How to Define Authorizations

Applicable Release: SAP Business One 9.3 and SAP Business One 9.3, version for SAP HANA

SAP

Typographic Conventions

Type Style	Description
Example	Words or characters quoted from the screen. These include field names, screen titles, pushbuttons labels, menu names, menu paths, and menu options. Textual cross-references to other documents.
Example	Emphasized words or expressions.
`EXAMPLE`	Technical names of system objects. These include report names, program names, transaction codes, table names, and key concepts of a programming language when they are surrounded by body text, for example, SELECT and INCLUDE.
`Example`	Output on the screen. This includes file and directory names and their paths, messages, names of variables and parameters, source text, and names of installation, upgrade and database tools.
`Example`	Exact user entry. These are words or characters that you enter in the system exactly as they appear in the documentation.
`<Example>`	Variable user entry. Angle brackets indicate that you replace these words and characters with appropriate entries to make entries in the system.
`EXAMPLE`	Keys on the keyboard, for example, F2 or ENTER.

Document History

Version	Date	Change
1.0	2013-09-02	First version
1.1	2018-11-28	• UDFs were added to the Determination Criteria - Inventory window • The screenshot of window Determination Criteria - Inventory was updated in section 2.1 • Screenshot and information were updated in section 2.3
1.2	2019-10-30	• Updates and corrections from Chapter 2 to Chapter 20 • Added steps for setting up authorizations for system queries

Table of Contents

1   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 and user groups 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.

2 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.
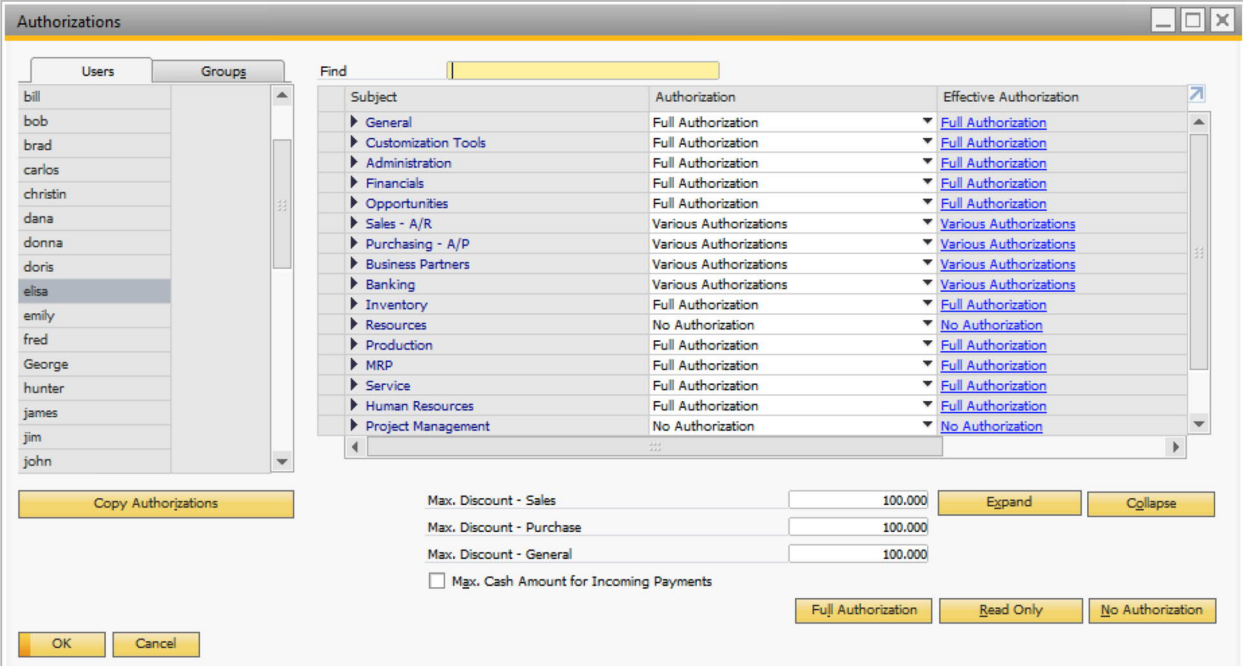
To open the Authorizations window, proceed as follows:

From the SAP Business One Main Menu, choose Administration → System Initialization → Authorizations → General Authorizations.

You can define the authorizations for either an individual user, or a group of users with Authorization group type.

2.1 Authorizations for Users

To define authorizations for a user, select the user on the Users tab on the left side of the window,

Authorizations					□ ×
Users	**Groups**	Find			
bill		Subject	Authorization	Effective Authorization	↗
bob		▶ General	Full Authorization ▼	Full Authorization	
brad		▶ Customization Tools	Full Authorization ▼	Full Authorization	
carlos		▶ Administration	Full Authorization ▼	Full Authorization	
christin		▶ Financials	Full Authorization ▼	Full Authorization	
dana		▶ Opportunities	Full Authorization ▼	Full Authorization	
donna		▶ Sales - A/R	Various Authorizations ▼	Various Authorizations	
doris		▶ Purchasing - A/P	Various Authorizations ▼	Various Authorizations	
elisa		▶ Business Partners	Various Authorizations ▼	Various Authorizations	
emily		▶ Banking	Various Authorizations ▼	Various Authorizations	
fred		▶ Inventory	Full Authorization ▼	Full Authorization	
George		▶ Resources	No Authorization ▼	No Authorization	
hunter		▶ Production	Full Authorization ▼	Full Authorization	
james		▶ MRP	Full Authorization ▼	Full Authorization	
jim		▶ Service	Full Authorization ▼	Full Authorization	
john		▶ Human Resources	Full Authorization ▼	Full Authorization	
		▶ Project Management	No Authorization ▼	No Authorization	

Copy Authorizations

Max. Discount - Sales	100.000	**Expand**	**Collapse**
Max. Discount - Purchase	100.000		
Max. Discount - General	100.000		

☐ Max. Cash Amount for Incoming Payments

Full Authorization **Read Only** **No Authorization**

OK **Cancel**

Defining Authorization Profiles for a Certain User

In the Authorization column, select one of the following options for the corresponding subject displayed in the Subject column:

- Full Authorization: grant full authorizations to the user for the subject
- Read-Only: the user can display all data of the subject but cannot make any changes to it
- No Authorization: the user is unable to display or change any data of the subject

Effective Authorization for a User

This column displays the resultant authorization that the current user has over the subject. It is the highest level of authorization that is applied to the user considering the authorization defined for it and the user group or groups it belongs to.

> **Example**
>
> User U0001 is assigned to User Group A and User Group B. For a particular permission subject:
> - U0001 authorization = Read-Only
> - User Group A authorization = Full
> - User Group B authorization = No Authorization
>
> As a result, the effective authorization = Full

> **Note**
>
> The authorizations at the window level have the highest priority over those at the field, tab or other sub-levels. When a specific window is inaccessible to a user, the user cannot access any elements of the window, unless the user has the authorization of an authorized user and can provide credentials of the authorized user in the Permission override window that pops up.

2.2   Authorizations for User Groups

To define authorizations for a user group, select a user group on the Groups tab on the left side of the window,
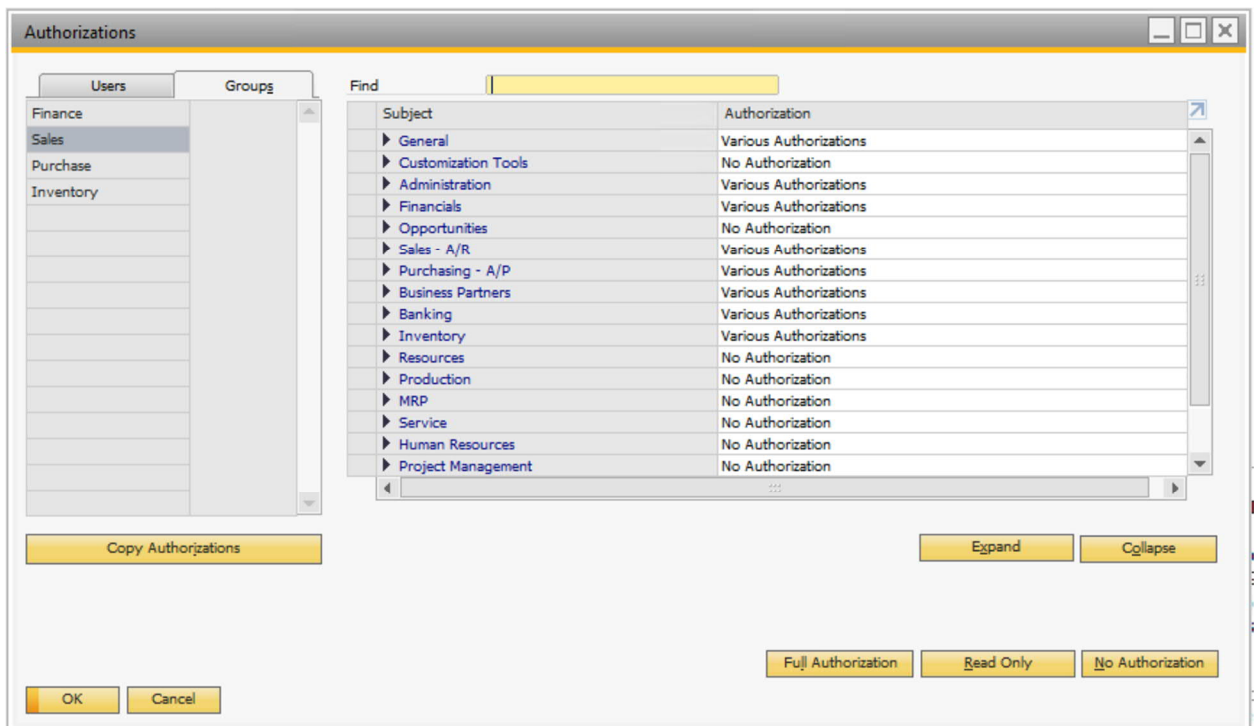
Defining Authorization Profiles for a User Group

In the Authorization column, select one of the following options for the corresponding subject displayed in the Subject column:

- Full Authorization: grant full authorizations to all users in the group for the subject
- Read-Only: all users in the group can display all data of the subject but cannot make any changes to it
- No Authorization: all users in the group are unable to display or change any data of the subject

2.3 Copying Authorization Profiles from One User to Another

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

Prerequisite

Ensure that the users are already defined in the company.

> **i** 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.
5. The second user now has the same authorizations as the first.
6. 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:

  o 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.

  o 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.

3 General Authorizations

The following modules and functions define the General authorizations:

Field Name	Description
General	• Full Authorization – Users can enter all General functions and make required changes or new settings. • Read Only – Users can view the data defined in all the General functions. • No Authorization – Users cannot access any option specified in the General functions. **i Note** If you select the Read Only authorization for the entire list of General functions, the authorizations for its child items without the Read Only option are automatically set to No Authorization.
Send Message	• Full Authorization – Users can open the Send Message window (File → Send →Send Message) and send messages. • Read Only – Users can open the Send Message window but cannot send messages. **i Note** 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. To save a distribution list when sending e-mails or SMS messages, authorization for the document settings (Administration →System Initialization) is required. The Read Only authorization gives users the ability to view a saved distribution list. With full authorization, users can save a new distribution list. • No Authorization – Users cannot open the Send Message window.
Print Layout Designer	• Full Authorization – Users can use the Print Layout Designer functions, such as modifying existing print templates and creating new print templates, for sales and purchasing documents. • No Authorization – Users cannot use the Print Layout Designer functions.

Field Name	Description
Change Default Report	• **Full Authorization** – Users can layout change the default print currently defined for a certain document or report. • **No Authorization** – Users cannot change the default print layout currently defined for a certain document or report.
Query Print Layout	• **Full Authorization** – Users can open the Query Print Layout window and modify the user-defined query print template. **i Note** To open a template, you need authorization for Print Layout Designer. To print the query, you require authorization in the Sales module for document printing. To create a new query print layout, you require Read Only or Full Authorization for the query generator, query manager and for Saved Queries – Group No. 1, 2, and so on. • **No Authorization** – Users cannot open the Query Print Layout window.
Form Settings	• **Full Authorization** – Users can open the Form Settings window (Tools →Form Settings) and modify data. For example, Users can determine which columns to be displayed, determine whether the columns will be active or not, or change the system default values for fields such as Sales Employee, Price List and Discount. **i Note** o To modify the Sales Employee field in a marketing document through Form Settings (or directly in the document) when adding the document, authorization for Sales - AR → Change Sales Employee is required. o To update the Sales Employee field through Form Settings when updating a marketing document, authorization for Sales - AR → Sales Employee Update is required. o The Price List dropdown list in Form Settings displays only price lists in the price list group for which you have read only or full authorization. o To set a discount in Form Setting (or directly in the document header or document row), you must first define the Max. Discount - Sales value and/or the Max. Discount - Purchase value in the Authorizations window. • **No Authorization** – Users cannot access the Form Settings window (Tools →Form Settings).

Field Name	Description
Access to Confidential Accounts	• Full Authorization – Users can view G/L accounts marked as Confidential (Financials → Chart of Accounts → Confidential field); you also must have Read Only or Full Authorization rights for the chart of accounts. • No Authorization – Users 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 Choose From lists displaying G/L accounts. ℹ Note Users without authorizations for confidential accounts but with authorizations for journal entries/documents can view journal entries/documents posted to the accounts.
Account Balances	• Full Authorization – Users can view the balances of G/L accounts in the chart of accounts and generate reports with account balance data; you also must have Read Only or Full Authorization rights for the chart of accounts. • No Authorization – Users cannot view data about G/L accounts in financial reports, such as the General Ledger report.
BP Balances	o Full Authorization – Users can view the balances of business partners displayed in the Business Partner Master Data window and in the Account Balance window. You also require Read Only or Full Authorization 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. o No Authorization – Users cannot view data for business partners or in financial reports such as the General Ledger report. In addition, the Account Balance field in the Business Partner Master Data window displays asterisks (****) instead of the actual balance. ℹ Note If users have no authorizations to view business partner balances, you must also prevent them from viewing the following: o All documents and reports related to the business partner by which the balances can be concluded, including marketing documents, journal entries and transaction journals. o Accounts balances (chart of accounts) by which the business partner balances can be concluded when the accounts transactions that involve business partners can be viewed.

Field Name	Description
Access to Masked Data	• Full Authorization – Users can view and modify the masked data. • Read-Only – Users can view but cannot modify the masked data. • No Authorization – Users can view but cannot modify the masked data. Available in Korea only: • Full Authorization – Users can view and modify the actual values of the masked data. • Read-Only – Users can view but cannot modify the actual values of the masked data. • No Authorization – Users can view fully/partially masked data only.
Employee ID No.	• Full Authorization – Users can view and modify the Employee ID No. • Read-Only – Users can view but cannot modify the Employee ID No. • No Authorization – Users can view but cannot modify the Employee ID No.
Employee Passport No.	• Full Authorization – Users can view and modify the Employee Passport No. • Read-Only – Users can view but cannot modify the Employee Passport No. • No Authorization – Users can view but cannot modify the Employee Passport No.
BP ID No. 2	• Full Authorization – Users can view and modify the BP ID No. 2. • Read-Only – Users can view but cannot modify the BP ID No. 2. • No Authorization – Users can view but cannot modify the BP ID No. 2.
Unformatted Text	• Full Authorization – Users can export data in XML format. You also require authorization for the relevant functions and documents. • No Authorization – Users cannot export data in XML format.

MS–EXCEL	• Full Authorization – Users can export data to Microsoft Excel. You also require authorization for the related functions.
	• No Authorization –The Export to Microsoft Excel icon ![icon] and the File → Export →MS-Excel menu are disabled.
	
	   i Note
	
	   If you have no authorizations except for Export to MS-Excel, only the main menu and the MS Excel icon are active when

Field Name	Description
	you open SAP Business One. Note that the main menu is not exported to MS Excel
MS–WORD	• Full Authorization – Users can export documents, letters, and reports to Microsoft Word. • No Authorization – The Export to Microsoft Word icon [W] is not active for you.
Period Status: Unlocked Except Sales	• Full Authorization – Users can add documents even when the posting period status is Unlocked Except Sales. You must have authorization to add the relevant document. • No Authorization – Users cannot add documents when the posting period status is Unlocked Except Sales.
Period Status: Closing Period	• Full Authorization – Users can add documents even when the posting period status is Closing Period. You must have authorization to add the relevant document. • No Authorization – Users cannot add documents when the posting period status is Closing Period.
Launch Application	• Full Authorization –Users can open the Launch Application window and run external applications. • No Authorization –Users cannot open the Launch Application window. The Launch Application icon and the File → Launch Application menu are disabled.
Drag & Relate	• Full Authorization – Users can access and use the Drag & Relate tab functions (Main Menu → Drag & Relate tab). You can grant authorizations for specific Drag & Relate categories to different users. For example, a user can be authorized for Sales – A/R but not for Financials. • No Authorization – The Drag & Relate tab is not displayed in the Main Menu, even if you have full authorization for the Drag & Relate subcategories. o To provide authorization for Drag & Relate functions for certain modules only, grant full authorization to the Drag & Relate category, and then set No Authorization for those modules from which the user should be excluded.
Sales – A/R	• Full Authorization – Users can access and use the Drag & Relate tab functions for Sales A/R. • No Authorization – Users cannot use the Drag & Relate functions for the Sales A/R module. o To open documents and the Item Master Data window, you require either Read Only or Full Authorization rights for the business partner master data.
Purchasing – A/P	• Full Authorization – Users can access and use the Drag & Relate tab functions for the Purchasing A/P module.

Field Name	Description
	• No Authorization – Users cannot use the Drag & Relate functions for the Purchasing A/P module. o To open documents and the Item Master Data window, you also require either Read Only or Full Authorization rights for the business partner master data.
Business Partners	• Full Authorization – Users can access and use the Drag & Relate tab functions for business partner information. • No Authorization – Users cannot use the Drag & Relate functions for business partner information. o You need authorization for Business Partner Master Data to open activities, and Read Only or Full Authorization is also required to set up and use the payment terms (Administration → Setup→ Business Partners → Payment Terms).
Inventory	• Full Authorization – Users can access and use the Drag &Relate tab functions for the Inventory module. • No Authorization – Users cannot use the Drag & Relate functions for inventory information. To open the Item Master Data window or the Bill Of Materials window, you require either Read Only or Full Authorization rights for item groups, warehouses, and manufacturers. You also require Read Only or Full Authorization for the setup of the item groups, warehouses, and manufacturers (Administration→Setup → Inventory).
Production	• Full Authorization – Users can access and use the Drag & Relate tab functions for the Production module. To open the production order from within the Drag & Relate tab, you require Read Only or Full Authorization. • No Authorization – Users cannot use the Drag & Relate functions for production information.
Financials	• Full Authorization – Users can access and use the Drag & Relate tab functions for the Financials module. You also require authorization for the chart of accounts and the journal entry. • No Authorization – Users cannot use the Drag & Relate functions for financials information.
Service	• Full Authorization – Users can access and use the Drag & Relate tab functions for the Service module. You also require Read Only or Full Authorization to open the service contract, service call, and customer equipment card. • No Authorization – Users cannot use the Drag & Relate functions for service information.
Renaming Fields	• Full Authorization – Users can open the Change Description window and change field names (CTRL+ double-click a field

Field Name	Description
	name). You also require authorization for the relevant document. • No Authorization – Users cannot open this window.
Access Log	• Full Authorization – Users can open the Access Log window (Tools → Access Log) to view the access details of the different users. • No Authorization – Users cannot open this window.
Change Log	Users can open the Change Log window (Tools → Change Log) from various windows. • Full Authorization – Users can access the Change Log window. You also require authorization for the relevant forms. • No Authorization – Users cannot open this window.
Edit Form UI	• Full Authorization – Users can enter the Edit Form UI mode and modify a form (Tools → Edit Form UI). • No Authorization – Users cannot enter the Edit Form UI mode.
Organize My Menu	• Full Authorization – Allows you to access the Organize My Menu window (Tools → My Menu → Organize) and customize the menu. • No Authorization – Users cannot open this window.
Cancel Marketing Documents by Generating Cancellation Documents	• Full Authorization- Users can generate cancellation documents • No Authorization Users cannot generate cancellation documents
Cancel Other Documents	• Full Authorization- Users can Cancel documents which don't generate journal entries, such as sales/purchase orders or quotations. • No Authorization- Users cannot Cancel documents which don't generate journal entries, such as sales/purchase orders or quotations.
Close Document	• Full Authorization – Users can close documents such as sales/purchase quotations, sales/purchase orders, delivery and returns (Data →Close), if Close is an option for the documents. • No Authorization – Users cannot close the documents.
Change Field Labels	This entry doesn't work anymore. It is now replaced by Renaming Fields.
Document Manual Numbering	• Full Authorization - Users can determine whether to manually number a document. • No Authorization - Users cannot determine whether to manually number a document.

Field Name	Description
Relationship Map	• Full Authorization – Users can open the Relationship Map window (Go to → Relationship Map) to see a visual of an object's relations with other objects. • No Authorization - Users cannot open this window.

Translations	• Full Authorization – Users can click the 🌐(Globe) icon in a translatable field, or right click the field and choose Translate, to open the Translations window and translate the field value into multiple languages.
	• Read-Only – Users can open the Translations window but cannot add or edit any item.
	• No Authorization – Users cannot open the Translations window.
	
	   ⓘ Note
	   These authorizations are available only when you have enabled Multi-Language Support from the Administration → System Initialization → Company Details → Basic Initialization tab.

Future Posting Date in Documents	• Full Authorization – Users can enter a future posting date in sales and purchasing documents if Allow Future Posting Date checkbox is selected (Administration → System Initialization → Document Settings). • No Authorization – Users cannot enter future posting dates.
Logger Settings	• Full Authorization – Users can open the Logger Settings window (Help → Support Desk) to log file parameters. • No Authorization - Users cannot open the Logger Settings window. The window is disabled.
Electronic File Manager	• Full Authorization – Users can open the Electronic File Manager window ((Administration → Setup → General)) to design electronic format solutions. • No Authorization - Users cannot open this window.
SAP HANA Database Client Enablement	• Full Authorization- Users can view and modify the checkbox status. • Read Only- Users can view the checkbox but cannot modify the checkbox status. • No Authorization- Users cannot view or modify the checkbox status.
Disable DI API Permission Check	• Full Authorization – Your authorizations are ignored in the DI API and no requests from DI API check permissions, which means all permissions are granted. • No Authorization – Your authorizations are applied in the DI API.

4 Customization Tool Authorizations

The following modules and functions define the Customization Tools authorizations:

Field Name	Description
Customization Tools	- Full Authorization – Users can use all the functions available under the Customization Tools and make required changes or define new settings. - Read Only –Users can view the data defined in all the Customization Tools. - No Authorization – Users cannot access any option under the Customization Tools. **i** Note If you select the Read Only authorization for the Customization Tools menu, the authorizations for its child items without the Read Only option are automatically set to No Authorization.
User-Defined Values - Setup	You require authorization for the relevant windows. To have authorization to queries in the Query Manager, you must have authorizations for Query Manager and the "Saved Queries - Group No. X" fields (Reports → Query Generator → Saved Queries - Group No. X). - Full Authorization – Users can create and search for user-defined values in many fields in SAP Business One (Tools → Customization Tools → User-Defined Values). - Read Only – Users can view existing formatted searches but cannot modify them. - No Authorization – Users cannot define or view formatted searches.
User-Defined Fields - Management	- Full Authorization –Users can view, modify and create user–defined fields (Tools → Customization Tools → User–Defined Fields Management). - No Authorization – Users cannot open this window.
Execute Commands	Available for Israel only.

Field Name	Description
	• Full Authorization –Users can access the Execute Commands window (Administration → Utilities → Execute Commands) and execute commands written as macros. • Read Only – Users cannot open this window. • No Authorization – Users cannot open this window.
User–Defined Object Registration	• Full Authorization – Users can access the user-defined objects registration wizard (Tools → Customization Tools → Objects Registration Wizard). Users 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. • No Authorization – Users cannot view or open the wizard.

5 Administration Module Authorizations

The following modules and functions define the Administration authorizations:

Field Name	Description
Administration	• Full Authorization – Users can enter all Administration module functions and make required changes or new settings. • Read Only –Users can view the data defined in the Administration module. • No Authorization – Users cannot access any of the functions in the Administration module. ⓘ Note If you select the Read Only authorization for the entire Administration module, the authorizations for its child items without the Read Only option are automatically set to No Authorization.
Exchange Rates and Indexes	• Full Authorization – Users can open the Exchange Rates and Indexes window (Administration → Exchange Rates and Indexes) and enter relevant exchange rates. With this authorization, the Exchange Rates and Indexes window opens automatically when users try to add a document for which any exchange rate is not defined. • Read Only – Users can view the data in the Exchange Rates and Indexes window. • No Authorization – Users cannot open the Exchange Rates and Indexes window. ⓘ Note With read only or no authorization, users cannot create a document if the exchange rate on the creation date (if required) is not defined. This is because the users are not authorized to update the Exchange Rates and Indexes window. If you have already defined an exchange rate for that date, this setting has no effect.
System Initialization	Controls your access to the functions in the System Initialization menu. The authorizations selected in the System Initialization 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:

Field Name	Description
	• **Full Authorization** – Users can enter all functions located in the System Initialization menu and make changes or create new settings. • **Read Only** – Users can view the data defined in all the functions located in the System Initialization submenu. • **No Authorization** – Users cannot access any function located in the System Initialization menu.
Company Details	• **Full Authorization** – Users can enter the Company Details window and make required settings or modifications. • **Read Only** – Users can view the Company Details window. • **No Authorization** – Users cannot open the Company Details window.
Allow Stock Release Without Item Cost	This feature is available only when the Use Perpetual Inventory checkbox on the Company Details → Basic Initialization tab is selected. • **Full Authorization** – Users can select the Allow Stock Release Without Item Cost checkbox (Company Details → Basic Initialization). Authorization for the Company Details window is also required. • **No Authorization** – Users cannot select this checkbox.
Mask Credit Card Number	• **Full Authorization** – Users can select the Mask Credit Card Number checkbox (Company Details → Basic Initialization). Authorization for the Company Details window is required. • **No Authorization** – Users cannot select this checkbox. **ⅈ Note** As of SAP Business One 9.3 PL04, this authorization doesn't work anymore. The checkbox is selected by default and always disabled.
General Settings	• **Full Authorization** – Users can make changes or create new settings on all tabs of the General Settings window. To grant authorization to define default payment terms, authorization is also required for payment terms setup (Administration → Setup → Business Partner → Payment Terms) and Read Only authorization is required for the price lists (in Inventory). • **Read Only** – Users can view the data defined in the various tab pages of the General Settings window. • **No Authorization** – Users cannot open the General Settings window.
Cash Flow	• **Full Authorization** – Users can define the global settings for assigning Cash Flow line items to Cash Flow relevant transactions. • **Read Only** – Users can view the settings of the Cash Flow tab.

Field Name	Description
	• No Authorization – The Cash Flow tab is not displayed in the General Settings window.
VAT Report Settings	This authorization is available for Korean localizations only. • Full Authorization – Users can view and update the settings on the VAT tab in the Administration → System Initialization → Company Details → General Settings window. The VAT tab is visible only when the Extended Tax Reporting checkbox on the Administration → System Initialization → Company Details → Accounting Data tab is selected. • Read Only - Users can view the settings of the VAT Report. • No Authorization – The VAT tab is not displayed in the General Settings window.
Map Services	• Full Authorization – Users can define new Map Services (General Settings → Services tab). Authorization for the General Settings window is required. • No Authorization – Users cannot define new Map Services.
Posting Period	You open this window by choosing General Settings → Posting Periods tab → New Period or by clicking the link arrow next to one of the posting periods in the table. • Full Authorization – Users can enter the Posting Period window and make settings or modifications on condition that they have Full Authorization for Change Period Status. • Read Only – Users can view the Posting Period window on condition that they have Full Authorization for Change Period Status. • No Authorization – Users cannot open the Posting Period window.
Change Period Status	• Full Authorization – Users can change the period status of the posting period, including locking it (Administration → System Initialization → Posting Period → Posting Period window). • No Authorization – You are unable to change the period status.
Document Numbering	• Full Authorization – Users can enter the Document Numbering window and define a numbering series. • Read Only – Users can view the Document Numbering window. • No Authorization – Users cannot view the Document Numbering window. **i** Note The authorization for a user or user group to use a specific numbering series to generate a document is set under the category Administration → System Initialization → Numbering Series → Series - Group No. X.

Field Name	Description
Document Settings	• Full Authorization – Users can enter the Document Settings window and make settings or modifications. You also require Read Only or Full Authorization rights for the Price Lists. • Read Only – Users can view the Document Settings window. • No Authorization – Users cannot open the Document Settings window.
Max. Under / Over Payment	This authorization is not applicable anymore.
Allow Future Posting	• Full Authorization – Users can select or deselect the Allow Future Posting Date checkbox (Document Settings → General tab). • No Authorization – Users cannot change this selection.
Print Preferences	• Full Authorization – Users can enter the Print Preferences window and make required settings or modifications. • Read Only – Users can view the Print Preferences window. • No Authorization – Users cannot open the Print Preferences window.
Menu Alias for Searching	• Full Authorization – Users can define a menu alias for searching from Administration → System Initialization → Menu Alias for Searching. • No Authorization – Users cannot open the Menu Alias for Searching window
Menu Structure	• Full Authorization – Users can define the menu structure. • No Authorization – Users cannot open the Menu Structure window.
Opening Balances	• Full Authorization – Users can enter opening balances for G/L accounts, business partners, and 1099 form or box. • Read Only – Users can view the Opening Balance windows only. • No Authorization – Users cannot access these options.
G/L Accounts Opening Balance	• Full Authorization – Users can open the G/L Accounts Opening Balance window and record data. • No Authorization – Users cannot access this window.
Business Partners Opening Balance	• Full Authorization – Users can open the Business Partners Opening Balance window and record relevant data. • No Authorization – Users cannot access this window.
1099 Opening Balance	Relevant only for the United States localization. • Full Authorization – Users can open the 1099 Opening Balance window and enter data. • Read Only – Users cannot access the 1099 Opening Balance window.

Field Name	Description
	• No Authorization – Users cannot open the 1099 Opening Balance window.
Numbering Series	• Full Authorization – When users generate a document, they can view a complete list of numbering series defined for the document and select one of them. • Read Only – Users cannot access any document. • No Authorization – Users cannot access any document. ⚠️ Caution If no authorization is granted to the Numbering Series option, a user cannot access any document in SAP Business One. We recommend that you grant authorizations for series groups as described below. If No Authorization is granted to any numbering series groups, the user does not have access to any documents, even if the document numbering series has been defined correctly. If Read Only is granted at the header level, then No Authorization is granted to all the series groups and Read Only is applied only to locked series. In such a case, the series groups have No Authorization or Full Authorization.
Series Lock	• Full Authorization – Users can select the Lock option for fields in the Series - <Document Type> - Setup window. • Read Only – Users cannot select the Lock option for fields in the Series - <Document Type> - Setup window. • No Authorization – Users cannot select the Lock option for fields in the Series - <Document Type> - Setup window.

Series – Group No. 1 - 10	This authorization works as follows:
	
	1. In the Document Numbering - Setup window, select a type of document and define a default numbering series.
	
	2. Double click the empty row header of the document and assign a series group number, for example, 1, to the numbering series in the Group field of the Series - <Document Type> - Setup window.
	
	3. Assign one of the following authorizations for the series group Series – Group No. 1 to a certain user or user group:
	
	   o Full Authorization – When generating a document, the user or user group can view and select the series group in the series list.
	
	   o No Authorization – The user or user group cannot access or create a document assigned to this group.

Field Name	Description
	ⅈ Note This setting affects the use of the Group field in the Document Numbering - Setup window.
Copy from Unauthorized Series Group	• Full Authorization – When users use the Copy From functionality, they can view documents with a series group for which they have no authorization in the document list. • No Authorization – Users cannot view documents with a series group for which they have no authorization.
E-Mail Settings	• Full Authorization – Users can open the E-Mail Settings window and set up the E-Mail signatures. • Read Only – Users can view the E-Mail Settings window. • No Authorization – Users cannot open this window.
Implementation Tasks	Select Full or No Authorization for all of the child authorizations under Implementation Tasks.
Implementation Tasks	• Full Authorization- Users can access and modify data in the Implementation Tasks window. • No Authorization- Users cannot access the Implementation Tasks window.
Implementation Project	• Full Authorization- Users can open the Implementation Project menu and work with the Edit and View tabs presented. • Read Only- Users can view the Implementation Project window. • No Authorization- Users cannot open the Implementation Project window.
Tooltip Preview	• Full Authorization – Users can access and modify Tooltip Preview. • No Authorization – Users cannot access Tooltip Preview.
Setup	Select Full, Read Only, or No Authorization for all of the child authorizations under Setup.
General	Only Superusers can modify the Password window and the password definitions in the Users-Setup window. Select Full, Read Only, or No Authorization for all of the child authorizations under General.
Users	• Full Authorization- Users can create, delete and modify the Users- Setup window • Read Only - Users can view the Users-Setup window • No Authorization- Users cannot access the Users-Setup window
Change My Personal Settings	• Full Authorization – Users can view and change their personal settings.

Field Name	Description
	• Read Only – Users can view their personal settings only. • No Authorization – Users cannot view their personal settings.
User Defaults	• Full Authorization- Users can create, delete and modify User Defaults in the User Defaults window • Read Only - Users can view the User Defaults window • No Authorization- Users cannot access the User Defaults window
Sales Employees/Buyers	• Full Authorization- Users can create, delete and define Sales Employees and Buyers- in the Sales Employees/ Buyers-Setup window • Read Only - Users can view the Sales Employees/ Buyers-Setup window • No Authorization- Users cannot access the Sales Employees/ Buyers-Setup window
Territories	• Full Authorization- Users can view and add territories in the Territories- Setup window • Read Only - Users can view the Territories- Setup window • No Authorization- Users cannot access the Territories- Setup window
Commission Groups	• Full Authorization- Users can view and access Commission Groups • Read Only- Users can view Commission Groups • No Authorization- Users cannot access the Commission Groups
Predefined Text	• Full Authorization- Users can access and modify the Predefined Text-Setup window • Read Only - Users can view the Predefined Text-Setup window • No Authorization- Users cannot access the Predefined Text-Setup window
Reference Field Links	• Full Authorization- Users can access and modify Reference Field Links • Read Only - Users can view Reference Field Links • No Authorization- Users cannot access Reference Field Links
Freight	• Full Authorization- Users can access and modify the Freight-Setup window • Read Only - Users can view the Freight-Setup window • No Authorization - Users cannot access the Freight-Setup window
Message Preferences	• Full Authorization – Users can access and modify the Message Preferences window and can set their preferences for some

Field Name	Description
	system messages with the checkbox Remember My Answer and Do Not Show this Message Again. • No Authorization – Users cannot access the Message Preferences window or set preferences for system messages.
Report and Layout Manager	• Full Authorization - Users can access and generate Report and Layout Manager • No Authorization - Users cannot access Report and Layout Manager
Dashboard Manager	• Full Authorization - Users can access the Dashboard Manager-Setup window • No Authorization - Users cannot access the Dashboard Manager Set-up window
Dashboard Parameters	• Full Authorization-- Users can access Dashboard Parameters • No Authorization-- Users cannot access Dashboard Parameters
Crystal Server Configuration	• Full Authorization-- Users can access Crystal Server Configuration • No Authorization-- Users cannot access Crystal Server Configuration
SAP Links	• Full Authorization-- Users can view and access SAP Links • Read Only -- Users can view SAP Links • No Authorization--Users cannot access SAP Links
SAP HANA Model Management	• Full Authorization – Users can access and modify the window. • No Authorization – Users cannot access the window.
Financials	Select Full, Read Only, or No Authorization for all of the child authorizations under Financials.
Edit Chart of Accounts	• Full Authorization- Users can access and edit the chart of accounts in the Edit Chart of Accounts window • Read Only- Users can view the Edit Chart of Accounts window • No Authorization- Users cannot access the Edit Chart of Accounts window
G/L Account Determination	To define G/L account determination, full authorization for Sales - Allow Changes to Reconciliation Accounts is required, which lets you access the Allow Changes to Control Accounts option.
G/L Account Determination	• Full Authorization- Users can access all tabs and modify the G/L Account Determination • Read Only- Users can view the G/L Account Determination window • No Authorization- Users cannot view or modify the G/L Account Determination

Field Name	Description
Determination Criteria - Inventory	• Full Authorization- Users can view and select criteria in the Determination Criteria- Inventory window • Read Only- Users can view the Determination Criteria - Inventory window • No Authorization- Users cannot access the Determination Criteria - Inventory window
Determination Criteria - Resources	• Full Authorization- Users can view and select criteria in the Determination Criteria- Resources window • Read Only- Users can view the Determination Criteria - Resources window • No Authorization- Users cannot access the Determination Criteria - Resource window
Account Segmentation	• Full Authorization- Users can view and update the Account Segmentation-Setup window • Read Only - Users can view the Account Segmentation- Setup window • No Authorization- Users cannot access the Account Segmentation-Setup window i Note This window is visible only when the checkbox Use Segmentation Accounts on the Company Details → Basic Initialization tab is selected.
Currencies	• Full Authorization- Users can view and update the Currencies Setup window. • Read Only- Users can view the Currencies Setup window • No Authorization- Users cannot access the Currencies Setup window
Indexes	• Full Authorization- Users can add and modify Indexes in the Exchange Rates and Indexes window • Read Only - Users can view the Exchange Rates and Indexes window • No Authorization- Users cannot view or modify Indexes in the Exchange Rates and Indexes window
Transaction Codes	• Full Authorization- Users can modify and add to the Transaction Codes- Setup window • Read Only - Users can view the Transaction Codes- Setup window • No Authorization- Users cannot view or modify the Transaction Codes-Setup window

Field Name	Description
Projects	• Full Authorization- Users can modify and add to the Project-Setup window • Read Only- Users can view the Projects-Setup window • No Authorization- Users cannot view or modify the Projects-Setup window
Period Indicators	• Full Authorization- Users can view and modify the Period Indicators-Setup window • Read Only - Users can view the Period Indicators- Setup window • No Authorization- Users cannot access the Period Indicators-Setup window
1099 Table	• Relevant only for the United States localization. • Full Authorization — Users can open the 1099 Table, enter data and access 1099 Boxes. • Read Only — Users can view the 1099 Table. • No Authorization — Users cannot access the 1099 Table
Doubtful Debts	• Full Authorization- Users can add, delete and modify the data in the Doubtful Debts-Setup window • Read Only -Users can view the Doubtful Debts-Setup window • No Authorization- Users cannot access the Doubtful Debts-Setup window
Tax	Select Full, Read Only, or No Authorization for all of the child authorizations under Tax.
Tax Code Determination	• Full Authorization - Users can access and modify the Tax Code Determination- Setup window • Read Only - Users can view the Tax Code Determination-Setup window • No Authorization- Users cannot access the Tax Code Determination-Setup window
Sales Tax Jurisdiction Types	• Full Authorization — Users can access and modify the Sales Tax Jurisdiction Types window. • Read Only — Users can view the Sales Tax Jurisdiction Types window only. • No Authorization — Users cannot access the Sales Tax Jurisdiction Types window.
Sales Tax Jurisdictions	• Full Authorization- Users can access and define jurisdiction from the Sales Tax Jurisdictions-Selection Criteria window • Read Only - Users can view the Sales Tax Jurisdictions-Selection Criteria window • No Authorization- Users cannot access the Sales Tax Jurisdictions-Selection Criteria window

Field Name	Description
Sales Tax Codes	• Full Authorization- Users can access and modify the Sales Tax Codes-Setup window • Read Only - Users can view the Sales Tax Codes-Setup window • No Authorization- Users cannot access the Sales Tax Codes-Setup window
Fixed Assets	• Full Authorization- Users can view and modify the fixed assets setup • Read Only - Users can view the fixed assets setup • No Authorization- Users cannot access the fixed assets setup i Note The authorizations for Fixed Assets and the related windows are available only when the checkbox Enable Fixed Assets on the Administration → System Initialization → Company Details → Basic Initialization tab is selected.
Account Determination	• Full Authorization- Users can view and modify the Account Determination window • Read Only - Users can view the Account Determination window • No Authorization- Users cannot access the Account Determination window
Depreciation Types	• Full Authorization- Users can view and modify the Depreciation Types window • Read Only - Users can view the Depreciation Types window • No Authorization- Users cannot access the Depreciation Types window
Depreciation Areas	• Full Authorization- Users can view and modify the Depreciation Areas window • Read Only - Users can view the Depreciation Areas window • No Authorization- Users cannot access the Depreciation Areas window
Asset Classes	• Full Authorization- Users can view and modify the Asset Classes window • Read Only - Users can view the Asset Classes window • No Authorization- Users cannot access the Asset Classes window
Attribute Groups	• Full Authorization- Users can view and modify the Attribute Groups window • Read Only - Users can view the Attribute Groups window • No Authorization- Users cannot access the Attribute Groups window

Field Name	Description
Cash Flow Line Items	• Full Authorization- Users can add and select Cash Flow Line Items from the Cash Flow Line Items-Setup window • Read Only Users can view Cash Flow Line Items- Setup window • No Authorization- Users cannot access Cash Flow Line Items-Setup window
Financial KPI Factors (version for SAP HANA)	• Full Authorization- Users can view and modify the Financial KPI Factors window • Read Only - Users can view the Financial KPI Factors window • No Authorization- Users cannot access the Financial KPI Factors window
Expense Types	• Full Authorization- Users can view and modify the Expense Types window • Read Only - Users can view the Expense Types window • No Authorization- Users cannot access the Expense Types window
Opportunities	• Full Authorization – Users can enter all the functions specified in the Opportunities module and make required changes or new settings. You also require full authorization for the sales stages, as defined in the authorizations in Administration → Setup → Opportunity. You require authorization for the Close Document function (in General Authorizations), even if authorization is not provided for setting up and viewing documents in these modules. Therefore, on the Opportunity Stages tab, when closing a row (before opening a new row), you first may have to close a document linked to that stage. • Read Only – Users can view the data defined in all the functions specified in the Opportunities module. • No Authorization – Users cannot access any option specified in the Opportunities module.
Opportunity Stages	• Full Authorization-- Users can view, add and delete Opportunities Stages in the Opportunities Stages- Set-up window • Read Only - Users can view the Opportunities Stages- Setup window • No Authorization- Users cannot access the Opportunities Stages- Setup window
Partners	• Full Authorization- Users can add, modify and delete from the Partners-Setup-Window • Read Only- Users can view the Partner-Setup window • No Authorization- Users cannot access the Partner Setup window

Field Name	Description
Competitors	- Full Authorization-Users can add, modify and delete from the Competitors-Setup window - Read Only - Users can view the Competitors-Setup window - No Authorization- Users cannot access the Competitors-Setup window
Relationships	- Full Authorization- Users can view and add to the Relationships-Setup window - No Authorization- Users cannot view or modify the Relationships- Setup window
Sales (version for SAP HANA)	Select Full, Read Only, or No Authorization for all of the child authorizations under Sales.
ATP Checking Rule List (version for SAP HANA)	- Full Authorization - You can view and modify the ATP Checking Rule List window - Read Only - You can view the ATP Checking Rule List window - No Authorization - you cannot access the ATP Checking Rule List window ℹ Note This authorization is available only when the checkbox Enable Advanced Available to Promise in Document Settings is selected.
Purchasing	Select Full, Read Only, or No Authorization for all of the child authorizations under Purchasing
Landed Costs	- Full Authorization- Users can add and modify the Landed Costs-Setup window - Read Only - Users can view the Landed Costs- Setup window - No Authorization- Users cannot access the Landed Costs-Setup window
Business Partners	Select Full, Read Only, or No Authorization for all of the child authorizations under Business Partner
Countries	- Full Authorization- Users can add, modify and delete countries from the Countries- Setup window - Read Only - Users can view the Countries-Setup window - No Authorization- Users cannot access the Countries-Setup window
Address Formats	- Full Authorization- Users can insert and modify addresses in the Address Formats-Setup window - Read Only - Users can view Address Formats only - No Authorization- Users cannot access Address Formats

Field Name	Description
Customer Groups	• Full Authorization-Users can modify and add customer groups in the Customer Groups -Setup window • Read Only -Users can view the Customer Groups Setup window • No Authorization-Users cannot access the Customer Groups Setup window
Vendor Groups	• Full Authorization-Users can modify and add vendor groups in the Vendor Groups -Setup window • Read Only -Users can view the Vendor Groups Setup window • No Authorization-Users cannot access the Vendor Groups Setup window
Business Partner Properties	• Full Authorization - Users can access the Business Partner Properties-Setup window • Read Only - Users can view the Business Partner Properties-Setup window • No Authorization - Users cannot access the Business Partner Properties-Setup window
Business Partner Priorities	• Full Authorization- Users can add and modify the Business Partner priority list in the Business Partner Priorities Setup window • Read Only - Users can view Business Partner Priorities Setup window • No Authorization- Users cannot access the Business Partner Priorities Setup window
Dunning Terms	• Full Authorization- Users can add and modify Dunning Terms in the Dunning Terms-Setup window • Read Only - Users can view the Dunning Terms-Setup window • No Authorization- Users cannot access the Dunning Terms-Setup window
Payment Terms	• Full Authorization - Users can modify and update the Payment Terms-Setup window • Read Only - Users can view the Payment Terms-Setup window • No Authorization- Users cannot access the Payment Terms-Setup window i Note The field value of Total Discount % in the BP Fields section of the Payment Terms-Setup window cannot be greater than the value of the Max. Discount - General field at the bottom of the General Authorizations window. Price List displays only price lists of a price list group for which users have authorizations (Inventory → Price Lists)

Field Name	Description
Cash Discount	• Full Authorization - Users can view and modify a cash discount in the Cash Discount window (Payment Terms - Setup → Cash Discount Name→ Define New). • Read Only - Users can view the Cash Discount window • No Authorization- Users cannot view or modify cash discounts in the Cash Discount window
Payment Blocks	• Full Authorization - Users can add and modify description in the Payment Blocks - Setup window or through the Business Partner Master Data → Payment Run tab or the AP/AR Invoice → Accounting tab. In Payment Blocks, you can describe various reasons for blocking payments generated by the Payment Wizard. • Read Only- Users can view the Payment Blocks Setup window. • No Authorization- Users cannot access the Payment Blocks Setup window.
Target Group	• Full Authorization- Users can view and update the Target Group Setup window • Read Only - Users can view the Target Group Setup window • No Authorization- Users cannot access the Target Group Setup window
Banking	Select Full, Read Only, or No Authorization for all of the child authorizations under Banking.
Banks	• Full Authorization- Users can add, remove and modify data in the Banks-Setup window • Read Only Users can view the Banks-Setup window • No Authorization- Users cannot access the Banks-Setup window
House Bank Accounts	• Full Authorization- Users can add, remove and update the House Bank Accounts-Setup window • Read Only - Users can view the House Bank Accounts-Setup window • No Authorization- Users cannot access the House Bank Accounts-Setup window
Credit Cards	• Full Authorization- Users can add, delete and modify the Credit Cards-Setup window • Read Only - Users can view the Credit Cards-Setup window • No Authorization- Users cannot access the Credit Cards-Setup window
Credit Card Payment	• Full Authorization-Users can view and modify the Credit Card Payment-Setup window

Field Name	Description
	• Read Only- Users can view the Credit Card Payment-Setup window • No Authorization- Users cannot access the Credit Card Payment-Setup window
Credit Card Payment Methods	• Full Authorization-Users can add Credit Card Payment Methods and modify the Credit Card Payment Methods-Setup window • Read Only - Users can view the Credit Card Payment Methods-Setup window • No Authorization- Users cannot access the Credit Card Payment Methods-Setup window
Bank Charges Allocation Codes	• Full Authorization-Users can add, modify and delete data in the Bank Charges Allocation Codes-Setup window • Read Only -Users can view the Bank Charges Allocation Codes-Setup window • No Authorization- Users cannot access the Bank Charges Allocation Codes-Setup window
Payment Methods	• Full Authorization- Users can add and update Payment Methods in the Payment Methods-Setup window • Read Only- Users can view payment methods in the Payment Methods-Setup window • No Authorization-Users cannot access the Payment Methods-Setup window
Bank Statement Processing	• Full Authorization - Users can view and modify the data in the menu entries under the menu entry Bank Statement Processing. • Read Only - Users can view the data in the menu entries under the menu entry Bank Statement Processing. • No Authorization - Users cannot access the menu entries under the menu entry Bank Statement Processing. This functionality is available when the Install Bank Statement Processing checkbox in the Company Details → Basic Initialization tab is selected.
Inventory	Select Full, Read Only, or No Authorization for all of the child authorizations under Inventory.
Item Groups	• Full Authorization-Users can set up and modify Item Groups in the Item Groups-Setup window. • Read Only- Users can view the Item Groups Setup window • No Authorization- Users cannot access the Item Groups Setup window
Item Properties	• Full Authorization-Users can access the Item Properties-Setup window

Field Name	Description
	• Read Only- Users can view the Item Properties-Setup window • No Authorization- Users cannot access the Item Properties-Setup window
Warehouses	• Full Authorization- Users can view and modify the Warehouse-Setup window • Read Only - Users can view the Warehouse - Setup window • No Authorization- Users cannot access the Warehouse -Setup window
Enable and Disable Bin Locations	• Full Authorization- Users can select or deselect the checkbox Enable Bin Locations in the Warehouse - Setup window. When the checkbox is selected, the warehouse can be managed by bin locations. • No Authorization- Users cannot select or deselect the checkbox Enable Bin Locations in the Warehouse - Setup window.
Activate and Deactivate Warehouse	• Full Authorization - Users can select or deselect the checkbox Inactive in the Warehouse - Setup window. • No Authorization - Users cannot select or deselect the checkbox Inactive in the Warehouse - Setup window. To enable this authorization, Full Authorization for Warehouses is required.
Units of Measure	• Full Authorization- Users can add and modify data in the Units of Measure -Setup window • Read Only - Users can view the Units of Measure -Setup window • No Authorization- Users cannot access the Units of Measure - Setup window
Unit of Measure Groups	• Full Authorization- Users can modify and define new Unit of Measure Groups in the Unit of Measure Groups- Setup window • Read Only - Users can view Unit of Measure Groups in the Unit of Measure Groups- Setup window • No Authorization- Users cannot access the Unit of Measure Groups- Setup window
Length and Width	• Full Authorization- Users can add and modify Length and Width definitions in the Length and Width-Setup window • Read Only - Users can view Length and Width definitions in the Length and width-Setup window • No Authorization- Users cannot access the Length and width-Setup window
Weight	• Full Authorization- Users can add and modify Weight definitions in the Weight-Setup window • Read Only - Users can view Weight definitions in the Weight-Setup window

Field Name	Description
	• No Authorization- Users cannot access the Weight-Setup window
Customs Groups	• Full Authorization- Users can add, delete and modify the Customs Groups-Setup window • Read Only - Users can view the Customs Groups in the Customs Groups Setup window • No Authorization- Users cannot access the Customs Groups Setup window
Manufacturers	• Full Authorization-Users can modify, delete and add Manufacturers to the Manufacturers-Setup window • Read Only - Users can view Manufacturers in the Manufacturers-Setup window • No Authorization- Users cannot access the Manufacturers-Setup window
Shipping Types	• Full Authorization-Users can add, delete and modify Shipping Types in the Shipping Types-Setup window • Read Only - Users can view Shipping Types in the Shipping Types-Setup window • No Authorization- Users cannot access the Shipping Types-Setup window
Locations	• Full Authorization-Users can view, add and remove locations from the Locations- Setup window • Read Only - Users can view locations in the Locations-Setup window • No Authorization- Users cannot access the Locations -Setup window
Inventory Cycles	• Full Authorization- Users can modify and set up Inventory Cycles from the Inventory Cycles-Setup window • Read Only - Users can view Inventory Cycles in the Inventory Cycles-Setup window • No Authorization- Users cannot access the Inventory Cycles-Setup window
Cycle Count Determination	• Full Authorization- Users can access Cycle Count Determination in the Cycle Count Determination-Setup window • Read Only - Users can view the Cycle Count Determination-Setup window • No Authorization - Users cannot access the Cycle Count Determination-Setup window
Package Types	• Full Authorization- Users can add, modify and remove package types in the Package Types-Setup window • Read Only - Users can view the Package Types-Setup window

Field Name	Description
	• No Authorization- Users cannot access the Package Types-Setup window
Bin Locations	Select Full, Read Only, or No Authorization for all of the child authorizations under Bin Locations. **i Note** Bin location entries are displayed only when the checkbox Enable Bin Locations for a warehouse is selected in the Warehouse- Setup window.
Bin Location Field Activation	• Full Authorization - Users can view and modify the Bin Location Field Activation window • Read Only - Users can view the Bin Location Field Activation window • No Authorization - Users cannot access the Bin Location Field Activation window
Bin Location Attribute Codes	• Full Authorization- Users can add and modify the Bin Location Attribute Codes to the Bin Location Attribute Codes window • Read Only - Users can view the Bin Location Attribute Codes window • No Authorization- Users cannot view or modify the Bin Location Attribute Codes window
Warehouse Sublevel Codes	• Full Authorization- Users can access and define Warehouse Sublevel Codes on the Warehouse Sublevel Codes-Setup window • Read Only - Users can view the Warehouse Sublevel Codes-Setup window • No Authorization- Users cannot access the Warehouse Sublevel Codes Setup window
Warehouse Sublevel Code Management	• Full Authorization- Users can access and generate Warehouse Sublevel Code management in the Warehouse Sublevel Code Management-Setup window • Read Only - Users can view the Warehouse Sublevel Code Management-Setup window • No Authorization- Users cannot access the Warehouse Sublevel Code Management-Setup window
Resources	Select Full, Read Only, or No Authorization for all of the child authorizations under Resources
Resource Groups	• Full Authorization - Users can view and modify the Resource Groups window • Read Only - Users can view the Resource Groups window

Field Name	Description
	• No Authorization - Users cannot access the Resource Groups window
Resource Properties	• Full Authorization - Users can view and modify the Resource Properties window • Read Only - Users can view the Resource Properties window • No Authorization - Users cannot access the Resource Properties window
Service	Select Full, Read Only, or No Authorization for all of the child authorizations under Service
Contract Templates	• Full Authorization- Users can add and modify Contract Templates in the Contract Templates-Setup window • Read Only - Users can view Contract Templates in the Contract Templates-Setup window • No Authorization- Users cannot access the Contract Templates-Setup window
Queues	• Full Authorization-Users can modify, add or remove Queues on the Queues-Setup window. • Read Only - Users can view the Queues-Setup window • No Authorization- Users cannot access the Queues-Setup window
Project Management	Select Full, Read Only, or No Authorization for all of the child authorizations under Project Management ℹ Note The Project Management options are displayed only when the Enable Project Management checkbox in the Company Details → Basic Initialization tab is selected.
Stages - Setup	• Full Authorization - Users can view and modify the Stages - Setup window. • Read Only - Users can view the Stages - Setup window. • No Authorization - Users cannot access the Stages - Setup window.
Activity Type - Setup	• Full Authorization - Users can view and modify the Activity Type - Setup window. • Read Only - Users can view the Activity Type - Setup window. • No Authorization - Users cannot access the Activity Type - Setup window.
Production	Select Full, Read Only, or No Authorization for all of the child authorizations under Production

Field Name	Description
Route Stages	• Full Authorization - Users can view and modify the Route Stages window. • Read Only - Users can view the Route Stages window. • No Authorization - Users cannot access the Route Stages window.
Data Import/Export	Select Full or No Authorization for all of the child authorizations under Data Import/Export
Data Import	Select Full or No Authorization for all of the child authorizations under Data Import
Import from Excel	• Full Authorization – Users can access the Import from Excel window and import data from Microsoft Excel files • No Authorization – Users cannot access the Import from Excel window
Import Transactions from SAP Business One	• Full Authorization – Users can access the Import Transactions from SAP Business One window and choose the data to be imported. • No Authorization – Users cannot access the Import Transactions from SAP Business One window
Import Fixed Assets Master Data from Microsoft Excel	• Full Authorization – Users can access the Import Fixed Assets Master Data from Microsoft Excel window and choose the data to be imported. • No Authorization – Users cannot access the Import Fixed Assets Master Data from Microsoft Excel window
Financial Template Import Wizard	• Full Authorization – Users can access the Financial Template Import Wizard window and choose the data to be imported. • No Authorization – Users cannot access the Financial Template Import Wizard window
Data Export	• Full Authorization – Users can perform the data export actions available (Data Import/Export → Data Export). • No Authorization – Users cannot use this function.
Utilities	Select Full, Read Only, or No Authorization for all of the child authorizations under Utilities
Period–End Closing	• Full Authorization – Users can open the Period-End Closing window and perform period-end closing transactions. • No Authorization – Users cannot open this window.
Update Control Report	The Update Control Report opens automatically after the completion of an upgrade process. • Full Authorization – Users can view the Update Control report and perform year transfer operations.

Field Name	Description
	• Read Only – Users can view the Update Control report but cannot select the Display Non–matching Quantities Only checkbox. • No Authorization –Users cannot view the Update Control report.
Check Document Numbering - Selection Criteria	• Full Authorization – Users can open the Check Document Numbering window and perform this operation. • No Authorization – Users cannot open this window.
Data Archive Wizard	• Full Authorization – Users can access and run the Data Archive Wizard. • No Authorization – Users cannot access this window. ℹ Note Full authorization to Data Archive Wizard Execution is required to execute the wizard (the final step in the Wizard).
Data Archive Wizard Execution	• Full Authorization – Users can access, run and execute the Data Archive Wizard. • No Authorization – Users cannot execute the Data Archive Wizard. ℹ Note With full authorization for Data Archive Wizard but no authorization for Data Archive Wizard Execution, users can access all Wizard Options in Step 2 but cannot execute the wizard.
Master Data Cleanup Wizard	• Full Authorization – Users can open the Check Master Data Cleanup Wizard window and perform this operation. • No Authorization – Users cannot open this window.
Change Logs Cleanup	• Full Authorization – Users can open the Change Log Cleanup window. To execute the cleanup, Full Authorization to Execute Change Log Cleanup is required. • No Authorization – Users cannot open this window.
Execute Change Logs Cleanup	• Full Authorization – Users can execute the change log cleanup. This authorization is available only when Full Authorization is set to Change Log Cleanup. • No Authorization – Users cannot execute the change log cleanup.
Manual Master Data Series Converter	• Full Authorization – Users can open the Check Manual Master Data Series Converter window and perform this operation.

Field Name	Description
	• No Authorization – Users cannot open this window.
Revalidate Manual Internal Reconciliations	• Full Authorization – Users can open the Revalidate Manual Internal Reconciliations window and perform this operation. • No Authorization – Users cannot open this window.
Transfer Posting Correction Wizard	• Full Authorization – Users can access the Transfer Posting Correction Wizard window and post corrections resulted from VAT changes. • No Authorization – Users cannot open this window.
Restore	• Full Authorization – Users can perform the restore options under Help → Support Desk → Restore. • No Authorization – Users cannot perform any restore operations. ⓘ Note All restore actions may be performed only in accordance with direct instruction from your SAP Business One Support Center.
Restore G/L Account and Business Partner Balances	• Full Authorization – Users can choose the option Restore G/L Account and Business Partner Balances • No Authorization – Users cannot choose the option Restore G/L Account and Business Partner Balances
Restore Item Balances	• Full Authorization – Users can choose the Restore Item Balances option • No Authorization – Users cannot choose the Restore Item Balances option
Restore Numbering File	• Full Authorization – Users can choose the Restore Numbering File option • No Authorization – Users cannot choose the Restore Numbering File option
Restore System Reports	• Full Authorization – Users can choose the Restore System Reports option • No Authorization – Users cannot choose the Restore System Reports option
Restore Stored Procedures	• Full Authorization – Users can choose the Restore Stored Procedures option • No Authorization – Users cannot choose the Restore Stored Procedures option
UI Configuration Template	• Full Authorization – Users can open the UI Configuration Template window and add/modify UI templates. • No Authorization – Users can open the UI Configuration Template window

Field Name	Description
	i Note To add a template for a form, make sure that you have authorization for the specific form. To add a template to a document, make sure that you have authorizations for the document and for Numbering Series.
Data Protection Tools	Select Full or No Authorization for all of the child authorizations under Data Protection Tools **i** Note The functionality is available only when the Enable Personal Data Protection Management checkbox in the Company Details → Basic Initialization tab is selected.
Personal Data Management	• Full Authorization – Users can view and modify the Personal Data Management window • Read Only – Users can view the Personal Data Management window • No Authorization – Users cannot access the Personal Data Management window
Personal Data Management Wizard	Select Full or No Authorization for the actions that users can perform in the Personal Data Management Wizard.
Personal Data Report	• Full Authorization – Users can see and perform the Personal Data Report action to create a report • No Authorization – Users cannot see or perform the Personal Data Report action
Personal Data Cleanup	• Full Authorization – Users can see and perform the Personal Data Cleanup action • No Authorization – Users cannot see or perform the Personal Data Cleanup action
Personal Data Blocking	• Full Authorization – Users can see and perform the Personal Data Blocking action • No Authorization – Users cannot see or perform the Personal Data Blocking action
Personal Data Unblocking	• Full Authorization – Users can see and perform the Personal Data Unblocking action • No Authorization – Users cannot see or perform the Personal Data Unblocking action
Determine Natural Persons	• Full Authorization – Users can see and perform the Determine Natural Persons action or the Reverse Natural Person Determination action

Field Name	Description
	• No Authorization – Users cannot see or perform the Determine Natural Persons action or the Reverse Natural Person Determination action
View Sensitive Personal Data	• Full Authorization – Users can view the sensitive data by choosing Display Sensitive Data in the context menu • No Authorization – Users cannot view the sensitive data
View Sensitive Personal Data Access Log	• Full Authorization – Users can access the Sensitive Personal Data Access Log window • No Authorization - Users cannot access the Sensitive Personal Data Access Log window
Approval Process	Select Full or No Authorization for all of the child authorizations under Approval Process
Approval Stages	• Full Authorization – Users can access the Approval Stages window, define new approval stages and modify existing ones. • Read Only – Users can view the Approval Stages window. • No Authorization – Users cannot open the Approval Stages window.
Approval Templates	• Full Authorization – Users can access the Approval Templates window, define new approval templates, and modify existing ones. To define terms based on user queries, Full Authorization to Query Manager is required. In the list of user queries, you can view only quires of a query group for which you have authorization. • Read Only – Users can view the Approval Templates window. • No Authorization – Users cannot open the Approval Templates window. i Note o The Originator needs to have Full Authorization for the selected documents. o The authorizer needs to have read only or full authorization for the selected documents in order to be able to view the drafts pending for approval before approving or rejecting them. With no authorization for the selected documents, the authorizer can approve or reject a request, but cannot access the draft.
Approval Status Report	• Full Authorization – Users can run the Approval Status report, view the report results, and change the approval status to Canceled through the context menu. To view the details of a document in the report, Read Only or Full Authorization rights for the document is required.

Field Name	Description
	• No Authorization – Users cannot open this report.
Approval Decision Report	• Full Authorization –Users 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 Read Only or Full Authorization rights for the relevant documents. • No Authorization – Users cannot open this report.
Alerts Management	• Full Authorization – Users can open the Alerts Management window, define new alerts, and update system alerts. To generating new alerts, Full Authorization for the Query Manager is required. In the list of user queries, you can view only quires of a query group for which you have authorization. • Read Only – Users can view the Alerts Management window. • No Authorization – Users cannot open the Alerts Management window.
BI OnDemand Integration Configuration	• Full Authorization – Users can open the BI OnDemand Integration Configuration window to upload query results to BI OnDemand. • Read Only – Users can view the BI OnDemand Integration Configuration window. • No Authorization – Users cannot open this window
Workflow	Select Full or No Authorization for all of the child authorizations under Workflow
Workflow Instance	• Full Authorization-Users can open and modify data in the Workflow Instance window • No Authorization- Users cannot open this window
Workflow Worklist	• Full Authorization- Users can open and modify data in the Workflow Worklist window • No Authorization- Users cannot open this window
Workflow Manager	• Full Authorization- Users can open and modify data in the Workflow Manager window • No Authorization- Users cannot open this window
Workflow Tracking	• Full Authorization- Users can open and modify data in the Workflow Tracking window • No Authorization - Users cannot open this window
Alerts Management	• Full Authorization – Users can open the Alerts Management window, define new alerts, and update system alerts. To select queries for the alerts requires authorization for the Query Manager.

Field Name	Description
	• Read Only – Users can view the Alerts Management window. • No Authorization – Users cannot open the Alerts Management window.
BI OnDemand Integration Configuration	• Full Authorization – Users can open the BI OnDemand Integration Configuration window to upload query results to BI OnDemand. … • Read Only – Users can view the BI OnDemand Integration Configuration window. • No Authorization – Users cannot open this window

6 Financials Module Authorizations

The following modules and functions define the Financials authorizations:

Field Name	Description
Financials	Controls your access to all functions in the Financials module. The authorizations selected in the Financials row apply to all Financials functions. To set authorizations for individual functions, select the required authorization for each function as described in this table. • Full Authorization – Users can enter all the functions specified in the Financials module and make required changes or new settings. • Read Only – Users can view the data defined in all the functions specified in the Financials module. • No Authorization – Users cannot access any option specified in the Financials module. **i** Note If you select Read Only authorization for the entire Financials module, the authorizations for its child items without the Read Only option are automatically set to No Authorization.
Chart of Accounts	• Full Authorization – Users can open the Chart of Accounts window, create new G/L accounts, and modify existing ones. This includes access to the Chart of Accounts window from other parts of SAP Business One. For example, users can access the Chart of Accounts window through the arrow link to the G/L account from a marketing document. • Read Only – Users can view the Chart of Accounts window. • No Authorization – Users cannot open the Chart of Accounts window. **i** Note o Users with no authorization for Chart of Accounts can still view the accounts data and the related balances in the financial reports for which they have authorizations. o User with no authorization for Chart of Accounts but with authorization for Form Settings can design the List of Accounts window and choose the data to be displayed from chart of accounts.

Field Name	Description
Account Code Generator	This feature is available only when the Use Segmentation Accounts checkbox is selected in the Company Details → Basic Initialization tab. • Full Authorization – Users can open the Account Code Generator window and generate G/L account codes when working with segmentation accounts. • No Authorization – Users cannot open the Account Code Generator window.

Journal Entry	Prerequisites for this authorization are as follows:
	
	1. Find Journal Entries in the Document Numbering - Setup window and define a default numbering series.
	
	2. Double click the empty row header of the document type and assign a series group number, for example, 1, to the numbering series in the Group field of the Series - Journal Entries - Setup window.
	
	3. Assign full authorization for the series group to the users in the General Authorizations window (Administration → System Instillation → Numbering Series → Series - Group No. 1).
	
	• Full Authorization – Users can open the Journal Entry window, add manual journal entries, and perform all actions related to journal entries.
	
	Note that users can access only journal entries with numbering series which are assigned to series groups for which they have full authorizations.
	
	• Read Only – Users can view the Journal Entry window.
	
	• No Authorization – Users cannot open the Journal Entry window.
	
	   i Note
	
	   o Users with no authorization for Access to Confidential Accounts but with full authorization or read only authorization for journal entries can view journal entries posted to the confidential accounts for which the users have authorization for the associated numbering series.
	
	   o When a user is authorized to access financial reports, the user can view journal entries with all numbering series no matter if the user has authorization for the series or not. However, the user can only access the journal entries with numbering series for which the user has read only or full authorization.
	
	   o Modifying the Journal Entry window, for example, displaying or hiding certain fields in the Form Settings window, requires full authorization for Form Settings.

Field Name	Description
Update Posting Data	• Full Authorization – Users can update all the active fields in an existing journal entry, such as Ref. 1, Indicator, and Project. • Read Only – Users cannot update any fields in an existing journal entry with the exception of Due Date and Details. • No Authorization – Users cannot update any fields in an existing journal entry with the exception of Due Date and Details. **i Note** A user with no authorization for the Journal Entry or Update Posting Data windows cannot update the Document Date and the Posting Date fields in the journal entry rows, even if the user is granted full authorization for these options. In a sales or purchasing document that generates a journal entry, some fields can be updated, such as the Customer or Vendor Reference No fields. However, this information is not updated automatically in the Journal Entry window, in fields such as Ref. 2. If you do not have full authorization to update posting data, Users 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.
Confirm Entry with Multiple Currencies	• Full Authorization – Users can select or deselect the Block Multi Currency Journal Entry checkbox (Administration → System Initialization → Document Settings → Per Document tab → Journal Entry). You also require authorization for the Document Settings window. • No Authorization – Users cannot change the selection of the Block Multi Currency Journal Entry checkbox.
Confirm Unbalanced FC Entry	• Full Authorization – Users can select or deselect the Block Unbalanced FC Journal Entry checkbox (Administration → System Initialization → Document Settings → Per Document tab → Journal Entry). You also require authorization for the Document Settings window. • No Authorization – Users cannot change the selection of the Block Unbalanced FC Journal Entry checkbox.
Confirm Row Posting Date Editing	• Full Authorization – Users can select or deselect the Block Posting Date Editing per Row checkbox (Administration → System Initialization → Document Settings → Per Document tab → Journal Entry). You also require authorization for the Document Settings window. • No Authorization – Users cannot change the selection of the Block Posting Date Editing per Row checkbox.

Field Name	Description
Allow Row Doc. Date Editing	• Full Authorization – Users can select or deselect the Block Document Date Editing per Row checkbox (Administration → System Initialization → Document Settings → Per Document tab → Journal Entry). You also require authorization for the Document Settings window. • No Authorization – Users cannot change the selection of the Block Document Date Editing per Row checkbox.
Confirm SC Editing	• Full Authorization – Users can select or deselect the Block Editing of Totals in System Currency checkbox (Administration → System Initialization → Document Settings → Per Document tab → Journal Entry). You also require authorization for the Document Settings window. • No Authorization – Users cannot change the selection of the Block Editing of Totals in System Currency checkbox.
Journal Vouchers	• Full Authorization – Users can open the Journal Vouchers window, add journal vouchers, modify existing vouchers, and delete vouchers. To post journal vouchers to the accounting system, full authorization for Journal Entry is required. For more information, see the description on the Journal Entry authorization. • Read Only – Users can view the Journal Vouchers window. • No Authorization – Users cannot open the Journal Vouchers window.
Posting Templates	• Full Authorization – Users can open the Posting Templates window, add new templates, and update existing ones. • Read Only – Users can view the Posting Templates window. • No Authorization – Users cannot open the Posting Templates window.
Recurring Postings	• Full Authorization – Users can open the Recurring Postings window, add new recurring postings, and update the existing ones. • Read Only – Users can view the Recurring Postings window. • No Authorization – Users cannot open the Recurring Postings window. ℹ Note 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."

Field Name	Description
	o The Display Recurring Postings on Execution checkbox is selected (Administration → System Initialization → General Settings → Services tab). o You have no authorization for the Recurring Postings window. o There are recurring postings scheduled for execution.
Reverse Transactions	• Full Authorization – Users can open the Reverse Transactions window and cancel transactions scheduled to be reversed today. • Read Only – Users can view the Reverse Transactions window but cannot reverse transactions. • No Authorization – Users cannot open the Reverse Transactions window. ⓘ Note 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." o You have no authorization for the Reverse Transactions window. o There are Reverse Transactions scheduled to be cancelled today
Exchange Rate Differences	• Full Authorization – Users can open the Exchange Rate Differences window, perform exchange rate differences transactions, and save approved transactions. If the exchange rate for the day on which this report is run is not defined in the Exchange Rates and Indexes window and users have no authorization for Exchange Rates and Indexes, this authorization will not take effect. • No Authorization – Users cannot open this window.
Conversion Differences	• Full Authorization – Users can open the Conversion Rate Differences window and perform conversion differences transactions. If the exchange rate for the day on which this report is run is not defined in the Exchange Rates and Indexes window and users have no authorization for Exchange Rates and Indexes, this authorization will not take effect. • No Authorization – Users cannot open this window.
1099 Editing	Relevant only to the United States localization. • Full Authorization – Users can open the 1099 Editing window and update 1099 Forms, Boxes and Amounts. • Read Only – Users can view the 1099 Editing window.

Field Name	Description
	• No Authorization – Users cannot open the 1099 Editing window.
Financial Report Templates	• Full Authorization – Users can open the Financial Report Templates window, design new financial report templates, and update existing ones. • No Authorization – Users cannot open this window.
Process Checklist	• Full Authorization - Users can open the Process Checklist window and define the visual presentation of business processes. • Read Only - Users can view the data in this window. • No Authorization - Users cannot open this window.
Journal Voucher Report	• Full Authorization – Users can create a report that provides comprehensive information on existing journal vouchers. • No Authorization – Users cannot create a Journal Voucher report.
Fixed Assets	• Full Authorization - Users can access all windows in the Fixed Assets menu and add or edit the data. • Read Only - Users can view all windows in the Fixed Assets menu. • No Authorization - Users cannot access any window in the Fixed Assets menu. The Fixed Assets authorizations and the related windows are available only when the checkbox Enable Fixed Assets on the Basic Initialization tab of the Administration → System Initialization → Company Details window is selected.
Asset Master Data	• Full Authorization - Users can access this window and add or modify the data. • Read Only - Users can view the data in this window. • No Authorization - Users cannot open this window.
Capitalization	• Full Authorization - Users can access this window and generate documents. • Read Only - Users can view the data in this window. • No Authorization - Users cannot access this window. This authorization is available only when the default Fixed Asset Capitalization series is defined for the users in the Document Numbering window and the users have authorization for the series group number under Administration→System Instillation→ Numbering Series in the General Authorizations window.
Capitalization Credit Memo	• Full Authorization - Users can access this window and generate documents. • Read Only - Users can view the data in this window.

Field Name	Description
	• No Authorization - Users cannot access this window. This authorization is available only when the default Fixed Asset Capitalization series is defined for the users in the Document Numbering window and the users have authorization for the series group number under Administration→System Instillation→ Numbering Series in the General Authorizations window.
Retirement	• Full Authorization - Users can access this window and generate documents. • Read Only - Users can view the data in this window. • No Authorization - Users cannot access this window. This authorization is available only when the default Fixed Asset Capitalization series is defined for the users in the Document Numbering window and the users have authorization for the series group number under Administration→System Instillation→ Numbering Series in the General Authorizations window.
Transfer	• Full Authorization - Users can access this window and generate documents. • Read Only - Users can view the data in this window. • No Authorization - Users cannot access this window. This authorization is available only when the default Fixed Asset Capitalization series is defined for the users in the Document Numbering window and the users have authorization for the series group number under Administration→System Instillation→ Numbering Series in the General Authorizations window.
Manual Depreciation	• Full Authorization - Users can access this window and generate documents. • Read Only - Users can view the data in this window. • No Authorization - Users cannot access this window. This authorization is available only when the default Fixed Asset Capitalization series is defined for the users in the Document Numbering window and the users have authorization for the series group number under Administration→System Instillation→ Numbering Series in the General Authorizations window.
Depreciation Run	• Full Authorization - Users can access this window, view previously created depreciation runs and execute depreciation runs. • Read Only - Users can access this window and view previously created depreciation runs. • No Authorization - Users cannot access this window.

Field Name	Description
Asset Revaluation	• Full Authorization - Users can access this window and generate documents. • Read Only - Users can view the data in this window. • No Authorization - Users cannot access this window. This authorization is available only when the default Fixed Asset Capitalization series is defined for the users in the Document Numbering window and the users have authorization for the series group number under Administration→System Instillation→ Numbering Series in the General Authorizations window.
Fiscal Year Change	• Full Authorization - Users can access this window and start a fiscal year change to calculate the year-end value of assets. • Read Only - Users can view the data in this window. • No Authorization - Users cannot access this window.
Fixed Asset Reports	• Full Authorization - Users can access all windows in the Fixed Asset Reports menu and run the reports. • No Authorization - Users cannot access any window in the Fixed Asset Reports menu.
Asset Depreciation Forecast Report	• Full Authorization - Users can access this window and run the report. • No Authorization - Users cannot access this window.
Asset History Sheet	• Full Authorization - Users can access this window and run the report. • No Authorization - Users cannot access this window.
Asset Status Report	• Full Authorization - Users can access this window and run the report. • No Authorization - Users cannot access this window.
Asset Transaction Report	• Full Authorization - Users can access this window and run the report. • No Authorization - Users cannot access this window.
Internal Reconciliations	• Full Authorization – Users can access all windows in the Internal Reconciliations menu and manage reconciliations. • Read Only - Users can access all windows in the Internal Reconciliations menu. • No Authorization - Users cannot access any window in the Internal Reconciliations menu
Reconciliation	• Full Authorization – Users can internally reconcile transactions created for G/L accounts. • Read Only – Users can view transactions available for reconciliation but cannot reconcile them.

Field Name	Description
	• No Authorization – Users cannot open the Reconciliation window.
Budget Setup	• Full Authorization – Users can access all windows and reports in the Budget menu and configure budget setups. • Read Only – Users do not have full access to the Budget windows but have either Read Only or No Authorization. • No Authorization – Users cannot access any window in the Budget menu.
Budget Scenarios – Setup	• Full Authorization – Users can open the Budget Scenarios – Setup window, define new scenarios, update existing ones, and import budget scenarios. To enable the Import Scenario option in the Budget Scenarios – Setup window, Full Authorization for Import Budget Scenarios is required. • No Authorization – Users cannot open the Budget Scenarios – Setup window.
Import Budget Scenarios	• Full Authorization - Users can import budget scenarios from one company into another. To enable this authorization, Full Authorization for Budget Scenarios – Setup is required. • No Authorization - Users cannot import budget scenarios.
Budget Distribution Methods - Setup	• Full Authorization – Users can define new Budget Distribution Methods and update existing ones in the Budget Distribution Methods – Setup window. • Read Only – Users can view the Budget Distribution Methods – Setup window. • No Authorization – Users cannot open the Budget Distribution Methods – Setup window.
Budget	• Full Authorization – Users can define and update budget amounts in the Budget – Setup window. • Read Only – Users can view existing budgets in the Budget – Setup window. • No Authorization – Users cannot open the Budget – Setup window.
Confirm Budget Deviation	• Full Authorization – Users can confirm a warning message regarding budget deviation in documents and journal entries (defined by choosing Administration → System Initialization → General Settings → Budget tab). Users can also add a document or a journal entry that causes a deviation from the budget, as defined for the linked G/L account. • No Authorization – Users cannot confirm budget deviation warning messages.

Field Name	Description
Cost Accounting	• Full Authorization – Users can access all windows and reports in the Cost Accounting menu. • Read Only – Users can view windows related to the cost accounting functions, with the exception of the Profit Center Report window. • No Authorization – Users cannot view any data related to cost accounting.
Dimensions	• Full Authorization - Users can access and determine multiple dimensions. This menu is available when the Use Multidimensions checkbox on the General Settings → Cost Accounting tab is selected. To enable this authorization, Full Authorization for Cost Accounting is required. • Read Only - Users can only view the selected dimensions. To enable this authorization, Read Only authorization for Cost Accounting is required. • No Authorization - Users cannot open this window
Cost Centers - Setup	• Full Authorization – Users can define new cost centers and update existing ones. • Read Only – Users can view the cost centers defined in the company. • No Authorization – Users cannot open the Cost Centers – Setup window.
Distribution Rules - Setup	• Full Authorization – Users can define new distribution rules and update existing ones. • Read Only – Users can view the distribution rules defined in the company. • No Authorization – Users cannot open the Distribution Rules – Setup window.
Table of Cost Centers and Distribution Rules	• Full Authorization – Users can display the Table of Cost Centers and Distribution Rules window, add new cost centers, add new distribution rules, and make cost accounting adjustments. • Read Only – Users can view the Table of Cost Centers and Distribution Rules window. • No Authorization – Users cannot open the Table of Cost Centers and Distribution Rules window.
Cost Center Report	• Full Authorization – Users can open the Cost Center Report window. • No Authorization – Users cannot open this window.
Distribution Report	• Full Authorization – Users can open the Distribution Report window.

Field Name	Description
	• No Authorization – Users cannot open this window.
Cost Accounting Summary Report	• Full Authorization – Users can open the Cost Accounting Summary Report window. • No Authorization – Users cannot open this window.
Budget Versus Cost Accounting	• Full Authorization – Users can open the Budget Versus Cost Accounting window. • No Authorization – Users cannot open this window.
Accrual Types	• Full Authorization – Users can display the Accrual Types window and update accrual types. • Read Only – Users can view the Accrual Types window. • No Authorization – Users cannot open this window.
Cost Accounting Reconciliation Report	• Full Authorization – Users can open the Cost Accounting Reconciliation Report window. • No Authorization – Users cannot open this window.
Journal Entry for Cost Accounting Adjustment	• Full Authorization – Users can access the Journal Entry for Cost Accounting Adjustment window and generate a journal entry. To generate an adjustment journal entry, the authorization for a Journal Entry numbering series which is defined as Cost Accounting Adjustment Only through the Document Numbering window is required. • No Authorization – Users cannot open the Journal Entry for Cost Accounting Adjustment window.
Cost Elements	• Full Authorization – Users can access the Cost Elements window, add new elements and modify the existing ones. • Read Only – Users can access the Cost Elements window. • No Authorization – Users cannot open the Cost Elements window.
Financial Reports	• Full Authorization – Users can access and generate all the Financial Reports in all the categories, such as the Trial Balance and the General Ledger reports. • No Authorization – Users cannot access or generate any of the reports specified in this submenu. ⓘ Note 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 Full Authorization rights for the Aging menu to apply this authorization to both the Customer Receivables Aging and the Vendor Liabilities Aging reports.

Field Name	Description
Electronic Reports	• Full Authorization – Users can generate legal reports in electronic format that comply with the conventional regulations of this country. • Read Only – Users can view existing electronic reports. • No Authorization - Users cannot generate legal reports in electronic format **i Note** Currently, Users can find electronic reports only in the Financials 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 Main Menu, otherwise, it remains hidden.
Accounting	• Full Authorization – Users can access and generate all the accounting reports, such as General Ledger, 1099 Report, and Aging. • No Authorization – Users cannot access and generate any of the reports located under this submenu.
G/L Accounts and Business Partners	• Full Authorization – Users can run the G/L Accounts and Business Partners report. • No Authorization – Users cannot generate this report.
General Ledger	• Full Authorization – Users can run the General Ledger report. • No Authorization – Users cannot generate this report.
Aging Customer Receivables Aging Vendor Liabilities Aging	• Full Authorization – Users can access and generate the Aging reports. • No Authorization for Aging – Users cannot access or generate the reports located under this submenu.
Transaction Journal Report	• Full Authorization – Users can run the Transaction Journal report. • No Authorization – Users cannot generate this report.
Transaction Report by Projects	• Full Authorization – Users can access the Transaction Report by Projects window and generate a transaction report by projects. • No Authorization – Users cannot access the Transaction Report by Projects window.
Document Journal	• Full Authorization – Users can run the Document Journal report. • No Authorization – Users cannot generate this report.
Cash Flow Reference Report	• Full Authorization – Users can run the Cash Flow Reference report.

Field Name	Description
	• No Authorization – Users cannot generate this report.
1099/1096 Report	Relevant only for the United States localization. • Full Authorization – Users can run the 1099 report. • No Authorization – Users cannot generate this report.
Tax	• Full Authorization – Users can run the tax reports. • No Authorization – Users cannot generate these reports.
Tax Report	• Full Authorization – Users can run the Tax report. • No Authorization – Users cannot generate this report.
Commission Trade Tax Invoice Journal - Selection Criteria	Available in Russia only. • Full Authorization – Users can access this window and run the report. • No Authorization – Users cannot open this window.
Customer Open Document List	Available in the United States and Germany only. • Full authorization - Users can generate this crystal report. • No Authorization- Users cannot access this report.
Financial	• Full Authorization – Users can access and generate all the financial reports, such as Balance Sheet and Cash Flow. • No Authorization for Financial – Users cannot access or generate any of the reports located under this submenu.
Balance Sheet	• Full Authorization – Users can run the Balance Sheet report. • No Authorization – Users cannot generate this report.
Trial Balance	• Full Authorization – Users can run the Trial Balance report. • No Authorization – Users cannot generate this report.
Profit and Loss Statement	• Full Authorization – Users can run the Profit and Loss Statement report. • No Authorization – Users cannot generate this report.
Cash Flow	• Full Authorization – Users can run the Cash Flow report. • No Authorization – Users cannot generate this report.
Include Projected Postings by Others	• Full Authorization – Users can view records created by other users in the Include Projected Postings section of the Cash Flow - Selection Criteria window and in the Cash Flow report. • No Authorization – Users cannot view records created by other users in the Include Projected Postings section of the Cash Flow - Selection Criteria window or in the Cash Flow report, even if they have Full Authorization for Cash Flow.
Statement of Cash Flows	• Full Authorization – Users can run the Statement of Cash Flows report and adjust it.

Field Name	Description
	• Read Only – Users can only view the Statement of Cash Flows report • No Authorization – Users cannot generate this report.
Comparison	• Full Authorization – Users can access and generate all the comparison reports, such as Balance Sheet Comparison and Trial Balance Comparison. • No Authorization – Users cannot access or generate any of the reports located under this submenu.
Balance Sheet Comparison	• Full Authorization – Users can run the Balance Sheet Comparison report. • No Authorization – Users cannot generate this report.
Trial Balance Comparison	• Full Authorization – Users can run the Trial Balance Comparison report. • No Authorization – Users cannot generate this report.
Profit and Loss Statement Comparison	• Full Authorization – Users can run the Profit and Loss Statement Comparison report. • No Authorization – Users cannot generate this report.
Budget Setup	• Full Authorization – Users can access and generate all the budget-related reports, such as Budget and Trial Balance Budget. • No Authorization – Users cannot access or generate any of the reports located under this submenu.
Budget Report	• Full Authorization – Users can run the Budget report. • No Authorization – Users cannot generate this report.
Balance Sheet Budget Report	• Full Authorization – Users can run the Balance Sheet Budget report. • No Authorization – Users cannot generate this report.
Trial Balance Budget Report	• Full Authorization – Users can run the Trial Balance Budget report. • No Authorization – Users cannot generate this report.
Profit and Loss Statement Budget Report	• Full Authorization – Users can run the Profit and Loss Statement Budget report. • No Authorization – Users cannot generate this report.

7 Opportunities Module Authorizations

The following modules and functions define the Opportunities authorizations:

Field Name	Description
Opportunities	• Full Authorization – Users can enter all the functions specified in the Opportunities module and make required changes or new settings. When adding a new stage, users can choose whether to close a document which is linked to the previous stage. Closing the document requires authorization for the Close Document function (in General Authorizations). • Read Only – Users can view the data defined in all the functions specified in the Opportunities module. • No Authorization – Users cannot access any option specified in the Opportunities module. ⓘ Note If you select the Read Only authorization for the entire Opportunities module, the authorizations for its child items without the Read Only option are automatically set to No Authorization.
Opportunity	• Full Authorization – Users can open the Opportunity window, add new sales opportunities, and modify existing opportunities. • Read Only – Users can view the Opportunity window. • No Authorization – Users cannot open the Opportunity window.
Gross Profit	• Full Authorization – Users can update the Gross Profit % and Gross Profit Total fields. • No Authorization – Users cannot update the Gross Profit % and Gross Profit Total fields.
Special Opportunity Authorizations	• Full Authorization – Users can access the options under the Special Opportunity Authorizations submenu • No Authorization – Users cannot access the options under the Special Opportunity Authorizations submenu
Edit Closing Date	• Full Authorization – Users can update the Closing Date field in the Opportunity window if the opportunity status is Won or Lost. This authorization is available only when Full Authorization is set to Opportunity. • No Authorization – If users have full authorization for Opportunity but no authorization for Edit Closing Date, the

Field Name	Description
	Closing Date field is disabled when the opportunity status is Won or Lost,
Opportunities Reports	• Full Authorization – Users can access and generate all the sales opportunity reports, such as management, general, and status reports. • No Authorization – Users cannot access or generate any of the reports located under this submenu.
Electronic Reports	• Full Authorization- Users can view and generate Electronic Reports • Read Only- Users can view Electronic Reports • No Authorization- Users cannot access Electronic Reports
Management Reports	• Full Authorization – Users can access and generate all the management reports, such as Opportunities Forecast; Opportunities Forecast Over Time; and Opportunities Statistics. • No Authorization – Users cannot access and generate any of these reports.
General Reports	• Full Authorization – Users can access and generate all the general reports such as Opportunities Report; Stage Analysis; and Information Source Distribution Over Time. • No Authorization – Users cannot access or generate any of these reports.
Status Reports	• Full Authorization – Users can access and generate all status reports, such as Won Opportunities; Lost Opportunities; My Open Opportunities; and My Closed Opportunities. • No Authorization – Users cannot access or generate any of these reports.
Opportunities Pipeline	• Full Authorization – Users can access and generate the Opportunities Pipeline report and open the Dynamic Opportunity Analysis window and the Opportunity List window. • No Authorization – Users cannot access and generate this report.
Dynamic Opportunity Analysis	• Full Authorization – Users can access and run the Dynamic Opportunity Analysis report (through the Go To main menu). • No Authorization – Users cannot use this function.
Opportunity List	• Full Authorization – Users can open the Opportunity List window (by double clicking the pipeline in the Opportunities Pipeline window). • No Authorization – Users cannot open this window.

8   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
Sales – A/R	- Full Authorization – Users can access all the windows and perform all the actions specified in the Sales – A/R module and make required changes or new settings. - Read Only – Users can view the data defined in all the functions specified in the Sales – A/R module. - No Authorization – Users cannot access any option specified in the Sales – A/R module. **i Note** If you select the Read Only authorization for the entire Sales – A/R module, the authorizations for its child items without the Read Only option are automatically set to No Authorization. A default numbering series needs to be assigned to users for them to be able to open a sales document. Full authorization or read only authorization for the base document is required to copy a base document to a target document.
Sales Blanket Agreement	- Full Authorization – Users can open the Sales Blanket Agreement window, add new blanket agreements and modify the existing ones. - Read Only – Users can view sales blanket agreements. - No Authorization – Users cannot open the Sales Blanket Agreement window.
Blanket Agreement Status	- Full Authorization – Users can modify the Status field of a blanket agreement.

Field Name	Description
	This authorization is available only when Full Authorization is set to Blanket Agreement under Sales - A/R. • No Authorization – Users cannot modify the Status field of a blanket agreement. **ⅈ Note** Note the following when managing approval processes for a blanket agreement: o The blanket agreement generator in the approval process template needs full authorization for Blanket Agreement Status in order to be able to modify the status from Draft to To Be Approved, which triggers the Request for Approval. o Once a blanket agreement is approved, the requester cannot modify the blanket agreement status even with full authorization for Blanket Agreement Status.
Sales Quotation	• Full Authorization – Users can open the Sales Quotation window, add new documents, and modify existing ones. • Read Only – Users can view sales quotation documents. • No Authorization – Users cannot open the Sales Quotation window.
Sales Order	• Full Authorization – Users can open the Sales Order window, add new documents, and modify the existing ones. Full authorization for Procurement Confirmation Wizard and for Purchase Order under Purchasing - AP are required to activate the Procurement Confirmation Wizard from a sales order. • Read Only – Users can view sales order documents. • No Authorization – Users cannot open the Sales Order window.
Delivery	• Full Authorization – Users can open the Delivery window, add new documents, and modify existing ones. • Read Only – Users can view delivery documents. • No Authorization – Users cannot open the Delivery window.
Return Request	• Full Authorization – Users can open the Return Request window, add new documents, and modify the existing ones. • Read Only – Users can view return request documents. • No Authorization – Users cannot open the Return Request window.
Return	• Full Authorization – Users can open the Return window, add new documents, and modify the existing ones. • Read Only – Users can view return documents. • No Authorization – Users cannot open the Return window.

Field Name	Description
A/R Down Payment Request	• Full Authorization – Users can open the A/R Down Payment Request window, add new documents, and modify the existing ones. Full authorization for Incoming Payments is required to activate payment means. • Read Only – You can view A/R down payment request documents. • No Authorization – You cannot open the A/R Down Payment Request window.
A/R Down Payment Invoice	• Full Authorization – Users can open the A/R Down Payment Invoice window, add new documents, and modify existing ones. Users can also update the payment means in the sales order. • Read Only – Users can view A/R Down Payment Invoice documents. • No Authorization – Users cannot open the A/R Down Payment Invoice window.
A/R Invoice	• Full Authorization – Users can open the A/R Invoice window, add new documents, and modify existing ones. • Read Only – Users can view A/R invoice documents. • No Authorization – Users cannot open the A/R Invoice window.
A/R Invoice + Payment	• Full Authorization – Users can open the A/R Invoice + Payment window, add new documents, and modify existing ones. This authorization is available only when Full Authorization is set to Incoming Payments. • Read Only – Users can view A/R invoice + Payment documents. With no authorization for Incoming Payments, users can view the payment list by choosing the Payment Means icon in the toolbar but cannot access the Incoming Payments window. • No Authorization – Users cannot open the A/R Invoice + Payment window.
A/R Credit Memo	• Full Authorization – Users can open the A/R Credit Memo window, add new documents, and modify existing ones. • Read Only – Users can view A/R credit memo documents. • No Authorization – Users cannot open the A/R Credit Memo window.
A/R Reserve Invoice	• Full Authorization – Users can open the A/R Reserve Invoice window, add new documents, and modify existing ones. • Read Only – Users can view A/R reserve invoice documents. • No Authorization – Users cannot open the A/R Reserve Invoice window.

Field Name	Description
Recurring Transactions	• Full Authorization – Users can open the Recurring Transactions/Confirmation of Recurring Transactions window and execute the recurring transactions. Full authorization for the types of documents listed in the Transact. Type column is required to execute the recurring transactions. Full or read-only authorization for Recurring Transactions Templates is required to access the Recurring Transactions - Templates window by choosing the Templates button in the Confirmation of Recurring Transactions window. • Read Only – Users can view the Recurring Transactions window but cannot execute the recurring transactions. • No Authorization – Users cannot open the Recurring Transactions window.
Recurring Transactions Templates	• Full Authorization – Users can open the Recurring Transactions – Templates window to create recurring transaction templates, • Read Only – Users can view the Recurring Transactions – Templates window. • No Authorization – Users cannot open the Recurring Transactions – Templates window.
Document Generation Wizard	• Full Authorization – Users can access the document generation wizard and create documents. Generating documents does not require authorization for base or target documents. • No Authorization – Users cannot use this function.
Available-to-Promise Check (version for SAP HANA)	• Full Authorization – Users can access the Available-to-Promise Check window. • No Authorization – Users cannot access the Available-to-Promise Check window. This authorization is available only when the Enable Advanced Available to Promise checkbox on the Document Settings→ General tab is selected.
Delivery Schedule Management (version for SAP HANA)	• Full Authorization – Users can access the Delivery Schedule Management window. • No Authorization – Users cannot access the Delivery Schedule Management window.
Fixed Qty/Date (version for SAP HANA)	• Full Authorization – Users can select or deselect the Fixed Qty/Date checkbox in the Delivery Schedule Details window. To access the window, right click on Qty in a sales order to open the context menu. • No Authorization – Users cannot select or deselect the checkbox. It is disabled.

Field Name	Description
Document Draft	• Full Authorization – Users can save a document as a draft (by choosing Save as Draft or File → Save as Draft in the context menu). • No Authorization – Users cannot save any document as a draft.
Document Drafts Report	• Full Authorization – Users can open the Document Drafts Report window, open existing drafts, modify them, and add them as genuine documents. Users can close or remove a draft through the context menu. • Read Only- Users can open the Document Drafts Report window, open existing drafts, modify them, and add them as genuine documents. Users can close or remove a draft through the context menu. • No Authorization – Users cannot open the Document Drafts Report window. ⅈ Note In addition to full or read-only authorization for Document Drafts Report, authorization for a document (sales order, delivery, etc.) is also required to access the draft document.
Remove Document Drafts	• Full Authorization - Users can remove Document Drafts. To enable this authorization, full authorization for Document Drafts Report is required. • No Authorization- Users cannot remove Document Drafts ⅈ Note If users have no authorization for Document Drafts Report but have full authorization for Remove Document Drafts, they cannot remove the draft.
Document Printing	• Full Authorization – Users can print all the documents and reports in SAP Business One and access the Document Printing window. • No Authorization – Users cannot print documents, reports, or windows through SAP Business One. ⅈ Note This authorization applies to all documents and reports. It is also required for sending documents in e-mails, to fax and for preview, and exporting them to PDFs, text, unformatted text and images.
Dunning Wizard	• Full Authorization – Users can access the Dunning Wizard, define required parameters, and save them by choosing Save

Field Name	Description
	Selection Parameter and Exit on the Processing page of the wizard.
	To execute the other options on the Processing page, full authorization for Execute a dunning run is required.
	To print, e-mail or preview dunning letters, authorization for Document Printing is required.
	• No Authorization – Users cannot use this function.
Execute a dunning run	• Full Authorization – Users can execute a dunning run in the Dunning Wizard.
	• Read Only – Users can run the Dunning Wizard. They can view executed dunning runs or run the wizard and select Save Selection Parameter and Exit on the Processing page.
	• No Authorization – Users can run the Dunning Wizard. They can view executed dunning runs or run the wizard and select Save Selection Parameter and Exit on the Processing page.
Gross Profit Recalculation Wizard	• Full Authorization – Users can access and run the Gross Profit Recalculation Wizard.
	Executing the wizard requires Full Authorization for Execute Gross Profit Recalculation Run.
	• No Authorization – Users cannot access the Gross Profit Recalculation Wizard.
	This feature is available when you manage a perpetual inventory system.
Execute Gross Profit Recalculation Run	• Full Authorization – Users can execute the Gross Profit Recalculation Wizard.
	• No Authorization – Users cannot execute the wizard. They can only save parameters or save simulation.
Sales Reports	• Full Authorization-- Users can access and generate all Sales Reports, add new documents and view the existing ones.
	• No Authorization-- Users cannot open Sales Reports.
Electronic Reports	• Full Authorization- Users can view and generate Electronic Reports
	• Read Only- Users can view Electronic Reports
	• No Authorization- Users cannot access Electronic Reports
Sales Analysis	• Full Authorization – Users can run the Sales Analysis report.
	• No Authorization – Users cannot run this report.
Backorder – Selection Criteria	• Full Authorization – Users can run the Backorder report.
	• Read Only – Users cannot generate the Backorder report.
	• No Authorization – Users cannot generate the Backorder report.

Field Name	Description
Blanket Agreement Fulfillment Report	• Full Authorization – Users can run the Blanket Agreement Fulfillment Report under Sales - A/R. • No Authorization – Users cannot run the Blanket Agreement Fulfillment Report under Sales - A/R.
View Related Blanket Agreement from BP Master Data	• Full Authorization – Users can view a business partner's sales blanket agreements by choosing You Can Also → View Related Sales Blanket Agreements in the Business Partner Master Data window. • No Authorization – Users cannot view the related sales blanket agreements.
Annual Sales Analysis (by Quarter)	• Full Authorization – Users can run the Annual Sales Analysis (by Quarter) Crystal report. • No Authorization – Users cannot run this report.
Monthly Customer Status Report (version for Microsoft SQL)	• Full Authorization – Users can run the Monthly Customer Status Crystal report. • No Authorization – Users cannot run this report.
Monthly Customer Status Report (version for SAP HANA)	• Full Authorization- Users can view and modify the Monthly Customer Status report • No Authorization- Users cannot access the report
Tax Only	• Full Authorization – Users can select the Tax Only checkbox in a row on the Contents tab of a sales document to mark the row for tax payments and not for other purposes. The Tax Only checkbox is invisible by default. To display it, open Form Settings. • No Authorization – Users cannot select the Tax Only checkbox.
Change Row Amounts	• Full Authorization – Users can change the price, discount, and line total of the contents in a document. • No Authorization – Users cannot change the price, discount, and line total of the contents in a document. Those fields are disabled.
Change Sales Employee	• Full Authorization – Users can change the sales employee entered automatically in a document (according to either the selected customer or the document owner) when adding the document. • No Authorization – Users cannot select a different sales employee for the document.
Sales Employee Update	• Full Authorization – Users can change the sales employee selected in an existing document. • No Authorization – Users cannot change the sales employee in existing documents.

Field Name	Description
Confirm Credit Line Deviation	When a customer exceeds the credit limit (defined by choosing Business Partner Master Data → Payment Terms tab → Credit Limit), the following warning message appears: "Customer has exceeded credit limit." • Full Authorization – Users can approve system messages regarding the deviation from the credit limit by clicking Yes, thus enabling the customer to exceed the credit limit. • No Authorization – Users cannot approve such actions.
Confirm Debt Line Deviation	When a customer deviates from the commitment limit (defined for each customer by choosing Business Partner Master Data → Payment Terms tab → Max. Commitment), the following warning message appears: "Customer has exceeded commitment limit." • Full Authorization – Users can approve system messages regarding deviation from the commitment limit by clicking Yes, thus enabling the customer to deviate from the commitment limit. • No Authorization – Users cannot approve such actions.
Confirm Stock Limit Deviation	If, during stock issue, inventory falls below the minimum level defined in Item Master Data, the following warning message appears: "Inventory is under minimum per Item." This warning is defined by choosing Document Settings → General tab → When Attempting to Release Stock Below the Minimum Level → Warning Only), A warning message also appears when inventory falls below the minimum in goods issue and inventory transfer documents. If the receipt of stock makes the inventory quantity higher than the maximum quantity level defined in Item Master Data, the following warning message appears: "Quantity exceeds maximum inventory level." • Full Authorization – Users can approve system messages regarding deviation from the minimum/ maximum stock level by clicking Yes, allowing the stock to fall below the minimum or exceed the maximum. • No Authorization – Users cannot approve such actions.
Partial Delivery	Users can select or deselect the Allow Partial Delivery in Sales Orders checkbox on the Logistics tab. This determines whether the sales order can be copied partially to a target document. To set the default, choose Business Partner Master Data → Payment Terms tab. • Full Authorization – Users can select or deselect the Partial Delivery checkbox in sales orders.

Field Name	Description
	• No Authorization – Users cannot change this definition in the document. The Allow Partial Delivery checkbox is disabled.
Document Confirmation	Users can select or deselect the Approved checkbox on the Logistics tab in sales and purchase orders and in sales and purchase return requests. This determines whether these documents are approved for being copied to a target document. To set the default, choose Administration → System Initialization → Document Settings → Per Document tab → Sales Order/Purchase Order. • Full Authorization – Users can select or deselect the Approved checkbox in sales orders and in purchase orders. • No Authorization – Users cannot change this definition in the document. The Approved checkbox is disabled.
Documents with Zero Amounts	Users can add sales and purchasing documents with a zero total amount (the value in the Total field is 0). • Full Authorization – Users can add documents with a zero total amount. • No Authorization – Users cannot add such documents.
Allow to Change Reconciliation Accounts	• Full Authorization – Users can select or deselect the Permit Change of Control Accounts checkbox (Administration → Setup → Financials → G/L Account Determination → Sales/Purchase tab). • No Authorization – Users cannot change this definition. The Permit Change of Control Accounts checkbox is disabled.
Gross Profit	• Full Authorization – Users can open the Gross Profit window and modify relevant data. • Read Only – Users can view the Gross Profit window. • No Authorization – Users cannot open the Gross Profit window. In addition, gross profit data is not displayed in reports (such as Sales Analysis) generated by a user with no authorization.
Change Tax Rate	Available in Israel only, where the tax rate is managed at company level. • Full Authorization - Users can change the default company tax rate when they add a new marketing document or when they copy an existing marketing document to another document. • No Authorization – Users cannot change the default company tax rate in marketing documents. It is read-only.
Modify Posted A/R Documents	• Full Authorization - Users can modify fields at the row level after the sales documents have been posted. For example, the owner can be modified in a row in a sales document that creates a journal entry (such as an invoice) or inventory transaction only (such as a delivery in a non-perpetual inventory system) after the document has been posted.

Field Name	Description
	• No Authorization – Users cannot modify any field at the row level after the sales document has been posted.

9 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
Purchasing – A/P	• Full Authorization – Users can access all the windows and perform all the actions specified in the Purchasing – A/P module and make required changes or new settings. • Read Only – Users can view the data defined in all the functions specified in the Purchasing – A/P module. • No Authorization – Users cannot access any of the options in the Purchasing – A/P module. **i Note** If you select the Read Only authorization for the entire Purchasing – A/P module, the authorizations for its child items without the Read Only option are automatically set to No Authorization.
Blanket Agreement	• Full Authorization – Users can open the Purchase Blanket Agreement window, add new blanket agreements and modify the existing ones. • Read Only – Users can view purchase blanket agreements. • No Authorization – Users cannot open the Purchase Blanket Agreement window.
Blanket Agreement Status	• Full Authorization – Users can modify the Status field of a blanket agreement. This authorization is available only when Full Authorization is set to Blanket Agreement under Purchase - A/P. • No Authorization – Users cannot modify the Status field of a blanket agreement.

Field Name	Description
	ⓘ Note
	o When managing Approval Process for blanket agreement:
	o The blanket agreement generator in the approval process template, shall have full authorization to Blanket Agreement Status in order to be able to modify the status from Draft into To Be Approved (which triggers the Request for Approval).
	o Once a blanket agreement is approved, the requester cannot modify the blanket agreement status even with full authorization for Blanket Agreement Status.
Purchase Request	• Full Authorization – Users can open the Purchase Request window, add new documents, and modify the existing ones.
	• Read Only – Users can view Purchase Request documents.
	• No Authorization – Users cannot open the Purchase Request window.
Requester Change	• Full Authorization – Users can change the requester code (user/employee) of an existing purchase request.
	• No Authorization – Users cannot change the requester code of an existing purchase request.
Purchase Quotation	• Full Authorization – Users can open the Purchase Quotation window, add new documents, and modify existing ones.
	• Read Only – Users can view Purchase Quotation documents.
	• No Authorization – Users cannot open the Purchase Quotation window.
Purchase Order	• Full Authorization – Users can open the Purchase Order window, add new documents, and modify existing ones. In addition, you are granted full authorization for the Split Purchase Order function.
	• Read Only – Users can view purchase order documents. In addition, you are granted read only authorization for the Split Purchase Order function.
	• No Authorization – Users cannot open the Purchase Order window.
Split Purchase Order	• Full Authorization – Users can select and deselect the Split Purchase Order checkbox on the Logistics tab in a purchase order.
	• No Authorization – The Split Purchase Order checkbox is disabled.
Goods Receipt PO	• Full Authorization – Users can open the Goods Receipt PO window, add new documents, and modify the existing ones.

Field Name	Description
	• Read Only – Users can view Goods Receipt PO documents. • No Authorization – Users cannot open the Goods Receipt PO window.
Goods Return Request	• Full Authorization – Users can open the Goods Return Request window, add new documents, and modify the existing ones. • Read Only – Users can view Goods Return Request documents. • No Authorization – Users cannot open the Goods Return Request window.
Goods Return	• Full Authorization – Users can open the Goods Return window, add new documents, and modify existing ones. • Read Only – Users can view Goods Return documents. • No Authorization – Users cannot open the Goods Return window.
A/P Down Payment Invoice	• Full Authorization – Users can open the A/P Down Payment Invoice window, add new documents, and modify existing ones. • Read Only – Users can view A/P Down Payment Invoice documents. • No Authorization – Users cannot open the A/P Down Payment Invoice window.
A/P Invoice	• Full Authorization – Users can open the A/P Invoice window, add new documents, and modify existing ones. • Read Only – Users can view A/P invoice documents. • No Authorization – Users cannot open the A/P Invoice window.
A/P Credit Memo	• Full Authorization – Users can open the A/P Credit Memo window, add new documents, and modify existing ones. • Read Only – Users can view A/P Credit Memo documents. • No Authorization – Users cannot open the A/P Credit Memo window.
A/P Reserve Invoice	• Full Authorization – Users can open the A/P Reserve Invoice window, add new documents and modify existing ones. • Read Only – Users can view A/P Reserve Invoice documents. • No Authorization – Users cannot open the A/P Reserve Invoice window.
Landed Costs	• Full Authorization – Users can open the Landed Costs window, add new documents and modify existing ones. • Read Only – Users can view Landed Costs documents. • No Authorization – Users cannot open the Landed Costs window.

Field Name	Description
Folio Numbering - Editing	• Full Authorization – Users can edit the folio numbers by choosing Edit Folio Numbers in the context menu of a document. • No Authorization – Users cannot edit the folio numbers.
Procurement Confirmation Wizard	• Full Authorization – Users can access the Procurement Confirmation Wizard and create purchase documents directly from sales orders (providing you have an authorization for the purchase documents). • No Authorization – Users cannot open or view the wizard.
Purchase Quotation Generation Wizard	• Full Authorization – Users can access the Purchase Quotation Generation Wizard and create a batch of purchase quotations automatically. • No Authorization – Users cannot open or view the wizard.
Change Tax Amount Distribution	Relevant only for the United States localization Users can access the Define Tax Amount Distribution window, opened from the Tax Amount (LC) field in sales and purchasing documents or by choosing the Add Expenses field → Expenses window → Total Tax Amount field. • Full Authorization – Users can open the Define Tax Amount Distribution window and change the distribution of the tax amount. • Read Only – Users can view the Define Tax Amount Distribution window. • No Authorization – Users cannot open the Define Tax Amount Distribution window.
Purchasing Reports	• Full Authorization-- Users can open Purchasing Reports. • No Authorization-- Users cannot open Purchasing Reports.
Electronic Reports	• Full Authorization- Users can view and generate Electronic Reports • Read Only- Users can view Electronic Reports • No Authorization- Users cannot access Electronic Reports
Purchase Analysis	• Full Authorization – Users can view and access Purchase Analysis documents. • No Authorization – Users cannot access the window.
Purchase Request Report	• Full Authorization-- Users can open the Purchase Request Report, create target documents and view existing ones. • No Authorization-- Users cannot open Purchase Request Report.
Quotation Comparison	• Full Authorization – Users can open the Quotation Comparison, add new documents and view existing ones.

Field Name	Description
	• No Authorization – Users cannot open or view the Quotation Comparison.
Blanket Agreement	• Full Authorization – Users can run the Blanket Agreement Reports. • No Authorization – Users cannot run the Blanket Agreement Reports.
Blanket Agreement Fulfillment Report	• Full Authorization – Users can run the Blanket Agreement Fulfillment Report under Purchase - A/P. • No Authorization – Users cannot run the Blanket Agreement Fulfillment Report under Purchase - A/P.
View Related Blanket Agreement from BP Master Data	• Full Authorization – Users can view a business partner's purchase blanket agreements by choosing You Can Also → View Related Purchase Blanket Agreements in the Business Partner Master Data window. • No Authorization – Users cannot view the related purchase blanket agreements.
Tax Only	• Full Authorization – Users can select the Tax Only checkbox to mark a row in a purchasing document for tax payments and not for other purposes. The Tax Only checkbox is invisible by default. To display it, open Form Settings • No Authorization – Users cannot select the Tax Only checkbox.
Modify Posted A/P Documents	• Full Authorization – Users can modify fields at the row level after the purchasing documents have been posted. For example, the owner can be modified in a row in a document that creates a journal entry or inventory transaction, such as a goods receipt PO, after the document has been posted. • No Authorization – Users cannot modify any field at the row level in a purchasing document once it has been posted.

10   Business Partners Module Authorizations

The following modules and functions define the Business Partners authorizations:

Field Name	Description
Business Partners	• **Full Authorization** – Users can access all the windows and perform all the actions specified in the Business Partners module and make required changes or new settings. • **Read Only** – Users can view the data defined in all the functions specified in the Business Partners module. • **No Authorization** – Users cannot access any option specified in the Business Partners module. ℹ **Note** If you select the Read Only authorization for the entire Business Partners module, the authorizations for its child items without the Read Only option are automatically set to No Authorization.
Adding Business Partner	• **Full Authorization** – Users can add business partner master data from all business partner types: Customer, Vendor and Lead. In addition, you require Read Only authorization for price lists. • **No Authorization** – Users cannot add business partners.
Adding Customer/Vendor Master Data	• **Full Authorization** – Users can add Customer and Vendor business partner master data. • **No Authorization** – Users cannot add Customer and Vendor business partners.
Adding Lead BP	• **Full Authorization** – Users can add Lead business partner master data. • **No Authorization** – Users cannot add Lead business partners.
Business Partner Master Data	• **Full Authorization** – Users can open and work in the Business Partner Master Data window, modify and view data, and perform all the actions specified in this section, such as Sales Order Balance. • **Read Only** – Users can view the Business Partner Master Data window. If you select Read Only, all the options listed in this section (such as Delivery Balance) are set to No Authorization. • **No Authorization** – Users cannot open the Business Partner Master Data window.
Sales Order Balance	• **Full Authorization** – Users can view the sales order balance of the business partner in the Orders field.

Field Name	Description
	• No Authorization – Users see asterisks (****) instead of numbers.
Delivery Balance	• Full Authorization – Users can view the delivery balance of the business partner in the Deliveries field. • No Authorization – Users see asterisks (****) instead of numbers.
Goods Receipt PO Balance	• Full Authorization – Users can view the delivery balance of a business partner in the Goods Receipt PO Balance field. • No Authorization – Users see asterisks (****) instead of numbers.
Purchase Order Balance	• Full Authorization – Users can view the delivery balance of the business partner in the Purchase Order Balance field. • No Authorization – Users see (****) asterisks instead of numbers.
Change Sales Employee	• Full Authorization – Users can change the specified sales employee by choosing Business Partner Master Data → General tab. • No Authorization – Users cannot change the sales employee.
General Tab	• Full Authorization – Users can view and edit the data on the General tab in the Business Partner Master Data window, unless they have no authorization for a specific field on the tab. • Read Only – Users can view but cannot edit the data on the General tab in the Business Partner Master Data window. • No Authorization–The General tab in the Business Partner Master Data window is hidden.
Contact Persons Tab	• Full Authorization – Users can view and edit the data on the Contact Persons tab in the Business Partner Master Data window, unless they have no authorization for a specific field on the tab. • Read Only – Users can view but cannot edit the data on the Contact Persons tab in the Business Partner Master Data window. • No Authorization–The Contact Persons tab in the Business Partner Master Data window is hidden.
Addresses Tab	• Full Authorization – Users can view and edit the data on the Addresses tab in the Business Partner Master Data window, unless they have no authorization for a specific field on the tab. • Read Only – Users can view but cannot edit the data on the Addresses tab in the Business Partner Master Data window. • No Authorization–The Addresses tab in the Business Partner Master Data window is hidden.

Field Name	Description
Payment Terms Tab	• **Full Authorization** – Users can view and edit the data on the Payment Terms tab in the Business Partner Master Data window, unless they have no authorization for a specific field on the tab. • **Read Only** – Users can view but cannot edit the data on the Payment Terms tab in the Business Partner Master Data window. • **No Authorization**–The Payment Terms tab in the Business Partner Master Data window is hidden.
Payment Run Tab	• **Full Authorization** – Users can view and edit the data on the Payment Run tab in the Business Partner Master Data window, unless they have no authorization for a specific field on the tab. • **Read Only** – Users can view but cannot edit the data on the Payment Run tab in the Business Partner Master Data window. • **No Authorization**–The Payment Run tab in the Business Partner Master Data window is hidden.
Accounting Tab	• **Full Authorization** – Users can view and edit the data on the Accounting tab in the Business Partner Master Data window, unless they have no authorization for a specific field on the tab. • **Read Only** – Users can view but cannot edit the data on the Accounting tab in the Business Partner Master Data window. • **No Authorization**–The Accounting tab in the Business Partner Master Data window is hidden.

Intrastat Settings Tab	• **Full Authorization** – Users can view and edit the data on the Intrastat Settings tab in the Business Partner Master Data window, unless they have no authorization for a specific field on the tab.
	• **Read Only** – Users can view but cannot edit the data on the Intrastat Settings tab in the Business Partner Master Data window.
	• **No Authorization**–The Intrastat Settings tab in the Business Partner Master Data window is hidden.
	
	ⓘ Note
	  o The authorization for Intrastat Settings Tab will be updated to no authorization when no authorization is selected for General Tab.
	  o The authorization for General Tab will be updated to read-only when full or read-only authorization is selected for Intrastat Settings Tab.

Properties Tab	• **Full Authorization** – Users can view and edit the data on the Properties tab in the Business Partner Master Data window, unless they have no authorization for a specific field on the tab.

Field Name	Description
	• Read Only – Users can view but cannot edit the data on the Properties tab in the Business Partner Master Data window. • No Authorization–The Properties tab in the Business Partner Master Data window is hidden.
Remarks Tab	• Full Authorization – Users can view and edit the data on the Remarks tab in the Business Partner Master Data window, unless they have no authorization for a specific field on the tab. • Read Only – Users can view but cannot edit the data on the Remarks tab in the Business Partner Master Data window. • No Authorization–The Remarks tab in the Business Partner Master Data window is hidden.
Attachments Tab	• Full Authorization – Users can view and edit the data on the Attachments tab in the Business Partner Master Data window, unless they have no authorization for a specific field on the tab. • Read Only – Users can view but cannot edit the data on the Attachments tab in the Business Partner Master Data window. • No Authorization–The Attachments tab in the Business Partner Master Data window is hidden.
eDocs Tab	• Full Authorization – Users can view and edit the data on the eDocs tab in the Business Partner Master Data window, unless they have no authorization for a specific field on the tab. • Read Only – Users can view but cannot edit the data on the eDocs tab in the Business Partner Master Data window. • No Authorization–The eDocs tab in the Business Partner Master Data window is hidden.
Active	Users can set an activity period for the business partner. When this activity period is over, it is not possible to create documents for this business partner. • Full Authorization – Users can select or deselect the Active checkbox (Business Partner Master Data → General tab). When the checkbox is selected, three additional fields are displayed, letting you define the activity period and enter comments. • No Authorization – Users cannot set an activity period for a business partner.
Inactive	• Full Authorization – Users can select or deselect the Inactive checkbox (Business Partner Master Data → General tab). When the checkbox is selected, three additional fields are displayed, letting you define the inactive period and enter comments. • No Authorization – Users cannot set an inactive period for a business partner.

Field Name	Description
Remove Business Partner	• Full Authorization – Users can remove a business partner (from the context menu; or the menu bar, choose Data → Remove Business Partner). • No Authorization – Users cannot remove a business partner.
Campaign Generation Wizard	• Full Authorization – Users can access the Campaign Generation Wizard, create a new campaign, save it, and load the saved campaign. • No Authorization – Users cannot access the wizard.
Execute Campaign	• Full Authorization – Users can execute the Campaign Generation Wizard on condition that they have authorization for Campaign Generation Wizard. • No Authorization – If users have full authorization for Campaign Generation Wizard but no authorization for Execute Campaign, they can access the wizard, create a new campaign, save it and load the saved campaign, but they cannot execute the campaign.
Campaign	• Full Authorization – Users can open the Campaign window, add new campaigns, and modify existing ones. • Read Only – Users can view the Campaign window. • No Authorization – Users cannot open the Campaign window.
Business Partner Type	• Full Authorization – Users can search for and view specific types of business partners. • No Authorization – Users cannot search for specific types of business partners.
Customers, Vendors, Leads	• Full Authorization – Users can search for and view specific types of business partners. • No Authorization – Users cannot search for specific types of business partners.
Activity	• Full Authorization – Users can open the Activity window, add new activities, and modify existing ones. • Read Only – Users can view the Activity window. • No Authorization – Users cannot open the Activity window.
Delete Activity	• Full Authorization – Users can delete an existing activity by the context menu or by choosing Data → Remove. • No Authorization – Users cannot delete activities.
Internal Reconciliations	• Full Authorization – Users can display, cancel, and recreate internal reconciliations created for a specified range of business partners, and manage previous internal reconciliations. • Read Only - Users can view the Reconciliation and Manage Previous Reconciliations windows but not make any changes.

Field Name	Description
	• No Authorization – Users cannot view these windows.
Reconciliation	• Full Authorization - Users can display, cancel, and recreate internal reconciliations created for a specified range of business partners. • Read Only – Users can view the Reconciliation window but cannot make any changes. • No Authorization – Users cannot view this window.
Manage Previous Reconciliations	• Full Authorization – Users can display, cancel, and recreate internal reconciliations created for a specified range of business partners. • Read Only – Users can view the Manage Previous Reconciliations window but cannot make any changes. • No Authorization – Users cannot view this window.
Business Partner Reports	• Full Authorization – Users can open and run all the business partner reports. In addition, you require full authorization for BP Balances, Account Balances, Accounting and Access to Confidential Accounts fields. These are set in General Authorizations module Authorizations. To print these reports, you require full authorization for the Document Printing field. • No Authorization – Users cannot run these reports.
Electronic Reports	• Full Authorization- Users can view and generate Electronic Reports • Read Only- Users can view Electronic Reports • No Authorization- Users cannot access Electronic Reports
Activities Overview	• Full Authorization – Users can open and run all activity reports: My Activities, Activities Overview and Activity Check in Report (available in SAP Business One, version for SAP HANA only). • No Authorization – Users cannot run these reports.
Inactive Customers	• Full Authorization – Users can open and run the Inactive Customers report. • No Authorization – Users cannot run this report.
Dunning History Report	• Full Authorization – Users can open and run the Dunning History report. • No Authorization – Users cannot run this report.
Campaigns List	• Full Authorization – Users can open and run the Campaigns List report. • No Authorization – Users cannot run this report.
Sent Emails Report	• Full Authorization – Users can open and run the Sent Emails Report. • No Authorization – Users cannot run this report.

11 Banking Module Authorizations

The following modules and functions define the Banking authorizations:

Field Name	Description
Banking	• **Full Authorization** – Users can access all the windows and perform all the actions specified in the Banking module and make required changes or new settings. • **Read Only** – Users can view the data defined in all the functions specified in the Banking module. • **No Authorization** – Users cannot access any option specified in the Banking module. ⓘ Note If you select the Read Only authorization for the entire Banking module, the authorizations for its child items without the Read Only option are automatically set to No Authorization.
Incoming Payments	• **Full Authorization** – Users can open all the windows located under the Incoming Payments submenu, add new incoming payment documents, view the Check Register window, Credit Card Management window, Credit Card Summary window and perform various actions. • **Read Only** – Users can view windows located under the Incoming Payments submenu. • **No Authorization** – Users cannot open any of the windows located under the Incoming Payments submenu.
Incoming Payments	• **Full Authorization** – Users can open the Incoming Payments window, add new incoming payment documents, and modify existing ones. • **Read Only** – Users can view the Incoming Payments window. • **No Authorization** – Users cannot open the Incoming Payments window.
Cash Receipt	• **Full Authorization** – Users can use cash as the payment means (Incoming Payments → Payment Means → Cash tab). • **No Authorization** – Users cannot use cash as the payment means in incoming payments.
Check Register	• **Full Authorization** – Users can open the Check Register window, view check data, update due dates, endorse and cancel checks, and cancel deposits and payments. • **Read Only** – Users can view the Check Register window.

Field Name	Description
	• No Authorization – Users cannot open the Check Register window.
Credit Card Management	• Full Authorization – Users can open the Credit Card Management window, view credit card vouchers data, update references, and cancel credit card vouchers. • Read Only –Users can view the Credit Card Management window • No Authorization – Users cannot open the Credit Card Management window
Deposits	• Full Authorization – Users can open the Deposit window and deposit checks, credit card vouchers, and cash to the bank or to a business partner. In addition, Users can view previous deposits, modify their data, and even cancel deposits. This authorization also includes access to the Postdated Credit Voucher window and the ability to deposit postdated checks. • Read Only – Users can view the Deposit window. • No Authorization – Users cannot open the Deposit window.
Deposit	• Full Authorization – Users can open the Deposit window and deposit checks, credit card vouchers, and cash to the bank or to a business partner. In addition, Users can view previous deposits, modify their data, and even cancel deposits. • Read Only – Users can view the Deposit window. • No Authorization – Users cannot open the Deposit window.
Outgoing Payments	• Full Authorization – Users can open all the windows located under the Outgoing Payments submenu, add new outgoing payment documents, process and view checks for payment, perform actions in the Void Checks for Payment window, and open the Checks for Payments Draft Report. • Read Only – Users can view the windows located under the Outgoing Payments submenu. • No Authorization – Users cannot open any of the windows located under the Outgoing Payments submenu.
Outgoing Payments	• Full Authorization – Users can open the Outgoing Payments window, add new outgoing payment documents, and modify existing ones. • Read Only – Users can view the Outgoing Payments window. • No Authorization – Users cannot open the Outgoing Payments window.
Payment Draft	• Full Authorization- Users can save a payment as a draft • No Authorization- Users cannot save a payment as a draft

Field Name	Description
Checks for Payment	• Full Authorization – Users can open the Checks for Payment window, add new checks for payment documents, modify the existing ones and cancel checks. This authorization also determines the ability to access the Check Register Report under Banking → Banking Reports. • Read Only – Users can view the Checks for Payment window. • No Authorization – Users cannot open the Checks for Payment window.
Void Checks for Payment	• Full Authorization – Users can open the Void Checks for Payment window, void required checks, and reprint them. ℹ Note Make sure that you have authorizations for Numbering Series. • Read Only – Users can view the Void Checks for Payment window. • No Authorization – Users cannot open the Void Checks for Payment window
Update Pay To	• Full Authorization – Users can change Pay to in the Checks for Payment window • No Authorization – Users cannot change Pay to in the Checks for Payment window
Create Check for Payment Without Journal Entry	• Full Authorization –Users can deselect Create Journal Entry in the Checks for Payment window to create a check for payment without a journal entry. • No Authorization – Users cannot deselect Create Journal Entry in the Checks for Payment window.
Print Check for Payment	• Full Authorization – Users can print a check for payment from the check itself and from Document Printing. • No Authorization – Users cannot print a check for payment from the check itself or from Document Printing.
Print Voided Checks for Payment	• Full Authorization – Users can print voided checks for payment. • No Authorization – Users cannot print voided checks for payment.
Reprint Check for Previously Printed Payment	• Full Authorization – Users can print a check that was already printed • No Authorization – Users cannot print any check that was already printed
Payment Drafts Report	• Full Authorization – Users can open the Payment Drafts Report window, open existing drafts, modify them, and add them as genuine documents.

Field Name	Description
	• No Authorization – Users cannot open the Payment Drafts Report window. ⅰ Note The Payment Drafts Report authorization applies to both incoming and outgoing payments.
Remove Payment Drafts	• Full Authorization – Users can remove payment drafts from the Payment Drafts Report window. • No Authorization – Users cannot remove payment drafts from the Payment Drafts Report window.
Checks for Payment Draft	• Full Authorization – Users can save checks for payment as drafts. • No Authorization – Users cannot save checks for payment as drafts.
Checks for Payment Drafts Report	• Full Authorization – Users can open the Payment Drafts Report window, open existing drafts, modify them, and add them as genuine documents. • Read Only – Users can view the Checks for Payment Drafts Report window. • No Authorization – Users cannot open the Payment Drafts Report window.
Remove Checks for Payment Drafts	• Full Authorization- Users can remove Checks for Payment Drafts from the Checks for Payment Drafts Report window. • No Authorization- Users cannot remove Checks for Payment Drafts from the Checks for Payment Drafts Report window.
Payment System	• Full Authorization – Users can run the Payment Wizard, access all its related definitions, and execute payment runs. • No Authorization – Users cannot work with the payment wizard.
Payment Wizard	• Full Authorization – Users can work with the Payment Wizard and execute payment runs. Full authorization for Execute is required to enable the Execute Payment Run option in the Save Options step of the wizard. • No Authorization – Users cannot work with the payment wizard.
Execute	• Full Authorization – Users can execute payment runs by selecting the Execute Payment Run option in the payment wizard when they have full authorization for Payment Wizard. • No Authorization – Users cannot execute the wizard. The Execute Payment Run option is hidden.

Field Name	Description
	i Note This authorization is not applicable to Execute Payment Order.
Payment Engine - Bank File Generation	• Full Authorization – Users can generate a bank file by selecting Bank File in the step Payment Run Summary and Printing of the Payment Wizard when they have full authorization for the wizard. • No Authorization – Users cannot generate bank files.
Payment Orders	• Full Authorization-- Users can access Payment Orders under Banding and print payment orders. Full Authorization for Documents Printing under Sales - A/R is required for printing payment orders. • No Authorization--Users cannot access Payment Orders.

Bank Statements and External Reconciliations	• Full Authorization – Users can open all the windows specified in the Bank Statements and Reconciliations submenu and perform various actions.
	• Read Only – Users can only view the Bank Statement Summary window.
	   i Note
	   This option applies only in certain localizations and is relevant when the Install Bank Statement Processing checkbox on the Basic Initialization tab of the Administration → System Initialization → Company Details window is selected.
	• No Authorization – Users cannot open any of the windows located under the Bank Statements and Reconciliations submenu.

Bank Statement Summary	• Full Authorization – Users can access Bank Statement Summary via Bank Statement Processing and view and process bank statement details.
	• Read Only – Users can view bank statement details
	• No Authorization – Users cannot access Bank Statement Processing.
	   i Note
	   The entry Bank Statement Processing is available when the Install Bank Statement Processing checkbox on the Basic Initialization tab in the Administration → System Initialization → Company Details window is selected.

Field Name	Description

Process External Bank Statement	• Full Authorization – Users can access the Process External Bank Statement window, add new bank statements, or update the existing ones.
	• No Authorization – Users cannot open this window.
	
	i Note
	    o This functionality is available when the Install Bank Statement Processing checkbox on the Basic Initialization tab in the Administration → System Initialization → Company Details window is deselected.
	    o In some localizations (for example, Polish), the window name is Statement Evidence.

Bank Statement Information	• Full Authorization – Users can access Bank Statement Information under Banking Reports. • No Authorization – Users cannot access Bank Statement Information.
Reconciliation	• Full Authorization – Users can access the Reconciliation window and reconcile open transactions with open bank statement transactions. • No Authorization – Users cannot open this window.
External Bank Reconciliation	• Full Authorization – Users can access the Manual Reconciliation window and check/clear open transactions against bank statement transactions. • No Authorization – Users cannot open this window. **i** Note This functionality is available when the Install Bank Statement Processing checkbox on the Basic Initialization tab in the Administration → System Initialization → Company Details window is deselected.
Manage Previous External Reconciliations	• Full Authorization – Users can access the Manage Previous Reconciliations window and view and cancel reconciliations. • No Authorization – Users cannot open this window.
Check and Restore Previous External Reconciliations	• Full Authorization – Users can access the Check and Restore Previous Reconciliations window and open and restore reconciliations. • No Authorization – Users cannot open this window.
Check Number Confirmation	• Full Authorization – Users can access the Check Number Confirmation window and change the Status column. • Read Only – Users can view the Check Number Confirmation window.

Field Name	Description
	• No Authorization – Users cannot open the Check Number Confirmation window.
Electronic Reports	• Full Authorization- Users can view and generate Electronic Reports • Read Only- Users can view Electronic Reports • No Authorization- Users cannot access Electronic Reports
Bank Reconciliation Report	• Full Authorization – Users can run the Bank Reconciliation crystal report under Banking Reports→External Reconciliation. • No Authorization – Users cannot run this report.
Payment Orders Report by Business Partner	• Full Authorization – Users can run the Payment Orders Report by Business Partner crystal report under Banking Reports. • No Authorization – Users cannot run this report.
Payment Orders Report by Payment Run	• Full Authorization – Users can run the Payment Orders Report by Payment Run crystal report under Banking Reports. • No Authorization – Users cannot run this report.

12   Inventory Module Authorizations

The following modules and functions define the Inventory authorizations:

Field Name	Description

Inventory	• Full Authorization – Users can access all the windows and perform all the actions specified in the Inventory module and make required changes or new settings.
	• Read Only – Users can view the data defined in all the functions specified in the Inventory module.
	• No Authorization – Users cannot access any option specified in the Inventory module.
	
	   ⁱ Note
	
	   If you select the Read Only authorization for the entire Inventory module, the authorizations for its child items without the Read Only option are automatically set to No Authorization.

Item Master Data	• Full Authorization – Users can open and work in the Item Master Data window, modify and view data, and perform all the actions specified in this section. • Read Only – Users can view the Item Master Data window. • No Authorization – Users cannot open the Item Master Data window.
General Tab	• Full Authorization – Users can view and edit the data on the General tab in the Item Master Data window, unless they have no authorization for a specific field on the tab. • Read Only – Users can view but cannot edit the data on the General tab in the Item Master Data window. • No Authorization–The General tab in the Item Master Data window is hidden.
Purchasing Tab	• Full Authorization – Users can view and edit the data on the Purchasing tab in the Item Master Data window, unless they have no authorization for a specific field on the tab. • Read Only – Users can view but cannot edit the data on the Purchasing tab in the Item Master Data window. • No Authorization–The Purchasing tab in the Item Master Data window is hidden.
Sales Tab	• Full Authorization – Users can view and edit the data on the Sales tab in the Item Master Data window, unless they have no authorization for a specific field on the tab.

Field Name	Description
	- Read Only – Users can view but cannot edit the data on the Sales tab in the Item Master Data window. - No Authorization–The Sales tab in the Item Master Data window is hidden.
Inventory Tab	- Full Authorization – Users can view and edit the data on the Inventory tab in the Item Master Data window, unless they have no authorization for a specific field on the tab. - Read Only – Users can view but cannot edit the data on the Inventory tab in the Item Master Data window. - No Authorization–The Inventory tab in the Item Master Data window is hidden.
Planning Tab	- Full Authorization – Users can view and edit the data on the Planning tab in the Item Master Data window, unless they have no authorization for a specific field on the tab. - Read Only – Users can view but cannot edit the data on the Planning tab in the Item Master Data window. - No Authorization–The Planning tab in the Item Master Data window is hidden.
Production Tab	- Full Authorization – Users can view and edit the data on the Production tab in the Item Master Data window, unless they have no authorization for a specific field on the tab. - Read Only – Users can view but cannot edit the data on the Production tab in the Item Master Data window. - No Authorization–The Production tab in the Item Master Data window is hidden.
Properties Tab	- Full Authorization – Users can view and edit the data on the Properties tab in the Item Master Data window, unless they have no authorization for a specific field on the tab. - Read Only – Users can view but cannot edit the data on the Properties tab in the Item Master Data window. - No Authorization–The Properties tab in the Item Master Data window is hidden.
Remarks Tab	- Full Authorization – Users can view and edit the data on the Remarks tab in the Item Master Data window, unless they have no authorization for a specific field on the tab. - Read Only – Users can view but cannot edit the data on the Remarks tab in the Item Master Data window. - No Authorization–The Remarks tab in the Item Master Data window is hidden.
Attachments Tab	Full Authorization – Users can view and edit the data on the Attachments tab in the Item Master Data window, unless they have no authorization for a specific field on the tab.

Field Name	Description
	• Read Only – Users can view but cannot edit the data on the Attachments tab in the Item Master Data window. • No Authorization–The Attachments tab in the Item Master Data window is hidden.

Intrastat Settings Tab	• Full Authorization – Users can view and edit the data on the Intrastat Settings tab in the Item Master Data window, unless they have no authorization for a specific field on the tab.
	• Read Only – Users can view but cannot edit the data on the Intrastat Settings tab in the Item Master Data window.
	• No Authorization–The Intrastat Settings tab in the Item Master Data window is hidden.
	
	ⁱ Note
	  o The authorization for Intrastat Settings Tab will be updated to no authorization when no authorization is selected for General Tab.
	  o The authorization for General Tab will be updated to read-only when full or read-only authorization is selected for Intrastat Settings Tab.

Localization Fields Tab	• Full Authorization – Users can view and edit the data on the Localization Fields tab in the Item Master Data window, unless they have no authorization for a specific field on the tab. • Read Only – Users can view but cannot edit the data on the Localization Fields tab in the Item Master Data window. • No Authorization–The Localization Fields tab in the Item Master Data window is hidden.
Active	Users can set a validity period for the item. When this validity period is over, it is not possible to create documents that include this item. • Full Authorization – Users can select or deselect the Active checkbox (Item Master Data → General tab). When the checkbox is selected, three additional fields are displayed, letting you define the validity period and enter comments. • No Authorization – Users cannot set a validity period for an item.
Inactive	• Full Authorization – Users can select or deselect the Inactive checkbox (Item Master Data → General tab). When the checkbox is selected, three additional fields are displayed, letting you define the inactive period and enter comments. • No Authorization – Users cannot set an inactive period for an item.

Field Name	Description
Valuation Method	• Full Authorization – When adding a new item or updating an existing one, users can change the Valuation Method set for the item (Item Master Data → Inventory Data tab). • Read Only – Users cannot change this definition. • No Authorization – Users cannot change this definition.
Remove Item Master Data	• Full Authorization – Users can delete an item master data record (from the menu bar, choose Data → Remove; or choose Remove from the context menu). • No Authorization – Users cannot delete an Item Master Data record.
Bar Codes	• Full Authorization- Users can define and enter one or more Bar-Codes into the Item Master Data. • Read Only-Users can view Bar-Codes in the Item Master Data • No Authorization-Users cannot view or modify Bar-Codes in the Item Master Data
Bin Locations	• Full Authorization – Users can access all the windows and perform all the actions specified in the Bin Locations submenu. • Read Only – Users can view the data defined in all the functions specified in the Bin Locations submenu. • No Authorization – Users cannot access any option specified in the Bin Locations submenu.
Bin Location Master Data	• Full Authorization – Users can access the Bin Location Master Data window and add new master data or update the existing master data. • Read Only – Users can view Bin Location Master Data only. • No Authorization – Users cannot access Bin Location Master Data.
Activate and Deactivate Bin Location	• Full Authorization – Users can activate or deactivate a piece of bin location master data by selecting or deselecting the Inactive checkbox in the Bin Location Master Data window. • No Authorization – The Inactive checkbox is disabled.
Transaction Restrictions	• Full Authorization – Users can modify the Transaction Restrictions setting in the Bin Location Master Data window. • No Authorization – Users cannot modify this setting.
Bin Location Management	• Full Authorization – Users can access the Bin Location Management window and generate, update and delete a range of bin locations. • No Authorization – Users cannot access the Bin Location Management window.
Bin Location Code Modification	• Full Authorization – Users can access the Bin Location Code Modification window and modify bin location codes.

Field Name	Description
	• Read Only – Users cannot access the Bin Location Code Modification window. • No Authorization – Users cannot access the Bin Location Code Modification window.
Item Management	• Full Authorization – Users can access all the windows, perform all the actions relevant to the Item Management submenu. • Read Only – Users can view the data defined in all of the functions available under the Item Management submenu. • No Authorization – Users cannot access any option under the Item Management submenu. ⅈ Note If you select Read Only authorization for the entire Item Management menu, the authorizations for its child items without the Read Only option are automatically set to No Authorization.
Item Serial Numbers	• Full Authorization – Users can open all the windows specified in the Serial Numbers submenu, add new serial numbers, and update existing ones. • No Authorization – Users cannot open these windows.
Serial Number Management	• Full Authorization – Users can access the Serial Numbers Management window, view serial numbers selected in documents, update data for specific serial numbers, or perform a sweeping update of several serial numbers. • No Authorization – Users cannot open this window. ⚠ Caution A user with no authorization for the Serial Numbers Management window cannot select or define serial numbers in documents. For example, the user cannot right-click in the Quantity field and choose Batch/Serial Numbers in stock release documents or open the Define Serial Numbers window in stock receipt documents.
Serial Number Details	• Full Authorization – Users can access the Serial Number Details window, view serial numbers selected in documents, update data for specific serial numbers, or perform a sweeping update of several serial numbers. • No Authorization – Users cannot open this window.
Batches	• Full Authorization – Users can open all the windows specified in the Batches submenu, add new serial number, and update existing ones. • No Authorization – Users cannot open these windows.

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

Field Name	Description
Inventory Transactions	• **Full Authorization** – Users can access all the windows and perform all the actions available under the Inventory Transactions submenu. • **Read Only** – Users can view the data defined under all the functions in the Inventory Transactions submenu. • **No Authorization** – Users cannot access any option in the Inventory Transactions submenu. **i** Note If Read Only authorization is selected for the entire Inventory Transactions submenu, the authorizations for its child items without the Read Only option are automatically set to No Authorization
Goods Receipt	• **Full Authorization** – Users can open the Goods Receipt window, add new documents and modify existing ones. • **Read Only** – Users can view Goods Receipt documents. • **No Authorization** – Users cannot open the Goods Receipt window.
Goods Issue	• **Full Authorization** – Users can open the Goods Issue window, add new documents, and modify existing ones. • **Read Only** – Users can view Goods Issue documents. • **No Authorization** – Users cannot open the Goods Issue window.
Inventory Transfer Request	• **Full Authorization** – Users can open the Inventory Transfer Request window, add new documents, and modify existing ones. • **Read Only** – Users can view Inventory Transfer Request documents. • **No Authorization** – Users cannot open this window.
Inventory Transfer	• **Full Authorization** – Users can open the Inventory Transfer window, add new documents, and modify existing ones. • **Read Only** – Users can view Inventory Transfer documents. • **No Authorization** – Users cannot open the Inventory Transfer window.
Inventory Counting Transactions	• **Full Authorization** – Users can access all the windows and perform all the actions available under the Inventory Counting Transactions submenu. • **Read Only** – Users can access and view the windows available under the Inventory Counting Transactions submenu. • **No Authorization** – Users cannot access any option under the Inventory Counting Transactions submenu.

Field Name	Description
	i Note If you select the Read Only authorization for the Inventory Counting Transactions submenu, the authorizations for its child items without the Read Only option are automatically set to No Authorization.
Inventory Counting	• Full Authorization- Users can open the Inventory Counting window, add new documents and modify existing ones. • Read only- Users can view the Inventory Counting window. • No Authorization- Users cannot open the Inventory Counting window.
Special Inventory Counting Authorizations	• Full Authorization- Users have full authorization for all the child options under the Special Inventory Counting Authorizations submenu. • No Authorization- Users have no authorization for any of the child options under the Special Inventory Counting Authorizations submenu.
Modify Inventory Counting	• Full Authorization- Users can open an existing Inventory Counting document and modify it. • No Authorization - Users can view inventory counting documents but cannot modify them when they have authorization for Inventory Counting.
Freeze Items	• Full Authorization - Users can freeze an item or cancel this action by selecting or deselecting the Freeze checkbox in the table row of the Inventory Counting window. When this checkbox is selected, you can prevent any transaction (except inventory posting) that affects the in-warehouse quantity of the item in the selected warehouse and bin. • No Authorization- you cannot select or deselect this checkbox.
Inventory Posting	• Full Authorization – Users can open the Inventory Posting window, add new documents and modify the existing ones. • Read only - Users can view the Inventory Posting window only. • No Authorization – Users cannot open this window.
Inventory Opening Balance	• Full Authorization- Users can open the Inventory Opening Balance window, add new documents and modify the existing ones. • Read Only- Users can view the Inventory Opening Balance window. • No Authorization- Users cannot open the Inventory Opening Balance window.

Field Name	Description
Cycle Count Recommendations	• Full Authorization – Users can open the Cycle Count Recommendations window and perform various actions. • Read Only – Users can view the Cycle Count Recommendations window. • No Authorization – Users cannot open this window.
Inventory Revaluation	• Full Authorization – Users can open the Inventory Revaluation window, add new documents and view the existing ones. • Read Only – Users can view Inventory Revaluation documents. • No Authorization – Users cannot open this window.
Price Lists	• Full Authorization – Users can access all the windows, perform all the actions available under the Price Lists submenu. • Read Only – Users can access and view windows available under the Price Lists submenu. • No Authorization – Users cannot access any option under the Price List submenu.
Price Lists	• Full Authorization – Users can access all the windows and perform all the actions available under the Price Lists submenu. • Read Only – Users can access and view windows available under the Price Lists submenu. • No Authorization – Users cannot access any option under the Price Lists submenu.
Price List – Group No. 1, 2, 3 and 4	Users can access price lists related to a certain group (Inventory → Price Lists → Price Lists → Group). • Full Authorization – Users can access all the price lists related to the group. • Read Only – Users can view the price lists related to the group. • No Authorization – Users cannot access any price list related to the group. ⓘ Note A user with no authorization for a certain price list group is not able to view its prices in the Item Master Data window. The Price field displays asterisks (****) for restricted price list groups. In addition, the price list is excluded from the price list drop-down list of any other relevant windows.
Last Evaluated Price	• Full Authorization – Users can view the Last Evaluated Price list. • No Authorization – Users cannot view data in this price list.

Field Name	Description
	i Note A user with no authorization for the Last Evaluated Price list cannot view its prices in the Item Master Data window. The Price field displays asterisks (****) for this price list.
Last Purchase Price	• Full Authorization – Users can view the Last Purchase Price list. • No Authorization – Users cannot view data in this price list. **i** Note A user with no authorization for the Last Purchase Price list is not able to view its prices in any relevant windows, for example, the Item Master Data window. The Price field in the Item Master Data window displays asterisks (****) for this price list.
Item Cost	• Full Authorization – Users can view Item Cost in relevant windows, for example, the Item Master Data window, marketing documents, Batch Details window and Serial Number Details window (when the item is managed by the batch/serial valuation method). • No Authorization – Users cannot view Item Cost.
Period and Volume Discounts	• Full Authorization – Users can access the Hierarchies and Expansions window, and define date-dependent and quantity-dependent hierarchies and expansions for selected price lists. • Read Only – Users can view the Hierarchies and Expansions window. • No Authorization – Users cannot open the Hierarchies and Expansions window.
Special Prices	• Full Authorization – Users can access all the windows under the Special Prices submenu, add new data, modify existing data, and perform various actions. • Read Only – Users can view the different windows under the Special Prices submenu. • No Authorization – Users cannot access any window under the Special Prices submenu.
Special Prices for Business Partners	• Full Authorization – Users can access the Special Prices for Business Partners window, define special prices for business partners, and modify existing data. • Read Only – Users can view the Special Prices for Business Partners window. • No Authorization – Users cannot open the Special Prices for Business Partners window.

Field Name	Description
Copy Special Prices to Selection Criteria	• Full Authorization – Users can access the Copy Special Prices to Selection Criteria window and copy special prices to a range of business partners and/or items. • No Authorization – Users cannot open this window.
Update Special Prices Globally	• Full Authorization – Users can access the Update Special Prices Globally window and perform a global update of special prices by changing the discount %, price, or linked price list. • No Authorization – Users cannot open this window.
Discount Groups	• Full Authorization – Users can access the Discount Groups window and define special prices according to discount groups. • Read Only – Users can view the Discount Groups window. • No Authorization – Users cannot open the Discount Groups window.
Update Parent Item Prices Globally	• Full Authorization – Users can access the Update Parent Item Prices Globally window and update prices for the parent and child items comprising bills of materials. • Read Only – Users can view the Update Parent Item Prices Globally window. • No Authorization – Users cannot open this window.
Prices Update Wizard	• Full Authorization – Users can access the Prices Update Wizard window and update prices globally. • No Authorization – Users cannot open this window.
Execute Prices Update	• Full Authorization – Users can execute the price updates with the Prices Update Wizard window. • No Authorization – Users cannot execute any price update with the Prices Update Wizard window. **i Note** When users have full authorization for Prices Update Wizard and no authorization for Execute Prices Update, they can only view the prices update simulation.
Pick and Pack	• Full Authorization – Users can access the Pick and Pack Manager and the Pick List windows. • No Authorization – Users cannot open these windows.
Pick Pack and Production Manager	• Full Authorization – Users can access the Pick Pack and Production Manager window, pick and release sales orders, and pack items for delivery. • No Authorization – Users cannot open this window.
Pick List	• Full Authorization – Users can access the Pick List window, pick items, and pack them for delivery.

Field Name	Description
	• Read Only – Users can view the Pick List window. • No Authorization – Users cannot open the Pick List window. ⁱ Note In addition to full authorization for Pick List, authorizations for the documents in the Create drop-down list in the Pick List window are also required if you want to create such documents from a pick list.
Inventory Reports	Select Full Authorization or No Authorization for all windows and actions available under the Inventory Reports submenu.
Items List	• Full Authorization – Users can access the Items List report. • No Authorization – Users cannot access the Items List report.
Last Prices Report	• Full Authorization – Users can access the Last Prices Report. • No Authorization – Users cannot access the Last Prices Report.
Inactive Items	• Full Authorization – Users can access the Inactive Items report. • No Authorization – Users cannot access the Inactive Items report.
Inventory Posting List	• Full Authorization – Users can access the Inventory Posting List. • No Authorization – Users cannot access the Inventory Posting List.
Inventory Status	• Full Authorization – Users can access the Inventory Status report. • No Authorization – Users cannot access the Inventory Status report.
Inventory in Warehouse Report	• Full Authorization – Users can access the Inventory in Warehouse Report. • No Authorization – Users cannot access the Inventory in Warehouse Report.
Inventory Audit Report	• Full Authorization – Users can access the Inventory Audit Report. ⁱ Note Users with no authorization for Item Cost can view the cost in this report. • No Authorization – Users cannot access the Inventory Audit Report.
Inventory Valuation Simulation Report	• Full Authorization – Users can access the Inventory Valuation Simulation Report.

Field Name	Description
	• No Authorization – Users cannot access the Inventory Valuation Simulation Report. ⓘ Note This report is available when you manage a perpetual inventory system.
Inventory Valuation Report	• Full Authorization – Users can access the Inventory Valuation Report. • No Authorization – Users cannot access the Inventory Valuation Report. ⓘ Note This report is available when you manage a non-perpetual inventory system.
Batch Number Transactions Report	• Full Authorization – Users can access the Batch Number Transactions Report. • No Authorization – Users cannot access the Batch Number Transactions Report.
Serial Number Transactions Report	• Full Authorization – Users can access the Serial Number Transactions Report. • No Authorization – Users cannot access the Serial Number Transactions Report.
Bin Location List	• Full Authorization – Users can access the Bin Location List report. • No Authorization – Users cannot access the Bin Location List report. ⓘ Note This report is available when the Enable Bin Locations checkbox is selected for at least one warehouse.
Bin Location Content List	• Full Authorization – Users can access the Bin Location Content List report. • No Authorization – Users cannot access the Bin Location Content List report. ⓘ Note This report is available when the Enable Bin Locations checkbox is selected for at least one warehouse.
Price Report	• Full Authorization – Users can access the Price Report. • No Authorization – Users cannot access the Price Report.

Field Name	Description
Discount Group Report	• Full Authorization – Users can access the Discount Group Report. • No Authorization – Users cannot access the Discount Group Report.
Inventory Counting Transactions Report	• Full Authorization – Users can access the Inventory Counting Transactions Report. • No Authorization – Users cannot access the Inventory Counting Transactions Report.
Inventory Valuation Method Report	• Full Authorization – Users can access the Inventory Valuation Method Report. • No Authorization – Users cannot access the Inventory Valuation Method Report.
Inventory Turnover Analysis	• Full Authorization – Users can access the Inventory Turnover Analysis crystal report. • No Authorization – Users cannot access the Inventory Turnover Analysis crystal report.

13 Resources Module Authorizations

The following modules and functions define the Resources authorizations:

Field Name	Description
Resources	• Full Authorization – Users can access all the windows and perform all the actions available under the Resources submenu. • Read Only – Users can access and view windows available under the Resources submenu. • No Authorization – Users cannot access any option available under the Resources submenu. ℹ **Note** If you select the Read Only authorization for the Resources submenu, the authorizations for its child items without the Read Only option are automatically set to No Authorization.
Resource Master Data	• Full Authorization – Users can access the Resource Master Data window, add new master data and modify the existing master data. • Read Only – Users can view the Resource Master Data window only. • No Authorization – Users cannot access this window.
Resource Capacity	• Full Authorization – Users can access the Resource Capacity window and define resources capacity. • Read Only – Users can view the Resource Capacity window only. • No Authorization – Users cannot access this window.
Set Daily Internal Capacities	• Full Authorization – Users can access this window and set daily internal capacities. • No Authorization – Users cannot access this window.

14　Production Module Authorizations

The following modules and functions define the Production authorizations:

Field Name	Description

Production	• Full Authorization – Users can enter all the windows located under the Production module and make new settings and modifications.
	• Read Only – Users can view the data in all the windows located under the Production module.
	• No Authorization – Users cannot access any window located under the Production module.
	
	  i Note
	
	  If you select Read Only authorization for the entire Production module, the authorizations for its child items without the Read Only option are automatically set to No Authorization.

Bill of Materials	• Full Authorization – Users can access the Bill of Materials window, define new bills of materials, or modify existing ones. • Read Only – Users can view the Bill of Materials window. • No Authorization – Users cannot open the Bill of Materials window.

Production Order	• Full Authorization – Users can access the Production Order window, plan new production orders, modify existing ones, release orders for production, and close production orders at the end of the production process.
	• Read Only – Users can view the Production Order window.
	• No Authorization – Users cannot open the Production Order window.
	
	  i Note
	
	  To enable the Report Completion option in the context menu of a production order, full authorization for Receipt from Production and for Issue for Production (when the issue method is Backflush) are required.

Receipt from Production	• Full Authorization – Users can access the Receipt from Production window and release or receive quantities. • Read Only – Users can view the Receipt from Production window.

Field Name	Description
	• No Authorization – Users cannot open the Receipt from Production window.
Issue for Production	• Full Authorization – Users can access the Issue for Production window and release or receive quantities. • Read Only – Users can view the Issue for Production window. • No Authorization – Users cannot open the Issue for Production window.
Bill of Materials - Component Management	• Full Authorization – Users can access the Bill of Materials - Component Management window and apply batch updates to BOMs. • No Authorization – Users cannot access this window.
Production Std Cost Management	• Full Authorization – Users can access all the windows available under the Production Std Cost Management submenu. • No Authorization – Users cannot access any window under the Production Std Cost Management submenu.

Production Std Cost Rollup	• Full Authorization – Users can access the Production Std Cost Rollup window and update a parent item's production standard cost with the sum of total production standard costs of its BOM components.
	
	  ⅰ Note
	
	  The checkbox Include in Production Std Cost Rollup on the Item Master Data→Production Data tab must be selected for the parent item.
	• No Authorization – Users cannot access this window.

Production Std Cost Update	• Full Authorization – Users can access the Production Std Cost Update window and overwrite the production standard cost value with the current item cost value.
	
	  ⅰ Note
	
	  o The checkbox Include in Production Std Cost Rollup on the Item Master Data→Production Data tab must be selected for the item.
	  o This functionality is available when you manage a perpetual inventory system.
	• No Authorization – Users cannot access this window.

Production Cost Recalculation Wizard	• Full Authorization – Users can run the Production Cost Recalculation Wizard. • No Authorization – Users cannot access this wizard.

Field Name	Description
	i Note This functionality is available when you manage items by the serial or batch valuation method.
Execute Production Cost Recalculation Run	• Full Authorization – Users can execute the Production Cost Recalculation Wizard. • No Authorization – When users have full authorization for Production Cost Recalculation Wizard and no authorization for Execute Production Cost Recalculation Run, they can only run a simulation.
Production Reports	• Full Authorization – Users can access all windows available under the Production Reports submenu. • No Authorization – Users cannot access any window under the Production Reports submenu.
Electronic Reports	• Full Authorization- Users can view and generate Electronic Reports • Read Only- Users can view Electronic Reports • No Authorization- Users cannot access Electronic Reports
Bill of Materials Report	• Full Authorization- Users can view and generate Bill of Materials Reports. • No Authorization-Users cannot open the Bill of Materials Reports.

15 MRP Module Authorizations

The following modules and functions define the MRP authorizations:

Field Name	Description
MRP	• Full Authorization – Users can enter all the windows specified in the MRP module. • Read Only – Users can view only the Forecasts window. • No Authorization – Users cannot access any window specified in the MRP module. ℹ️ Note If you select Read Only authorization for the entire MRP module, the authorizations for its child items without the Read Only option are automatically set to No Authorization.
Forecasts	• Full Authorization – Users can access the Forecasts window, define new forecasts, or modify existing ones. • Read Only – Users can view the Forecasts window. • No Authorization – Users cannot open the Forecasts window.
MRP Wizard	• Full Authorization – Users can access the MRP Wizard window and run MRP calculation of recommendations. • No Authorization – Users cannot access the wizard.
Order Recommendation	• Full Authorization – Users can access the Order Recommendation Report window and create purchase requests, purchase quotations, purchase orders, production orders and stock transfer requests. ℹ️ Note Full authorization for the corresponding documents is required. • No Authorization – Users cannot open this window.
MRP Reports	• Full Authorization- Users can access MRP Reports • No Authorization- Users cannot access MRP Reports
Electronic Reports	• Full Authorization- Users can view and modify Electronic Reports • Read Only- Users can view Electronic Reports • No Authorization- Users cannot access Electronic Reports

16 Service Module Authorizations

The following modules and functions define the Service authorizations:

Field Name	Description
Service	• Full Authorization – Users can enter all the windows located under the Service module and perform the various actions available in this module. • Read Only – Users can view the data in all the windows located under the Service module. • No Authorization – Users cannot access any window located under the Service module. **ⓘ Note** If you select the Read Only authorization for the entire Service module, the authorizations for its child items without the Read Only option are automatically set to No Authorization
Service Call	• Full Authorization – Users can open the Service Call window, record new service calls, and update existing ones. • Read Only – Users can view the Service Call window. • No Authorization – Users cannot open the Service Call window.
Special Service Call Authorizations	• Full Authorization – Users can perform all the actions available under the Special Service Call Authorizations submenu. • No Authorization – Users cannot perform any of these actions.
Change Status	• Full Authorization – Users can change the status of a service call by clicking the Call Status field in a service call and selecting a different status. • No Authorization – Users cannot change the status of a service call.
Define Statuses	• Full Authorization – Users can define a new status for a service call by clicking the Call Status field in a service call and selecting the option Define New to open the Service Call Statuses – Setup window. • No Authorization – Users cannot change the status of a service call.
Reopen	• Full Authorization – Users can reopen a service call and change its status from Closed to Open by clicking the Call Status field in a closed service call and selecting Open. • No Authorization – Users cannot reopen a service call.

Field Name	Description
Edit Created On/Closed On	• Full Authorization – Users can edit the Created On field when they create a new service call and can edit the Closed On field when they change the service call status to Closed in the Service Call window. • No Authorization – Users cannot edit the fields Created On or Closed On in the Service Call window.
Allow Service Without Contract	• Full Authorization – Users can record a service call for customers without a valid service contract. The following system message is displayed: "Warning: No valid contracts exist for the customer". Users can confirm the system message by choosing the OK button and recording the service call. • No Authorization – Users cannot confirm the system message or process service calls for customers with no valid service contracts.
Allow Service Beyond Coverage Time	• Full Authorization – Users can record a service call with a Created On date which exceeds the coverage time defined in the service contract. The following system message appears: "Warning: You cannot create a service call outside normal working hour or on public holidays". Confirm the system message by choosing OK, and then process the service call. • No Authorization – Users cannot confirm the system message or process service calls that deviate from the coverage time defined in the service contract.
Allow Service Beyond Credit Limit	• Full Authorization – Users can record a service call for a customer that deviates from his or her credit limit (defined by choosing Business Partners → Business Partner Master Data → Payment Terms tab.) The following system message appears: "Customer has passed credit limit". Confirm the system message by choosing the OK button, and then process the service call. • No Authorization – Users cannot confirm this message or process service calls for customers who deviate from their credit limit. ⓘ Note System messages regarding deviations from the credit limit appear only if the Credit Limit checkbox is selected (Administration → System Initialization → General Settings → Sales → Customer Activity Restrictions).
Equipment Card	• Full Authorization – Users can access the Equipment Card window, create new customer equipment cards, and modify existing ones. • Read Only – Users can view the Equipment Card window.

Field Name	Description
	• No Authorization – Users cannot open the Equipment Card window.
	i Note
	When users have read only or no authorization for Equipment Card but the Auto. Create Equipment Card checkbox on the General Settings → Inventory tab is selected, the automatic creation of an equipment card which follows the creation of a delivery or invoice is enabled.
Service Contract	• Full Authorization – Users can access the Service Contract window, define new service contracts, and modify existing ones.
	• Read Only – Users can view the Service Contract window.
	• No Authorization – Users cannot open the Service Contract window.
Change Status	• Full Authorization – Users can change the status of a service contract by clicking the Status field (Service Contract → General tab) and selecting a status from the dropdown list.
	• No Authorization – Users cannot change the status of a service contract.
Solutions Knowledge Base	• Full Authorization – Users can access the Solutions Knowledge Base window, add new solutions, and modify existing ones.
	• Read Only – Users can view the Solutions Knowledge Base window.
	• No Authorization – Users cannot open the Solutions Knowledge Base window.
Special Solution Authorizations Change Status	• Full Authorization – Users can change the status of a knowledge base solution by selecting a status from the Status field in the Solutions Knowledge Base window.
	• No Authorization – Users cannot change the status of a knowledge base solution.
Service Reports	• Full Authorization – Users can access all the windows and perform various actions available under the Service Reports submenu.
	• Read Only – Users can view the data in all the windows available under the Service Reports submenu.
	• No Authorization – Users cannot access any window under the Service Reports submenu.
	i Note
	If you select the Read Only authorization for the Service Reports submenu, the authorizations for its child items

Field Name	Description
	without the Read Only option are automatically set to No Authorization.
Service Calls	• Full Authorization – Users can access the Service Calls report. • No Authorization – Users cannot access the Service Calls report.
Service Calls by Queue - Selection Criteria	• Full Authorization – Users can access the Service Calls by Queue report. • No Authorization – Users cannot access the Service Calls by Queue report.
Response Time by Assigned to - Selection Criteria	• Full Authorization – Users can access the Response Time by Assigned to report. • No Authorization – Users cannot access the Response Time by Assigned to report.
Average Closure Time	• Full Authorization – Users can access the Average Closure Time report. • No Authorization – Users cannot access the Average Closure Time report.
Service Contracts	• Full Authorization – Users can access the Service Contracts report. • No Authorization – Users cannot access the Service Contracts report.
Equipment Card Report	• Full Authorization – Users can access the Equipment Card Report. • No Authorization – Users cannot access the Equipment Card Report.
Service Monitor	• Full Authorization – Users can access the Service Monitor report. • No Authorization – Users cannot access the Service Monitor report.

17 Human Resources Module Authorizations

The following modules and functions define the Human Resources authorizations:

Field Name	Description
Human Resources	- Full Authorization – Users can open all windows and reports in the Human Resources module. - Read Only – Users can view the data in all the windows in the Human Resources module. - No Authorization – Users cannot access any window in the Human Resources module. i **Note** If you select Read Only authorization for the entire Human Resource module, the authorizations for its child items without the Read Only option are automatically set to No Authorization
Employee Master Data	- Full Authorization – Users can access the Employee Master Data window, create new master data for company employees, and modify existing ones. - Read Only – Users can view the Employee Master Data window. - No Authorization – Users cannot open the Employee Master Data window.
Time Sheet	- Full Authorization – Users can access the Time Sheet window, create new time sheet, and modify existing ones. - Read Only – Users can view the Time Sheet window. - No Authorization – Users cannot open the Time Sheet window.
Human Resources Reports	Users can r grant Full Authorization or No Authorization for the Human Resources Reports.
Employee List	- Full Authorization – Users can access the Employee List window. - No Authorization – Users cannot access the Employee List window.
Absence Report	Full Authorization – Users can access the Absence Report.

Field Name	Description
	• **No Authorization** – Users cannot access the Absence Report.
Phone Book	• **Full Authorization** – Users can access the Phone Book. • **No Authorization** – Users cannot access the Phone Book.

18 Project Management Module Authorizations

The following modules and functions define the Project Management authorizations:

Field Name	Description

Project Management	• Full Authorization – Users can enter all the windows and reports specified in the Project Management module.
	• Read Only – Users can view the data in all the windows specified in the Project Management module.
	• No Authorization – Users cannot access any window specified in the Project Management module
	
	i Note
	  o If you select Read Only authorization for the entire Project Management module, the authorizations for its child items without the Read Only option are automatically set to No Authorization.
	  o The Project Management menu is available only when the Enable Project Management checkbox on the Administration → System Initialization → Company Details → Basic Initialization tab is selected.

Project	• Full Authorization – Users can access the Project window, create new project, and modify existing ones. • Read Only – Users can view the Project window. • No Authorization – Users cannot open the Project window.
Project Reports	You can grant Full Authorization or No Authorization for the Project Management Reports.
Stage Analysis - Selection Criteria	• Full Authorization – Users can access the Stage Analysis report. • No Authorization – Users cannot access the Stage Analysis report.
Open Issues - Selection Criteria	• Full Authorization – Users can access the Open Issues report. • No Authorization – Users cannot access the Open Issues report.
Resources - Selection Criteria	• Full Authorization – Users can access the Resources report. • No Authorization – Users cannot access the Resources report.
Time Sheet - Selection Criteria	• Full Authorization – Users can access the Time Sheet report. • No Authorization – Users cannot access the Time Sheet report.

19 Reports Module Authorizations

The following modules and functions define the Reports authorizations:

Field Name	Description
Reports	- Full Authorization – Users can enter all the windows and reports specified in the Reports module. - Read Only – Users can view the data in all the windows specified in the Reports module. - No Authorization – Users cannot access any window specified in the Reports module **i Note** If you select Read Only authorization for the entire Reports module, the authorizations for its child items without the Read Only option are automatically set to No Authorization.
Sales and Purchasing	- Full Authorization-- Users can access all the sales and purchasing reports available under the Sales and Purchasing submenu. - No Authorization-- Users cannot access these reports.
Open Items List	- Full Authorization – Users can access all the windows and reports available under the Open Items List menu entry. - No Authorization – access cannot access any window under this menu entry. **i Note** You can access Open Items List by choosing one of the following from the Main Menu of SAP Business One: Sales - A/R → Sales Reports, Purchasing - A/P → Purchasing Reports, Inventory → Inventory Reports or Reports →Sales and Purchasing.
Sales Quotations	- Full Authorization - Users can access open Sales Quotations from the Open Documents drop-down list in the Open Items List window. - No Authorization - Users cannot access open Sales Quotations from the Open Documents drop-down list in the Open Items List window.
Sales Orders	Full Authorization - Users can access open Sales Orders from the Open Documents drop-down list in the Open Items List window.

Field Name	Description
	• No Authorization - Users cannot access open Sales Orders from the Open Documents drop-down list in the Open Items List window.
Deliveries	• Full Authorization - Users can access open Deliveries from the Open Documents drop-down list in the Open Items List window. • No Authorization - Users cannot access open Deliveries from the Open Documents drop-down list in the Open Items List window.
Return Requests	• Full Authorization - Users can access open Return Requests from the Open Documents drop-down list in the Open Items List window. • No Authorization - Users cannot access open Return Requests from the Open Documents drop-down list in the Open Items List window.
Returns	• Full Authorization - Users can access open Returns from the Open Documents drop-down list in the Open Items List window. • No Authorization - Users cannot access open Returns from the Open Documents drop-down list in the Open Items List window.
A/R Down Payments - Unpaid	• Full Authorization - Users can access unpaid A/R Down Payments from the Open Documents drop-down list in the Open Items List window. • No Authorization - Users cannot access unpaid A/R Down Payments from the Open Documents drop-down list in the Open Items List window.
A/R Down Payments - Not Yet Fully Applied	• Full Authorization - Users can access A/R Down Payments that are not yet fully applied from the Open Documents drop-down list in the Open Items List window. • No Authorization - Users cannot access A/R Down Payments that are not yet fully applied from the Open Documents drop-down list in the Open Items List window.
A/R Invoices	• Full Authorization- Users can access open A/R Invoices from the Open Documents drop-down list in the Open Items List window. • No Authorization - Users cannot access open A/R Invoices from the Open Documents drop-down list in the Open Items List window.
A/R Credit Memos	• Full Authorization - Users can access open A/R Credit Memos from the Open Documents drop-down list in the Open Items List window. • No Authorization - Users cannot access open A/R Credit Memos from the Open Documents drop-down list in the Open Items List window.

Field Name	Description
A/R Reserve Invoices – Unpaid	• Full Authorization- Users can access unpaid A/R Reserve Invoices from the Open Documents drop-down list in the Open Items List window. • No Authorization - Users cannot access unpaid A/R Reserve Invoices from the Open Documents drop-down list in the Open Items List window.
A/R Reserve Invoices - Not Yet Delivered	• Full Authorization - Users can access A/R Reserve Invoices that are not yet fully delivered from the Open Documents drop-down list in the Open Items List window. • No Authorization - Users cannot access A/R Reserve Invoices that are not yet fully delivered from the Open Documents drop-down list in the Open Items List window.
Purchase Quotations	• Full Authorization - Users can access open Purchase Quotations from the Open Documents drop-down list in the Open Items List window. • No Authorization - Users cannot access open Purchase Quotations from the Open Documents drop-down list in the Open Items List window.
Purchase Requests	• Full Authorization - Users can access open Purchase Requests from the Open Documents drop-down list in the Open Items List window. • No Authorization - Users cannot access open Purchase Requests from the Open Documents drop-down list in the Open Items List window.
Purchase Orders	• Full Authorization- Users can access open Purchase Orders from the Open Documents drop-down list in the Open Items List window. • No Authorization - Users cannot access open Purchase Orders from the Open Documents drop-down list in the Open Items List window.
Goods Receipt POs	• Full Authorization - Users can access open Goods Receipt POs from the Open Documents drop-down list in the Open Items List window. • No Authorization - Users cannot access open Goods Receipt POs from the Open Documents drop-down list in the Open Items List window.
Goods Return Requests	• Full Authorization - Users can access open Goods Return Requests from the Open Documents drop-down list in the Open Items List window. • No Authorization - Users cannot access open Goods Return Requests from the Open Documents drop-down list in the Open Items List window.

Field Name	Description
Goods Return	• Full Authorization - Users can access open Goods Return from the Open Documents drop-down list in the Open Items List window. • No Authorization - Users cannot access open Goods Return from the Open Documents drop-down list in the Open Items List window.
A/P Down Payments - Unpaid	• Full Authorization - Users can access unpaid A/P Down Payments from the Open Documents drop-down list in the Open Items List window. • No Authorization - Users cannot access unpaid A/P Down Payments from the Open Documents drop-down list in the Open Items List window.
A/P Down Payments - Not Yet Fully Applied	• Full Authorization - Users can access A/P Down Payments that are not yet fully applied from the Open Documents drop-down list in the Open Items List window. • No Authorization - Users cannot access A/P Down Payments that are not yet fully applied from the Open Documents drop-down list in the Open Items List window.
A/P Invoices	• Full Authorization- Users can access open A/P Invoices from the Open Documents drop-down list in the Open Items List window. • No Authorization - Users cannot access open A/P Invoices from the Open Documents drop-down list in the Open Items List window.
A/P Credit Memos	• Full Authorization - Users can access open A/P Credit Memos from the Open Documents drop-down list in the Open Items List window. • No Authorization - Users cannot access open A/P Credit Memos from the Open Documents drop-down list in the Open Items List window.
A/P Reserve Invoices - Unpaid	• Full Authorization- Users can access unpaid A/P Reserve Invoices from the Open Documents drop-down list in the Open Items List window. • No Authorization - Users cannot access unpaid A/P Reserve Invoices from the Open Documents drop-down list in the Open Items List window.
A/P Reserve Invoices - Not Yet Delivered	• Full Authorization- Users can access A/P Reserve Invoices that are not yet fully delivered from the Open Documents drop-down list in the Open Items List window. • No Authorization - Users cannot access A/P Reserve Invoices that are not yet fully delivered from the Open Documents drop-down list in the Open Items List window.

Field Name	Description
Inventory Transfer Requests	• Full Authorization - Users can access open Inventory Transfer Requests from the Open Documents drop-down list in the Open Items List window. • No Authorization - Users cannot access open Inventory Transfer Requests from the Open Documents drop-down list in the Open Items List window.
Production Orders	• Full Authorization- Users can access open Production Orders from the Open Documents drop-down list in the Open Items List window. • No Authorization - Users cannot access open Production Orders from the Open Documents drop-down list in the Open Items List window.
Missing Items	• Full Authorization- Users can access Missing Items from the Open Documents drop-down list in the Open Items List window. • No Authorization - Users cannot access Missing Items from the Open Documents drop-down list in the Open Items List window.
Query Generator	• Full Authorization – Users can open the Query Generator window, create new queries, create and edit query categories, and view all the user–defined queries and system queries. • Read Only – Users can open the Query Generator window but cannot create, edit or view queries. • No Authorization – Users cannot access the Query Generator window and view queries.
New Queries	• Full Authorization – Users can open the Query Generator or the Query Wizard window to create new queries. • No Authorization – Users cannot open the Query Generator or the Query Wizard window.
Create/Edit Categories	• Full Authorization – Users can open the Create/Edit Categories window (Query Manager → Manage Categories), create new categories for your queries, or edit existing ones. • No Authorization – Users cannot open the Create/Edit Categories window.
Saved Queries – Group (No. 1- 20)	Users can run queries related to each of the 20 authorization groups available in SAP Business One. Each query category can be linked to up to 20 authorization groups (Query Manager → Manage Categories → Authorization Groups). When linking query categories to different authorization groups, it is possible to restrict certain users from running queries in the linked categories. • Full Authorization – Users can run queries related to categories linked to this authorization group. For example, Full Authorization for Saved Queries – Group No. 1 lets you run queries related to query categories linked to authorization group number 1.

Field Name	Description
	• Read Only – Users can view queries related to this authorization group, but cannot save queries in categories linked to this group. • No Authorization – Users cannot view queries linked to this group, nor save queries in categories linked to this authorization group.
Execute Non-select SQL Statement	• Full Authorization – Users can generate Non-select SQL Statements. • No Authorization – Users cannot generate Non-select SQL Statements. ℹ Note Make sure you have authorizations for query tools and for Modify SQL Statement.
Modify SQL Statement	• Full Authorization - Users can edit the SQL statement in the Display Query Structure field in the Query Generator window by clicking the pencil icon. • No Authorization - Users cannot edit the SQL statement in a query, but can view the text in the Query Generator window.
Query Wizard	• Full Authorization – Users can open the Query Wizard window and create new queries. • No Authorization – Users cannot use this wizard. ℹ Note A user with no authorization for the New Queries field cannot open the Query Wizard.
Query Manager	• Full Authorization - Users can open the Query Manager window, view, schedule, create a report and remove a query. • Read Only - Users can open the Query Manager window, schedule and create a report from a query. Users cannot view the query or remove it. • No Authorization - Users cannot open the Query Manager window.
Report Scheduling	• Full Authorization - Users can access all forms specified in the Report Scheduling section. • Read Only - Users can view the data in all forms specified in the Report Scheduling section. • No Authorization - Users cannot access any form specified in the Report Scheduling section.
Scheduled Report Overview	• Full Authorization - Users can open the Scheduled Report Overview window (Tool → Scheduled Report Overview) to view all the scheduled reports and those already executed.

Field Name	Description
	• Read Only - Users can view the Scheduled Report Overview window. • No Authorization - Users cannot open the Scheduled Report Overview window.
Report Execution Scheduler	• Full Authorization - Users can open the Report Execution Scheduler window (Tools → Queries → Query Manager → Schedule) to define and add scheduling. • Read Only - Users can view the Report Execution Scheduler window from the Scheduled Report Overview window. • No Authorization - Users cannot open the Report Execution Scheduler window.

20 Cockpit & Widget Authorizations

The following modules and functions define the Cockpit and the Widget authorizations.

Field Name	Description
Cockpit & Widget	You can grant authorizations for the different parts of the Cockpit and the Widget. • Full Authorization – Users can access all parts specified in the Cockpit & Widget authorizations section. • No Authorization – Users cannot access any part specified in the Cockpit & Widget authorizations section. ⓘ Note These authorizations are available when the Cockpit option on the Administration → System Initialization→ General Settings→ Cockpit tab is selected.
Cockpit Management	• Full Authorization - Users can access the Cockpit Management – Setup window (Tools → Cockpit) for creating and maintaining the cockpits. • No Authorization – Users cannot access the Cockpit Management – setup window.
General Widgets	• Full Authorization – Users can view and access all widgets specified in the General Widgets section. • No Authorization – Users cannot access any of the widgets specified in the General Widgets section.
Dashboards	• Full Authorization – Users can view and access the particular content in the cockpit widget. You are also required to have the correct authorization for the content itself. • No Authorization – Users cannot access the particular content in the cockpit widget.
Common Functions	• Full Authorization- Users can open and work with documents and common functions presented in the Common Functions widget in the Cockpit • No Authorization- Users cannot view or open the documents in the Common Functions widget
Open Documents	• Full Authorization-Users can select and view open documents in the Open Documents widget in the Cockpit • No Authorization- Users cannot open or view the documents in the Open Documents widget

Field Name	Description
	ⓘ Note Even if you have full authorization for this widget, you can view only documents under the menu of Reports→ Sales and Purchasing→ Open Items List for which you have full authorization.
Messages and Alerts	• Full Authorization -Users can view message and alert overviews listed in the Messages and Alerts widget of the Cockpit • No Authorization- Users cannot view message or alert overviews in the Messages and Alerts widget
Browser	• Full Authorization - Users can view the content of the Browser widget. • No Authorization- Users cannot view the content of the Browser widget.
Dashboard Widget	• Full Authorization – Users can view and access all dashboards specified in the Dashboards section. • No Authorization – Users cannot access any of the dashboards specified in the Dashboards section.
Widget Content	• Full Authorization – Users can view and access all widget content specified in the Widget Content section. • No Authorization – Users cannot access any of the widget content specified in the Widget Content section.
Crystal Dashboard	• Full Authorization – Users can view and access all dashboards specified in the Crystal Dashboard section. • No Authorization – Users cannot access any of the dashboards specified in the Crystal Dashboard section.
Service Call (version for Microsoft SQL)	• Full Authorization-Users can open and view performance indicators and the Service call status with the Service Call window • No Authorization- Users cannot open or view the Service Call window
Customer Receivables Aging (version for Microsoft SQL)	• Full Authorization- Users can access an overall analysis of the company's accounts receivables collection efforts and the status of key accounts with the Customer Receivables Aging dashboard • No Authorization- Users cannot access the Customer Receivables Aging dashboard
Sales Analysis (version for Microsoft SQL)	• Full Authorization- Users can view the sales performance and status of customers and employees with the Sales Analysis dashboard • No Authorization- Users cannot access the Sales Analysis dashboard

Field Name	Description
Cash Flow Forecast	• Full Authorization- Users can open and view detailed information about your company's incoming and outgoing cash flows • No Authorization- Users cannot open or view information about the company's Cash Flow Forecast
Purchase Quotations (version for Microsoft SQL)	• Full Authorization- Users can open and modify the Purchase Quotation window found in the Common Functions widget of the Cockpit • No Authorization- Users cannot access the Purchase Quotation window via the Common Functions widget of the Cockpit
Service Call- SAP HANA	• Full Authorization-Users can open and view performance indicators and the Service call status with the Service Call window • No Authorization- Users cannot open or view the Service Call window
Sales Analysis-SAP HANA	• Full Authorization- Users can view the sales performance and status of customers and employees with the Sales Analysis dashboard • No Authorization- Users cannot access the Sales Analysis dashboard
Purchase Quotations- SAP HANA	• Full Authorization-Users can view and monitor open purchase quotations with the Purchase Quotation dashboard • No Authorization- Users cannot view or open the Purchase Quotations dashboard
Inventory Status- SAP HANA	• Full Authorization- Users can open and view the detailed confirmation status of all open document rows for a specific item with the Inventory Status dashboard • No Authorization- Users cannot access the Inventory Status dashboard
Delivery Analysis-SAP HANA	• Full Authorization- Users can open and identify whether the company delivers goods to customers on time with the Delivery Analysis dashboard • No Authorization- Users cannot access the Delivery Analysis dashboard

21 User Authorizations

The following modules and functions define the User authorizations:

Field Name	Description
User Authorization	You can grant authorizations for user-defined forms. • Full Authorization – Users can access all forms specified in the User Authorization section. • Read Only – Users can view the data in all forms specified in the User Authorization section. • No Authorization – Users cannot access any form specified in the User Authorization section. ℹ Note To create authorizations for user–defined forms, choose Administration → System Initialization → Authorizations → Additional Authorization Creator. If you do not create any user-defined forms, the User Authorization title is displayed as No User Authorizations. If you select Read Only authorization for the entire User Authorization module, the authorizations for its child items without the Read Only option are automatically set to No Authorization.
XL Reporter Tools	• Full Authorization - Users can start XL Reporter from the Tools menu, to compose or edit reports or change the XL Reporter settings. • No Authorization – Users cannot access XL Reporter.
XL Reporter Reports	• Full Authorization – Users can access and run reports that have been generated and placed in the Main Menu by XL Reporter. To access Report Composer and Report Designer (Administration → Setup → General → Users), you must be defined as a Superuser. • No Authorization – Users cannot access reports generated by XL Reporter.

22 System Queries Authorizations

If you want to allow or prevent your users from viewing the reports below, you need to set up authorizations for them:

- BP Bank Accounts Query
- Checks for Payment in Date Cross Section Report
- Customer Receivables by Customer Cross-Section
- Customers Credit Limit Deviation
- External Reconciliation by Due Date
- External Reconciliation by Exact Amount
- External Reconciliation by Sum (FC)
- External Reconciliation by Trans. Number
- G/L Account Location in Balance Sheet Templates
- House Bank Accounts Query
- Internal Reconciliation by Trans. Number
- Locate Exceptional Discount in Invoice
- Locate Journal Transaction by Amount Range
- Locate Journal Transaction by FC Amount Range
- Locate Reconciliation in Bank Statement by Row Number
- Locate Reconciliation/Row in Bank Statements by Exact Amount
- SE Commission by Invoices in Posting Date Cross Section
- Transactions Received from Voucher Report

These reports above are System Queries, which you can access either through the Query Manager icon ( ) in the tool bar or by choosing the menu Tools → Queries → System Queries.

To set up authorizations for system queries, proceed as follows:

1. Go to Tools → Queries → Query Manager, choose Manage Category to open the Create/Edit Categories window, and assign the desired authorization groups to system queries.

2. Choose Main Menu → Administration → System Initialization → Authorizations→ General Authorizations to open the General Authorizations window, go to Reports → Query Generator → Saved Queries - Group No. 1 - Group No. 20 and assign authorizations to users.

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