read Only</i> – If you have full authorization for the <i>Journal Entry</i> window, you can update all the active fields in an existing journal entry; otherwise, you can only view the <i>Journal Entry</i> window. • <i>No Authorization</i> – You cannot update any fields in an existing journal entry with the exception of <i>Due Date</i> and <i>Details</i>. <p> Note</p> <p>A user with no authorization for the <i>Journal Entry</i> or <i>Update Posting Data</i> windows cannot update the <i>Document Date</i> and the <i>Posting Date</i> fields in the journal entry rows, even if the user is granted full authorization for these options.</p> <p>In a sales or purchasing document that generates a journal entry, some fields can be updated, such as the <i>Customer</i> or <i>Vendor Reference No</i> fields. However, this information is not updated automatically in the <i>Journal Entry</i> window, in fields such as <i>Ref. 2</i>. If you do not have full authorization to update posting data, you cannot manually update this data in the corresponding journal entry. In this case, the journal entry information does not match the sales or purchasing document.</p>
Confirm Entry with Multiple Currencies	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can select or deselect the <i>Block Multi Currency Journal Entry</i> checkbox (<i>Administration</i> → <i>System Initialization</i> → <i>Document Settings</i> → <i>Per Document</i> tab → <i>Journal Entry</i>). You also require authorization for the <i>Journal Entry</i> window. • <i>No Authorization</i> – You cannot change the selection of the <i>Block Multi Currency Journal Entry</i> checkbox.
Confirm Unbalanced FC Entry	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can select or deselect the <i>Block Unbalanced FC Journal Entry</i> checkbox (<i>Administration</i> → <i>System Initialization</i> → <i>Document Settings</i> → <i>Per Document</i> tab → <i>Journal Entry</i>). You also require authorization for the <i>Journal Entry</i> window. • <i>No Authorization</i> – You cannot change the selection of the <i>Block Unbalanced FC Journal Entry</i> checkbox.
Confirm Row Posting Date Editing	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can select or deselect the <i>Block Posting Date Editing per Row</i> checkbox (<i>Administration</i> → <i>System Initialization</i> → <i>Document Settings</i> → <i>Per Document</i> tab → <i>Journal Entry</i>). You also require authorization for the <i>Journal Entry</i> window. • <i>No Authorization</i> – You cannot change the selection of the <i>Block Posting Date Editing per Row</i> checkbox.
Allow Doc. Row Date Editing	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can select or deselect the <i>Block Document Date Editing per Row</i> checkbox (<i>Administration</i> → <i>System Initialization</i> → <i>Document Settings</i> → <i>Per Document</i> tab → <i>Journal Entry</i>). You also require authorization for the <i>Journal Entry</i> window. • <i>No Authorization</i> – You cannot change the selection of the <i>Block Document Date Editing per Row</i> checkbox.

Field Name	Description
<i>Confirm SC Editing</i>	<ul style="list-style-type: none"> <i>Full Authorization</i> – You can select or deselect the <i>Block Editing of Totals in System Currency</i> checkbox (<i>Administration</i> → <i>System Initialization</i> → <i>Document Settings</i> → <i>Per Document</i> tab → <i>Journal Entry</i>). You also require authorization for <i>Journal Entry</i> window. <i>No Authorization</i> – You cannot change the selection of the <i>Block Editing of Totals in System Currency</i> checkbox.
<i>Journal Vouchers</i>	<ul style="list-style-type: none"> <i>Full Authorization</i> – You can open the <i>Journal Vouchers</i> window, add journal vouchers, modify existing vouchers, delete vouchers, and post journal vouchers to the accounting system. You also require authorization for the <i>Journal Entry</i> window and for the <i>Document Numbering Series - Group No. X</i> window. <i>Read Only</i> – You can view the <i>Journal Vouchers</i> window. <i>No Authorization</i> – You cannot open the <i>Journal Vouchers</i> window.
<i>Posting Templates</i>	<ul style="list-style-type: none"> <i>Full Authorization</i> – You can open the <i>Posting Templates</i> window, add new templates, and update existing ones. <i>Read Only</i> – You can view the <i>Posting Templates</i> window. <i>No Authorization</i> – You cannot open the <i>Posting Templates</i> window.
<i>Recurring Postings</i>	<ul style="list-style-type: none"> <i>Full Authorization</i> – You can open the <i>Recurring Postings</i> window, add new recurring postings, and update existing ones. You also require read only or full authorization for the <i>Transaction Codes - Setup</i> window (<i>Administration</i> → <i>Setup</i> → <i>Financials</i> → <i>Transaction Codes</i>). In addition, you must select the <i>Display Recurring Postings on Execution</i> checkbox (<i>Administration</i> → <i>System Initialization</i> → <i>General Settings</i> → <i>Services</i> tab). <i>Read Only</i> – You can view the <i>Recurring Postings</i> window. <i>No Authorization</i> – You cannot open the <i>Recurring Postings</i> window. <p> Note</p> <p>When you log on to the application, if the circumstances listed below are in effect, SAP Business One displays the error message "You are not permitted to perform this action: Recurring Postings."</p> <ul style="list-style-type: none"> The <i>Display Recurring Postings on Execution</i> checkbox is selected (<i>Administration</i> → <i>System Initialization</i> → <i>General Settings</i> → <i>Services</i> tab). You have no authorization for the <i>Recurring Postings</i> window. There are recurring postings scheduled for execution.

Field Name	Description
<i>Reverse Transactions</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can open the <i>Reverse Transactions</i> window and cancel transactions scheduled to be reversed today. • <i>Read Only</i> – You can view the <i>Reverse Transactions</i> window. • <i>No Authorization</i> – You cannot open the <i>Reverse Transactions</i> window. <p> Note</p> <p>When you log on, if the circumstances listed below are in effect, SAP Business One displays the error message "You are not permitted to perform this action: Reverse Transactions."</p> <ul style="list-style-type: none"> • You have no authorization for the <i>Reverse Transactions</i> window. • There are reverse transactions scheduled to be cancelled today.
<i>Exchange Rate Differences</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can open the <i>Exchange Rate Differences</i> window, perform exchange rate differences transactions, and save approved transactions. You also require authorization to update exchange rates. You must define an exchange rate for the day on which this report is run. • <i>No Authorization</i> – You cannot open this window.
<i>Conversion Differences</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can open the <i>Conversion Rate Differences</i> window, perform exchange rate differences transactions, and save approved transactions. You also require authorization to update exchange rates. You must define an exchange rate for the day on which this report is run. • <i>No Authorization</i> – You cannot open this window.
<i>1099 Editing</i>	<p>Relevant only to the United States localization.</p> <ul style="list-style-type: none"> • <i>Full Authorization</i> – You can open the <i>1099 Editing</i> window and update 1099 Forms, Boxes and Amounts. • <i>Read Only</i> – You can view the <i>1099 Editing</i> window. • <i>No Authorization</i> – You cannot open the <i>1099 Editing</i> window.
<i>Financial Report Templates</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can open the <i>Financial Report Templates</i> window, design new financial report templates, and update existing ones. • <i>No Authorization</i> – You cannot open this window.
<i>Journal Voucher Report</i>	<p>Relevant for China, Korea, and Japan localizations only.</p> <ul style="list-style-type: none"> • <i>Full Authorization</i> – You can create a report that provides comprehensive information on existing journal vouchers. • <i>No Authorization</i> – You cannot create a Journal Voucher report.
<i>Internal Reconciliations</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can internally reconcile transactions created for business partners or for G/L accounts in the <i>Reconciliation</i> and <i>Manage Previous Reconciliations</i> windows. • <i>Read Only</i> – You can view the reconciled transactions. • <i>No Authorization</i> – You cannot open the <i>Reconciliation</i> and <i>Manage Previous Reconciliations</i> windows.

Field Name	Description
<i>Reconciliation</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can internally reconcile transactions created for business partners or for G/L accounts. • <i>Read Only</i> – You can view the reconciled transactions. • <i>No Authorization</i> – You cannot open the <i>Reconciliation</i> window.
<i>Budget Setup</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can access all windows and reports located in the <i>Budget</i> menu. • <i>Read Only</i> – You do not have full access to the Budget windows, but have either <i>Read Only</i> or <i>No Authorization</i>. • <i>No Authorization</i> – You cannot access any window in the <i>Budget</i> menu.
<i>Budget Scenarios – Setup</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can open the <i>Budget Scenarios – Setup</i> window, define new scenarios, update existing ones, and import budget scenarios. • <i>No Authorization</i> – You cannot open the <i>Budget Scenarios – Setup</i> window.
<i>Import Budget Scenarios</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can use the <i>Import Scenario</i> option to import budget scenarios. • <i>No Authorization</i> – You cannot use this function.
<i>Budget Distribution Methods - Setup</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can define new budget distribution methods and update existing ones in the <i>Budget Distribution Methods – Setup</i> window. • <i>Read Only</i> – You can view the <i>Budget Distribution Methods – Setup</i> window. • <i>No Authorization</i> – You cannot open the <i>Budget Distribution Methods – Setup</i> window.
<i>Budget</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can define and update budget amounts in the <i>Budget – Setup</i> window. • <i>Read Only</i> – You can view existing budgets in the <i>Budget – Setup</i> window. • <i>No Authorization</i> – You cannot open the <i>Budget – Setup</i> window.
<i>Confirm Budget Deviation</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can confirm a warning message regarding budget deviation in documents and journal entries (defined by choosing <i>Administration</i> → <i>System Initialization</i> → <i>General Settings</i> → <i>Budget</i> tab). You can also add a document or a journal entry that causes a deviation from the budget, as defined for the linked G/L account. • <i>No Authorization</i> – You cannot confirm budget deviation warning messages.
<i>Cost Accounting</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can access all windows and reports located in the <i>Cost Accounting</i> menu, including the <i>Profit Centers – Setup</i> window and the <i>Profit Center Report</i> window. • <i>Read Only</i> – You can view windows related to the cost accounting functions, with the exception of the <i>Profit Center Report</i> window. • <i>No Authorization</i> – You cannot view any data related to cost accounting.
<i>Profit Centers - Setup</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can define new profit centers and update existing ones. • <i>Read Only</i> – You can view the profit centers defined in the company. • <i>No Authorization</i> – You cannot open the <i>Profit Centers – Setup</i> window.

Field Name	Description
<i>Distribution Rules - Setup</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can define new distribution rules and update existing ones. • <i>Read Only</i> – You can view the distribution rules defined in the company. • <i>No Authorization</i> – You cannot open the <i>Distribution Rules – Setup</i> window.
<i>Table of Profit Centers and Distribution</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can display the <i>Table of Profit Centers and Distribution Rules</i> window and update distribution factors. • <i>Read Only</i> – You can view the <i>Table of Profit Centers and Distribution Rules</i> window. • <i>No Authorization</i> – You cannot open the <i>Table of Profit Centers and Distribution Rules</i> window.
<i>Profit Center Report</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can open the <i>Profit Center Report</i> window. • <i>No Authorization</i> – You cannot open this window.
<i>TDS</i>	Relevant for the India localization only. <ul style="list-style-type: none"> • <i>Full Authorization</i> – You can open the TDS documents. • <i>Read Only</i> – You can view the TDS documents. • <i>No Authorization</i> – You cannot open the TDS documents.
<i>Adjustment Entry</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can make adjustments in the TDS amount per invoice. • <i>Read Only</i> – You can view adjusted entries in TDS. • <i>No Authorization</i> – You cannot make adjustments in the TDS amount per invoice.
<i>Form 16A</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can create a Form 16A. • <i>Read Only</i> – You can view a Form 16A. • <i>No Authorization</i> – You cannot create a Form 16A.
<i>Acknowledge Number</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can define the acknowledgement number to generate with the Form 16A report. • <i>Read Only</i> – You can view the <i>Setting Up Acknowledgement Numbers</i> window. • <i>No Authorization</i> – You cannot define the acknowledgement number to generate with the Form 16A report.
<i>Generate Quarterly e-TDS File</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can generate a quarterly e-TDS file. • <i>Read Only</i> – You can view the <i>Generate Quarterly e-TDS File</i> window. • <i>No Authorization</i> – You cannot generate a quarterly e-TDS file.


Field Name	Description
<i>Financial Reports</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can access and generate all the financial reports in all the categories, such as the Trial Balance and the General Ledger reports. • <i>No Authorization</i> – You cannot access or generate any of the reports specified in this submenu. <p> Note</p> <p>You can grant full authorization or no authorization to each individual report or globally to a group of reports located in a certain menu. For example, grant <i>Full Authorization</i> rights for the <i>Aging</i> menu to apply this authorization to both the Customer Receivables Aging and the Vendor Liabilities Aging reports.</p>
<i>Electronic Reports</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can generate legal reports in electronic format that comply with the conventional regulations of this country. • <i>Read Only</i> – You can view existing electronic reports. • <i>No Authorization</i> – You cannot generate legal reports in electronic format. <p> Note</p> <p>Currently, you can find electronic reports only in the <i>Financials</i> module of the UK and DE localizations. The electronic report folders in the different modules are folders reserved for electronic reports usage. If functions are added to an electronic report folder, the folder appears in the <i>Main Menu</i>, otherwise, it remains hidden.</p>
<i>Accounting</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can access and generate all the accounting reports, such as General Ledger, 1099 Report, and Aging. • <i>No Authorization</i> – You cannot access and generate any of the reports located under this submenu.
<i>G/L Accounts and Business Partners</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can run the G/L Accounts and Business Partners report. • <i>No Authorization</i> – You cannot generate this report.
<i>General Ledger</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can run the General Ledger report. • <i>No Authorization</i> – You cannot generate this report.
<i>Aging</i> <i>Customer Receivables Aging</i> <i>Vendor Liabilities Aging</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can access and generate the Aging reports. • <i>No Authorization for Aging</i> – You cannot access or generate the reports located under this submenu.
<i>Transaction Journal Report</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can run the Transaction Journal report. • <i>No Authorization</i> – You cannot generate this report.
<i>Transaction Report by Projects</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can run the Transaction Report by Projects report. • <i>No Authorization</i> – You cannot generate this report.

Field Name	Description
<i>Document Journal</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can run the Document Journal report. • <i>No Authorization</i> – You cannot generate this report.
<i>1099/1096 Report</i>	Relevant only for the United States localization. <ul style="list-style-type: none"> • <i>Full Authorization</i> – You can run the 1099 report. • <i>No Authorization</i> – You cannot generate this report.
<i>Tax</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can run the tax reports. • <i>No Authorization</i> – You cannot generate these reports.
<i>Financial</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can access and generate all the financial reports, such as Balance Sheet and Cash Flow. • <i>No Authorization for Financial</i> – You cannot access or generate any of the reports located under this submenu.
<i>Balance Sheet</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can run the Balance Sheet report. • <i>No Authorization</i> – You cannot generate this report.
<i>Trial Balance</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can run the Trial Balance report. • <i>No Authorization</i> – You cannot generate this report.
<i>Profit and Loss Statement</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can run the Profit and Loss Statement report. • <i>No Authorization</i> – You cannot generate this report.
<i>Cash Flow</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can run the Cash Flow report. • <i>No Authorization</i> – You cannot generate this report.
<i>Comparison</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can access and generate all the comparison reports, such as Balance Sheet Comparison and Trial Balance Comparison. • <i>No Authorization</i> – You cannot access or generate any of the reports located under this submenu.
<i>Balance Sheet Comparison</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can run the Balance Sheet Comparison report. • <i>No Authorization</i> – You cannot generate this report.
<i>Trial Balance Comparison</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can run the Trial Balance Comparison report. • <i>No Authorization</i> – You cannot generate this report.
<i>Profit and Loss Statement Comparison</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can run the Profit and Loss Statement Comparison report. • <i>No Authorization</i> – You cannot generate this report.
<i>Budget Setup</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can access and generate all the budget-related reports, such as Budget and Trial Balance Budget. • <i>No Authorization</i> – You cannot access or generate any of the reports located under this submenu.
<i>Budget Report</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can run the Budget report. • <i>No Authorization</i> – You cannot generate this report.
<i>Balance Sheet Budget Report</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can run the Balance Sheet Budget report. • <i>No Authorization</i> – You cannot generate this report.

Field Name	Description
<i>Trial Balance Budget Report</i>	<ul style="list-style-type: none">• <i>Full Authorization</i> – You can run the Trial Balance Budget report.• <i>No Authorization</i> – You cannot generate this report.
<i>Profit and Loss Statement Budget Report</i>	<ul style="list-style-type: none">• <i>Full Authorization</i> – You can run the Profit and Loss Statement Budget report.• <i>No Authorization</i> – You cannot generate this report.

Sales Opportunities Module Authorizations

The following modules and functions define the *Sales Opportunities* authorizations:

Field Name	Description
<i>Sales Opportunities</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can enter all the functions specified in the <i>Sales Opportunities</i> module and make required changes or new settings. You also require full authorization for the sales stages, as defined in the authorizations in <i>Administration</i> → <i>Setup</i> → <i>Sales Opportunity</i>. You require authorization for the <i>Close Document</i> function (in General Authorizations), even if authorization is not provided for setting up and viewing documents in these modules. Therefore, on the <i>Sales Opportunity Stages</i> tab, when closing a row (before opening a new row), you first may have to close a document linked to that stage. • <i>Read Only</i> – You can view the data defined in all the functions specified in the <i>Sales Opportunities</i> module. • <i>No Authorization</i> – You cannot access any option specified in the <i>Sales Opportunities</i> module. <p> Note</p> <p>If you select the <i>Read Only</i> authorization for the entire <i>Sales Opportunities</i> module, functions for which the <i>Read Only</i> authorization is not available are automatically set to <i>No Authorization</i>.</p>
<i>Sales Opportunity</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can open the <i>Sales Opportunity</i> window, add new sales opportunities, and modify existing opportunities. • <i>Read Only</i> – You can view the <i>Sales Opportunity</i> window. • <i>No Authorization</i> – You cannot open the <i>Sales Opportunity</i> window.
<i>Sales Opportunities Reports</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can access and generate all the sales opportunity reports, such as management, general, and status reports. • <i>No Authorization</i> – You cannot access or generate any of the reports located under this submenu.
<i>Management Reports</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can access and generate all the management reports, such as Opportunities Forecast; Opportunities Forecast Over Time; and Opportunities Statistics. • <i>No Authorization</i> – You cannot access and generate any of these reports.
<i>General Reports</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can access and generate all the general reports such as Opportunities; Stage Analysis; and Source Distribution Over Time. • <i>No Authorization</i> – You cannot access or generate any of these reports.
<i>Status Reports</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can access and generate all status reports, such as Won Opportunities; Lost Opportunities; My Open Opportunities; and My Closed Opportunities. • <i>No Authorization</i> – You cannot access or generate any of these reports.


Field Name	Description
<i>Opportunities Pipeline</i>	<ul style="list-style-type: none">• <i>Full Authorization</i> – You can access and generate the Opportunities Pipeline report, and open the <i>Dynamic Opportunity Analysis</i> window and the Opportunity List.• <i>No Authorization</i> – You cannot access and generate this report.
<i>Dynamic Opportunity Analysis</i>	<ul style="list-style-type: none">• <i>Full Authorization</i> – You can access and run the <i>Dynamic Opportunity Analysis</i> report.• <i>No Authorization</i> – You cannot use this function.
<i>Opportunity List</i>	<ul style="list-style-type: none">• <i>Full Authorization</i> – You can open the <i>Opportunity List</i> window.• <i>No Authorization</i> – You 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, if you use special prices or if you update prices manually. You must also define this at the row level.
- Authorization for price lists, especially if you update prices manually
- Authorization for row totals, especially if you update prices manually
- Authorization to modify the table layout, if required

The following modules and functions define the *Sales – A/R* authorizations:

Field Name	Description
<i>Sales – A/R</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can access all the windows and perform all the actions specified in the <i>Sales – A/R</i> module and make required changes or new settings. • <i>Read Only</i> – You can view the data defined in all the functions specified in the <i>Sales – A/R</i> module. • <i>No Authorization</i> – You cannot access any option specified in the <i>Sales – A/R</i> module. <div>  Note If you select the <i>Read Only</i> authorization for the entire <i>Sales – A/R</i> module, functions for which this authorization is not available are automatically set to <i>No Authorization</i>. </div>
<i>Sales Quotation</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can open the <i>Sales Quotation</i> window, add new documents, and modify existing ones. • <i>Read Only</i> – You can view sales quotation documents. • <i>No Authorization</i> – You cannot open the <i>Sales Quotation</i> window.
<i>Sales Order</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can open the <i>Sales Order</i> window, add new documents, and modify existing ones. In addition, you are granted full authorization for the <i>Purchase Order Confirmation</i> window. • <i>Read Only</i> – You can view sales order documents. In addition, you are granted read only authorization for the <i>Purchase Order Confirmation</i> window. • <i>No Authorization</i> – You cannot open the <i>Sales Order</i> window.
<i>Purchase Order Confirmation</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can work in the <i>Purchase Order Confirmation</i> window and create purchase order documents (providing you have an authorization for the purchase order document). • <i>Read Only</i> – You can view the <i>Purchase Order Confirmation</i> window. • <i>No Authorization</i> – You cannot work in the <i>Purchase Order Confirmation</i> window.

Field Name	Description
<i>Delivery</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can open the <i>Delivery</i> window, add new documents, and modify existing ones. • <i>Read Only</i> – You can view delivery documents. • <i>No Authorization</i> – You cannot open the <i>Delivery</i> window.
<i>Return</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can open the <i>Return</i> window, add new documents, and modify existing ones. • <i>Read Only</i> – You can view return documents. • <i>No Authorization</i> – You cannot open the <i>Return</i> window.
<i>A/R Down Payment Request</i>	<p>Relevant for certain localizations only.</p> <ul style="list-style-type: none"> • <i>Full Authorization</i> – You can create a request for a down payment for the company's customers. • <i>Read Only</i> – You can view the <i>A/R Down Payment Request</i> window. • <i>No Authorization</i> – You cannot create a request for a down payment for the company's customers.
<i>A/R Down Payment Invoice</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can open the <i>A/R Down Payment Invoice</i> window, add new documents, and modify existing ones. You can also update the payment means in the sales order. • <i>Read Only</i> – You can view A/R down payment invoice documents. • <i>No Authorization</i> – You cannot open the <i>A/R Down Payment Invoice</i> window.
<i>A/R Invoice</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can open the <i>A/R Invoice</i> window, add new documents, and modify existing ones. • <i>Read Only</i> – You can view A/R invoice documents. • <i>No Authorization</i> – You cannot open the <i>A/R Invoice</i> window.
<i>A/R Invoice + Payment</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can open the <i>A/R Invoice + Payment</i> window, add new documents, and modify existing ones. • <i>Read Only</i> – You can view A/R invoice + payment documents. • <i>No Authorization</i> – You cannot open the <i>A/R Invoice + Payment</i> window.
<i>A/R Credit Memo</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can open the <i>A/R Credit Memo</i> window, add new documents, and modify existing ones. • <i>Read Only</i> – You can view A/R credit memo documents. • <i>No Authorization</i> – You cannot open the <i>A/R Credit Memo</i> window.
<i>A/R Reserve Invoice</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can open the <i>A/R Reserve Invoice</i> window, add new documents, and modify existing ones. • <i>Read Only</i> – You can view A/R reserve invoice documents. • <i>No Authorization</i> – You cannot open the <i>A/R Reserve Invoice</i> window.
<i>Document Generation Wizard</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can access the document generation wizard and create documents. • <i>No Authorization</i> – You cannot use this function.

Field Name	Description
<i>Document Draft</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can open the <i>Document Drafts</i> window, open existing drafts, modify them, and add them as genuine documents. • <i>Read Only</i> – You can view document drafts. <i>Read Only</i> authorization does not allow you to save a document as a draft (<i>File</i> → <i>Save as Draft</i>). • <i>No Authorization</i> – You cannot open the <i>Document Drafts</i> window.
<i>Document Printing</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can print all the documents and reports in SAP Business One and access the <i>Document Printing</i> window. • <i>No Authorization</i> – You cannot print (documents, reports, or windows) through SAP Business One. <p> Note</p> <p>This authorization applies to all documents and reports. It is also required for sending document attachments in e-mails.</p>
<i>Dunning Wizard</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can access the dunning wizard, define required parameters, and print dunning letters. You also require authorization for document printing. • <i>No Authorization</i> – You cannot use this function.
<i>Execute a Dunning Run</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can execute a dunning run. • <i>Read Only</i> – You can view executed dunning runs. • <i>No Authorization</i> – You cannot execute a dunning run. However, you can select the <i>Save Selection Parameter and Exit</i> option in the dunning wizard.
<i>Sales Reports</i> <i>Sales Analysis</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can run the Sales Analysis report. • <i>No Authorization</i> – You cannot run this report.
<i>Backorder Report – Selection Criteria</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can run the Backorder report. • <i>Read Only</i> – You can view the Backorder report. • <i>No Authorization</i> – You cannot generate the Backorder report.
<i>Tax Only</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can select the <i>Tax Only</i> checkbox to mark a row in a sales document for tax payments and not for other purposes. • <i>No Authorization</i> – You cannot select the <i>Tax Only</i> checkbox.
<i>Change Row Amounts</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can change prices and amounts in the document rows. • <i>No Authorization</i> – You cannot change item prices, row totals, and so on.
<i>Change Sales Employee</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can change the sales employee entered automatically in the document (according to either the selected customer or the document owner). • <i>No Authorization</i> – You cannot select a different sales employee for the document.
<i>Sales Employee Update</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can change the sales employee selected in an existing document. • <i>No Authorization</i> – You cannot change the sales employee in existing documents.

Field Name	Description
<i>Confirm Credit Line Deviation</i>	<p>When a customer exceeds the credit limit (defined by choosing <i>Business Partner Master Data</i> → <i>Payment Terms</i> tab → <i>Credit Limit</i>), the following warning message appears: "Customer has exceeded credit limit."</p> <ul style="list-style-type: none"> • <i>Full Authorization</i> – You can approve system messages regarding the deviation from the credit limit by clicking Yes, thus enabling the customer to exceed the credit limit. • <i>No Authorization</i> – You cannot approve such actions.
<i>Confirm Debt Line Deviation</i>	<p>When a customer deviates from the commitment limit (defined for each customer by choosing <i>Business Partner Master Data</i> → <i>Payment Terms</i> tab → <i>Max. Commitment</i>), the following warning message appears: "Customer has exceeded commitment limit."</p> <ul style="list-style-type: none"> • <i>Full Authorization</i> – You can approve system messages regarding deviation from the commitment limit by clicking Yes, thus enabling the customer to deviate from the commitment limit. • <i>No Authorization</i> – You cannot approve such actions.
<i>Confirm Stock Limit Deviation</i>	<p>If, during stock issue, inventory falls below the minimum level (defined by choosing <i>Document Settings</i> → <i>General</i> tab → <i>When Attempting to Release Stock Below the Minimum Level</i> → <i>Warning Only</i>), the following warning message appears: "Inventory is under minimum per Item." This warning also appears when inventory falls below the minimum in goods issue and inventory transfer documents.</p> <ul style="list-style-type: none"> • <i>Full Authorization</i> – You can approve system messages regarding deviation from the minimum stock level by clicking Yes, allowing the stock to fall below the minimum. • <i>No Authorization</i> – You cannot approve such actions.
<i>Partial Delivery</i>	<p>You can select or deselect the <i>Partial Delivery in Sales Orders</i> checkbox. This determines whether the sales order can be copied partially to a target document. To set the default, choose <i>Business Partner Master Data</i> → <i>Payment Terms</i> tab.</p> <ul style="list-style-type: none"> • <i>Full Authorization</i> – You can select or deselect the <i>Partial Delivery</i> checkbox in sales orders. • <i>No Authorization</i> – You cannot change this definition in the document. The <i>Partial Delivery</i> checkbox is disabled.
<i>Document Confirmation</i>	<p>You can select or deselect the <i>Approved</i> 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 <i>Administration</i> → <i>System Initialization</i> → <i>Document Settings</i> → <i>Per Document</i> tab → <i>Sales Order/Purchase Order</i>.</p> <ul style="list-style-type: none"> • <i>Full Authorization</i> – You can select or deselect the <i>Approved</i> checkbox in sales orders and in purchase orders. • <i>No Authorization</i> – You cannot change this definition in the document. The <i>Approved</i> checkbox is disabled.


Field Name	Description
<i>Documents with Zero Amounts</i>	<p>You can add the following sales and purchasing documents with a zero total amount (the value in the <i>Total</i> field is 0): sales quotation, sales order, delivery, return, purchase order, goods receipt PO, and goods receipt.</p> <ul style="list-style-type: none"> • <i>Full Authorization</i> – You can add documents with a zero total amount. • <i>No Authorization</i> – You cannot add such documents.
<i>Allow Changes to Reconciliation Accounts</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can select or deselect the <i>Allow Changing Control Accounts</i> checkbox (<i>Administration</i> → <i>Setup</i> → <i>Financials</i> → <i>G/L Account Determination</i> → <i>Sales/Purchase</i> tab). • <i>No Authorization</i> – You cannot change this definition. The <i>Allow Changing Control Accounts</i> checkbox is disabled.
<i>Gross Profit</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can open the <i>Gross Profit</i> window and modify relevant data. • <i>Read Only</i> – You can view the <i>Gross Profit</i> window. • <i>No Authorization</i> – You cannot open the <i>Gross Profit</i> window. In addition, gross profit data is not displayed in reports (such as Sales Analysis) generated by a user with no authorization.
<i>Change Tax Rate</i>	<p>Relevant for certain localizations only.</p> <ul style="list-style-type: none"> • <i>Full Authorization</i> – You can change the tax rate. • <i>No Authorization</i> – You cannot change the tax rate.
<i>Modify Posted A/R Documents</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> - You 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 that creates journal entries, such as a delivery, once the document has been posted. • <i>No Authorization</i> – You cannot modify any field at the row level after the sales 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, 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, especially if prices are updated manually
- Authorization for row totals, especially if prices are updated manually
- Authorization to modify the table layout, if required

The following modules and functions define the *Purchasing – A/P* authorizations:


Field Name	Description
<i>Purchasing – A/P</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can access all the windows and perform all the actions specified in the <i>Purchasing – A/P</i> module and make required changes or new settings. • <i>Read Only</i> – You can view the data defined in all the functions specified in the <i>Purchasing – A/P</i> module. • <i>No Authorization</i> – You cannot access any of the options in the <i>Purchasing – A/P</i> module.  Note If you select the <i>Read Only</i> authorization for the entire <i>Purchasing – A/P</i> module, functions for which this authorization is not available are automatically set to <i>No Authorization</i> .
<i>Purchase Order</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can open the <i>Purchase Order</i> window, add new documents, and modify existing ones. In addition, you are granted full authorization for the <i>Split Purchase Order</i> function. • <i>Read Only</i> – You can view purchase order documents. In addition, you are granted read only authorization for the <i>Split Purchase Order</i> function. • <i>No Authorization</i> – You cannot open the <i>Purchase Order</i> window.
<i>Split Purchase Order</i>	<p>You can select or deselect the <i>Split PO</i> checkbox on the <i>Logistics</i> tab in the <i>Purchase Order</i> window. This determines whether the purchase order is split into several "child" purchase orders according to the number of different warehouses selected in the document. To define the default setting, choose <i>Administration</i> → <i>System Initialization</i> → <i>Document Settings</i> → <i>Per Document</i> tab → <i>Purchase Order</i>.</p> <ul style="list-style-type: none"> • <i>Full Authorization</i> – You can select or deselect the <i>Split PO</i> checkbox in the <i>Purchase Orders</i> window. • <i>No Authorization</i> – You cannot change this definition in the document. The <i>Split PO</i> checkbox is disabled.

Field Name	Description
<i>Goods Receipt PO</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can open the <i>Goods Receipt PO</i> window, add new documents, and modify existing ones. • <i>Read Only</i> – You can view goods receipt PO documents. • <i>No Authorization</i> – You cannot open the <i>Goods Receipt PO</i> window.
<i>Goods Return</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can open the <i>Goods Return</i> window, add new documents, and modify existing ones. • <i>Read Only</i> – You can view goods return documents. • <i>No Authorization</i> – You cannot open the <i>Goods Return</i> window.
<i>A/P Down Payment Request</i>	<p>Relevant for certain localizations only.</p> <ul style="list-style-type: none"> • <i>Full Authorization</i> – You can create an A/P down payment request, which is a request by your vendor that a down payment be made at a certain time. • <i>Read Only</i> – You can view the A/P down payment requests. • <i>No Authorization</i> – You cannot create an A/P down payment request.
<i>A/P Down Payment Invoice</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can open the <i>A/P Down Payment Invoice</i> window, add new documents, and modify existing ones. • <i>Read Only</i> – You can view A/P down payment invoice documents. • <i>No Authorization</i> – You cannot open the <i>A/P Down Payment Invoice</i> window.
<i>A/P Invoice</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can open the <i>A/P Invoice</i> window, add new documents, and modify existing ones. • <i>Read Only</i> – You can view A/P invoice documents. • <i>No Authorization</i> – You cannot open the <i>A/P Invoice</i> window.
<i>A/P Credit Memo</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can open the <i>A/P Credit Memo</i> window, add new documents, and modify existing ones. • <i>Read Only</i> – You can view A/P credit memo documents. • <i>No Authorization</i> – You cannot open the <i>A/P Credit Memo</i> window.
<i>A/P Reserve Invoice</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can open the <i>A/P Reserve Invoice</i> window, add new documents and modify existing ones. • <i>Read Only</i> – You can view A/P reserve invoice documents. • <i>No Authorization</i> – You cannot open the <i>A/P Reserve Invoice</i> window.
<i>Landed Costs</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can open the <i>Landed Costs</i> window, add new documents and modify existing ones. • <i>Read Only</i> – You can view landed costs documents. • <i>No Authorization</i> – You cannot open the <i>Landed Costs</i> window.

Field Name	Description
<i>Change Tax Amount Distribution</i>	<p>Relevant only for the United States localization</p> <p>You can access the <i>Define Tax Amount Distribution</i> window, opened from the <i>Tax Amount (LC)</i> field in sales and purchasing documents or by choosing the <i>Add Expenses</i> field → <i>Expenses</i> window → <i>Total Tax Amount</i> field.</p> <ul style="list-style-type: none"> • <i>Full Authorization</i> – You can open the <i>Define Tax Amount Distribution</i> window and change the distribution of the tax amount. • <i>Read Only</i> – You can view the <i>Define Tax Amount Distribution</i> window. • <i>No Authorization</i> – You cannot open the <i>Define Tax Amount Distribution</i> window.
<i>Purchasing Reports</i> <i>Purchase Analysis</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can run the Purchase Analysis report. • <i>No Authorization</i> – You cannot run this report.
<i>Tax Only</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can select the <i>Tax Only</i> checkbox to mark a row in a purchasing document for tax payments and not for other purposes. • <i>No Authorization</i> – You cannot select the <i>Tax Only</i> checkbox.
<i>Modify Posted A/P Documents</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You 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 that creates journal entries, such as a goods receipt PO, once the document has been posted. • <i>No Authorization</i> – You cannot modify any field at the row level in a purchasing document once it has been posted.

Business Partners Module Authorizations

The following modules and functions define the *Business Partners* authorizations:


Field Name	Description
<i>Business Partners</i>	<ul style="list-style-type: none"> <i>Full Authorization</i> – You can access all the windows and perform all the actions specified in the <i>Business Partners</i> module and make required changes or new settings. <i>Read Only</i> – You can view the data defined in all the functions specified in the <i>Business Partners</i> module. <i>No Authorization</i> – You cannot access any option specified in the <i>Business Partners</i> module.  Note If you select the <i>Read Only</i> authorization for the entire <i>Business Partners</i> module, functions for which this authorization is not available are automatically set to <i>No Authorization</i> .
<i>Adding Business Partner</i>	<ul style="list-style-type: none"> <i>Full Authorization</i> – You can add business partner master data from all business partner types: <i>Customer</i>, <i>Vendor</i> and <i>Lead</i>. In addition, you require <i>Read Only</i> authorization for price lists. <i>No Authorization</i> – You cannot add business partners.
<i>Adding Customer/Vendor Master Data</i>	<ul style="list-style-type: none"> <i>Full Authorization</i> – You can add <i>Customer</i> and <i>Vendor</i> business partner master data. <i>No Authorization</i> – You cannot add <i>Customer</i> and <i>Vendor</i> business partners.
<i>Adding Lead BP</i>	<ul style="list-style-type: none"> <i>Full Authorization</i> – You can add <i>Lead</i> business partner master data. <i>No Authorization</i> – You cannot add <i>Lead</i> business partners.
<i>Business Partner Master Data</i>	<ul style="list-style-type: none"> <i>Full Authorization</i> – You can open and work in the <i>Business Partner Master Data</i> window, modify and view data, and perform all the actions specified in this section, such as <i>Sales Order Balance</i>. <i>Read Only</i> – You can view the <i>Business Partner Master Data</i> window. If you select <i>Read Only</i>, all the options listed in this section (such as <i>Delivery Balance</i>) are set to <i>No Authorization</i>. <i>No Authorization</i> – You cannot open the <i>Business Partner Master Data</i> window.
<i>Sales Order Balance</i>	<ul style="list-style-type: none"> <i>Full Authorization</i> – You can view the sales order balance of the business partner, displayed in the <i>Orders</i> field. <i>No Authorization</i> – You see asterisks (****) instead of numbers.
<i>Delivery Balance</i>	<ul style="list-style-type: none"> <i>Full Authorization</i> – You can view the delivery balance of the business partner, displayed in the <i>Deliveries</i> field. <i>No Authorization</i> – You see (****) asterisks instead of numbers.
<i>Change Sales Employee</i>	<ul style="list-style-type: none"> <i>Full Authorization</i> – You can change the specified sales employee by choosing <i>Business Partner Master Data</i> → <i>General</i> tab. <i>No Authorization</i> – You cannot change the sales employee.

Field Name	Description
<i>Active</i>	<p>You 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.</p> <ul style="list-style-type: none"> • <i>Full Authorization</i> – You can select or deselect the <i>Active</i> checkbox (<i>Business Partner Master Data</i> → <i>General</i> tab). When the checkbox is selected, three additional fields are displayed, letting you define the activity period and enter comments. • <i>No Authorization</i> – You cannot set an activity period for a business partner.
<i>Inactive</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can select or deselect the <i>Inactive</i> checkbox (<i>Business Partner Master Data</i> → <i>General</i> tab). When the checkbox is selected, three additional fields are displayed, letting you define the inactive period and enter comments. • <i>No Authorization</i> – You cannot set an inactive period for a business partner.
<i>Remove Business Partner</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can delete a business partner (from the menu bar, choose <i>Data</i> → <i>Remove Business Partner</i>). • <i>No Authorization</i> – You cannot delete a business partner.
<i>Business Partner Type</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can search for and view specific types of business partners. • <i>No Authorization</i> – You cannot search for specific types of business partners.
<i>Customers, Vendors, Leads</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can search for and view specific types of business partners. • <i>No Authorization</i> – You cannot search for specific types of business partners.
<i>Activity</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can open the <i>Activity</i> window, add new activities, and modify existing ones. • <i>Read Only</i> – You can view the <i>Activity</i> window. • <i>No Authorization</i> – You cannot open the <i>Activity</i> window.
<i>Delete Activity</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can delete an existing activity by choosing <i>Data</i> → <i>Remove</i>. • <i>No Authorization</i> – You cannot delete activities.
<i>Internal Reconciliations</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You 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. • <i>Read Only</i> – You can view the <i>Reconciliation</i> and <i>Manage Previous Reconciliations</i> windows but not make any changes. • <i>No Authorization</i> – You cannot view these windows.
<i>Reconciliation</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can display, cancel, and recreate external or internal reconciliations created for a specified range of business partners or G/L accounts. • <i>Read Only</i> – You can view the <i>Reconciliation</i> window but cannot make any changes. • <i>No Authorization</i> – You cannot view this window.


Field Name	Description
<i>Manage Previous Reconciliations</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can display, cancel, and recreate external or internal reconciliations created for a specified range of business partners or G/L accounts. • <i>Read Only</i> – You can view the <i>Manage Previous Reconciliations</i> window but cannot make any changes. • <i>No Authorization</i> – You cannot view this window.
<i>Business Partner Reports</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can open and run all the business partner reports. In addition, you require full authorization for <i>BP Balances</i>, <i>Account Balances</i>, <i>Accounting</i> and <i>Access to Confidential Accounts</i> fields. These are set in <i>General Authorizations</i> module Authorizations. To print these reports, you require full authorization for the <i>Document Printing</i> field. • <i>No Authorization</i> – You cannot run these reports.
<i>Activities Overview</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can open and run all <i>Activities Overview</i> reports. • <i>No Authorization</i> – You cannot run this report.
<i>Inactive Customers</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can open and run the <i>Inactive Customers</i> report. • <i>No Authorization</i> – You cannot run this report.
<i>Dunning History Report</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can open and run the <i>Dunning History</i> report. • <i>No Authorization</i> – You cannot run this report.


Banking Module Authorizations

The following modules and functions define the *Banking* authorizations:

Field Name	Description
<i>Banking</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can access all the windows and perform all the actions specified in the <i>Banking</i> module and make required changes or new settings. • <i>Read Only</i> – You can view the data defined in all the functions specified in the <i>Banking</i> module. • <i>No Authorization</i> – You cannot access any option specified in the <i>Banking</i> module. <p> Note If you select the <i>Read Only</i> authorization for the entire <i>Banking</i> module, functions for which this authorization is not available are automatically set to <i>No Authorization</i>.</p>
<i>Incoming Payments</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can open all the windows located under the <i>Incoming Payments</i> submenu, add new incoming payment documents, view the <i>Check Register</i> window, and perform various actions in the <i>Credit Card Management</i> window. • <i>Read Only</i> – You can view windows located under the <i>Incoming Payments</i> submenu. • <i>No Authorization</i> – You cannot open any of the windows located under the <i>Incoming Payments</i> submenu.
<i>Incoming Payments</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can open the <i>Incoming Payments</i> window, add new incoming payment documents, and modify existing ones. • <i>Read Only</i> – You can view the <i>Incoming Payments</i> window. • <i>No Authorization</i> – You cannot open the <i>Incoming Payments</i> window.
<i>Cash Receipt</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can use cash as the payment means (<i>Incoming Payments</i> → <i>Payment Means</i> → <i>Cash</i> tab). • <i>No Authorization</i> – You cannot use cash as the payment means in incoming payments.
<i>Check Register</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can open the <i>Check Register</i> window, view check data, update due dates, and endorse and cancel checks. • <i>Read Only</i> – You can view the <i>Check Register</i> window. • <i>No Authorization</i> – You cannot open the <i>Check Register</i> window.
<i>Credit Card Management</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can open the <i>Credit Card Management</i> window, view credit card vouchers data, update references, and endorse and cancel credit card vouchers. • <i>Read Only</i> – You can view the <i>Credit Card Management</i> window • <i>No Authorization</i> – You cannot open the <i>Credit Card Management</i> window.
<i>Credit Card Summary</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can display and update credit card voucher references that are received from credit card companies. • <i>No Authorization</i> – You cannot create a credit card summary.


Field Name	Description
<i>Deposits</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can open the <i>Deposit</i> window and deposit checks, credit card vouchers, and cash to the bank or to a business partner. In addition, you can view previous deposits, modify their data, and even cancel deposits. This authorization also includes access to the <i>Postdated Credit Voucher</i> window and the ability to deposit postdated checks. • <i>Read Only</i> – You can view the <i>Deposit</i> window. • <i>No Authorization</i> – You cannot open the <i>Deposit</i> window.
<i>Deposit</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can open the <i>Deposit</i> window and deposit checks, credit card vouchers, and cash to the bank or to a business partner. In addition, you can view previous deposits, modify their data, and even cancel deposits. • <i>Read Only</i> – You can view the <i>Deposit</i> window. • <i>No Authorization</i> – You cannot open the <i>Deposit</i> window.
<i>Postdated Check Deposit</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can transfer postdated checks to the cash account. • <i>Read Only</i> – You can view the <i>Postdated Check Deposit</i> window. • <i>No Authorization</i> – You cannot open the <i>Postdated Check Deposit</i> window.
<i>Postdated Credit Voucher Deposit</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can transfer to the cash account credit card vouchers deposited to the deferred account. • <i>Read Only</i> – You can view the <i>Postdated Credit Voucher Deposit</i> window. • <i>No Authorization</i> – You cannot open the <i>Postdated Credit Voucher Deposit</i> window.
<i>Outgoing Payments</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can open all the windows located under the <i>Outgoing Payments</i> submenu, add new outgoing payment documents, process and view checks for payment, and perform actions in the <i>Voiding Check for Payment</i> window. • <i>Read Only</i> – You can view the windows located under the <i>Outgoing Payments</i> submenu. • <i>No Authorization</i> – You cannot open any of the windows located under the <i>Outgoing Payments</i> submenu.
<i>Outgoing Payments</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can open the <i>Outgoing Payments</i> window, add new outgoing payment documents, and modify existing ones. • <i>Read Only</i> – You can view the <i>Outgoing Payments</i> window. • <i>No Authorization</i> – You cannot open the <i>Outgoing Payments</i> window.
<i>Checks for Payment</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can open the <i>Checks for Payment</i> window, add new checks for payment documents, modify existing ones, and cancel checks. • <i>Read Only</i> – You can view the <i>Checks for Payment</i> window. • <i>No Authorization</i> – You cannot open the <i>Checks for Payment</i> window.




Field Name	Description
<i>Voiding Checks for Payment – Selection Criteria</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can open the <i>Voiding Checks for Payment</i> window, void required checks, and reprint them. • <i>Read Only</i> – You can view the <i>Voiding Checks for Payment</i> window. • <i>No Authorization</i> – You cannot open the <i>Voiding Checks for Payment</i> window.
<i>Payment Drafts Report</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can open the <i>Payment Drafts Report</i> window, open existing drafts, modify them, and add them as genuine documents. • <i>No Authorization</i> – You cannot open the <i>Payment Drafts Report</i> window. <p> Note</p> <p>The <i>Payment Drafts Report</i> authorization applies to both incoming and outgoing payments.</p>
<i>Remove/Delete/Print Payment Drafts</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You 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 <i>Outgoing and Incoming Payment</i> authorizations. • <i>Read Only</i> – You can view the <i>Payment Drafts Report</i> window. • <i>No Authorization</i> – You cannot view the payment documents in draft format.
<i>Checks for Payment Drafts</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can open the <i>Checks for Payment Drafts</i> window, view existing checks for payments that were saved as drafts, and save them as genuine checks. • <i>No Authorization</i> – You cannot open the <i>Checks for Payment Drafts</i> window.
<i>Payment System</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can work with the payment wizard, access all its related definitions, and execute payment runs. • <i>No Authorization</i> – You cannot work with the payment wizard.
<i>Payment Wizard</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can work with the payment wizard and execute payment runs. • <i>No Authorization</i> – You cannot work with the payment wizard.
<i>Executed</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can execute payment runs, for example, selecting the <i>Execute</i> option in the payment wizard. • <i>No Authorization</i> – You cannot select this status.
<i>Payment Run Defaults</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can access the <i>Payment Run Defaults</i> window and change required parameters. • <i>Read Only</i> – You can view the <i>Payment Run Defaults</i> window. • <i>No Authorization</i> – You cannot open the <i>Payment Run Defaults</i> window.


Field Name	Description
<i>Bank Statements and External Reconciliations</i>	<ul style="list-style-type: none"> <i>Full Authorization</i> – You can open all the windows specified in the <i>Bank Statements and Reconciliations</i> submenu, perform manual or automatic reconciliations, view the <i>Check and Restore Previous Reconciliations</i> window, and so on. <i>Read Only</i> – You can only view the <i>Bank Statement Summary</i> window. <p> Note</p> <p>This option applies only in certain localizations and is relevant when the <i>Install Bank Statement Processing</i> checkbox on the <i>Basic Initialization</i> tab in <i>Administration</i> → <i>System Initialization</i> → <i>Company Details</i> is selected.</p> <ul style="list-style-type: none"> <i>No Authorization</i> – You cannot open any of the windows located under the <i>Bank Statements and Reconciliations</i> submenu.
<i>Process External Bank Statement</i>	<ul style="list-style-type: none"> <i>Full Authorization</i> – You can access the <i>Process External Bank Statement</i> window, add new bank statements, or update existing ones. <i>No Authorization</i> – You cannot open this window.
<i>Reconciliation</i>	<ul style="list-style-type: none"> <i>Full Authorization</i> – You can access the <i>Reconciliation</i> window, perform manual and automatic reconciliations, and use the reconciliation wizard. <i>No Authorization</i> – You cannot open this window.
<i>Manage Previous External Reconciliations</i>	<ul style="list-style-type: none"> <i>Full Authorization</i> – You can access the <i>Manage Previous Reconciliations</i> window, and open and check reconciliations. <i>No Authorization</i> – You cannot open this window.
<i>Check and Restore Previous External Reconciliations</i>	<ul style="list-style-type: none"> <i>Full Authorization</i> – You can access the <i>Check and Restore Previous Reconciliations</i> window, and open and restore reconciliations. <i>No Authorization</i> – You cannot open this window.
<i>Check Number Confirmation</i>	<ul style="list-style-type: none"> <i>Full Authorization</i> – You can access the <i>Check Number Confirmation</i> window and change the <i>Status</i> column. <i>Read Only</i> – You can view the <i>Check Number Confirmation</i> window. <i>No Authorization</i> – You cannot open the <i>Check Number Confirmation</i> window.


Inventory Module Authorizations






The following modules and functions define the *Inventory* authorizations:

Field Name	Description
<i>Inventory</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can access all the windows and perform all the actions specified in the <i>Inventory</i> module and make required changes or new settings. • <i>Read Only</i> – You can view the data defined in all the functions specified in the <i>Inventory</i> module. • <i>No Authorization</i> – You cannot access any option specified in the <i>Inventory</i> module.  Note If you select the <i>Read Only</i> authorization for the entire <i>Inventory</i> module, functions for which the <i>Read Only</i> authorization is not available are automatically set to <i>No Authorization</i> .
<i>Item Master Data</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can open and work in the <i>Item Master Data</i> window, modify and view data, and perform all the actions specified in this section. • <i>Read Only</i> – You can view the <i>Item Master Data</i> window. • <i>No Authorization</i> – You cannot open the <i>Item Master Data</i> window.
<i>Active</i>	You 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. <ul style="list-style-type: none"> • <i>Full Authorization</i> – You can select or deselect the <i>Active</i> checkbox (<i>Item Master Data</i> → <i>General</i> tab). When the checkbox is selected, three additional fields are displayed, letting you define the validity period and enter comments. • <i>No Authorization</i> – You cannot set a validity period for an item.
<i>Inactive</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can select or deselect the <i>Inactive</i> checkbox (<i>Item Master Data</i> → <i>General</i> tab). When the checkbox is selected, three additional fields are displayed, letting you define the inactive period and enter comments. • <i>No Authorization</i> – You cannot set an inactive period for an item.
<i>Valuation Method</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can change the valuation method set for the item (<i>Item Master Data</i> → <i>Inventory Data</i> tab). • <i>Read Only</i> – You cannot change this definition. • <i>No Authorization</i> – You cannot change this definition.
<i>Remove Item Master Data</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can delete an item master data record (from the menu bar, choose <i>Data</i> → <i>Remove</i>). • <i>No Authorization</i> – You cannot delete an item master data record.

Field Name	Description
<i>Item Management</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can access all the windows, perform all the actions relevant to the <i>Item Management</i> submenu, and make required changes or new settings. • <i>Read Only</i> – You can view the data defined in all of the functions relevant to the <i>Item Management</i> submenu. • <i>No Authorization</i> – You cannot access any option relevant to the <i>Item Management</i> submenu. <p> Note</p> <p>If you select <i>Read Only</i> authorization for the entire <i>Item Management</i> menu, functions for which the <i>Read Only</i> authorization is not available are automatically set to <i>No Authorization</i>.</p>
<i>Serial Numbers</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can open all the windows specified in the <i>Serial Numbers</i> submenu, add new serial numbers, and update existing ones. • <i>No Authorization</i> – You cannot open these windows.
<i>Serial Numbers Management</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can access the <i>Serial Numbers Management</i> window, view serial numbers selected in documents, update data for specific serial numbers, or perform a sweeping update of several serial numbers. • <i>No Authorization</i> – You cannot open this window. <p> CAUTION</p> <p>A user with no authorization for the <i>Serial Numbers Management</i> window cannot select or define serial numbers in documents. For example, the user cannot right-click in the <i>Quantity</i> field and select <i>Batch/Serial Numbers</i> in stock release documents or open the <i>Define Serial Numbers</i> window in stock receipt documents.</p>
<i>Serial Number Details</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can access the <i>Serial Number Details</i> window, view serial numbers selected in documents, update data for specific serial numbers, or perform a sweeping update of several serial numbers. • <i>No Authorization</i> – You cannot open this window.
<i>Batches</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can open all the windows specified in the <i>Batches</i> submenu, add new serial number, and update existing ones. • <i>No Authorization</i> – You cannot open these windows.
<i>Batch Management</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can access the <i>Batch Management</i> window, view batch numbers selected in documents, update data for specific batch numbers or perform a sweeping update of several batch numbers. • <i>No Authorization</i> – You cannot open this window. <p> CAUTION</p> <p>A user with no authorization for the <i>Batch Management</i> window cannot select or define batch numbers in documents. For example, the user cannot right-click in the <i>Quantity</i> field and select <i>Batch/Serial Numbers</i> in stock release documents or open the <i>Define Batches</i> window in inventory receipt documents.</p>

Field Name	Description
<i>Batch Details</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can access the <i>Batch Details</i> window, view batch numbers selected in documents, update data for specific batch numbers, or perform a sweeping update of several batch numbers. • <i>No Authorization</i> – You cannot open this window.
<i>Alternative Items</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can access the <i>Alternative Items</i> window, define new alternative items for a certain item or even delete alternative item definitions. • <i>Read Only</i> – You can view the <i>Alternative Items</i> window. • <i>No Authorization</i> – You cannot open the <i>Alternative Items</i> window.
<i>Business Partner Catalog Numbers</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can access the <i>Business Partner Catalog Numbers</i> window, define new business partner catalog number for items, and update or delete catalog numbers. • <i>Read Only</i> – You can view the <i>Business Partner Catalog Numbers</i> window. • <i>No Authorization</i> – You cannot open the <i>Business Partner Catalog Numbers</i> window.
<i>Global Update to BP Catalog Numbers</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can access the <i>Global Update to BP Catalog Numbers</i> window and replace catalog numbers for a selected range of business partners and/or items. • <i>No Authorization</i> – You cannot open this window.
<i>Inventory Valuation Method</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can access the <i>Inventory Valuation Method</i> window and update the costing method of items. • <i>Read Only</i> – You can view the <i>Inventory Valuation Method</i> window. • <i>No Authorization</i> – You cannot open the <i>Inventory Valuation Method</i> window.
<i>Inventory Transactions</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can access all the windows, perform all the actions available under the <i>Inventory Transactions</i> submenu, and make required changes or new settings. • <i>Read Only</i> – You can view the data defined under all the functions in the <i>Inventory Transactions</i> submenu. • <i>No Authorization</i> – You cannot access any option in the <i>Inventory Transactions</i> submenu. <div style="margin-top: 10px;">  Note If <i>Read Only</i> authorization is selected for the entire <i>Inventory Transactions</i> submenu, functions for which the <i>Read Only</i> authorization is not available are automatically set to <i>No Authorization</i>. </div>
<i>Goods Receipt</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can open the <i>Goods Receipt</i> window, add new documents and modify existing ones. • <i>Read Only</i> – You can view <i>Goods Receipt</i> documents. • <i>No Authorization</i> – You cannot open the <i>Goods Receipt</i> window.
<i>Goods Issue</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can open the <i>Goods Issue</i> window, add new documents, and modify existing ones. • <i>Read Only</i> – You can view goods issue documents. • <i>No Authorization</i> – You cannot open the <i>Goods Issue</i> window.

Field Name	Description
<i>Inventory Transfer</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can open the <i>Inventory Transfer</i> window, add new documents, and modify existing ones. • <i>Read Only</i> – You can view inventory transfer documents. • <i>No Authorization</i> – You cannot open the <i>Inventory Transfer</i> window.
<i>Initial Quantities, Inventory Tracking and Stock Posting</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can perform all the actions available from the <i>Initial Quantities, Inventory Tracking and Stock Posting</i> window. • <i>No Authorization</i> – You cannot open this window.
<i>Initial Quantity</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can open the <i>Initial Quantity</i> window and record initial quantities for items. • <i>No Authorization</i> – You cannot open this window.
<i>Inventory Tracking</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can open the <i>Inventory Tracking</i> window and record inventory quantities for items. • <i>No Authorization</i> – You cannot open this window.
<i>Inventory Posting</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can open the <i>Stock Posting</i> window and carry out inventory postings for items. • <i>No Authorization</i> – You cannot open this window.
<i>Cycle Count Recommendations</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can open the <i>Cycle Count Recommendations</i> window. • <i>Read Only</i> – You can view the <i>Cycle Count Recommendations</i> window. • <i>No Authorization</i> – You cannot open this window.
<i>Inventory Revaluation</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can open the <i>Inventory Revaluation</i> window, change item prices, or update inventory debit/credit amounts. • <i>Read Only</i> – You can view previous <i>Inventory Revaluation</i> actions. • <i>No Authorization</i> – You cannot open this window.
<i>Price Lists</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can access all the price lists and windows located under the <i>Price Lists</i> submenu and make required changes or new settings. • <i>Read Only</i> – You can view the data defined in all the price lists and windows located under the <i>Price Lists</i> submenu. • <i>No Authorization</i> – You cannot access any price list or window located under the <i>Price Lists</i> submenu. <div>  Note If you select <i>Read Only</i> authorization for the entire <i>Price Lists</i> submenu, functions for which the <i>Read Only</i> authorization is not available are automatically set to <i>No Authorization</i>. </div>


Field Name	Description
<i>Price Lists</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can access all price list groups displayed in the <i>Price List</i> window, and make required changes and new settings. • <i>Read Only</i> – You can view the different price lists displayed in the <i>Price List</i> window. • <i>No Authorization</i> – You cannot access any price list displayed in the <i>Price List</i> window. <p> Note</p> <p>A user with no authorization for <i>Price Lists</i> is not able to view prices in the <i>Item Master Data</i> window. The <i>Price</i> field displays asterisks (****).</p>
<i>Price List – Group No. 1, 2, 3 and 4</i>	<p>You can access price lists related to a certain group (<i>Inventory</i> → <i>Price Lists</i> → <i>Price Lists</i> → <i>Group</i>).</p> <ul style="list-style-type: none"> • <i>Full Authorization</i> – You can access all the price lists related to the group. • <i>Read Only</i> – You can view the price lists related to the group. • <i>No Authorization</i> – You cannot access any price list related to the group and the data of such price lists is displayed as asterisks (****) in the <i>Price Lists</i> window. <p> Note</p> <p>A user with no authorization for a certain price list group is not able to view its prices in the <i>Item Master Data</i> window. The <i>Price</i> field displays asterisks (****) for restricted price list groups.</p>
<i>Last Evaluated Price</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can view the <i>Last Evaluated Price</i> list. • <i>No Authorization</i> – You cannot view data in this price list. <p> Note</p> <p>A user with no authorization for the <i>Last Evaluated Price</i> list cannot view its prices in the <i>Item Master Data</i> window. The <i>Price</i> field displays asterisks (****) for this price list.</p>
<i>Last Purchase Price</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can view the <i>Last Purchase Price</i> list. • <i>No Authorization</i> – You cannot view data in this price list. <p> Note</p> <p>A user with no authorization for the <i>Last Purchase Price</i> list is not able to view its prices in the <i>Item Master Data</i> window. The <i>Price</i> field displays asterisks (****) for this price list.</p>
<i>Item Cost</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can select <i>Item Cost</i> from the list of price lists. • <i>No Authorization</i> – You cannot view the <i>Item Cost</i> entry in the list of price lists. <p> Note</p> <p>The authorization for price lists does not affect the <i>Item Cost</i> field in the <i>Item Master Data</i> window or in the sales or marketing documents. Therefore, the item cost can be viewed in other places even when blocked in the price lists.</p>

Field Name	Description
<i>Period and Volume Discounts</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can access the <i>Hierarchies and Expansions</i> window, and define date-dependent and quantity-dependent hierarchies and expansions for selected price lists. • <i>Read Only</i> – You can view the <i>Hierarchies and Expansions</i> window. • <i>No Authorization</i> – You cannot open the <i>Hierarchies and Expansions</i> window.
<i>Special Prices</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can access all the windows under the <i>Special Prices</i> submenu, add new data, modify existing data, and perform various actions. • <i>Read Only</i> – You can view the different windows under the <i>Special Prices</i> submenu. • <i>No Authorization</i> – You cannot access windows under the <i>Special Prices</i> submenu.
<i>Special Prices for Business Partners</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can access the <i>Special Prices for Business Partners</i> window, define special prices for business partners, and modify existing data. • <i>Read Only</i> – You can view the <i>Special Prices for Business Partners</i> window. • <i>No Authorization</i> – You cannot open the <i>Special Prices for Business Partners</i> window.
<i>Copy Special Prices to Selection Criteria</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can access the <i>Copy Special Prices to Selection Criteria</i> window and copy special prices to a range of business partners and/or items. • <i>No Authorization</i> – You cannot open this window.
<i>Update Special Prices Globally</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can access the <i>Update Special Prices Globally</i> window and perform a global update of special prices by changing the discount %, price, or linked price list. • <i>No Authorization</i> – You cannot open this window.
<i>Discount Groups</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can access the <i>Discount Groups</i> window and define special prices according to discount groups. • <i>Read Only</i> – You can view the <i>Discount Groups</i> window. • <i>No Authorization</i> – You cannot open the <i>Discount Groups</i> window.
<i>Update Parent Item Prices Globally</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can access the <i>Update Parent Item Prices Globally</i> window and update prices for the parent and child items comprising bills of materials. • <i>Read Only</i> – You can view the <i>Update Parent Item Prices Globally</i> window. • <i>No Authorization</i> – You cannot open this window.
<i>Avg./Standard Price</i>	<p>Relevant for certain localizations only.</p> <ul style="list-style-type: none"> • <i>Full Authorization</i> – If the stock system is set to moving average price, you can see the moving average price of an item; if the stock system is set to standard price, you can see and change the standard price. • <i>Read Only</i> – You can only see the price. • <i>No Authorization</i> – You are not able to see the price.

Field Name	Description
<i>Pick and Pack</i>	<ul style="list-style-type: none">• <i>Full Authorization</i> – You can access the <i>Pick and Pack Manager</i> and the <i>Pick List</i> windows.• <i>No Authorization</i> – You cannot open these windows.
<i>Pick and Pack Manager</i>	<ul style="list-style-type: none">• <i>Full Authorization</i> – You can access the <i>Pick and Pack Manager</i> window, pick and release sales orders, and pack items for delivery.• <i>No Authorization</i> – You cannot open this window.
<i>Pick List</i>	<ul style="list-style-type: none">• <i>Full Authorization</i> – You can access the <i>Pick List</i> window, pick items, and pack them for delivery.• <i>Read Only</i> – You can view the <i>Pick List</i> window.• <i>No Authorization</i> – You cannot open the <i>Pick List</i> window.
<i>Inventory Reports</i>	You can grant <i>Full Authorization</i> or <i>No Authorization</i> for all the inventory reports in SAP Business One.


Production Module Authorizations

The following modules and functions define the *Production* authorizations:

Field Name	Description
<i>Production</i>	<ul style="list-style-type: none"> <i>Full Authorization</i> – You can enter all the windows located under the <i>Production</i> module and make new settings and modifications. <i>Read Only</i> – You can view the data in all the windows located under the <i>Production</i> module. <i>No Authorization</i> – You cannot access any window located under the <i>Production</i> module. <div>  Note If you select <i>Read Only</i> authorization for the entire <i>Production</i> module, functions for which the <i>Read Only</i> authorization is not available are automatically set to <i>No Authorization</i>. </div>
<i>Bill of Materials</i>	<ul style="list-style-type: none"> <i>Full Authorization</i> – You can access the <i>Bill of Materials</i> window, define new bills of materials, or modify existing ones. <i>Read Only</i> – You can view the <i>Bill of Materials</i> window. <i>No Authorization</i> – You cannot open the <i>Bill of Materials</i> window.
<i>Production Order</i>	<ul style="list-style-type: none"> <i>Full Authorization</i> – You can access the <i>Production Order</i> window, plan new production orders, modify existing ones, release orders for production, and close production orders at the end of the production process. <i>Read Only</i> – You can view the <i>Production Order</i> window. <i>No Authorization</i> – You cannot open the <i>Production Order</i> window.
<i>Receipt from Production</i>	<ul style="list-style-type: none"> <i>Full Authorization</i> – You can access the <i>Receipt from Production</i> window and release or receive quantities. <i>Read Only</i> – You can view the <i>Receipt from Production</i> window. <i>No Authorization</i> – You cannot open the <i>Receipt from Production</i> window.
<i>Issue for Production</i>	<ul style="list-style-type: none"> <i>Full Authorization</i> – You can access the <i>Issue for Production</i> window and release or receive quantities. <i>Read Only</i> – You can view the <i>Issue for Production</i> window. <i>No Authorization</i> – You cannot open the <i>Issue for Production</i> window.
<i>Production Reports</i> <i>Bill of Materials Report</i>	In the <i>Production Reports</i> section, you can grant full authorization or no authorization for the bill of materials report.


MRP Module Authorizations


The following modules and functions define the *MRP* authorizations:

Field Name	Description
<i>MRP</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can enter all the windows specified in the <i>MRP</i> module. • <i>Read Only</i> – You can view only the <i>Forecasts</i> window. • <i>No Authorization</i> – You cannot access any window specified in the <i>MRP</i> module. <div>  Note If you select <i>Read Only</i> authorization for the entire <i>MRP</i> module, functions for which the <i>Read Only</i> authorization is not available are automatically set to <i>No Authorization</i>. </div>
<i>Forecasts</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can access the <i>Forecasts</i> window, define new forecasts, or modify existing ones. • <i>Read Only</i> – You can view the <i>Forecasts</i> window. • <i>No Authorization</i> – You cannot open the <i>Forecasts</i> window.
<i>MRP Wizard</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can access the <i>MRP Wizard</i> window, define new forecasts, or modify existing ones. • <i>No Authorization</i> – You cannot use the wizard.
<i>Order Recommendation</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can access the <i>Order Recommendation Report</i> window, and create new purchase orders and production orders. • <i>No Authorization</i> – You cannot open this window.

Service Module Authorizations


The following modules and functions define the *Service* authorizations:

Field Name	Description
<i>Service</i>	<ul style="list-style-type: none"> <i>Full Authorization</i> – You can enter all the windows located under the <i>Service</i> module and perform the various actions available in this module. <i>Read Only</i> – You can view the data in all the windows located under the <i>Service</i> module. <i>No Authorization</i> – You cannot access any window located under the <i>Service</i> module. <div style="margin-top: 10px;">  Note If you select <i>Read Only</i> authorization for the entire <i>Service</i> module, functions for which the <i>Read Only</i> authorization is not available are automatically set to <i>No Authorization</i>. </div>
<i>Service Call</i>	<ul style="list-style-type: none"> <i>Full Authorization</i> – You can open the <i>Service Call</i> window, record new service calls, and update existing ones. <i>Read Only</i> – You can view the <i>Service Call</i> window. <i>No Authorization</i> – You cannot open the <i>Service Call</i> window.
<i>Special Service Call Authorizations</i>	<ul style="list-style-type: none"> <i>Full Authorization</i> – You can perform all the actions available under the <i>Special Service Call Authorizations</i> submenu. <i>No Authorization</i> – You cannot perform any of these actions.
<i>Change Status</i>	<ul style="list-style-type: none"> <i>Full Authorization</i> – You can change the status of a service call by clicking the <i>Call Status</i> field in a service call and selecting a different status. <i>No Authorization</i> – You cannot change the status of a service call.
<i>Define Statuses</i>	<ul style="list-style-type: none"> <i>Full Authorization</i> – You can define a new status for a service call by clicking the <i>Call Status</i> field in a service call and selecting the option <i>Define New</i> to open the <i>Service Call Statuses – Setup</i> window. <i>No Authorization</i> – You cannot change the status of a service call.
<i>Reopen</i>	<ul style="list-style-type: none"> <i>Full Authorization</i> – You can reopen a service call and change its status from <i>Closed</i> to <i>Open</i> by clicking the <i>Call Status</i> field in a closed service call and selecting <i>Open</i>. <i>No Authorization</i> – You cannot reopen a service call.
<i>Allow Service Without Contract</i>	<ul style="list-style-type: none"> <i>Full Authorization</i> – You can record a service call for customers without a valid service contract. The following system message is displayed: <i>"Warning: No valid contracts exist for the customer"</i>. You can confirm the system message by choosing the <i>OK</i> button and recording the service call. <i>No Authorization</i> – You cannot confirm the system message or process service calls for customers with no valid service contracts.

Field Name	Description
<i>Allow Service Beyond Coverage Time</i>	<ul style="list-style-type: none"> <i>Full Authorization</i> – You can record a service call that deviates from the coverage time defined in the service contract. The following system message appears: “<i>Warning: Attempt to create a call out of coverage time</i>”. Confirm the system message by choosing the <i>OK</i> button, and then process the service call. <i>No Authorization</i> – You cannot confirm the system message or process service calls that deviate from the coverage time defined in the service contract.
<i>Allow Service Beyond Credit Limit</i>	<ul style="list-style-type: none"> <i>Full Authorization</i> – You can record a service call for a customer that deviates from his or her credit limit (defined by choosing <i>Business Partners</i> → <i>Business Partner Master Data</i> → <i>Payment Terms</i> tab.) The following system message appears: “<i>Customer has passed credit limit</i>”. Confirm the system message by choosing the <i>OK</i> button, and then process the service call. <i>No Authorization</i> – You cannot confirm this message or process service calls for customers who deviate from their credit limit. <p> Note</p> <p>System messages regarding deviations from the credit limit appear only if the <i>Credit Limit</i> checkbox is selected (<i>Administration</i> → <i>System Initialization</i> → <i>General Settings</i> → <i>Sales</i> → <i>Customer Activity Restrictions</i>).</p>
<i>Customer Equipment Card</i>	<ul style="list-style-type: none"> <i>Full Authorization</i> – You can access the <i>Customer Equipment Card</i> window, create new customer equipment cards, and modify existing ones. <i>Read Only</i> – You can view the <i>Customer Equipment Card</i> window. <i>No Authorization</i> – You cannot open the <i>Customer Equipment Card</i> window.
<i>Service Contract</i>	<ul style="list-style-type: none"> <i>Full Authorization</i> – You can access the <i>Service Contract</i> window, define new service contracts, and modify existing ones. <i>Read Only</i> – You can view the <i>Service Contract</i> window. <i>No Authorization</i> – You cannot open the <i>Service Contract</i> window.
<i>Change Status</i>	<ul style="list-style-type: none"> <i>Full Authorization</i> – You can change the status of a service contract by clicking the <i>Status</i> field (<i>Service Contract</i> → <i>General</i> tab) and selecting a status from the dropdown list. <i>No Authorization</i> – You cannot change the status of a service contract.
<i>Solutions Knowledge Base</i>	<ul style="list-style-type: none"> <i>Full Authorization</i> – You can access the <i>Solutions Knowledge Base</i> window, add new solutions, and modify existing ones. <i>Read Only</i> – You can view the <i>Solutions Knowledge Base</i> window. <i>No Authorization</i> – You cannot open the <i>Solutions Knowledge Base</i> window.
<i>Special Solutions Authorizations</i> <i>Change Status</i>	<ul style="list-style-type: none"> <i>Full Authorization</i> – You can change the status of a knowledge base solution by selecting a status from the <i>Status</i> field in the <i>Solutions Knowledge Base</i> window. <i>No Authorization</i> – You cannot change the status of a knowledge base solution.
<i>Service Reports</i>	You can grant full authorization or no authorization for service reports.


Human Resources Module Authorizations


The following modules and functions define the *Human Resources* authorizations:

Field Name	Description
<i>Human Resources</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can open all windows and reports in the <i>Human Resources</i> module. • <i>Read Only</i> – You can view the data in all the windows in the <i>Human Resources</i> module. • <i>No Authorization</i> – You cannot access any window in the <i>Human Resources</i> module. <div>  Note If you select <i>Read Only</i> authorization for the entire <i>Human Resource</i> module, functions for which the <i>Read Only</i> authorization is not available are automatically set to <i>No Authorization</i>. </div>
<i>Employee Master Data</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can access the <i>Employee Master Data</i> window, create new master data for company employees, and modify existing ones. • <i>Read Only</i> – You can view the <i>Employee Master Data</i> window. • <i>No Authorization</i> – You cannot open the <i>Employee Master Data</i> window.
<i>Human Resources Reports</i>	You can grant full authorization or no authorization for the human resources reports.

Reports Module Authorizations

The following modules and functions define the *Reports* authorizations:


Field Name	Description
<i>Reports</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can enter all the windows and reports specified in the <i>Reports</i> module. • <i>Read Only</i> – You can view the data in all the windows specified in the <i>Reports</i> module. • <i>No Authorization</i> – You cannot access any window specified in the <i>Reports</i> module. <div>  Note If you select <i>Read Only</i> authorization for the entire <i>Reports</i> module, functions for which the <i>Read Only</i> authorization is not available are automatically set to <i>No Authorization</i>. </div>
<i>Sales and Purchasing</i> <i>Open Items List</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can open the Open Items List report and view data regarding open documents and missing items • <i>No Authorization</i> – You cannot open this window.
<i>Sales Quotations</i> <i>Sales Orders</i> <i>Deliveries</i> <i>Returns</i> <i>A/R Down Payments</i> <i>A/R Correction Invoices</i> <i>A/R Reserve Invoices</i> <i>Purchase Orders</i> <i>Goods Receipt POs</i> <i>Goods Returns</i> <i>A/P Down Payments</i> <i>A/P Invoices</i> <i>A/P Reserve Invoices</i> <i>Missing Items</i>	You can grant full authorization or no authorization for the different data options available for display in the Open Items List report.

Field Name	Description
<i>Query Generator</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can open the <i>Query Generator</i> window, create new queries, create and edit query categories, and view all the user-defined queries and system queries. • <i>Read Only</i> – You can view user-defined queries only. • <i>No Authorization</i> – You cannot access the <i>Query Generator</i> window and view queries.
<i>New Queries</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can open the <i>Query Generator</i> window and create new queries. When you open this window, a warning message is displayed. If you select <i>OK</i> and you have full authorization, the <i>Query Manager</i> window opens. • <i>No Authorization</i> – You cannot open the <i>Query Generator</i> window.
<i>Create/Edit Categories</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can open the <i>Create/Edit Categories</i> window (<i>Query Manager</i> → <i>Manage Categories</i>), create new categories for your queries, or edit existing ones. • <i>No Authorization</i> – You cannot open the <i>Create/Edit Categories</i> window.
<i>Saved Queries – Group (No. 1- 20)</i>	<p>You 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 (<i>Query Manager</i> → <i>Manage Categories</i> → <i>Authorization Groups</i>). When linking query categories to different authorization groups, it is possible to restrict certain users from running queries in the linked categories.</p> <ul style="list-style-type: none"> • <i>Full Authorization</i> – You can run queries related to categories linked to this authorization group. For example, <i>Full Authorization</i> for <i>Saved Queries – Group No. 1</i> lets you run queries related to query categories linked to authorization group number 1. • <i>Read Only</i> – You can view queries related to this authorization group, but cannot save queries in categories linked to this group. • <i>No Authorization</i> – You cannot view queries linked to this group, nor save queries in categories linked to this authorization group.
<i>Execute Non-select SQL Statement</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can generate nonselect SQL statements. • <i>No Authorization</i> – You cannot generate nonselect SQL statements.
<i>Modify SQL Statement</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> - You can edit the SQL statement in the <i>Display Query Structure</i> field in the <i>Query Generator</i> window by clicking the pencil icon. • <i>No Authorization</i> - You cannot edit the SQL statement in the query, but can view the text in the <i>Query Generator</i> window.
<i>Query Wizard</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can open the <i>Query Wizard</i> window and create new queries. • <i>No Authorization</i> – You cannot use this wizard. <div style="margin-top: 10px;">  Note A user with no authorization for <i>New Queries</i> field cannot open the query wizard. </div>

Field Name	Description
<i>Query Manager</i>	<ul style="list-style-type: none">• <i>Full Authorization</i> - You can modify the query (the pencil is enabled)• <i>Read Only</i> - You can view but not edit the query (the pencil is disabled).• <i>No Authorization</i> - You cannot open the <i>Query Manager</i> window.

User Authorizations

The following modules and functions define the *User* authorizations:

Field Name	Description
<i>User Authorization</i>	<p>You can grant authorizations for user-defined forms.</p> <ul style="list-style-type: none"> • <i>Full Authorization</i> – You can access all forms specified in the <i>User Authorization</i> section. • <i>Read Only</i> – You can view the data in all forms specified in the <i>User Authorization</i> section. • <i>No Authorization</i> – You cannot access any form specified in the <i>User Authorization</i> section. <p> Note</p> <p>To create authorizations for user-defined forms, choose <i>Administration</i> → <i>System Initialization</i> → <i>Authorizations</i> → <i>Additional Authorization Creator</i>.</p> <p>If you do not create any user-defined forms, the <i>User Authorization</i> title is displayed as <i>No User Authorizations</i>.</p> <p>If you select <i>Read Only</i> authorization for the entire <i>User Authorization</i> module, functions for which the <i>Read Only</i> authorization is not available are automatically set to <i>No Authorization</i>.</p>
<i>XL Reporter Tools</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> - You can start XL Reporter from the <i>Tools</i> menu, to compose or edit reports or change the XL Reporter settings. • <i>No Authorization</i> – You cannot access XL Reporter.
<i>XL Reporter Reports</i>	<ul style="list-style-type: none"> • <i>Full Authorization</i> – You can access and run reports that have been generated and placed in the <i>Main Menu</i> by XL Reporter. To access Report Composer and Report Designer (<i>Administration</i> → <i>Setup</i> → <i>General</i> → <i>Users</i>), you must be defined as a <i>Superuser</i>. • <i>No Authorization</i> – You cannot access reports generated by XL Reporter.

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