



Eclipse Authorization Keys

Release 8.0.8

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Authorization Keys Overview

Authorization keys define users' permissions. To grant permissions, you need to assign authorization keys to user records. Some keys have multiple levels of authority associated with them. For example, AP.ALLOWED authorizes a user to access A/P Entry in view-only mode for level 1 and edit mode for level 2. In most cases, each higher level inherits the previous level's functions.

You can assign authorization keys to templates that correspond with job descriptions. Assigning a template to a user is a quick way to assign all the authorization keys in the template. For example, templates for purchasing, sales, and counter personnel contain all the authorization keys needed to perform those functions.

- Any authorization key assigned in addition to a template containing the same key overrides the setting of the key in the template.
- The setting in the Template Authorization Key Level Hierarchy control maintenance record determines which level the system applies when the same authorization key with different levels appears in multiple templates assigned to the same user.

The SUPERUSER authorization key located at the bottom of the list of available keys assigns the highest level of all authorizations to a user. A superuser can perform all system functions. Only the system administrator should have this authorization.

The authorization key descriptions in this help project are grouped by functional areas, such as accounting, inventory, and order entry. To locate the description of a designated authorization key, search the help project using the key name.

Superuser Authorization

Assign the SUPERUSER authorization key to users who require access to every function with maximum privilege. System managers, their superiors, company owners, and Intuit Eclipse personnel can use this authorization key.

SUPERUSER

Allows the access granted by all the authorization keys at the highest level of authorization.

Superuser authorization does not include the following keys. These authorization keys limit a user's access and require that you enter additional detail information when you assign them.

Authorization Key	When this key is not assigned...
AP.SIGNATURE.PRINT	the user cannot print an imaged signature on checks.
GL.ACCOUNTS	the user can access all G/L accounts.
INVALID.PRODUCT.LINES	no product lines are invalid.
INVALID.VEN.TYPES	no vendor types are invalid. The user can access all vendor types.
MESSAGE.GROUP.TYPES	the user can access all message group types.
POE.SCHEDULE	the system does not set the Sched hot key on the POE Body screen to a default value.
SOE.CREDIT.REL.RANK	the user can release orders for any customer, based on the user's level assignment in the SOE.CREDIT.RELEASE authorization key.
SOE.SCHEDULE	the system does not set the Sched hot key on the SOE Body screen to a default value.
TOE.SCHEDULE	the system does not set the Sched hot key on the TOE Body screen to a default value.
VALID.BLINES	all buy lines are valid. The user can edit product records in all buy lines.
VALID.PLINES	all price lines are valid. The user can edit product records in all price lines.
VALID.PRODUCT.LINES	all product lines are valid.
VALID.VEN.TYPES	all vendor types are valid. The user can access all vendor types.
WIN.DIRECT.CREATE.DIR	the user cannot export a report from the system using the Windows Direct Options program.

Any authorization key assigned in addition to the SUPERUSER key overrides the SUPERUSER level of authorization for that key.

To test a system function with a lower level of authority, superusers can override their default level of authorization for a designated authorization key. To do this, assign the designated key (in addition to the SUPERUSER key) with the override level or the related detail information that restricts the user's actions.

New and Revised Authorization Keys for this Release

For each Eclipse release, the documentation provides a table listing all authorization keys that have been revised or added to the system since the last release.

For a list of the new and revised authorization keys, see the What's New documentation.

Creating User-Defined Authorization Keys

For some Eclipse applications, you can create user-defined authorization keys. After creating the key, you need to assign it to the designated application and to users to control their access to that application.

For example, in Product Data Warehouse, you can create a user-defined authorization key that controls a user's ability to view the sales price but not the buying price of a product. After creating the authorization key, assign it to a metadata item in Metadata Maintenance and then to your users in User Maintenance.

In Document Imaging, you can create a user-defined authorization key that controls a user's ability to edit an image. After creating the authorization key, add it to the Valid Imaging Auth Keys control maintenance record, assign it to an image profile Document Profile Maintenance, and then to your users in User Maintenance.

Use the User Defined Authorization Keys screen to create user-defined authorization keys.

► To create user-defined authorization keys:

1. Display the User Defined Authorization Key Maintenance screen in one of the following ways:
 - From the **Tools** menu, select **User Defined Authorization Keys**.
 - From the **PDW Main Menu**, select **User Defined Authorization Keys**.
 - From the **System > Custom > Add On Products > Document Imaging** menu, select **User Defined Authorization Keys**.
2. In the **Key** field, enter a name for the authorization key you want to create.
3. In the **Levels** field, enter the authorization levels to assign to the authorization key. To not assign levels to the authorization key, leave this field blank.

For example, to assign three different levels to the authorization key, enter 1-3.
4. In the **Default Level** field, enter the default authorization level for the authorization key.
5. Press **Esc** to save the new authorization key and exit the screen.

See Also:

Authorization Keys Overview

Assigning Authorization Keys to Users

B2B Commerce Authorization Keys

The following authorization key applies to the B2B Commerce companion product.

IDMS-XML.IN.REVIEW

Allows access to the IDMS-XML Invoice Review Queue.

- **Level 1** – Allows access to view transactions assigned to your user ID.
- **Level 2** – Allows access to view transactions assigned to all users.

Credit Card Authorization Keys

The following authorization keys apply to the Credit Card Authorization companion product.

CC.TYPE.CHANGE.ALLOW

Allows access to change a credit card type on the Credit Card Default Billing Information screen accessed from the Totals screen in order entry or the Default Credit Card Information screen in Customer Maintenance to a type that was not defined for the credit card.

CREDIT.CARD.ACCT

Allows access to view credit card numbers. The level number determines the number of digits that display.

If the level number is...	The number of digits displayed (from right to left) is...
blank	4
1-15	1-15
16-99	16

CREDIT.CARD.MANUALS

Allows access to manually authorize credit card payments, by entering an authorization code in the **Auth Code** field on an order's Credit Card Authorization screen. Manual payments are necessary if:

- You received a credit card payment using a system other than Eclipse.
- The system cannot communicate with the credit card processor due to network or computer problems, which forces you to call merchant support for a manual authorization code.

CREDIT.CARD.REQD.OVR

Allows access to override a customer requirement that requires credit card information in order entry.

CREDIT.CARD.RESETTLE

Allows access to the Credit Card Settlement Queue.

- **Level 1** – Allows access in view-only mode.
- **Level 2** – Allows access to resettle, negate, and force settle a settlement using the **Resettle** and **Negate** hot keys.
- **Level 3** – Allows access to remove or insert transactions on the detail screen and use the **Cancel** hot key.

CREDIT.CARD.SETUP

Allows access to edit credit card setup information on the following screens:

- Credit Card Processor
 - Credit Card Processor Range
 - Credit Card Definition Setup
 - Credit Card Branch Setup
-

Dataware Authorization Keys

The following authorization key applies to the Dataware interface.

DW.MAINT

Complete this record if your company sends and retrieves ftp files from Dataware.

Allows access to maintain the Dataware interface.

Document Imaging Authorization Keys

The following authorization key applies to the Document Imaging companion product and signature capture software.

IMG.EDIT.ALLOWED

Allows access to the Delete/Edit Indexes program. Use this program to edit image information or index pointers for images attached using the document imaging or signature capture software.

Also allows access to the Document Recall by Keyword feature, which you use to recall an image using a keyword search.

Electronic Data Interchange (EDI) Authorization Keys

The following authorization keys apply to the Electronic Data Interchange companion product.

EDI.ACTIVITY.VIEW

Allows access to view the EDI Activity Log. The level number, 1-99, determines which entries a user can view. A user can view log entries with a security level equal to or less than the level assigned to this authorization key. For example, a user with an EDI.ACTIVITY.VIEW level of 50 can view entries assigned a security level of 50 or lower, but cannot view entries with a security level of 51 or higher.

EDI.IN.REVIEW

Allows access to the EDI 810 Invoice Review Queue, 845 Contract Upload Queue, 855 P/O Acknowledgments Review Queue, and 856 Advance Ship Notice Review Queue.

- **Level 1** – Allows access to view the user's own entries.
 - **Level 2** – Allows access to view the entries of other users.
-

Fax System Authorization Keys

The following authorization keys apply to the Fax System companion product.

FAX.ALLOWED

Allows access to the Fax system.

- **Level 1** – Allows access to fax memos.
- **Level 2** – Allows access to fax documents such as sales orders, purchase orders, transfer orders, bids, and acknowledgments.
- **Level 3** – Allows access to send a fax from the print spooler, accessed from System / Printers / Your/All Hold Entries.

FAX.APPEND.DOC

Allows access to append documents to a fax memo. The level number, 1-99, determines which documents the user can append. The user can append a document assigned a level equal to or lower than the user's level.

Level 99 allows access to the Fax Append Documents program, where users can assign append document titles, file paths, and the authorization level required to use the document.

FAX.PRIORITY

Allows access to assign priority levels to faxes on the Fax Memo screen or edit priorities in the Outgoing Fax Status Queue.

- **Level 1** – Allows access to change the fax priority to Low.
- **Level 2** – Allows access to change the fax priority to Low or Medium.
- **Level 3** – Allows access to change the fax priority to Low, Medium, or High.
- **Level 4** – Allows access to change the fax priority to Low, Medium, High, or Urgent.

FAX.RESET

Allows access to use the **Reset** hot key on the Outgoing Fax Status Queue screen to halt and reschedule active faxes.

Allows access to use the RUN.FIXFAX program, which performs the 'fixfax' reset of the fax subsystem. The program displays the progress of the attempted reset of the fax subsystem.

Note: The system administrator needs to attach the RUN.FIXFAX program to a menu for the users authorized to run this program.

FAX.STATUS

Allows access to the Outgoing Fax Status Queue program.

- **Level 1** – Allows access to edit this user's own faxes.
- **Level 2** – Allows access to the status of faxes assigned to other users.

National Sales Tax Database Authorization Keys

The following authorization key applies to the National Sales Tax Database companion product.

NATL.TAX.MAINT

Allows access to edit the sales tax rates using the National Sales Tax Database Maintenance program.

E-mail Authorization Keys

The following authorization keys apply to the Outbound E-mail Commerce companion product.

EMAIL.LOG.BCC

Allows access to edit the Outbound E-mail Logging BCC control maintenance record.

EMAIL.SEND

Allows access to the Send E-mail program. For users not assigned this key, **E-Mail** hot keys are not active and e-mail is not available as a print status.

Outlook Integration Authorization Keys

The following authorization key applies to the Outlook Integration companion product.

OUTLOOK.ALLOWED

Allows access to sync Eclipse system data to Microsoft Outlook using the Outlook plugin.

Product Data Warehouse (PDW) Authorization Keys

The following authorization keys apply to the Product Data Warehouse (PDW) companion product.

PDW.CATALOG.EDIT

Allows access to edit, delete, and unsync records in the PDW. Users with this authorization can use the **Del**, **Edit**, and **UnSync** hot keys on the PDW Data Viewer screen.

PDW.NONSTOCK.ENTRY

Allows access to import a record from the PDW to the system product file as a nonstock.

- **Level 1** – Allows access to import a record in view-only mode.
- **Level 2** – Allows access to change the imported data, but not the price.
- **Level 3** – Allows access to change the imported data and price.

PDW.PM.UPLOAD

Allows access to create a PDW record from Product Maintenance.

PDW.REINDEX.ALLOWED

Allows access to run the Rebuild PDW Index program.

Rentals Authorization Keys

The following authorization keys apply to the Rental Maintenance companion product.

RENTAL.ALLOWED

Allows access to create rental agreements in Rental Agreement Entry.

RENTAL.MAINT

Allows access to view and edit rental information.

- **Level 1** – Allows access in view-only mode.
- **Level 2** – Allows access to do the following:
 - Edit fields in Rental Equipment Maintenance for serialized products. All fields are read-only for non-serialized products.
 - Set up rental fees in the Valid Additional Rental Fees control maintenance record.
 - Edit the maintenance schedule in Rental Product Maintenance.
 - Set up meter usage tables in Rental Meter Usage Maintenance.
 - Retire rental equipment.
 - Set depreciation schedules.
 - Set maintenance schedules.

Note: To allow users to access the Rental Rate Sheet Maintenance screen, also assign the OE.PRICE.VIEW.LEVEL authorization key.

- **Level 3** – Allows access to do the following:
 - Create and edit rental product records in Rental Product Maintenance.
 - Add and edit rental billing time codes in Rental Code Maintenance.
- **Level 4** – Not active.

RENTAL.OVERCOMMIT.ITEM

Allows access to over-commit rental items that are not available.

RF Authorization Keys

The following authorization keys apply to the RF Warehouse Management companion product.

RF.AUDIT.OVRD

Allows access to use the **Audit Override** hot key on the Tote Auditing screen to bypass the audit when you do not have time to audit the tote before it needs to be delivered.

RF.BO.SHIP.COMPLETE

Allows access to back-order items for an order with a Ship When Complete status in RF picking, if the RF Enable Check For B/O Of Ship Complete control maintenance record is set to level 2.

RF.CHANGE.FINAL.LOC

Allows access to change the final staging location on the Order Staging screen.

Note: Define default staging locations in Customer Maintenance, Branch Maintenance, and Fleet Maintenance.

RF.CHANGE.STAGE.LOC

Allows access to change the staging location on the Tote Inquiry screen.

Note: Define default staging locations in Customer Maintenance, Branch Maintenance, and Fleet Maintenance.

RF.COUNT.ABORT

Allows access to handle variances that occur during a product ranking cycle count.

Note: This authorization key, if assigned, overrides the Allow Abort From Related Counts control maintenance record for a product ranking cycle count. If you do not assign this authorization key, the control maintenance record determines whether the user must complete all related counts. The value **N** is equivalent to assigning level 0 to this record and **Y** is equivalent to assigning level 2. We recommend using the authorization key to control cycle counting.

When a count variance occurs during a product ranking cycle count, depending on their authorization level, users can take the following actions:

- **Level 0**
 - Complete related counts to find the variance.
- **Level 1**
 - Complete related counts to find the variance.
 - Queue the variance for an immediate cycle count, which the same user or another user can count at a later time.

- **Level 2**
 - Complete related counts to find the variance.
 - Queue the variance for an immediate cycle count, which the same user or another user can count at a later time.
 - Adjust current location and ignore related locations.
 - Make manual product quantity adjustments in RF Location Maintenance. To allow users to perform this function, also assign the PRD.LOCATION.MAINT authorization key at level 3.

RF.COUNT.ABORT.IM

Allows access to handle variances that occur during an immediate cycle count.

Note: This authorization key, if assigned, overrides the Allow Abort From Related Counts control maintenance record for an immediate cycle count. If you do not assign this authorization key, the control maintenance record determines whether the user must complete all related counts. The value **N** is equivalent to assigning level 0 to this record and **Y** is equivalent to assigning level 2. We recommend using the authorization key to control cycle counting.

When a count variance occurs during an immediate cycle count, depending on their authorization level, users can take the following actions:

- **Level 0**
 - Complete related counts to find the variance.
- **Level 1**
 - Complete related counts to find the variance.
 - Queue the variance for an immediate cycle count, which the same user or another user can count at a later time.
- **Level 2**
 - Complete related counts to find the variance.
 - Queue the variance for an immediate cycle count, which the same user or another user can count at a later time.
 - Adjust the current location and ignore related locations.
 - Make manual product quantity adjustments in RF Location Maintenance. To allow users to perform this function, also assign the PRD.LOCATION.MAINT authorization key at level 3.

RF.LOAD.OVRD

Allows access to load a tote that has not yet reached the status required for loading totes, as defined in the RF Tote Status Before Loading Trucks control maintenance record.

RF.LOCATION.TYPE

Allows access to change the location type in the **T** (Type) field on the Receiving Verify screen and the Direct Put Away screen in the RF system. Users not assigned this authorization key cannot access the **T** field.

- **Level 1** – Allows access to change the location type from **S** (Stock) to **F** (Defective), **O** (Over Shipment), **R** (Review), or **L** (Display). Users at this level cannot change the location type back to **S** (Stock).
- **Level 2** – Allows access to change any location type to any other location type.

RF.PICK.QTY.INCREASE

Allows access to increase the picking quantity.

- **Level 1** – Allows access to increase the picking quantity only when the products and customer allow increases.
- **Level 2** – Allows access to increase the picking quantity for products that allow increases, even when the customer does not.
- **Level 3** – Allows access to increase the picking quantity for a customer that allows increases, even when the products do not.
- **Level 4** – Allows access to increase the picking quantity, even when the products and customer do not allow increases.

RF.PR.D.PU.EDIT

Allows access to the Product PU Maint screen for cross-referencing barcodes to products.

- **Level 1** – Allows access in view-only mode. The **Primary** hot key on this screen is disabled. The **UD Maint** hot key displays user-defined bar codes in view-only mode.
- **Level 2** – Allows access in edit mode.

RF.PUTAWAY.OVRD.LOC

Allows access to override and accept a scanned putaway location that is the primary location for another product. When a scanned location is a primary location for another product, users not assigned this authorization key must scan another location.

Note: The system checks this authorization key when the **RF Putaway Primary Location Override Warning** control maintenance record is enabled.

RF.RECV.PUTAWAY.BO.QTY

Allows access to select the backorder option when using the **Qty** hot key on the RF Putaway screen. This option authorizes the user to backorder quantities at the time of RF Putaway.

RF.RECV.SHIPMENT.EDIT

Allows access to the Adjust Variance screen in RF Recv Verify to resolve receiving discrepancies.

RF.RECV.VERF.BO.QTY

Allows access to select the backorder option when using the **Qty** hot key on the RF Verify screen. This option authorizes the user to backorder quantities at the time of RF Receive/Verify.

Sales Force Automation (SFA) Authorization Keys

The following authorization keys apply to the Sales Force Automation (SFA) companion product.

SFA.ALLOWED

Allows access to use SFA.

SFA.MAINT

Allows access to update any customer account, regardless of the accessible branches defined for the customer or the user. When users create customer accounts in SFA, they cannot assign accessible branches.

We recommend that you assign this key to the user designated in the SFA Administrator control maintenance record.

Time Clock Authorization Keys

The following authorization keys apply to the Time Clock companion product.

TIME.CLOCK.ADJUST

Allows access to the Time Clock Detail and Equipment Time Clock Entry programs.

- **Level 1** – Allows access to view, but not edit, the time clock entries for all users.
- **Level 2** – Allows access to edit the time clock entries for other users, but not your own.
- **Level 3** – Allows access to edit the time clock entries for all users.

TIME.CLOCK.BUDGET

Allows access to the Time Clock Budget and Monthly Time Clock Budget programs.

- **Level 1** – Allows access to view, but not edit, only your own time clock entries.
- **Level 2** – Allows access to edit the time clock budget entries for other users, but not your own.
- **Level 3** – Allows access to edit the time clock budget entries for all users.

TIME.CLOCK.NOTE.EDIT

Allows access to edit time clock notes, even if the user's setting for the TIME.CLOCK.ADJUST key does not allow editing.

Web Commerce Authorization Keys

The following authorization keys apply to the Web Commerce companion product.

PRODUCT.CAT.MAINT

Allows access to view and edit product categories for web order entry.

- **Level 1** – Allows access to view product categories.
- **Level 2** – Allows access to edit and create product categories.

WOE.MAINT

Allows access to view and edit web order entry passwords and parameters assigned to customers and contacts on the B2B/WOE Remote Order Entry Parameters screen in Customer Maintenance and the Contact WOE Parameters screen.

- **Level 1** – Allows access to only view the information on these screens.
- **Level 2** – Allows access to edit the information on these screens, unless the parent screen displays in view-only mode.

Note: If the parent screen (Remote Order Entry Parameters or Contact Maintenance) displays in view-only mode, then the WOE screen (B2B/WOE Remote Order Entry Parameters or Contact WOE Parameters) displays in view-only mode, even if level 2 is assigned to the user.

Accounts Payable (A/P) Authorization Keys

The following authorization keys apply to Accounts Payable functions.

AP.ALLOWED

Allows access to the A/P Entry program.

- **Level 1** – Allows access to accounts payable records in view-only mode and use of the **Detail Notes** and **Adv** hot keys.
- **Level 2** – Allows access to create and edit accounts payable records, except for amounts in the **PO Total** column.

Note: When you display a payable in a closed period, the **Man Chk** hot key is still active in order to offset invoices against credit memos. To allow users to edit the **PO Total** column, assign the AP.PARTIAL.OK authorization key.

AP.CHANGE.CHECK.POST.DATE

Allows access to change the post date of a check from the Single Check Printing and Print Checks programs.

AP.EDIT.REC.PO

Allows access to edit both sides of a regular or direct purchase order (P/O) that is reconciled.

- **Level 1** – Allows access to make the following edits:

If a P/O is...	This authorization key allows...
reconciled but not yet paid	access to edit any field, <i>except</i> the vendor. To change the vendor, the user must enter a password. Note: If the P/O is in a closed period, the system does not allow edits.
reconciled and paid	access only to edit the Prt field on the POE Status screen.

- **Level 2** – Allows the access defined for level 1, along with access to edit the vendor.

When a user with this level of authorization changes the vendor, the system displays the following prompt: You are about to Change a Vendor on a P/O That Has Been Reconciled. Continue (Y/N)?

AP.EDIT.VIEW.ONLY.NOTES

Allows access from A/P Entry to edit notes in the A/P Notes screen, even if the payable is view-only.

AP.MANUAL.APPROVE

Allows access to override the **Approved** flag in A/P Entry and set it to **Y**, even if the invoice reconciliation difference is outside the allowable variance for the vendor.

AP.PARTIAL.OK

Allows access to change the **PO Total** amount in A/P Entry.

AP.PREVIEW.PRINT.CHECK

Allows access to print checks from the A/P Preview Queue using the **Print Check** hot key.

Note: For this authorization key to take effect, also assign the AP.PREVIEW.QUEUE.EDIT authorization key.

AP.PREVIEW.QUEUE.EDIT

Allows access to edit the **Pay On Date** and **Approved** columns in the A/P Preview Queue. Users not assigned this authorization key can view the queue but not edit these two columns.

Note: To allow users to use the **View** hot key on the A/P Preview Queue screen, also assign the AP.ALLOWED authorization key. To allow users to use the Print Check hot key on the A/P Preview Queue screen, also assign the AP.PREVIEW.PRINT.CHECK authorization key.

AP.SIGNATURE.PRINT

Allows access to print an imaged signature on A/P checks.

Note: Superuser authorization does not include this authorization key. To allow a superuser to print an imaged signature on checks, assign this authorization key in addition to the SUPERUSER authorization key.

During A/P check printing, the system checks to see if this authorization key is assigned to the user running the program. If the authorization key is not assigned, the system prompts the user for a password. If the user does not enter a password, the checks print without signatures.

CD.REUSE.CHECK.NO

Allows access to reuse check numbers in the Cash Disbursement Check Printing and Void Check programs.

CD.VOID.EFT

Allows access to delete an electronic funds transfer disbursement (EFT check) that has already been released.

Note: Voiding an EFT check requires that you contact the bank to void the electronic transfer of funds to the vendor. The system only undoes the application of the EFT check to the associated payables.

Accounts Receivable (A/R) Authorization Keys

The following authorization keys apply to Accounts Receivable functions.

APPLY.CR.HKEY

Allows access to apply credits using the **ApplyCr** hot key on the Cash Receipts screen.

AR.ALLOWED

Allows access to the A/R Inquiry program.

Displays A/R Items as an option on the Fast Select list in order entry, even when the user is not assigned the SOE.CLOSED.ORDER.EDIT key.

AR.STATEMENT

Allows access to the Print Statements program.

- **Level 1** – Allows access to print or fax statements for one customer. Users with this level can only select the Individual Customer(s) statement printing option.
- **Level 2** – Allows access to select any of the statement printing options in the Print Statements program. The default option for users with this level is All Batch Stmt Customers, but they can select any of the available statement printing options.

CR.ALLOWED

Allows access to the Cash Receipts Entry program.

- **Level 1** – Allows access to view cash receipts records.
- **Level 2** – Allows access to edit cash receipts records.

CR.ANTICIPATION.CREDIT

Allows access to generate an anticipation credit from the Cash Receipts screen.

General Ledger (G/L) Authorization Keys

The following authorization keys apply to General Ledger functions.

GL.ACCOUNTS

Limits access to view designated G/L accounts in G/L Inquiry. Users *not* assigned this key can view all accounts in G/L Inquiry.

After assigning the authorization key, use the **Detail** hot key to display the Detail Selection screen, where you build the list of accounts the user can view.

Note: This authorization key applies only to G/L Inquiry. Superuser authorization does not include this authorization key. To set this key for a superuser, assign it in addition to the SUPERUSER authorization key.

GL.BRANCH.EDIT

Allows access to change the G/L branch for an order generation.

GL.BRANCH.OVERRIDE

Allows access to post a journal entry to a G/L account that is not accessible to the designated branch.

When a user attempts to post a journal entry to an account that is not accessible to the branch, the system checks this authorization key, displays a warning, and does one of the following:

- If this key is assigned, asks if the user wants to post to an inaccessible branch.
- If this key is not assigned, prompts the user to enter a password to post to an inaccessible branch.

If the user continues, the system posts the journal entry to the designated account and then prompts the user to activate the G/L account for that branch.

- If the user enters **Y**, the system adds the branch to the account's list of accessible branches.
- If the user enters **N**, the system does not add the branch to the account's list of accessible branches.

GL.CLOSE.DATE.EDIT

Allows access to edit dates on the Change G/L Closing Date screen.

- **Level 1** – Allows access to change any date except the Audit Close Date.
- **Level 2** – Same as level 1.
- **Level 3** – Allows access to also change the Audit Close Date.

Allows access to edit journal entries that have been exported. After a user edits an exported journal entry, the system prompts the user to re-transmit the journal.

The system prompts users not assigned this authorization key to enter a password to edit an exported journal entry.

Note: Users cannot edit journal entries in a closed accounting period.

GL.MAINT

Allows access to G/L maintenance and setup programs.

- **Level 1** – Allows access to the G/L Account Maintenance program.
- **Level 2** – Allows additional access to the G/L Product Types and G/L Sales Sources programs.

GL.REPORTING

Allows access to the G/L Report Generator.

Exchange Rates Authorization Keys

The following authorization key applies to the foreign exchange rate function.

EXCHANGE.RATE.EDIT

Allows access to edit exchange rates in Exchange Rate Maintenance. Users not assigned this key can only view exchange rates.

Activity Logs Authorization Keys

The following authorization keys apply to viewing and editing information in the activity logs.

Editing Activity Log Comments

The following authorization keys allow access to edit the original and appended comments in the corresponding activity log entries.

Authorization Key	Activity Log	Users must be assigned xxx.ACTIVITY.EDIT ...
CUST.ACTIVITY.CMT.EDIT	Customer	<ul style="list-style-type: none"> Level 2 or 3 – to edit their own entries. Level 4 – to edit the entries of other users.
ORD.ACTIVITY.CMT.EDIT	Order	
PRD.ACTIVITY.CMT.EDIT	Product	
SYSTEM.ACTIVITY.CMT.EDIT	System	
USER.ACTIVITY.CMT.EDIT	User	
VENDOR.ACTIVITY.CMT.EDIT	Vendor	

Note: Users must be assigned both the xxx.ACTIVITY.VIEW and xxx.ACTIVITY.EDIT authorization keys for this key to work.

Creating Activity Log Entries and Appending Messages

The following authorization keys allow access to create activity log entries (trackers) or append messages to existing log entries. Users on the follow-up list for an activity log entry, can append comments to the entry regardless of their level of authorization.

Authorization Key	Activity Log	Level allows access to...
CUST.ACTIVITY.EDIT	Customer	1 – Create an activity log entry and view own entries. 2 – Also append comments to own entries. 3 – Also view the entries of other users. 4 – Also append comments to the entries of other users. 5 – Reserved for future use.
ORD.ACTIVITY.EDIT	Order	
PRD.ACTIVITY.EDIT	Product	
SYSTEM.ACTIVITY.EDIT	System	
USER.ACTIVITY.EDIT	User	
VENDOR.ACTIVITY.EDIT	Vendor	

Note: For the PRD.ACTIVITY.EDIT function to work, also assign the PRD.ACTIVITY.VIEW authorization key.

Viewing Activity Log Entries

The following authorization keys allow access to Activity Log Viewing. The level number, 1-99, determines which entries the user can view. Users can view log entries with a security level

equal to or less than the level assigned to the corresponding authorization key. For example, a user with an ACTIVITY.VIEW level of 50 can view entries assigned a security level of 50 or lower, but cannot view entries with a security level of 51 or higher.

These keys also determine the level of security assigned to activity log entries the user makes, if the Use User's Sec Level As Default For Queue Entries control maintenance record is set to **Y**.

Authorization Key	Activity Log
CUST.ACTIVITY.VIEW	Customer
ORD.ACTIVITY.VIEW	Order
PRD.ACTIVITY.VIEW	Product
SYSTEM.ACTIVITY.VIEW	System
USER.ACTIVITY.VIEW	User
VENDOR.ACTIVITY.VIEW	Vendor

Note: The system assigns security level 1 to all entries in the Product Activity Log. All users, regardless of their assigned view level, can view entries in this log. If the **Remote Cus** field in the user's record contains an entry, the user cannot access the log from Inventory Inquiry. A remote customer may not view the Product Activity Log.

All users assigned the SYSTEM.ACTIVITY.VIEW authorization key, regardless of the level, can see system-generated log entries.

Authorization Keys for Authorization Keys

The following authorization key applies to maintaining user-defined authorization keys.

UD.AUTH.KEY.EDIT

Allows access to create and edit user-defined authorization keys.

Branch and Territory Authorization Keys

The following authorization keys control a user's ability to view and edit branch and territory records.

BR.COST.ACTIVITY.VIEW

Allows access to view branch cost entries in the Product Activity Log.

Allows access to view the Branch Costs Inquiry screen.

BRANCH.MAINT

Allows access to Branch Maintenance to view and edit branch records.

- **Level 1** – Allows access in view-only mode.
- **Level 2** – Allows access in edit mode.

TERRITORY.MAINT

Allows access to Territory Maintenance to view and edit territory records.

- **Level 1** – Allows access in view-only mode.
 - **Level 2** – Allows access in edit mode.
-

Buy and Sell Matrix Functions Authorization Keys

The following authorization keys apply to the buy and sell matrix functions.

BMATRIX.MAINT

Allows access to the Buy Matrix Maintenance and Quick Buy Matrix Maintenance programs.

- **Level 1** – Allows access in view-only mode.
- **Level 2** – Allows access to create a new buy matrix cell. Also allows access to edit or delete buy matrix cells.
- **Level 3** – Functions the same as level 2.
- **Level 4** – Functions the same as level 2.

Note: When users access Buy Matrix Maintenance through Purchase Order Entry, the information displays as view-only regardless of the level assigned with this authorization key.

SMATRIX.MAINT

Allows access to the Sell Matrix Maintenance and Quick Sell Matrix Maintenance programs.

Note: In addition to assigning this authorization key, you must also assign the SMATRIX.MAINT.CUS.CLASS authorization key.

- **Level 1** – Allows view-only access to sell information in Sell Matrix Maintenance and the following views in Quick Sell Matrix Maintenance:
 - Prices
 - Rebates
 - Direct Rebates
 - Price/Qty

The user cannot see cost information. The user has no update access.

- **Level 2** – Allows view-only access to sell and cost information in Sell Matrix Maintenance and the following views in Quick Sell Matrix Maintenance:
 - Prices
 - Costs
 - Direct Costs
 - Rebates
 - Direct Rebates
 - Prices/Cost
 - Gross Profit

- Price/Qty
- Sell Price Override
- Cost Override Date
- Direct Cost Override

The user has no update access.

- **Level 3** – Allows view-only access to all cost and sell information. Allows update access to the sell information listed in level 1 *for branches to which the user has access*. The user can view cost overrides, but not edit them, using the **Cost Ovr** hot key on the Sell Matrix Maintenance screen and the **Cost Override** hot key on the Quick Sell Matrix Maintenance screen.
- **Level 4** – Allows access to view and update all sell and cost information. Allows access to create and edit cost overrides using the **Cost Ovr** hot key on the Sell Matrix Maintenance screen and the **Cost Override** hot key on the Quick Sell Matrix Maintenance screen.

Note: When users access Sell Matrix Maintenance through sales order entry, the information displays as view-only regardless of the level assigned with this authorization key.

SMATRIX.MAINT.CUS.CLASS

This authorization key further restricts the ability to view, create, and edit matrix cells.

Note: In addition to assigning this authorization key, you must also assign the SMATRIX.MAINT authorization key.

- **Not Assigned** – Allows access to matrix cells in view-only mode, as determined by the SMATRIX.MAINT authorization key.
- **Level 1** – Allows access to create or edit Customer matrix cells. Class and Type/Quote matrix cells are view-only, as determined by the SMATRIX.MAINT authorization key.
- **Level 2** – Allows access to create or edit Customer and Class matrix cells. Type/Quote matrix cells are view-only, as determined by the SMATRIX.MAINT authorization key.
- **Level 3** – Allows access to create and edit Customer, Class and Type/Quote matrix cells.

A user assigned SMATRIX.MAINT at level 3 cannot create or edit a cost override for a matrix cell. If the user is also assigned SMATRIX.MAINT.CUS.CLASS at level 1, they can create, edit, or delete a customer specific matrix cell, but still do not have access to the cost override functionality at the matrix cell level.

Access to Class matrix cells is also determined by the OE.PRICE.CLASS.LEVEL authorization key.

UD.MATRIX.UPLOAD

Allows access to upload data for creating a buy or sell matrix to your Hold file and define a layout for creating matrix cells from the uploaded data. With this authorization key, users can

select the **Matrix Upload User Defined** option using the **Process** hot key on the Spooler Control screen.

Note: **Matrix Upload User Defined** is a user-defined option, which you set up on the User Defined Upload Processing screen to call the MATRIX.USER.DEFINED subroutine.

Company Comments Authorization Keys

The following authorization key controls a user's ability to create and edit company-wide standard comments.

COMPANY.COMMENT.EDIT

Allows access to create and edit company-wide standard comments that are available to all users to add to or use in place of free-form tracker append comments, tracker closing comments, and fax comments.

Contact Authorization Keys

The following authorization key controls a user's ability to view and edit contact records.

CONTACT.MAINT

Allows access to Contact Maintenance.

- **Level 1** – Allows access to only view contact records.
- **Level 2** – Allows access to create contact records.
- **Level 3** – Allows access to edit a contact record, only if the user is the inside or outside salesperson for that contact's primary entity.
- **Level 4** – Allows access to edit or delete all contact records.

Note: The WOE.MAINT authorization key, defined for Customer Maintenance, also applies to Contact Maintenance.

Control Maintenance Authorization Keys

The following authorization keys control a user's ability to view and edit *restricted* control maintenance records. Assign the following authorization keys only if Support has enabled this functionality for your system.

CONTROL.MAINT.EDIT

Allows access to edit restricted control maintenance records. The level number, 0-999, determines which records the user can edit.

Users assigned a level with this authorization key can edit restricted control maintenance records assigned a level equal to or less than their level.

CONTROL.MAINT.VIEW

Allows access to view restricted control maintenance records. The level number, 0-999, determines which records the user can view.

Users assigned a level with this authorization key can view restricted control maintenance records assigned a level equal to or less than their level.

CONTROL.PARAMETER.AUTH

Allows access to restrict users from viewing and editing designated control maintenance records. Users with this authorization can assign view levels or other authorization key levels to control maintenance records to restrict who can view and edit the records.

To allow users to view restricted control maintenance records, assign one of the following:

- The CONTROL.MAINT.VIEW authorization key with a level equal to or higher than the level assigned to the record.
- Another designated authorization key and level required for viewing.

To allow users to edit restricted control maintenance records, assign one of the following:

- The CONTROL.MAINT.EDIT authorization key with a level equal to or higher than the level assigned to the record.
- Another designated authorization key and level required for editing.

Note: If you leave the Control Record Authorization Maintenance screen blank for a control maintenance record, any user who has access to Control Maintenance can view and edit the settings for that control maintenance record.

Customer Maintenance Authorization Keys

The following authorization keys control a user's ability to use, view, and edit customer records.

CUST.BR.AUTH.ONETIME

Allows access to activate a customer for a one-time-only transaction in Sales Order Entry or Cash Receipts Entry, if the customer is *not* set up being active or inactive for the sales branch. Enter an authorization level, 0-99.

To set up a customer for a branch, list the branch on the customer's Accessible Branches screen. A customer is inactive when the **Active** field for a branch on the Accessible Branches screen in Customer Maintenance is set to **N** and active when the **Active** field is set to **Y**.

When a user enters a transaction from a branch not listed on the customer's Accessible Branches screen, the system displays the following prompts: Don't Activate, Activate for Branch, and Activate for Onetime Use. Users assigned an authorization level greater than or equal to the level entered in the **One-Time Activation Level** field on the customer's Accessible Branches screen can activate the customer for a one-time-only transaction. When a user activates a customer for a one-time-only transaction, the system does not add the branch to the Accessible Branches screen.

Note: You can assign this authorization key only when the Display Customers/Vendors Who Are Inactive At A Branch control maintenance record is enabled.

CUST.BR.AUTH.OVRD

Allows access to permanently activate a vendor for transactions in Sales Order Entry or Cash Receipts Entry, if the customer is *not* set up as being active or inactive for the sales branch. Enter an authorization level, 0-99.

To set up a customer for a branch, list the branch on the customer's Accessible Branches screen. A customer is inactive when the **Active** field on the Accessible Branches screen is set to **N** and active when the **Active** field is set to **Y**.

When a user enters a transaction from a branch not listed on the customer's Accessible Branches screen, the system displays the following prompts: Don't Activate, Activate for Branch, and Activate for Onetime Use. Users assigned an authorization level greater than or equal to the level entered in the **Branch Activation Level** field on the customer's Accessible Branches screen can activate the customer. When a user activates a customer, the system adds the branch to the customer's Accessible Branches screen and sets the **Active** field to **Y**.

Note: You can assign this authorization key only when the Display Customers/Vendors Who Are Inactive At A Branch control maintenance record is enabled.

CUST.CERTIFY.EDIT

Allows access to edit the Product Certification Maintenance screen.

CUST.CREDIT.EDIT

Allows access to view and edit the system default and customer record Credit Control Parameters as shown in the following table:

CUSTOMER.MAINT	CUST.CREDIT.EDIT	Default Credit Control Parameters	Customer Credit Control Parameters
Not assigned	Not assigned	View	Cannot view
Not assigned	Assigned	Edit	Cannot view
Level 1	Assigned	Edit	View
Level 2	Assigned	Edit	Edit

CUST.DEMAND.BR.OVRD

Allows access to edit the **Branch Demand Override** field on the Miscellaneous Customer Information screen.

CUST.POINTS

Allows access to Points Maintenance to view and edit customer points information. Use the **Edit Points** hot key on the Customer Point Maintenance screen to access Points Maintenance.

- **Level 1** – Allows access in view-only mode.
- **Level 2** – Allows access to edit numbers in the **Redeemed** column.
- **Level 3** – Allows access to edit numbers in the **Adjustments** column.

CUST.PRICING.EDIT

Allows a user with CUSTOMER.MAINT level 2 authorization to edit the data on the Customer Pricing/Printing screen.

CUST.SALES.HIST.ALLOWED

Allows access to view data in the Customer Sales History file.

CUSTOMER.MAINT

Allows access to Customer Maintenance to view and edit customer records.

- **Level 1** – Allows access in view-only mode.
- **Level 2** – Allows access in edit mode.

CUSTOMER.MAINT.LEVEL

Restricts access to edit information in Customer Maintenance. This authorization key works with the Customer Maintenance Authorization Levels control maintenance record. Assign authorization as follows:

- To control a user's ability to edit customer information using a field or hot key on the Customer Maintenance screen, assign this key and an authorization level 0-99. The default level is 20.

To use a field or hot key for editing purposes, the user's assigned level must be equal to or greater than the security level assigned to the designated field or hot key in the Customer Maintenance Authorization Levels control maintenance record. If a user is not authorized to edit information at the assigned level, hot keys display information in view-only mode.

- To give a user unrestricted access to editing information in Customer Maintenance, assign CUSTOMER.MAINT level 2, but do *not* assign this key.

SLSMN.CUSTOMER.MAINT

This authorization key works with the CUSTOMER.MAINT authorization key to control a salesperson's ability to view and edit customer records and enter sales orders as shown in the following table:

If CUSTOMER.MAINT is...	and SLSMN.CUSTOMER.MAINT is...	The salesperson can...
Level 1	not assigned	<ul style="list-style-type: none"> • view customer records. • enter sales orders for customers.
	Level 1	<ul style="list-style-type: none"> • view customer records. • enter sales orders only for customers to whom the salesperson is assigned in Customer Maintenance.
	Level 2	<ul style="list-style-type: none"> • view customer records. • enter sales orders for customers. • edit the InSlsp and OutSlsp fields on the New Customer Entry screen, only if the current value is this user's ID.
	Level 3	<ul style="list-style-type: none"> • view customer records. • enter sales orders for customers. • edit InSlsp and OutSlsp fields on the New Customer Entry screen.
Level 2	not assigned	<ul style="list-style-type: none"> • edit customer records. • enter sales orders for customers.
	Level 1	<ul style="list-style-type: none"> • edit customer records. • enter sales orders only for customers to whom the salesperson is assigned in Customer Maintenance.
	Level 2	<ul style="list-style-type: none"> • edit records only for customers to whom the salesperson is assigned as an Out Salesperson or In Salesperson in Customer Maintenance. • view records for customers to whom the salesperson is not assigned. • enter sales orders for all customers.
	Level 3	<ul style="list-style-type: none"> • edit all customer records. • enter sales orders for all customers.

Dictionary Maintenance Authorization Keys

The following authorization key applies to accessing dictionary files.

DICT.MAINT

Allows access to the dictionary files, including access through the Report Writer/Mass Load programs. This key is usually reserved for system administration personnel.

- **Level 1** – Allows access to only view dictionary items.
 - **Level 2** – Allows access to view dictionary items and add new dictionary items.
 - **Level 3** – Allows access to edit dictionary items and add new dictionary items.
-

Entity Authorization Keys

The following authorization keys control a user's ability to view and edit customer and vendor records.

ACT.TRIG.SUBR.OVRD

Allows access to edit information on the Activity Trigger Override Maintenance screen accessed from Activity Trigger Maintenance and the Activity Trigger Override Maintenance screen in the Activity Trigger Subroutine Overrides control maintenance record.

Users not assigned this authorization key can access these screens in view-only mode.

ENTITY.PN.EDIT

Allows access to the Customer/Vendor Specific Part Numbers screen.

- **Level 1** – Allows access to view items.
- **Level 2** – Allows access to view and edit items.
- **Level 3** – Allows access to also delete items.

Note: Users assigned this authorization key at any level who access the system through Remote Order Entry only have access in view-only mode.

ENTITY.TRIGGER

Allows access to Activity Trigger Maintenance. For users not assigned this key, the **Activity Trigger** hot key in Customer or Vendor Maintenance is not active.

Equipment Authorization Keys

The following authorization key applies to tracking equipment costs.

EQUIPMENT.MAINT

Allows access to Equipment Maintenance.

- **Level 1** – Allows access to view equipment maintenance information.
 - **Level 2** – Allows access to edit equipment maintenance information.
-

Hot Swap Authorization Keys

The following authorization keys apply to the Hot Swap Server application.

SYNC.ACCOUNT.MAINT

Allows access to Sync Account Maintenance in the Hot Swap Server application.

- **Level 1** – Allows access to enter the Socket Communication Account Maintenance screen to create and edit individual sync accounts. Allows access to view the HotStandBy Status Inquiry screen.
- **Level 2** – Allows access to manage system-level sync parameters, which affect more than one sync account, using the System Sync Parameters screen, the Sync Dataset Maintenance screen, and the Sync Configuration Maintenance screen. Allows access to use the **Reset Totals**, **Change Status**, and **Change Reporting Server** hot keys on the HotStandBy Status Inquiry screen.

SYNC.UPDATE.DATA

Allows access to verify and update sync account data.

- **Level 1** – Allows access to verify sync accounts from the Remote File Verification / Update screen and the Release Control Account Sync screen.
 - **Level 2** – Allows access to update sync account data on the Remote File Verification / Update screen, the Release Control Account Sync screen, and the Data Copying Utility.
-

Job Bid Authorization Keys

The following authorization key controls a user's ability to maintain job bids.

JOB.BID.MAINT

Allows access to Job Bid Maintenance to view and edit job bid information.

- **Level 1** – Allows access in view-only mode.
 - **Level 2** – Allows access in edit mode.
-

Message Group Authorization Keys

The following authorization keys apply to accessing message groups.

MESSAGE.GROUP

Allows access to send messages to message groups. The level number, 1-99, determines the groups to which the user can send messages.

Users can only send messages to groups with a security level equal to or less than their MESSAGE.GROUP level. For example, a user with a MESSAGE.GROUP level of 50 can send messages to groups assigned a security level of 50 or lower, but cannot send messages to groups with a security level of 51 or higher.

Note: There is no connection between the MESSAGE.GROUP authorization key level assigned to a user and the ability of that user to view or edit the names of users in a message group. To prohibit a user from viewing or editing message groups, do not assign that user the Message Group Maintenance menu program.

MESSAGE.GROUP.TYPES

Limits access to view or edit only specified message group types in Message Group Maintenance. If you do not assign this authorization key, a user can view or edit all message group types.

After assigning the authorization key, use the **Detail** hot key to display the Detail for MESSAGE.GROUP.TYPES Selection screen, where you create the list of message group types the user can access.

If you assign this authorization key without specifying any detail, the user cannot view or edit any message group types. This authorization key is applicable only if the Valid Message Group Types control maintenance record defines message groups.

Note: Superuser authorization does not include this authorization key. To set this key for a superuser, assign it in addition to the SUPERUSER authorization key.

Pricing Authorization Keys

The following authorization keys apply to Price Line Maintenance, Price Sheet Entry, Commission Plan Maintenance, and Pricing Management.

BUY.SELL.GROUP.MAINT

Allows access to Buy/Sell Group Maintenance to view and edit records.

- **Level 1** – Allows access in view-only mode.
- **Level 2** – Allows access in edit mode.

COMM.PLAN.MAINT

Allows access to Commission Plan Maintenance to view and edit commission plans.

- **Level 1** – Allows access in view-only mode.
- **Level 2** – Allows access in edit mode.

PRICE.CHANGE.OVRD

Allows access to override pricing on a product that has a restricted matrix.

PRICE.LINE.MAINT

Allows access to Price Line Maintenance to view and edit records.

- **Level 1** – Allows access in view-only mode.
- **Level 2** – Allows access to edit price lines listed in the VALID.PLINES authorization key.
- **Level 3** – Allows access to edit all price lines.

PRICE.SHEET.ENTRY

Allows access to Price Sheet Entry to view and edit price sheets.

- **Level 1** – Allows access in view-only mode.
- **Level 2** – Allows access to edit price lines listed in the VALID.PLINES authorization key.
- **Level 3** – Allows access to edit all price lines.

PRICE.SHEET.MAINT

Allows access to Product Price Sheet Maintenance to view or edit prices and costs.

- **Level 1** – Allows access in view-only mode.
- **Level 2** – Allows access to edit prices and costs if the basis is 0.00, or the number of days since the basis was assigned a non-null value, or an effective date exceeds the days specified in the Number Of Days After Which The Users Can Edit Old Prices control maintenance record.
- **Level 3** – Allows access to edit all prices and costs.

PRICE.SHEET.UPDATE

Allows access to use the **Update Prices** hot key on the Price Sheet Entry screen to display the Price Sheet Entry/Update screen.

SELL.GROUP.REBATE.MAINT

Allows access to Sell Group Rebate Maintenance. Users not assigned this authorization key cannot access this screen.

- **Level 1** – Allows access in view-only mode.
 - **Level 2** – Allows access in edit mode.
-

Printer Authorization Keys

The following authorization key controls a user's ability to maintain printer location information.

PRINTER.LOCATION.MAINT

Allows access to Printer Location Maintenance to view and edit printer location information.

- **Level 1** – Allows access in view-only mode.
 - **Level 2** – Allows access in edit mode.
-

Product Maintenance Authorization Keys

The following authorization keys apply to Product Maintenance and Dynamic Kit Maintenance.

DYNAMIC.KIT.EDIT

Allows access to edit and create dynamic kits in Product Kit Maintenance. Users not assigned this authorization key can only view data in Product Kit Maintenance.

- **Level 1** – Allows access to edit a dynamic kit.
- **Level 2** – Allows access to create a dynamic kit.

MSDS.MAINT

Allows access to view and edit Hazard Classification information associated with a product on the MSDS Sheet Maintenance screen.

Allows access to view and attach Material Safety Data Sheets (MSDS) to products on the Product MSDS Information screen. Users cannot edit the information in the MSDS files. They can only attach the sheets to or delete the sheets from products.

- **Level 1** – Allows access to view Hazard Classification and MSDS information. The user cannot edit the information or attach MSDS sheets to products.
- **Level 2** – Allows access to edit Hazard Classification and MSDS information and attach MSDS sheets to products.

Note: Users with this authorization cannot attach MSDS sheets from the MSDS Review Queue. The MSDS Sheet Maintenance screen in this instance is view-only.

NONSTOCK

Allows access to create and edit nonstock records.

- **Level 1** – Allows users assigned the SOE.ALLOWED, POE.ALLOWED, or TOE.ALLOWED authorization key access to create a record for a nonstock product and enter a price and cost. Once the user saves a new nonstock record, the information is view-only.
- **Level 2** – Allows access to change the **Buy Line**, **Dflt List** price, **Price Base**, **Formula** and **G/L Type** fields, and use the **Pricing** hot key to display the Product Price Sheet Maintenance screen.
- **Level 3** – Allows access to change the **Dflt Cost** field.
- **Level 4** – Allows access to change the description of a product defined as a nonstock in Eclipse, and activates the **Product Maint** hot key on the NonStock Entry screen.

Note: To allow a user to change the product unit of measure on the NonStock Entry screen, also assign the OE.NSTK.UOM.EDIT authorization key.

PRD.SUBS.MAINT

Allows access to use the **Subs** hot key in Product Maintenance to assign substitute products to a product record.

Allows access to use the **Subs** hot key, in purchase order entry, sales order entry, and transfer order entry, to display the Substitute / Add On Sale Items screen and make substitutions on an order.

PRODUCT.FAMILY.MAINT

Allows access to Product Family Maintenance to view and edit product families. Allows access from sales order entry to convert products on a bid into a product family. Allows access from web order entry to convert products on a bid into a product group.

- **Level 1** – Allows access to view product families.
- **Level 2** – Allows access to edit product families the user has created.
- **Level 3** – Allows access to any edit product families.

PRODUCT.MAINT

Allows access to Product Maintenance.

- **Level 1** – Allows access to only view product records. All hot keys except for **Delete**, **Copy**, and **Sequence** on the Product Maintenance screen are available in view-only mode.
- **Level 2** – Allows access to create and edit product records in the buy lines and price lines for which the user is authorized. Access to the Branch Costs screen is view-only.

Note: To activate the **Loc** (Product Location Maintenance) hot key on the Product Maintenance screen for users, also assign the PRD.LOCATION.MAINT authorization key.

- **Level 3** – Allows access to edit data on the Branch Costs screen.

PRODUCT.MAINT.LEVEL

Restricts access to edit information in Product Maintenance. This authorization key works with the Product Maintenance Authorization Levels control maintenance record.

- To control a user's ability to edit product information using a field or hot key on the Product Maintenance screen, assign this key and an authorization level 0-99. The default level is 20.

To use a field or hot key for editing purposes, the user's assigned level must be equal to or greater than the security level assigned to the designated field or hot key in the Product Maintenance Authorization Levels control maintenance record. If a user is not authorized to edit information at the assigned level, hot keys display information in view-only mode.

- To give a user unrestricted access to editing information in Product Maintenance, assign PRODUCT.MAINT level 2, but do *not* assign this key.

Ship Via Authorization Keys

The following authorization key applies to Ship Via Maintenance.

SHIP.VIA.MAINT

Allows access to Ship Via Maintenance to view and edit records.

- **Level 1** – Allows access in view-only mode.
 - **Level 2** – Allows access in edit mode.
-

Terminal Authorization Keys

The following authorization key controls a user's ability to maintain terminal information.

TERMINAL.SETUP

Allows access to Terminal Setup to view and edit terminal information.

- **Level 1** – Allows access in view-only mode.
 - **Level 2** – Allows access in edit mode.
-

Terms Authorization Keys

The following authorization key applies to Terms Maintenance.

TERMS.MAINT

Allows access to Terms Maintenance to view and edit records.

- **Level 1** – Allows access in view-only mode.
 - **Level 2** – Allows access in edit mode.
-

User Maintenance Authorization Keys

The following authorization keys apply to maintaining user records and accessing the User Job Queue.

AUTH.PWD.MAINT

Allows access to create authorization passwords. The level number, 1-999, determines the type of authorization passwords the user can create.

If the authorization level is...	Then the user can create a password set for...
0	one-time use. The user cannot change this setting. The system deletes the password from the list after one use.
1-998	multiple use for the number of days equal to the level number. If the user changes the expiration date, it cannot be later than the system-generated date or earlier than the current date. The system deletes the password from the list following the expiration date.
999	multiple use with no expiration date. The password is available for use until the user removes it from the list.

USER.BRANCH.MAINT

Allows access from User Maintenance to view and edit the branches a user can access.

- **Level 1** – Allows access in view-only mode.
- **Level 2** – Allows access in edit mode.

USER.JOB.QUEUE

Allows access to view user job queues.

- **Level 1** – Allows access to view the user's own queue.
- **Level 2** – Allows access to view any user's queue.
- **Level 3** – The same as level 2.

Note: Users not assigned this key have the equivalent of level 1 authorization.

USER.KEY.MAINT

Allows access from User Maintenance to view or edit authorization keys.

- **Level 1** – Allows access in view-only mode.
- **Level 2** – Allows access in edit mode.

Note: The system does not save authorization key edits made by users assigned USER.MAINT.ALLOWED level 1.

USER.MAINT.ALLOWED

Allows access to User Maintenance.

- **Level 1** – Allows access to view user records.
- **Level 2** – Allows access to view and create user records.
- **Level 3** – Allows access to view, create, and edit user records.

USER.PASSWORD.EDIT

Allows access to edit the password of any user and modify the password parameters. Only the system administrator should have this authorization.

USER.TERR.MAINT

Allows access from User Maintenance to view and edit the types of territories (reporting, viewable, and editable) for which a user is authorized.

- **Level 1** – Allows access in view-only mode.
- **Level 2** – Allows access in edit mode.

USER.VIEW.SELECT

Allows access from User Maintenance to view or edit the order entry views assigned to a user.

- **Level 1** – Allows access in view-only mode.
 - **Level 2** – Allows access in edit mode.
-

Vendor Maintenance Authorization Keys

The following authorization keys control a user's ability to use, view, and edit vendor records.

VEN.BR.AUTH.ONETIME

Allows access to activate a vendor for a one-time-only transaction in Purchase Order Entry or A/P Entry, if the vendor is *not* set up as being active or inactive for the purchasing branch. Enter an authorization level, 0-99.

To set up a vendor for a branch, list the branch on the vendor's Accessible Branches screen. A vendor is inactive when the **Active** field for a branch on the Accessible Branches screen in Vendor Maintenance is set to **N** and active when the **Active** field is set to **Y**.

When a user enters a transaction from a branch not listed on the vendor's Accessible Branches screen, the system displays the following prompts: Don't Activate, Activate for Branch, and Activate for Onetime Use. Users assigned an authorization level greater than or equal to the level entered in the **One-Time Activation Level** field on the vendor's Accessible Branches screen can activate the vendor for a one-time-only transaction.

Note: When a user activates a vendor for a one-time-only transaction, the system does not add the branch to the Accessible Branches screen. You can assign this authorization key when you enable the Display Customers/Vendors Who Are Inactive At A Branch control maintenance record.

VEN.BR.AUTH.OVRD

Allows access to permanently activate a vendor for transactions in Purchase Order Entry and A/P Entry, if the vendor is *not* set up as being active or inactive for the purchasing branch. Enter an authorization level, 0-99.

To set up a vendor for a branch, list the branch on the vendor's Accessible Branches screen. A vendor is inactive when the **Active** field on the Accessible Branches screen is set to **N** and active when the **Active** field is set to **Y**.

When a user enters a transaction for a vendor that is not designated as active or inactive for a branch, the system displays the following prompts: Don't Activate, Activate for Branch, and Activate for Onetime Use. Users assigned an authorization level (0-99) greater than or equal to the level (0-99) entered in the **Branch Activation Level** field on the vendor's Accessible Branches screen can activate the vendor.

Note: When a user activates a vendor, the **Active** field on the Accessible Branches screen in Vendor Maintenance changes from **N** to **Y**. You can assign this authorization key only when you enable the Display Customers/Vendors Who Are Inactive At A Branch control maintenance record.

VENDOR.MAINT

Allows access to Vendor Maintenance to view and edit vendor records.

- **Level 1** – Allows access in view-only mode.
 - **Level 2** – Allows access in edit mode.
-

Zip Code Authorization Keys

The following authorization keys apply to creating and deleting zip codes.

ZIP.CODE.DELETE

Allows access to delete a zip code.

ZIP.CODE.ENTRY

Allows access to Zip Code Maintenance.

- **Level 1** – Allows access in view-only mode. The screens displayed from Zip Code Maintenance using the **Branch Tax Juris Ovr**d and **Ship Vias by Br** hot keys are also view-only.
 - **Level 2** – Allows access in edit mode. Also allows access to create a new zip code when creating a new customer in sales order entry.
-

Daily Planner Authorization Keys

The following authorization key applies to using the Daily Planner.

DAILY.PLANNER

Allows access to the Daily Planner program.

- **Level 1** – Allows access to view and edit the user's own daily schedule.
 - **Level 2** – Allows access to view, but not edit, another user's daily schedule.
 - **Level 3** – Allows access to view and edit any user's entries.
 - **Level 4** – Same as level 3.
-

Mass Load Authorization Keys

The following authorization key applies to using the Mass Load program.

MASSLOAD.ALLOWED

Allows access to the Mass Load Full Screen File Update program.

Phantom Status Authorization Keys

The following authorization keys apply to using the Phantom Status screen.

KILL.PHANTOM

Allows access to use the **Kill** hot key on the Phantom Status screen to stop any phantom process displayed on the screen that is running or sleeping.

KILL.PROCESS

Allows access to use the **Kill Process** hot key on the Phantom Status screen to stop any phantom process (not limited to those displayed on the screen) that is running or sleeping.

Users with this authorization can also use selection criteria to display groups of similar processes for selective or mass deletion.

PHANTOM.EDIT

Allows access to edit entries on the Phantom Status and Remote Reporting Status Queue screens.

- **Level 1** – Allows access to view the user's own jobs.
- **Level 2** – Allows access to edit or delete the user's own jobs.

Allows access to change the user ID of the user's own jobs to another user. If a user assigned at this level changes the user ID, the system displays the following message:
Once this is changed, you will not be able to change back to your User. Continue (Y/N)?

If the process scheduled is a Report Writer, the **Edit** hot key displays the Report Driver screen, where the user can change the **Sample** field and then access the **Print**, **Hold**, **Opts**, **Notes**, **Column Data**, and **Selection Data** hot keys.

If the process scheduled is a G/L Report Generator the **Edit** hot key displays the GL Report Generator driver screen, where the user can change the branch, as of date, company name, and account template fields and use the **Print**, **Hold**, and **Opts** hot keys.

- **Level 3** – Allows access to view the jobs of any user.
- **Level 4** – Allows access to edit or delete any user's jobs.

Allows access to change the user ID of any user's job to another user.

PHANTOM.MANAGER.CONTROL

Allows access to control the number of phantom processes running at the user level on the User Phantom Maintenance screen and the system level on the Phantom Status screen.

- **Level 1** – Allows access to view your user-level parameters.
- **Level 2** – Allows access to view your user-level and the system-level parameters.
- **Level 3** – Allows access to edit your user-level parameters.
- **Level 4** – Allows access to edit your user-level and the system-level parameters.

PHANTOM.MANAGER.PRIORITY

Allows access to view and edit the priorities assigned to phantom processes in the Phantom Manager screen.

- **Level 1** – Allows access to view the Phantom Manager screen.
- **Level 2** – Allows access to change the priority assigned to the user's own phantom processes.
- **Level 3** – Allows access to change the priority assigned to any user's phantom processes, kill a process, or force a queued process to run.

PHANTOM.THREAD.COUNT

Allows access to spawn phantom threads for running the A/P Aging Report. Enter the maximum thread count (1-99) the user can spawn. If you leave this record blank, the user can only run the report in a single thread.

Reports Authorization Keys

The following authorization key applies to running reports.

WIN.DIRECT.CREATE.DIR

Allows access from report screens to the Windows Direct Options screen, which you can use to download reports to a shared UNIX directory.

After assigning the key, use the **Detail** hot key to display the Detail Selection screen, where you can enter the names of folders and subfolders to which the user can export reports. If you do not enter any folder names, users cannot export a report from the system using the Windows Direct Options program unless you assign them WIN.DIRECT.CREATE.DIR at level 3.

- **Level 1** – Allows access to send reports to a folder specified on the Detailed Selection screen.
- **Level 2** – Allows access to create *subfolders* for folders in the following places:
 - In the **Windows Folder** field on the Windows Direct Options screen.
 - On the Detailed Selection screen for the authorization key, if the user has access to User Maintenance.
- **Level 3** – Allows access to create *folders or subfolders* in the following places:
 - In the **Windows Folder** field on the Windows Direct Options screen.
 - On the Detail Selection screen for the authorization key, if the user has access to User Maintenance.

Note: Superuser authorization does not include this authorization key.

Scheduler Authorization Keys

The following authorization key applies to the Scheduler.

SCHEDULER

Allows access to edit events in the Daily Schedule and Detail Schedule Maintenance and use the Purge Schedule Detail program.

- **Not assigned** – Users have full control over the events they create, except for purging.
For all events that a user does not create, the user can only alter their own personal information on the event. Personal information includes the user's alarm status, public notes, private notes, attendance, and inclusion in the event.
 - **Level 1** – Allows access to edit but not delete events the user does not create. Allows access to purge events the user created from the user's own schedule.
 - **Level 2** – Allows access to edit and delete events the user did not create. Allows access to purge events the user created from other users' schedules.
-

Solar Eclipse Authorization Keys

The following authorization keys apply to using Solar Eclipse.

SOLAR.ADD.IMAGES

Allows access to add any .gif or .jpg image to the archive for use in toolbar customization. For users not assigned this key, the **Import Image** button is not active in the Toolbar Customization window in Solar Eclipse.

SOLAR.EDIT.TOOLBAR

Allows access to the Toolbar Customization window to create and edit user-defined toolbars in Solar Eclipse.

- **Level 1** – Allows access to view the user's toolbar template.
- **Level 2** – Allows access to edit toolbars and assign them to users.

SOLAR.OE.SORT.ITEMS

Allows access to sort line items in Sales Order Entry in Solar Eclipse.

Spooler Authorization Keys

The following authorization keys apply to the Spooler.

DOWN.LOAD

Allows access to download data to the user's PC hard drive or floppy drive from the Spooler program using the Your/All Hold Entries programs. You can send reports to the Hold file and then copy them to a PC word processing, spreadsheet, or database program.

SPOOLER.FORWARD.EDIT

This authorization key works with the reports in Spooler Control. Users who are not assigned this authorization key and are not the report creator, cannot view the forward list for the report, add names to the forward list, or forward the report to other users.

- **Level 1** – Allows access to view and add names to the forward list of any report. The user cannot make any other changes to the forward list.
- **Level 2** – Allows access to edit the forward list of any report.

Note: The report creator can edit the forward list for the report regardless of the level assigned with this authorization key.

SPOOLER.MANAGEMENT

Allows access to use designated programs on the Spooler Management menu.

- **Level 1** – Reserved for future use. Functionality, if assigned, is the same as not assigning the authorization key.
- **Level 2** – Allows access to the Kill a Print Job program.
- **Level 3** – Allows access to the Kill a Print Job, Stop Spooler, and Start Spooler programs.

Note: All other functions on the Spooler Management menu are available to any user who has access to that menu.

SPOOLER.UPLOAD.AUTH

Allows access to use the **Upload** hot key on the Spooler Control screen to transfer a document from your PC to the Spooler.

If you upload a document through Your Hold Entries, the document also displays in Spooler Control, which you access from System / Printers / All Hold Entries.

System Maintenance Authorization Keys

The following authorization key applies to System Maintenance.

SYSTEM.PROGRAMMING

Allows access to use the following label format maintenance programs:

- User-Defined Shipping Documents
 - User-Defined Receiving Documents
 - User-Defined Transfer Documents
 - User-Defined Product Documents
 - User-Defined Customer Documents
 - User-Defined PN Xref Documents
-

Telemarketing Authorization Keys

The following authorization key applies to the Telemarketing Queue.

TELEMARKETING

Allows access to the Telemarketing Queue. The queue displays telemarketing data for customers for whom the user is assigned as the inside or outside salesperson.

- **Level 1** – Allows access to view the logged on user's telemarketing queue. Users designated as telemarketing managers can also view the queues of the salespeople assigned to them. Allows access to change the entry in the **Salesperson** field only for the logged on user and salespeople for whom the user is the telemarketing manager.
 - **Level 2** – Allows access to view any user's telemarketing queue. Allows access to change the entry in the **Salesperson** field.
-

TradePower Authorization Keys

The following authorization key applies to the Eclipse interface to the TradePower PowerLink software.

TRADEPOWERS.FTP

Allows access to the TradePower menu and programs.

User-Defined Screens and Help Authorization Keys

The following authorization keys apply to user-defined screens and help information.

HELP.EDIT

Allows access to create user-defined F9 help.

HELP.F11.EDIT

Allows access to create user-defined F11 help.

- **Level 1** – Allows access to view user-defined F11 Help screens.
- **Level 2** – Allows access to edit user-defined F11 Help screens.

USER.DEFINED.ASSIGN

Allows access to assign a user-defined screen to another screen. Does not allow access to assign a user-defined screen to a menu.

USER.DEFINED.DEFINE

Allows access to create or edit a user-defined screen.

Buy Lines Authorization Keys

The following authorization keys apply to maintaining buy lines.

BUYLINE.MAINT

Allows access to Buy Line Maintenance to view and edit buy line information.

- **Level 1** – Allows access in view-only mode.
- **Level 2** – Allows access to edit buy lines listed in the VALID.BLINES authorization key.
- **Level 3** – Allows access to edit all buy lines.

Note: When users access Buy Line Maintenance from an inquiry, the screen is view-only, even if they are assigned a level 2 or 3 authorization.

BUYLINE.MAINT.LEVEL

Restricts access to edit information in Buy Line Maintenance. This authorization key works with the Buy Line Maintenance Authorization Levels control maintenance record.

- To control a user's ability to edit buy line information in a field on the Buy Line Maintenance screen, assign this key and an authorization level 0-99. The default level is 20.

To edit a field, the user's assigned level must be equal to or greater than the security level assigned to the designated field in the Buy Line Maintenance Authorization Levels control maintenance record.

- To give a user unrestricted access to editing information in Buy Line Maintenance, do not assign this key.
-

History Ledger Authorization Keys

The following authorization keys apply to viewing COGS, cost, and price information in the Inventory History Ledger.

INV.SLS.LIMIT.DETAIL

Limits access in the Inventory History Ledger to view the sales order history only of accounts to which the user is assigned as an inside salesperson or outside salesperson. Users not assigned this authorization key can view history for all accounts.

Note: Users assigned this authorization key can still view all purchase, transfer, and adjustment transactions.

PO.PRICE.VIEW

Allows access to COGS or Cost on a purchase order in view-only mode in the Inventory History Ledger.

Note: For this authorization key to function, also assign users the COST.VIEW and COGS.VIEW authorization keys.

TO.PRICE.VIEW

Allows access to view unit COGS, unit price, and unit cost information for transfer order items displayed in the Inventory History Ledger. If this authorization key is not assigned, the system prevents the user from seeing unit COGS, unit price, and unit cost for the specified item on any transfer order.

- **Level 1** – Allows access to see unit COGS, unit price, and unit cost for the specified item on a transfer order only when you are authorized for both the receiving and shipping branches. This is the default level assigned with the key.
 - **Level 2** – Allows access to see unit COGS, unit price, and unit cost for the specified item on a transfer order between the displayed branch and all other branches.
-

Inventory Adjustments Authorization Keys

The following authorization keys apply to making inventory adjustments.

INVADJ.ALLOWED

Allows access to the Inventory Adjustment Entry program.

- **Level 1** – Allows access to view inventory adjustments.
- **Level 2** – Allows access to create inventory adjustments.
- **Level 3** – Allows access to create and edit inventory adjustments.

Note: Inventory adjustment options are further controlled by additional authorization keys.

INVADJ.COST.EDIT

Allows access to change the item cost on an inventory adjustment entry.

Note: For this authorization to take effect, also assign the INVADJ.ALLOWED key.

INVADJ.QTY.EDIT

Allows access to create new adjustments and change existing adjustment quantities.

- **Level 1** – Allows adjustments to stock products.
- **Level 2** – Allows adjustments to stock and nonstock products.

Note: For this authorization to take effect, also assign the INVADJ.ALLOWED key.

Receiving Authorization Keys

The following authorization key applies to the P/O Receiver report.

PO.RECVR.SET.DFLT

Allows access to use the **Save Dflts** hot key on the P/O Receiver screen to save the displayed settings in the **Order Status**, **Product Status**, **Show Commitments**, **Show Tag Quantities**, and **Location Types** fields as the default settings for the shipping branch where the report runs.

Warehouse Authorization Keys

The following authorization keys apply to warehouse management.

SHIPMENT.ALLOWED

Allows access to the Shipment Maintenance screen, where you can verify that all products listed on a vendor shipping ticket are in the shipment.

- **Level 1** – Allows access in view-only mode.
- **Level 2** – Allows access to create and edit shipments that have an open status.
- **Level 3** – Allows access to edit all shipments, regardless of status.

SHIPMENT.FREIGHT.ALLOWED

Allows access to use the **Freight** hot key on the Shipment Maintenance screen to display the Shipment Freight Capitalization screen, where you can distribute freight costs.

USER.PICK.GRP.MAINT

Allows access to use the **Pick Group** hot key in the Warehouse In-Process Status Queue to change a user's pick group.

WHSE.INPROCESS.ASSIGN

Allows access to assign an order to a designated picker on the Warehouse In-Process Status screen.

WHSE.INPROCESS.CLOSE

Allows access to close all in-process entries for the order through the Warehouse In-Process Status screen or the Warehouse In-Process Queue screen.

WHSE.INPROCESS.EDIT

Allows access to edit an order that is currently being picked.

Note: Users not assigned this key cannot change the print review status using the Reprint Picking Ticket program.

WHSE.ZONE.ALLOC.OVRD

Allows access to override an invalid zone in Zone Maintenance.

Adjustment Order Entry (AOE) Authorization Keys

The following authorization keys control a user's ability to enter and edit adjustment orders.

AOE.CLOSED.ORDER.CANCEL

Allows access to cancel inventory adjustment generations.

- **Level 1** – Allows access if the shipping or pricing branch of the order is the same as the user's home branch.
- **Level 2** – Allows access if the shipping or pricing branch of the order is the same as the user's home territory.
- **Level 3** – Allows access to cancel closed orders for any shipping or pricing branch to which the user has access.

Note: For this authorization key to take effect, also assign users the INVADJ.ALLOWED authorization key with level 2 authorization.

AOE.PIL.DAYS.OVRD

Allows access to override the maximum days supply limit for a product if an action in Adjustment Order Entry exceeds the days supply number. The system prompts users not assigned this key to enter a password to override a maximum days supply limit.

See Also:

Order Entry

COGS and Cost Authorization Keys

The following authorization keys control a user's ability to edit the cost of goods sold (COGS).

COGS.EDIT, COGS.EDIT.DIRECT, COGS.EDIT.NONSTOCK

These authorization keys allow users with access to sales order entry to change the COGS amount for stock, direct, and nonstock items as follows:

- COGS.EDIT applies to stock items.
- COGS.EDIT.DIRECT applies to direct items.
- COGS.EDIT.NONSTOCK applies to nonstock items.

Each key has 10 levels. The level number determines which local basis names display in the user's **F10** selection list.

- Users assigned level 10 select a cost basis from an **F10** list of all cost basis names.
- Users assigned levels 1-9 select a cost basis from an **F10** list of cost basis names with a view level (**VLvL**) equal to or less than the user's view level. Define cost and price basis name view levels in Price Line Maintenance.

When changing the cost for a group of products, on a screen such as SOE Subtotals, Job Bid Subtotal Maintenance, or Pricing Override, the **VLvL** assigned in the Global Buy/Sell Basis Names control maintenance record determines the basis names on the **F10** list.

To allow users to view Landed Cost, Average Landed Cost, Order COGS, and Order Comm Cost for a product, assign the COGS.EDIT authorization key with a level greater than or equal to the level assigned to the **To See Standard Global Basis When Costing, User Must Have Level** control maintenance record.

Note: If a user with COGS.EDIT.DIRECT and COGS.EDIT.NONSTOCK authorization changes the COGS for a stock item and nonstock item on a direct sales order and then changes the status of the order to a non-direct status, such as Call When Complete, the system removes the override on the stock item and reassigns the original COGS. The nonstock item retains its override.

COGS.VIEW

Allows access to do the following:

- Show or override the COGS-COST (Cost of Goods Sold Cost) on various screens and reports. When you run reports that can show COGS, "Cost of Goods Sold" is as an option on the Display Cost screen.
- Use the **Price/COGS/Margin** and **Price/COGS GP%/Unit of Measure/BO/Availability** view options in order entry.
- Use the **View** hot key on the Product Kits Maintenance screen to view the Basis assigned to the Global basis name designated as the COGS.

- Use the **Purchase Dollars** and **Transfer Dollars** view options when using the **Mode** hot key on the Product Sales History screen.
- View the **GP%** field on the Customer /Vendor Part Number Detail screen.
- Display the COGS column and cost of goods sold information on the Transfer Register report, along with the total cost for each transfer and the grand total cost for all transfers in the report. At the end of the report, the system displays the general ledger posting information for all transfers in the report.
- Use the **Quick Prc** hot key from sales order entry to view the **Cost** field on the Last Price Verification screen, and use **F10** in that field to view the Profit Wheel.

COST.VIEW

Allows access to do the following:

- Show and override the DFLT-COST (Default/Commission/Generic Cost) on various screens and reports. When you run reports that are able to show cost, Generic Cost is an option in the Display Cost screen.
 - Select the Unit Price/Cost/Margin view in order entry.
 - Use the **View** hot key on the Product Kits Maintenance screen to view the Basis assigned to the Global basis name designated as the Default Cost.
 - Use the **Quick Prc** hot key from sales order entry to view the **Cost** field on the Last Price Verification screen, and use **F10** in that field to view the Profit Wheel.
-

Commissions Authorization Keys

The following authorization key applies to viewing and reporting commission plan information.

COMMISSIONS.USER.AUTH

Allows access to run the Commissions Report for any user. Users not assigned this authorization key can only run the report for their own ID.

When this key is...	On the Commissions Report setup screen...
assigned	you can enter any user ID in the Salesperson/Writer ID field and the Writers hot key is active.
not assigned	the Salesperson/Writer ID field defaults to the ID of the currently logged on user, and the Writers hot key is not active.

Also allows access to display the CPlan \$ / CPlan % view in sales order entry from the SOE Totals screen using the **ViewAll Totals** hot key and then the **View** hot key.

Customer Calling Queue Authorization Keys

The following authorization key applies to the Customer Calling Queue.

CALLING.QUEUE

Allows access to the Customer Calling Queue program and report.

- **Level 1** – Allows access to the user's own orders.
 - **Level 2** – Allows access to any user's orders.
-

Order Entry Authorization Keys

The following authorization keys control a user's ability to enter and edit sales, purchase, transfer, adjustment, and work orders.

OE.CLOSED.SERIAL.EDIT

Allows access to add or edit serial numbers for a closed order on the Serial Number Entry screen.

OE.COPY.BID

Allows access to use the **Mode** hot key in the order entry programs to copy an order or bid to another bid. If the user does not have this authorization, the system prompts for a password.

Note: To allow a user to edit the copied bid, also assign the SOE.OPEN.ORDER.EDIT authorization key. To allow users to copy an item with a Delete status, also assign the OE.PRODUCT.USE.DELETE key. If the user does not have this authorization, the system prompts for a password.

OE.EDIT.INV.ACCT

Allows access to change the entry in the **Inventory Acct Ovr**d column in purchase order entry, sales order entry, or transfer order entry.

For this authorization key to take effect, also assign the respective order entry view (POE.INV.ACCT.OVRD, SOE.INV.ACCT.OVRD, or TOE.INV.ACCT.OVRD), which displays the **Inventory Acct Ovr**d column for the order. Users assigned any of these order entry views but not this authorization key can only view the entry in the **Inventory Acct Ovr**d column.

- **Level 1** – Allows access to edit the entry in the **Inventory Acct Ovr**d column, if there are no closed (invoiced) generations for the order ID and the associated generations pass all the other tests for editability.
- **Level 2** – Allows access to edit the entry in the **Inventory Acct Ovr**d column, if there are no generations for the order ID in closed accounting periods and the associated generations pass all the other tests for editability.

OE.JOB.MAINT

Allows access to assign a master order number to a customer on the Job Maintenance screen, which you display from order entry and Customer Maintenance.

Also allows access to view the junior orders contained within a master order using the Job Bid Totals Summary screen, which you display from the Inquiries screen in sales order entry. The **Job Totals** hot key is enabled only for Master Job Bids.

OE.LOT.OVRD.TYPE.DUPS

Allows access to edit the **Allow Dup Type/SubType** field on the Job Maintenance screen in sales order entry.

Note: The setting in the Allow Material Detail Type/Tag-SubType Duplicates control maintenance record determines the default value in the **Allow Dup Type/SubType** field.

OE.NSTK.PLINE.EDIT

Allows access to exclude a price line from nonstock entries using the **Excl NonStock** hot key in Price Line Maintenance.

OE.NSTK.UM.EDIT

Allows access to change the product unit of measure in the **UM** column on the NonStock Entry screen.

Note: To allow a user to access the NonStock Entry screen, assign the NONSTOCK authorization key. Users assigned the PRODUCT.MAINT authorization key at level 2 can change nonstock product units of measure in Product Maintenance.

OE.OVERCOMMIT.STOCK

Allows access to overcommit inventory from within the order entry programs.

OE.PRICE.CLASS.LEVEL

Allows access to view price class information or reprice an order to any price class up to and including the price class corresponding to the user's authorization level. Price class and authorization levels can be 1-999.

To allow a user to view price class information with a price class of ALL, assign the OE.PRICE.VIEW.LEVEL authorization key at a level equal to the user's highest defined price class. To ensure that a user can see all price class information, assign that user OE.PRICE.VIEW.LEVEL at a level of 999.

OE.PRICE.DATE.EDIT

Allows access to change the price date on the Pricing Override screen in purchase order entry, sales order entry, and transfer order entry.

- **Level 1** – Allows access to change the price date to a date later than the original date, but not earlier than the original date.
- **Level 2** – Allows access to change the price date to a date earlier or later than the original date.

OE.PRICE.VIEW.LEVEL

Allows access to view and edit cost and price basis fields. The level number (1-9) determines what the user can view.

Each cost and price basis name defined in Price Line Maintenance is assigned a view level number (**VLvL**). To view or edit a basis field, users must be assigned this authorization key with a level equal to or greater than the **VLvL** assigned to the basis name.

Selling prices are typically assigned levels 1 through 5, while costs are assigned levels 6 through 9. Assign users the highest level number (1-9) corresponding to the basis costs and prices to which they require access.

For example:

- To allow a user to see selling prices but not costs, assign an authorization level of 5.
- To allow a user to see all selling prices and costs, assign an authorization level of 9.

This authorization key also allows users with a level greater than the number specified in the Price View Level control maintenance record to fax or print a direct purchase order.

The following notes also apply to this key:

- The Print Price Sheets program does not check the OE.PRICE.VIEW.LEVEL authorization key. It is possible that users can access cost information through that program that is at a higher level than their OE.PRICE.VIEW.LEVEL authorization key level. Use caution when assigning access to the Print Price Sheets program.
- The product cost basis and corresponding cost displayed for users on the Product Price Sheet Maintenance and Branch Costs screens respect the view level (**VLvL**) assigned to the local cost basis names in Price Line Maintenance screen and the level assigned to users with this authorization key. The system assigns the same view level to **Landed Avg** and **Landed Cost** (displayed on the Branch Costs screen) that is assigned to AVG-COST on the Price Line Maintenance screen.
- If a local cost basis in Price Line Maintenance has a **VLvL** of **0**, users not assigned the OE.PRICE.VIEW.LEVEL authorization key can view that cost basis and the corresponding cost for any product assigned to that price line.
- Users assigned an OE view or template that allows them to see cost/COGS can see the corresponding cost for an item during order entry, regardless of the level assigned with the OE.PRICE.VIEW.LEVEL authorization key.

OE.PRODUCT.DESC.OVRD

Allows access to enter a replacement product description for an item in purchase order entry, sales order entry, and transfer order entry.

OE.PRODUCT.TYPE.EDIT

Allows access to change the product stock type on the Inventory History Ledger from Stock to Exceptional and Exceptional to Stock.

OE.PRODUCT.USE.DELETE

Allows access to enter products in purchase order entry, sales order entry, or transfer order entry, that are assigned the Delete status in Product Maintenance.

Any user can add products flagged for deletion to an order as long as the product on-hand quantity is greater than zero. When users try to sell or transfer more of a deleted product than is

currently available or purchase a product scheduled for deletion, the system displays a warning and a prompt that requires authorization to continue.

If this authorization key is...	The system prompts users to...
assigned	continue.
not assigned	enter a password.

OE.PRODUCT.USE.REVIEW

Allows access to order products that are assigned the Review status in Product Maintenance. When a user adds products flagged for review to an order, the system displays a warning and a prompt that requires authorization to continue:

If this authorization key is...	The system prompts the user to...
assigned	continue.
not assigned	enter a password.

Also allows access to add products that are assigned the Review status in Product Maintenance to a kit. When a user adds a product flagged for review to a kit, the system does one of the following:

If this authorization key is...	The system...
assigned	prompts the user to continue.
not assigned	does not allow the user to add that item to the kit.

OE.TAGGED.QTY.EDIT

Allows access to edit an item in sales order entry that is tagged to a purchase order. This editing includes canceling an order with a tagged product on it, deleting the item, lowering the quantity of the tagged item, and changing the item's status to Bid.

Procurement Authorization Keys

The following authorization keys control a user's ability to procure products.

PROCURE.GROUP.MAINT

Allows access to Procurement Group Maintenance to view and edit procurement group information.

- **Level 1** – Allows access in view-only mode.
- **Level 2** – Allows access in edit mode.

PROCUREMENT

Allows access to the Order Entry Procurement screen from the Scheduling screen in order entry, when there is a procurement source for that procure group. Also allows access to the Lot Control Procurement screen for lot controlled items.

- **Level 1** – Allows access to procure products from transfer branches and other procurement sources, if there is an insufficient quantity of available stock in the sales branch.

Procure Quantity = Order Quantity - Available Quantity

If the price line's **Check Avail** option for the stocking branch is set to **Y**, the user can procure only an amount up to the order quantity less the available quantity. Otherwise, the user can procure the entire quantity ordered, regardless of the available quantity.

- **Level 2** – Allows access to procure the item in any quantity up to the total sales order quantity, regardless of stock availability or the **Check Avail** setting.

Procure Quantity = Order Quantity

PROCUREMENT.ALL.BRS

Allows access from the Order Entry Procurement screen, using the **All Brchs** hot key, to view product availability in branches not in the normal path of procurement as well as those in the normal path of procurement.

PROCUREMENT.CONFIRM

Allows access to view and confirm procurements.

- **Level 1** – Allows access to the Procurement Confirmation screen in view-only mode.
- **Level 2** – Allows access to use the **Procure Confirm** hot key on the SOE Status screen and the **Create PO** hot key on the Procurement Confirmation screen. Allows access in the Procurement Confirmation Queue to create a purchase order to procure items, but not add them to an existing purchase order.
- **Level 3** – Allows access to also use the **Add to PO** hot key on the Procurement Confirmation screen. Allows access in the Procurement Confirmation Queue to create a purchase order to procure items or add them to an existing purchase order.

PROCUREMENT.OVERRIDE.AVL

Allows access to procure more of an item than is available at another branch.

This authorization key allows a user to override an inaccurate inventory count at a branch when the user has called and verified that there is sufficient quantity on hand at the other branch to fill the procurement request.

Products in Order Entry Authorization Keys

The following authorization keys control a user's ability to work with products in order entry.

PRD.LOCATION.MAINT

Allows access to the Product Location Maintenance and RF Location Maintenance programs.

- **Level 1** – Allows access in view-only mode.
- **Level 2** – Allows access to reallocate product between existing locations, without changing the total on-hand quantity.

Does *not* allow access to adjust the quantity on an in-process item.

Allows access to use the **Edit Location** hot key on the Inventory History Ledger screen.

Allows access to the RF Cycle Count screen with permission to count the locations specified as normal. If the user's count does not match the system quantity for a product location, the setting in the Action - Unauthorized User Finds Discrepancy In RF Cycle Cnt control maintenance record determines what the user can do next.

If the Product Location Quantity Movement control maintenance record is set to **Y**, allows access to move a product from one location to another. The system calculates the new quantity in the target location. Users can insert and delete locations as long as the total quantity remains the same. Users need to insert or delete a location before increasing or reducing a quantity. This authorization does *not* apply to a level 3 user.

- **Level 3** – Allows access to perform an inventory adjustment that changes the total on-hand quantity for an item. Also allows access to edit the **Revd Dt** field.

Note: Neither superusers nor users assigned the PRD.LOCATION.MAINT authorization key at any level can change an in-process quantity on the Product Location Maintenance or the RF Location Maintenance screens.

PRD.TAG.LOC.MOVE

Allows access to move a tagged item from one location to another in Product Location Maintenance or RF Product Location Maintenance. The process of moving a quantity of a tagged item, in whole or in part, breaks the tag. When this key is assigned, the system displays a warning, but allows the user to move the item.

PRD.ZONE

Allows access to view products outside a customer's valid product zones when product zone functionality is enabled.

PRODUCT.CERTIFY

Allows access to override the Certification Required restriction in sales order entry when an uncertified customer attempts to buy a regulated product. Regulated products are those assigned valid certification codes.

Purchase Order Entry Authorization Keys

The following authorization keys control a user's ability to enter and edit purchase orders.

FREIGHT.TARGET.OVERRIDE

Allows access to release a purchase order when the order total does not meet the vendor's minimum target amount. If the user does not have this authorization, the system prompts for a password.

POE.ALLOWED

Allows access to purchase order entry to view, edit, and create purchase orders.

- **Level 1**
 - Allows access to view orders. Users cannot create orders.
 - Allows access to the Stock Receipts program.
 - Allows Copy to Purchase Order Bid as an available selection when using the **Mode** hot key in sales order entry.
 - Allows access to Rebate Detail Maintenance.
- **Level 2** – Allows access to view and create orders.
- **Level 3** – Allows access to view, create, and edit orders. To allow users to edit orders, also assign the POE.OPEN.ORDER.EDIT authorization key.

Note: Users not assigned this key can view orders using hot keys on other screens.

POE.ASL.RELEASE

Allows access to release an ASL (Approved Supplier List) hold on a purchase order.

POE.BID.PRC.EDIT

Allows access to change the price of a product on a purchase order if the order is a bid. If you change the price in a bid, pricing expires.

Note: To allow users to edit open order prices, assign the POE.OPEN.PRC.EDIT authorization key.

POE.CLOSED.CHANGE.VENDOR

Allows access to change the vendor on a closed (received) purchase order.

Note: For this authorization to take effect, also assign the POE.CLOSED.ORDER.EDIT authorization key.

POE.CLOSED.ORDER.CANCEL

Allows access to cancel entire generations of closed (received) purchase orders.

- **Level 1** – Allows access if the shipping or pricing branch of the order is the same as the user's home branch.
- **Level 2** – Allows access if the shipping or pricing branch of the order is the same as the user's home territory.
- **Level 3** – Allows access to cancel closed orders for any shipping or pricing branch to which the user has access.

Note: For this authorization key to take effect, also assign the POE.CLOSED.QTY.EDIT and POE.CLOSED.ORDER.EDIT authorization keys.

POE.CLOSED.ORDER.EDIT

Allows access to edit a closed (received) purchase order. Users not assigned this key can only view a closed purchase order.

- **Level 1** – Allows access if the shipping or pricing branch of the order is the same as the user's home branch.
- **Level 2** – Allows access if the shipping or pricing branch of the order is the same as the user's home territory.
- **Level 3** – Allows access to edit closed orders for any shipping or pricing branch to which the user has access.

This authorization key is required when any of the following keys are assigned:

- POE.CLOSED.ORDER.CANCEL
- POE.CLOSED.ORDER.OPEN
- POE.CLOSED.PRC.EDIT
- POE.CLOSED.QTY.EDIT

POE.CLOSED.ORDER.OPEN

Allows access to change the status of a purchase order from Received to Open. To allow purchase order editing, assign the user POE.OPEN.ORDER.EDIT and other appropriate POE.OPEN authorization keys.

Note: For this authorization key to take effect, also assign the POE.CLOSED.ORDER.EDIT authorization key.

POE.CLOSED.PRC.EDIT

Allows access to edit prices on closed (received) purchase order generations.

Note: For this authorization key to take effect, also assign the POE.CLOSED.ORDER.EDIT authorization key.

POE.CLOSED.QTY.EDIT

Allows access to edit quantities on closed (received) purchase order generations.

- **Level 1** – Allows access to edit the quantity of a stock item.
- **Level 2** – Allows access to edit the quantity of a stock or nonstock item.

Note: For this authorization key to take effect, also assign the POE.CLOSED.ORDER.EDIT authorization key. This authorization key is required when the POE.CLOSED.ORDER.CANCEL key is assigned.

POE.CONSIGNMENT.ALLOWED

Allows access to create vendor consignment purchase orders. When this key is assigned to a user, the system displays a consignment prompt when the user enters purchase orders for vendors flagged as consignment vendors.

POE.CREDIT.QTY

Allows access to enter a negative quantity on a purchase order.

POE.CREDIT.REBILL

Allows access to use the Credit/Rebill function in Purchase Order Entry.

POE.EDIT.CLOSED.PERIOD

Allows access to edit the following fields on the POE Header screen for an order in a closed general ledger (G/L) period:

- Shipping Instructions
- Ordered With
- Phone Number
- Print Style

POE.EDIT.PAID.MATRL

Allows access to edit the **Freight Carrier** and **Bill of Lading** fields on the POE Totals screen after the material side of a purchase order/direct sales order/work order has been paid. A user with this authorization:

- Can change the freight carrier.
- Cannot remove the freight carrier.
- Cannot add a freight carrier if the **Freight Carrier** field is blank.

This functionality applies to the material side of purchase orders, direct sales orders, and work orders, as long as the **Freight Carrier** field contained a value at the time the material payable was paid.

If the freight side of the purchase order has been reconciled, users can only change the bill of lading number.

POE.EDIT.VIEW.ONLY.NOTES

Allows access to edit notes in the **Internal Notes** field on the POE Header screen, when the order is in view-only mode.

POE.MAC.OVERRIDE

Allows access to override the system warning when the difference between a manually changed cost on a purchase order and the moving average cost exceeds the maximum percentage set in the Maximum Difference Percentage From Average Cost In POE control maintenance record.

POE.OPEN.ORDER.EDIT

Allows access to edit an open purchase order. Users not assigned this key can only view open purchase orders. Purchase orders are open if they have not been received or canceled.

This authorization key is required when any of the following keys are assigned:

- POE.OPEN.PRC.EDIT
- POE.OPEN.QTY.EDIT
- POE.ORDER.TO.BID

POE.OPEN.ORDER.PRINT

Allows access to release open purchase orders to be printed, faxed or e-mailed. Users not assigned this key cannot release purchase orders. Purchase orders are open if they have not been received or canceled.

- **Level 1** – Allows access to view and release open purchase orders with negative totals from the P/O Release Queue or the POE Status screen. Users assigned this level cannot view or release unprinted purchase orders from the P/O Expedite Queue, including purchase orders with negative totals.
- **Level 2** – Allows access to release any open purchase orders.

POE.OPEN.PRC.EDIT

Allows access to edit prices on bids and open purchase order generations. Users not assigned this key cannot change costs, basis fields, or formulas in any way. Purchase orders are open if they have not been received or canceled.

Note: For this authorization key to take effect, also assign the POE.OPEN.ORDER.EDIT authorization key.

POE.OPEN.QTY.EDIT

Allows access to edit quantities on bids and open purchase orders.

- **Level 1** – Allows the user to edit the quantity of a stock item.
- **Level 2** – Allows the user to edit the quantity of a nonstock item.

Note: For this authorization key to take effect, also assign the POE.OPEN.ORDER.EDIT authorization key.

POE.ORDER.TO.BID

Allows access to change an open purchase order into a Request for Quote (RFQ).

Note: For this authorization key to take effect, also assign the POE.OPEN.ORDER.EDIT authorization key.

POE.PIL.DAYS.OVRD

Allows access to override the maximum days supply limit for a product if an action in purchase order entry causes the days supply number to be exceeded. The system prompts users not assigned this key to enter the password to override a maximum days supply limit.

POE.REMOTE.REVIEW

Allows access to the Remote Order Entry Review Queue from the **Purchasing>Queues** menu.

- **Level 1** – Allows access in view-only mode.
- **Level 2** – Allows access in edit mode.

POE.RETURN.COST.EDIT

Allows access to edit the cost on a negative purchase order created for a return.

POE.SCHEDULE

Determines whether the **Sched** hot key on the POE Body screen is set to **On** or **Off** when the user accesses purchase order entry.

- **Level 1** – The **Sched** hot key is set to **Off**. The Schedule screen displays only if there is an open quantity, such as a backorder, on that line item.
- **Level 2** – The **Sched** hot key is set to **On**. The Schedule screen displays upon entry of every line item, regardless of its open quantity status.

Users not assigned this key can still use the **Sched-On** or **Sched-Off** hot key on the POE Body screen to change the Schedule option at any time.

Note: Superuser authorization does not include this authorization key. To set this key for a superuser, assign it in addition to the SUPERUSER authorization key.

POE.WRITER.EDIT

Allows access to edit the **Written By** field on the POE Header screen when the writer on the purchase order does not match the user making the change.

Note: Users without this authorization can change their own ID to someone else's ID.

See Also:

Order Entry

Sales Budgeting Authorization Keys

The following authorization key applies to using the Sales Budget Queue.

BUDGET.QUEUE

Allows access to revise or create budgets for multiple customers at one time using the Sales Budget Queue program.

Sales Order Entry Authorization Keys

The following authorization keys control a user's ability to enter and edit sales orders.

CK.CHECK.AUTH.OVRD

Allows access to override a denied check authorization and accept a check for payment.

- **Level 1** – Allows access to override an approval code of FAIL, which indicates the check may have been good but the system could not establish communication with the check processor.
- **Level 2** – Allows access to override an approval code of DECL, which indicates the customer's account has insufficient funds.

CONVERT.PROSPECT

Allows access to enter an order or bid for a prospective customer in sales order entry. When the user enters an order or bid, the system removes the flag from the **Prospect** field in the prospect's customer record, and flags the **Bill To** and **Job or Ship To** fields.

Note: You cannot convert a customer back to a prospect if there are open bids, open orders, or history associated with the customer.

INV.INV.STAT

Allows access to edit the **Invoice Status** field on the Additional Header Information screen for a sales order generation to change the invoice status for that generation.

POS.OPEN.DRAWER

Allows access to open the cash drawer without entering an order.

SOE.ALLOWED

Allows access to sales order entry to view, edit, and create sales orders.

- **Level 1** – Allows access to view orders. Users cannot create orders.
- **Level 2** – Allows access to view and create orders.
- **Level 3** – Allows access to view, create, and edit orders. To allow users to edit orders, also assign the SOE.OPEN.ORDER.EDIT authorization key.

Note: Users not assigned the SOE.ALLOWED key can view orders using hot keys on other screens.

SOE.BID.APPRV.EXPIRED

Allows access to use expired pricing on a bid.

SOE.BID.COST.EDIT

Allows access to change the COST and COGS of any product on a sales order bid.

If you are assigned SOE.BID.COST.EDIT and change a stock product COST and COGS on a bid, pricing expires.

If you are assigned SOE.BID.COST.EDIT and are not assigned SOE.OPEN.PRICE.EDIT, you need authorization to convert the bid to an order.

Note: This authorization key overrides the SOE.BID.COST.EDIT.NONSTOCK key. The SOE.COST.EDIT authorization key overrides this authorization key.

SOE.BID.COST.EDIT.NONSTOCK

Allows access to change the COST and COGS only for nonstock products on a bid.

If you are assigned SOE.BID.COST.EDIT.NONSTOCK and change a nonstock product COST and COGS on a bid, pricing expires.

If you are assigned SOE.BID.COST.EDIT.NONSTOCK and are not assigned SOE.OPEN.PRC.EDIT, you need authorization to convert the bid to an order.

Note: The SOE.BID.COST.EDIT and SOE.COST.EDIT.NONSTOCK authorization keys override this authorization key.

SOE.BID.FLWUP.USER.EDIT

Allows access to edit Bid Follow Up Notes for another user.

When this authorization key is not assigned:

- The user cannot edit another user's comments on the Bid Followup screen, which you access from the Status screen in sales order entry. This screen displays in view-only mode.
- The user cannot edit the **User** field on the Bid Followup Queue.

SOE.BID.PRC.EDIT

Allows access to change the price of a product on a sales order if, and only if, the order is a bid. If you change a price on a bid, pricing expires.

Note: The SOE.OPEN.PRC.EDIT authorization key overrides this authorization key.

SOE.CANCEL.PARTIAL.KIT

Allows access to remove part of a kit from an order when another part of the kit has already been invoiced.

Note: If a user removes a partial kit from an order, the pricing does not reflect what has already shipped.

SOE.CASH.REQD.EDIT

Allows access to override the cash required requirement in sales order entry.

SOE.CLOSED.CANCEL.AR

Allows access to cancel an invoiced sales order to which a cash receipt has been applied. When a user cancels the order, the system prompts the user to continue. The system prompts users without this authorization to enter a password to continue.

Note: For this authorization to take effect, also assign the SOE.CLOSED.ORDER.EDIT and SOE.CLOSED.ORDER.CANCEL authorization keys.

SOE.CLOSED.CHANGE.CUST

Allows access to change the customer ship-to and bill-to entity on a closed (shipped) invoice.

SOE.CLOSED.CHANGE.SHIPDATE

Allows access to change the ship date on a closed, paid sales order. The system displays a warning when you change the date on the following screens:

- OE Status screen
- OE Scheduling screen
- Inventory Preview Queue
- Warehouse Status screen
- Warehouse In Process screen

SOE.CLOSED.ORDER.CANCEL

Allows access to delete the last item from a closed (shipped) generation.

- **Level 1** – Allows access if the shipping or pricing branch of the order is the same as the user's home branch.
- **Level 2** – Allows access if the shipping or pricing branch of the order is the same as the user's home territory.
- **Level 3** – Allows access for any shipping or pricing branch to which the user has access.

Note: To allow users to cancel a closed order generation, also assign the SOE.CLOSED.ORDER.CANCEL, SOE.CLOSED.ORDER.EDIT level 2 or higher, SOE.CLOSED.QTY.EDIT, and SOE.CLOSED.ORDER.OPEN keys.

SOE.CLOSED.ORDER.EDIT

Allows access to manually change the status of an order from any status to I for invoiced.

Allows access to edit a closed (invoiced) order generation, based on the user's home branch or home territory and whether the invoice document has been created. An invoice document is an invoice that has been printed, faxed, e-mailed, transmitted as an 810 by EDI, or viewed using the **Preview** hot key on the Print Invoices screen. A user not assigned this key can only view a closed order generation.

- **Level 1** – Allows access to edit a closed order generation if an invoice document has not been created and the shipping or pricing branch is the same as the user's home branch.

Note: If the **Print Paid-In-Full Invoices** control maintenance record is set to **N**, a level 1 user only has access to paid-in-full invoices in view-only mode.

- **Level 2** – Allows access to edit a closed order generation if an invoice document has not been created and the shipping or pricing branch is the same as the user's home branch or included in the user's home territory.
- **Level 3** – Allows access to edit any closed order generation for which an invoice document has not been created and the user has access to the shipping or pricing branch.
- **Level 4** – In addition to the functionality associated with level 3, allows access to edit a closed order generation if an invoice document has been created and the shipping or pricing branch is the same as the user's home branch.
- **Level 5** – In addition to the functionality associated with level 4, allows access to edit a closed order generation if an invoice document has been created and the shipping or pricing branch is the same as the user's home branch or is included in the user's home territory.
- **Level 6** – Allows access to edit any closed order generation, regardless of whether an invoice document has been created and the user has access to the shipping or pricing branch.

Note: To cancel a closed order generation, users must be assigned the SOE.CLOSED.ORDER.CANCEL, SOE.CLOSED.ORDER.OPEN, SOE.CLOSED.ORDER.EDIT Level 2, and SOE.CLOSED.QTY.EDIT keys.

Levels 2 through 6 display **A/R Items** as an option on the Fast Select list in order entry.

This authorization key is required when any of the following keys are assigned:

- SOE.CLOSED.ORDER.EDIT.SHIP
- SOE.CLOSED.ORDER.OPEN
- SOE.CLOSED.PRC.EDIT
- SOE.CLOSED.QTY.EDIT

SOE.CLOSED.ORDER.EDIT.SHIP

Use this authorization key to prevent a user from editing a closed (invoiced) order generation, based on whether the ship ticket has printed. If a user's authorization level for this key does not prevent them from editing the order, then the system uses the SOE.CLOSED.ORDER.EDIT authorization key to determine whether they can edit the order. The default is level 6.

Note: For this authorization to take effect, also assign users the SOE.CLOSED.ORDER.EDIT authorization key.

The six levels in this authorization key correspond to the six levels in the SOE.CLOSED.ORDER.EDIT authorization key, but levels 1-3 in this record are identical.

Level	Description
Level 1 Level 2 Level 3	<ul style="list-style-type: none"> If the ship ticket has not printed, the system uses the SOE.CLOSED.ORDER.EDIT authorization key to determine whether the user can edit the order. If the ship ticket has printed, the user cannot edit the order.
Level 4	<ul style="list-style-type: none"> If the ship ticket has not printed, the system uses the SOE.CLOSED.ORDER.EDIT authorization key to determine whether the user can edit the order. If the ship ticket has printed and the shipping branch is the same as the user's home branch, the system uses the SOE.CLOSED.ORDER.EDIT authorization key to determine the user's access to edit the order. Otherwise, the user cannot edit the order.
Level 5	<ul style="list-style-type: none"> If the ship ticket has not printed, the system uses the SOE.CLOSED.ORDER.EDIT authorization key to determine whether the user can edit the order. If the ship ticket has printed and the shipping branch is the same as the user's home branch or included in the user's home territory, the system uses the SOE.CLOSED.ORDER.EDIT authorization key to determine the user's access to edit the order. Otherwise, the user cannot edit the order.
Level 6	Regardless of the shipping branch or whether the ship ticket has printed, the system uses the SOE.CLOSED.ORDER.EDIT authorization key to determine the user's access to edit any closed order generation. This level establishes backward compatibility with earlier releases.

SOE.CLOSED.ORDER.FAX

Allows access to fax a closed (shipped) generation from the SOE Status screen.

Note: For this authorization to take effect, also assign the SOE.PRINT.INVOICE authorization key.

SOE.CLOSED.ORDER.OPEN

Allows access to change the status of an invoiced sales order generation from Invoice to any open order status.

Note: For this authorization to take effect, also assign the SOE.CLOSED.ORDER.EDIT authorization key.

To allow users to edit the open order generation, assign the SOE.OPEN.ORDER.EDIT key and other appropriate SOE.OPEN authorization keys.

To allow users to cancel a closed order generation, also assign the SOE.CLOSED.ORDER.CANCEL, SOE.CLOSED.ORDER.EDIT level 2, SOE.CLOSED.QTY.EDIT, and SOE.CLOSED.ORDER.OPEN authorization keys.

SOE.CLOSED.PRC.EDIT

Allows access to change the selling prices on a closed order generation. Users not assigned this key cannot change prices, basis names, formulas, costs, or gross profit percentages.

Note: For this authorization to take effect, also assign users the SOE.CLOSED.ORDER.EDIT authorization key.

SOE.CLOSED.QTY.EDIT

Allows access to edit quantities and descriptions on closed (shipped) sales order generations.

- **Level 1** – Allows access to edit the quantity and description of a stock item. Also allows access to use the **Subs** hot key on the SOE Body screen and the **Substitute** hot key on the SOE Schedule screen to view and order substitute products.
- **Level 2** – Allows access to edit the quantity of a stock or nonstock item. Also allows access to delete all but the last remaining item from an invoiced generation. To allow users to delete the last remaining item from an invoiced generation, also assign the SOE.CLOSED.ORDER.CANCEL key.

Note: For this authorization to take effect, also assign users the SOE.CLOSED.ORDER.EDIT authorization key.

SOE.CONSIGNMENT.ALLOWED

Allows access to create customer consignment orders. If a customer is a consignment inventory customer and the order taker is assigned this authorization key, during sales order entry the system displays consignment options appropriate to the level assigned with the key.

- **Level 1** – Allows access to create customer non-consignment orders and consignment transfer orders.
- **Level 2** – Allows access to create customer non-consignment orders and consignment billing orders.
- **Level 3** – Allows access to create non-consignment orders, customer consignment transfer orders, and customer consignment billing orders.

SOE.COST.EDIT, SOE.COST.EDIT.DIRECT, SOE.COST.EDIT.NONSTOCK

These keys allow access to change the cost of items on an open order or bid:

- SOE.COST.EDIT applies to any item on a sales order.
- SOE.COST.EDIT.DIRECT applies to stock and nonstock items on a direct order.
- SOE.COST.EDIT.NONSTOCK applies to nonstock items on a sales order.

Note: This key overrides the SOE.BID.COST.EDIT.NONSTOCK authorization key.

Each key has 10 levels. The level number determines which local basis names display in the user's **F10** selection list.

Each cost and price basis name defined in Price Line Maintenance is assigned a view level (**VLvL**).

- Users assigned level 10 select a cost basis from an **F10** list of all cost basis names.
- Users assigned levels 1-9 select a cost basis from an **F10** list of cost basis names with a **VLvL** equal to or less than their view level.

When changing the cost for a group of products on a screen, such as Subtotals or Lot Subtotals, the **VLvL** assigned in the Global Buy/Sell Basis Names control maintenance record determines the basis names included on the **F10** list.

Note: If a user who is assigned the SOE.COST.EDIT.DIRECT and SOE.COST.EDIT.NONSTOCK authorization keys changes the cost for a stock item and nonstock item on a direct sales order, and then changes the status of the order from D-Direct Shipment to a non-direct status, such as Call When Complete, the system removes the override on the stock item and reassigns the original cost, but the nonstock item retains its override.

SOE.CREDIT.OVERRIDE

Allows access to the Sales Order Credit Override screen from the SOE Totals screen or the Open Order Status Review Queue to approve or deny a credit override. Assign this authorization key to a credit manager.

SOE.CREDIT.QTY

Allows access to enter a negative quantity on a sales order. If the user is not assigned this authorization key, the system prompts for a password. If the user does not enter an appropriate password, the negative quantity changes to zero.

SOE.CREDIT.REBILL

Allows access to use the **Credit/Rebill** hot key on the SOE Body screen to create billing adjustments for orders in a closed accounting period. This function creates a credit that replicates the displayed order and a copy of the original order that the user can adjust or correct.

SOE.CREDIT.REL.RANK

Limits access to release orders on credit hold for customers with designated ranks.

Note: For this authorization to take effect, also assign the SOE.CREDIT.RELEASE authorization key. Superuser authorization does not include this authorization key.

After assigning the authorization key, use the **Detail** hot key to display the Detail Selection screen. Enter each customer rank for which to authorize this user to release a credit hold on a separate line of the screen and then press **Esc**.

Users not assigned this authorization key can release orders for any customer, based on their level assignment in the SOE.CREDIT.RELEASE authorization key.

For example, a user is assigned SOE.CREDIT.RELEASE level 20 and SOE.CREDIT.REL.RANK for rank A customers. The user attempts to release a hold for a rank B customer.

- If the customer is more than 20 percent over their credit limit, the system displays the following message: You Are Not Authorized to Release a Shipping Ticket. The system prompts the user to enter a password.
- If the customer is less than 20 percent over their credit limit, the system displays the following message: You Are Not Authorized to Release a Shipping Ticket (Ranked Customer). The system prompts the user to enter a password.

When an order is released, the system sends a message to the Credit Manager.

Note: Enter the ranking method this authorization key uses to determine a customer's rank in the Ranking Method Used By SOE.CREDIT.REL.RANK control maintenance record.

SOE.CREDIT.RELEASE

Allows access to override a credit hold on a customer order. Enter the percentage, 1-999, by which this user can exceed a customer's credit limit. The system prompts users not assigned this authorization key to enter a password to override a credit hold.

If a customer has a defined percentage in the **Credit Release Percentage Override** field on the Additional Customer Credit Data screen and the SOE.CREDIT.RELEASE key is assigned to the user, the system restricts the user to the lower of the two percentages.

If the assigned percentage is...	The user...
1-998	can exceed a customer's credit limit by that percentage. For example, a user assigned 350 can exceed the credit limit by 350%.
999	can exceed a customer's credit limit by an infinite amount.

On a customer's Credit Control Parameters screen, the following four credit restrictions work with the SOE.CREDIT.RELEASE authorization key:

- No Order Entry when credit limit exceeded, unless authorized.
- No Order Entry, regardless of credit limit, unless authorized.

Only a superuser or a user assigned SOE.CREDIT.RELEASE level 999 can authorize an order that is subject to this restriction.)

- No printing of shipping ticket when credit limit exceeded, unless authorized.
- No printing of shipping ticket, regardless of credit limit, unless authorized.

Only a superuser or a user assigned SOE.CREDIT.RELEASE level 999 can authorize an order that is subject to this restriction.)

Do not confuse this key with the SOE.CASH.REQD.EDIT key, which allows users to override cash required for C.O.D. customers.

Note: Users not assigned this key can print/fax the sales order side of a direct, but not the purchase order side.

This authorization key also allows access to print a shipping ticket for orders whose ship via placed them on hold for review in the Order Status Review Queue.

SOE.DIRECT.EDIT

Allows access to create and edit direct shipment sales order generations.

- **Level 0** – Allows access to create a direct sales order and edit the order segment before the purchase order prints.
- **Level 1** – Allows access to also print, use EDI, or fax a direct sales order.
- **Level 2** – Allows access to also edit a direct sales order after the associated purchase order prints.

The following notes apply to this key:

- Users not assigned this authorization key cannot create or change any part of a direct generation.
- To allow users to fax the purchase order portion of a direct generation, also assign the COGS.VIEW authorization key.
- Also assign SOE.DIRECT.EDIT for **Direct Shipment from Vendor** to be an available selection when using the **Mode** hot key in sales order entry.

SOE.DUP.ORDER.OK

Allows access to add or edit an item on an order when the system identifies the item as being duplicated on another order for the same customer.

Note: This authorization key takes effect only if the Duplicate Order Check control maintenance record is set to **Y**. Existing order refers to all open orders and any closed orders found by Duplicate Order Check within the time period specified in the Duplicate Order History Days To Check control maintenance record.

If a user orders an item that is already on another order for the customer, the system displays the Possible Duplicate Orders Found screen and a prompt that requires authorization to continue.

If this authorization key is...	The system...
assigned	prompts the user to continue.
not assigned	prompts the user to enter a password.

SOE.EDIT.CLOSED.PERIOD

Allows access to edit the following fields on the SOE Header screen for an order in a closed G/L period:

- Shipping Instructions
- Internal Notes
- Ordered By
- Phone Number
- PO Number
- Release Number
- Batch ID

SOE.EDIT.IAO.INV.COGS

Allows access to edit COGS on IAO line items on sales orders. An IAO item is a stock or nonstock product assigned an Inventory Account Override.

- **Level 1** – Allows access to edit COGS on an IAO line item of a new sales order.
- **Level 2** – Allows access to edit COGS on an IAO line item of a new or open sales order.
- **Level 3** – Allows access to edit COGS on an IAO line item of a new, open, or closed sales order.

SOE.EDIT.IAO.INV.COST

Allows access to edit COST on IAO line items on sales orders. An IAO item is a stock or nonstock product assigned an Inventory Account Override.

- **Level 1** – Allows access to edit COST on an IAO line item of a new sales order.
- **Level 2** – Allows access to edit COST on an IAO line item of a new or open sales order.
- **Level 3** – Allows access to edit COST on an IAO line item of a new, open, or closed sales order.

SOE.EDIT.IAO.INV.PRICE

Allows access to edit PRICE on IAO line items on sales orders. An IAO item is a stock or nonstock product assigned an Inventory Account Override.

- **Level 1** – Allows access to edit PRICE on an IAO line item of a new sales order.
- **Level 2** – Allows access to edit PRICE COGS on an IAO line item of a new or open sales order.
- **Level 3** – Allows access to edit PRICE on an IAO line item of a new, open, or closed sales order.

SOE.EDIT.LOCKED.DIRECT

Allows access to edit a locked sales order for a direct shipment purchase order. For example, users assigned this key can edit the sales amount or other sales information after paying the vendor. Users cannot edit any pricing information that affects COGS or Cost. For details on what you can edit, see Editing Vendor Direct Shipments.

Allows access to edit lot item material detail on invoiced generations.

SOE.EDIT.VIEW.ONLY.NOTES

Allows access to edit notes in the **Internal Notes** field on the SOE Header screen, when the order is in view-only mode.

SOE.FREIGHT.EDIT

Allows access to edit the **Freight** and **Total Freight** fields and use the **Freight** hot key on the SOE Totals screen.

SOE.GP.CONTROL.EDIT

Allows access to edit the entries on the SOE GP% Control Parameters screen.

SOE.HANDLING.EDIT

Allows access to edit **Handling** and **Total Handling** fields and use the **Freight** hot key on the SOE Totals screen.

SOE.KITS

Allows access from the SOE Scheduling screen to Product Kit Maintenance.

- **Level 1** – Allows access to view product kit information.
- **Level 2** – Allows access to edit product kit information.

Note: To create kits, display Product Kit Maintenance from Product Maintenance.

SOE.MANIFEST.EDIT

Allows access to the Shipping Manifest program.

- **Level 1** – Allows access to view a closed manifest or edit an open manifest.
- **Level 2** – Allows access to open a closed manifest.

SOE.MASTER.BID.EDIT

Allows access to create, commit, and un-commit change orders for master orders.

- **Level 1** – Allows access to:
 - Commit change orders to their master job bid and trickle changes to the associated junior orders.
 - Create new junior orders from Job Bid Tracking.
 - All changes to a master job bid or junior order must go through change orders.

- **Level 2** – Allows access to:
 - Commit change orders to their master job bid and trickle changes to the associated junior orders.
 - Create new junior orders from Job Bid Tracking.
 - Make material detail changes to a junior order that do not affect dollar totals, by editing material detail on the Lot Item Detail screen.Users cannot edit **Total Lot Cost** or **Total Lot Price** on the junior order.
- **Level 3** – Allows access to:
 - Add line items to junior orders from Job Bid Tracking.
 - Make material detail changes to a junior order that do not affect dollar totals, by editing material detail on the Lot Item Detail screen.Users cannot edit **Total Lot Cost** or **Total Lot Price** on the junior order.
- **Level 4** – Allows access to:
 - Add line items to junior orders from Job Bid Tracking.
 - Edit order quantities, prices, and costs on junior orders or master job bids. The system does not prompt users for authorization to make the changes.

SOE.MAX.COLLECTION.DAYS

Allows access to view and edit the Commission % by Collection Days screen.

- **Level 1** – Allows access in view-only mode.
- **Level 2** – Allows access in edit mode.

SOE.MAX.DISC

Allows access in sales order entry to override the **Maximum Discount from Standard Price** percentage set for the order or the user.

You can assign a maximum discount from standard price can be assigned to an order or user. In sales order entry, when a user changes the price of an item, the system compares the new discount percent from the standard price to the maximums, first by order and then by user. If the new discount is greater than the maximum, a warning states that the new sales price exceeds the maximum percentage the user is allowed to discount from the standard sales price.

The system prompts users not assigned this key to enter a password to authorize the override.

SOE.MAX.PRICE

Allows access to override the price ceiling for an item.

In sales order entry, when a user changes the price of an item, the system compares the new price to the price associated with the **Price Ceiling Global Basis Name** control maintenance record. If the new price is greater than the price ceiling, the system displays a warning.

The system prompts users not assigned this key to enter a password to authorize the override.

SOE.MIN.GP

Allows access in sales order entry to override the **Minimum GP%** set for a sales order, product, price line, or user.

You can assign a minimum required gross profit percentage (GP%) to a sales order, product, price line, and user. In sales order entry, when a user makes a change that affects the GP% for an item, the system compares the new GP% to all the specified minimums, in the following sequence: order, product, price line, and user. If the new GP% falls below one of these minimums, the system displays a warning that identifies the parameter (order, product, price line, user) affected by the change and what the minimum GP% for that level is.

The system prompts users not assigned this key to enter a password to authorize the override.

SOE.OPEN.ORDER.EDIT

Allows access to edit an open order or bid. Users not assigned this authorization key can only view open sales orders or bids.

Remote customers assigned an order status of B-Bid can edit bids, but only view orders that are not bids. Remote customers must be assigned the SOE.OPEN.ORDER.EDIT and SOE.OPEN.QTY.EDIT authorization keys to edit bids.

SOE.OPEN.PRC.EDIT

Allows access to change the selling price on open sales order generations. Users not assigned this key cannot change prices, basis names, formulas, costs, or gross profit percentages in any way.

Users not assigned the SOE.OPEN.PRC.EDIT and OE.PRICE.CLASS.LEVEL authorization keys can use the **Pricing** hot key on the SOE Body screen to enter a valid quote amount. Users cannot make any other pricing changes without the appropriate authorization keys.

Note: For this authorization to take effect, also assign the SOE.OPEN.ORDER.EDIT authorization key.

SOE.OPEN.QTY.EDIT

Allows access to edit quantities and descriptions on open sales orders.

- **Level 1** – Allows access to edit the quantity of a stock item. Also allows access to use the **Subs** hot key on the SOE Body screen and the **Substitutes** hot key on the Scheduler screen to view and order substitute products.
- **Level 2** – Allows access to also edit the quantity of a nonstock item.

Remote customers assigned an order status of B-Bid can edit bids, but only view orders that are not bids.

Note: For this authorization to take effect, also assign the SOE.OPEN.ORDER.EDIT authorization key.

SOE.ORDER.PAD

Allows access to the Reorder Pad through sales order entry.

SOE.ORDER.TO.BID

Allows access to change the status of an existing sales order segment to Bid on the Schedule, Detail Scheduling, or Status screen or using the **Mode** hot key.

Note: For this authorization to take effect, also assign the SOE.OPEN.ORDER.EDIT authorization key.

SOE.OVERRIDE.CLIENT.PRICE

Allows access to manually override the **Client Prc** on the Sales Order Entry Body screen of orders that use client pricing.

SOE.OVRD.NO.PRC.CHANGE

Allows access to change the price on an item for the following:

- A customer whose **Restrict Price Changes in Sales Order Entry (Y/N)** field in the Additional Customer Pricing/Printing Data screen is set to **Y**.
- A product whose **Restrict Price Changes in Sales Order Entry (Y/N)** field on the Additional Price Maintenance screen is set to **Y**.

SOE.PACKAGE.QTY

Allows access to override a product's sell package quantity in sales order entry.

- **Level 1** – Allows access to override the sell package quantity on consignment invoices only.
- **Level 2** – Allows access to override the sell package quantity anywhere in the system.

When users enter an order quantity that cannot be evenly divided by the sell package quantity, the system displays a warning. The system prompts users not assigned this authorization key to enter a password to authorize the override.

Note: You can set the sell package quantity on the Product Price Maintenance screen.

SOE.PAYMENT.APPLY

Allows access to apply payments to outstanding invoices.

- **Level 1** – Allows access to use the **Apply Payment** hot key on the SOE Totals screen to apply cash received through sales order entry to outstanding invoices.
- **Level 2** – Same as level 1.
- **Level 3** – Same as level 1.

SOE.PAYMENT.EDIT

Allows access to edit payments received in sales order entry.

Assign this authorization key to managers who resolve problems in reconciliation of the Cash Box Journal.

If this authorization key is...	The user can use the Pymts hot key on the SOE Totals screen to...
not assigned	receive payments, but not edit payments.
assigned	receive and edit payments. The user can display the Payments screen and select the payment to edit. Then, from the Cash Recvd or Change field, edit the payment date, time, collecting user, location, or branch.

SOE.PAYMENT.TERMS.EDIT

Allows access to change a customer's payment terms on the SOE Header screen.

SOE.PIL.DAYS.OVRD

Allows access to override the maximum days supply limit for a product if an action in sales order entry exceeds the days supply number. Users not assigned this key must enter a password to override a maximum days supply limit.

SOE.PRINT.INVOICE

Allows access to print or reprint invoices from the Status screen in sales order entry or the A/R ledger.

SOE.PROCESS.OPEN.SERS

Allows access to process a sales order even if there are outstanding serial numbers that need to be entered on the order, if the Require Authorization to Process Sales Order With Open Serial Numbers control maintenance record is set to **Y**.

SOE.REMOTE.REVIEW

Allows access to the Remote Order Entry Review program.

- **Level 1** – Allows access to view orders logged by the user's assigned customers.
- **Level 2** – Allows access to view remote orders logged to any user.

SOE.REPRINT.SHIP.TICK

Allows access to reprint shipping tickets using the Reprint Picking Ticket or Unprinted Sales Order Review programs, or any other program that offers that ability. Users not assigned this key must enter a password before reprinting a ticket.

SOE.RETURN.ALLOWED

Allows access to return a product after the time limit specified in the Maximum Number Of Days Allowed For Returns On Nonstock Items and Maximum Number Of Days Allowed For Returns On Stock Items control maintenance records.

- **Level 1** – Allows the user to make a return after the return time period for stock items.
- **Level 2** – Allows the user to make a return for all items, regardless of time.

The system displays a warning prompt when users return items after the return period. Unauthorized users must enter a password to continue.

SOE.SALESPERSON.EDIT

Allows access to change the **Outside Salesperson** or **Inside Salesperson** on the SOE Header screen.

Allows access to run the Sales by Salesperson by Line or Product Report for any salesperson. If not assigned, users can run this report only for their own ID.

Allows access to modify the commission percentage of other users on the SOE Salesperson Split Commission Percentage screen. If not assigned, users can still adjust their own commission percentage.

SOE.SCHEDULE

Determines whether the **Sched** hot key on the SOE Body screen is set to **On** or **Off** when the user accesses sales order entry. Users not assigned this key can still use the **Sched-On** or **Sched-Off** hot key on the SOE Body screen to change the Schedule option at any time.

- **Level 1** – The **Sched** hot key defaults to **On**, and the Schedule screen displays for line items only if an item is not available, such as a backorder. When the **Sched** hot key is set to **Off**, the Schedule screen never displays for line items, regardless of availability.
- **Level 2** – The **Sched** hot key defaults to **On**, and the Schedule screen displays for every line item, regardless of availability. When the **Sched** hot key is set to **Off**, the Schedule screen never displays for line items, regardless of availability.

Note: When a user has Superuser authorization, the **Sched** hot key defaults to **Off**, and it operates as if set for level 1. To otherwise set this key for a superuser, assign it in addition to the SUPERUSER authorization key.

Note: If the user is not a superuser and does not have this authorization key assigned, the **Sched** hot key defaults to **Off**. If this user toggles the **Sched** hot key to **On**, it works as if set for level 1.

SOE.SINGLE.INVOICE

Allows access on the SOE Totals screen to edit the **Single Invoicing** field and adjust the **Unearned** amount.

- **Level 1** – Allows access to change **Single Invoicing** from **N** to **Y**.
- **Level 2** – Allows access to also change **Single Invoicing** from **Y** to **N**.
- **Level 3** – Allows access to also edit the **Unearned** amount.

SOE.SPLIT.PRICING

Allows access to override split quantity pricing.

- **Level 1** – Not used.
- **Level 2** – Allows access to override split quantity pricing.

If an item on an order qualifies for quantity break pricing and the corresponding matrix has **Split Qty Pricing** set to **Y**, the system displays the following prompt: Split Qtys (Y/N).

SOE.TAX.EDIT

Allows access in sales order entry to edit the tax related aspects of a sales order.

- **Level 1** – Allows access to edit only the **Tax Exempt ID #** field on the SOE Header screen or the **Exempt #** field on the New Customer Entry screen.
- **Level 2** – Allows access to also edit the **Tax Jurisdiction** field on the SOE Header screen.
- **Level 3** – Allows access to also edit the **Sales Tax** field on the SOE Totals screen.

SOE.WRITER.EDIT

Allows access to edit the writer ID on the SOE Header screen of an existing order.

- **Level 1** – Allows access to edit the writer ID for the user's own orders.
- **Level 2** – Allows access to edit the writer ID for any sales order.

See Also:

Order Entry

Serial Numbers Authorization Keys

The following authorization keys apply to overriding serial number warnings.

OE.SERIAL.SYNC.EDIT

Allows access to edit the product assigned to a serial number displayed on the Palm Serial Queue screen.

SERIAL.OVRD

Allows access to override a system warning that you are using an invalid serial number.

Allows access to print a ship ticket after an order is invoiced, even if serial numbers have not been entered for serialized products.

- If assigned, the system displays the following message: You are about to print a ship ticket with open serial numbers.
 - If not assigned, the system displays the following message: You are not authorized to print a ship ticket with open serial numbers.
-

Suggested P/Os Authorization Keys

The following authorization key controls a user's ability to work with suggested purchase orders.

SUGGESTED.PO.QUEUE

Allows access to the Suggested P/O Queue to view and create suggested purchase orders. This authorization key is added to all users, however, you must also have the menu items assigned to use the Suggested P/O Queue.

- **Level 1** – Allows access in view-only mode.
 - **Level 2** – Allows access in edit mode.
-

Suggested Transfers Authorization Keys

The following authorization keys control a user's ability to work with suggested transfer orders.

CONV.SUGGESTED.TRANSFER

Allows access to the Convert Suggested to Actual screen to view and create suggested transfers.

- **Level 1** – Allows access in view-only mode.
- **Level 2** – Allows access in edit mode.

SUGGESTED.AUTO.TRANSFER

Allows access to the Suggested Auto Transfer screen to view and create suggested transfers. This authorization key is added to all users, however, you must also have the menu items assigned to use the Suggested Auto Transfer screen.

- **Level 1** – Allows access in view-only mode.
 - **Level 2** – Allows access in edit mode.
-

Transfer Order Entry (TOE) Authorization Keys

The following authorization keys control a user's ability to view and edit transfer orders.

TOE.ALLOWED

Allows access to transfer order entry to view, edit, and create transfers.

- **Level 1**
 - Allows access to view orders. Users cannot create orders.
 - Allows **Copy to Transfer** as an available selection when using the **Mode** hot key in sales order entry.
- **Level 2** – Allows access to view and create orders.
- **Level 3** – Allows access to view, create, and edit orders. To allow users to edit orders, also assign the TOE.OPEN.ORDER.EDIT authorization key.

Note: Users not assigned this key can view orders using hot keys on other screens.

TOE.BID.COST.EDIT

Allows access to change the cost/COGS of any products on a transfer order if the order is a bid. If you change the cost/COGS on a bid, pricing expires.

Note: This authorization key overrides the TOE.BID.COST.EDIT.NONSTOCK key. The TOE.COST.EDIT authorization key overrides this authorization key.

TOE.BID.COST.EDIT.NONSTOCK

Allows access to change the cost/COGS of a nonstock product on a transfer order if the order is a bid. If you change the cost/COGS on a bid, pricing expires.

Note: The TOE.BID.COST.EDIT and TOE.COST.EDIT.NONSTOCK authorization keys override this authorization key.

TOE.BID.PRC.EDIT

Allows access to change the price of a product on a transfer order if the order is a bid. If you change the price on a bid, pricing expires.

Note: The TOE.OPEN.PRC.EDIT authorization key overrides this authorization key.

TOE.CLOSED.CHANGE.BRANCH

Allows access to change the receiving branch of a closed transfer order.

Users not assigned this key must enter a password to change the receiving branch of a closed transfer.

TOE.CLOSED.ORDER.CANCEL

Allows access to cancel a closed (shipped or received) transfer.

- **Level 1** – Allows access if the shipping or receiving branch of the transfer is the same as the user's home branch.
- **Level 2** – Allows access if the shipping or receiving branch of the transfer is the same as the user's home territory.
- **Level 3** – Allows access to cancel closed transfers for any shipping or receiving branch to which the user has access.

TOE.CLOSED.ORDER.EDIT

Allows access to edit a closed (shipped or received) transfer order. Users not assigned this key can only view closed transfer orders.

- **Level 1** – Allows access if the shipping or receiving branch of the transfer is the same as the user's home branch.
- **Level 2** – Allows access if the shipping or receiving branch of the transfer is the same as the user's home territory.
- **Level 3** – Allows access to edit closed transfers for any shipping or receiving branch to which the user has access.

This authorization key is required when any of the following keys are assigned:

- TOE.CLOSED.ORDER.OPEN
- TOE.CLOSED.PRC.EDIT
- TOE.CLOSED.QTY.EDIT

TOE.CLOSED.ORDER.OPEN

Allows access to change the status of a transfer order from Received to Open.

To allow users to edit the open transfer order, assign the TOE.OPEN.ORDER.EDIT authorization key and other appropriate TOE.OPEN authorization keys.

TOE.CLOSED.PRC.EDIT

Allows access to change the transfer ship or receive prices on a closed (shipped or received) inventory transfer order. Users not assigned this key cannot change transfer prices.

TOE.CLOSED.QTY.EDIT

Allows access to edit quantities on closed (shipped) transfer order generations.

- **Level 1** – Allows access to edit the quantity of a stock item.
- **Level 2** – Allows access to also edit the quantity of a nonstock item.

TOE.COST.EDIT

Allows access to change the cost of any item on a transfer order. The level number determines which local basis names display in the user's selection list.

Each cost and price basis name defined in Price Line Maintenance is assigned a view level (**VLvL**).

- Users assigned level 10 select a cost basis from a list of all cost basis names.
- Users assigned levels 1-9 select a cost basis from a list of cost basis names with a **VLvL** equal to or less than their view level.

When changing the cost for a group of products on a screen, such as Subtotals or Lot Subtotals, the **VLvL** assigned in the Global Buy/Sell Basis Names control maintenance record determines the basis names included on the selection list.

Transfer order entry provides for a shipping price, a cost, and a receiving price. This authorization key only controls the user's ability to change the cost. See the TOE.CLOSED.PRC.EDIT and TOE.OPEN.PRC.EDIT keys for price editing.

Note: This key overrides the TOE.BID.COST.EDIT authorization key. Transfer order entry provides for a shipping price, a cost, and a receiving price. This authorization key controls the user's ability to change the cost. See the TOE.CLOSED.PRC.EDIT and TOE.OPEN.PRC.EDIT keys for price editing.

TOE.COST.EDIT.NONSTOCK

Allows access to change the cost for nonstock items on a transfer order. The level number (1-10) determines which local basis names display in the user's selection list.

Each cost and price basis name defined in Price Line Maintenance is assigned a view level (**VLvL**).

- Users assigned level 10 select a cost basis from a list of all cost basis names.
- Users assigned levels 1-9 select a cost basis from a list of cost basis names with a **VLvL** equal to or less than their view level.

Note: This key overrides the TOE.BID.COST.EDIT.NONSTOCK authorization key.

TOE.CREDIT.QTY

Allows access to enter a negative quantity on a transfer order for issuing a credit.

TOE.EDIT.VIEW.ONLY.NOTES

Allows access to edit notes in the **Internal Notes** field on the TOE Header screen, even if the order is in view-only mode.

TOE.OPEN.ORDER.EDIT

Allows access to edit an open (not yet shipped, received or canceled) transfer order generation. Users not assigned this key can only view open transfer orders.

This authorization key is required when any of the following keys are assigned:

- TOE.OPEN.PRC.EDIT
- TOE.OPEN.QTY.EDIT

TOE.OPEN.PRC.EDIT

Allows access to change the shipping or receiving price on open transfer order generations. Users not assigned this key cannot change these prices, basis fields, formulas, costs, or gross profit percentages in any way on existing open transfers or newly created transfers.

Note: For this authorization key to take effect, also assign the TOE.OPEN.ORDER.EDIT authorization key.

TOE.OPEN.QTY.EDIT

Allows access to edit order quantities on open transfer orders. This key does not restrict the ability to edit shipped or received quantities.

- **Level 1** – Allows access to edit the quantity of a stock item.
- **Level 2** – Allows access to edit the quantity of a stock or nonstock item.

Note: For this authorization key to take effect, also assign the TOE.OPEN.ORDER.EDIT authorization key.

TOE.ORDER.TO.BID

Allows access to convert an open transfer into a bid.

Note: For this authorization key to take effect, also assign the TOE.OPEN.ORDER.EDIT authorization key.

TOE.PIL.DAYS.OVRD

Allows access to override the maximum days supply limit for a product if an action in transfer order entry exceeds the days supply number. The system prompts users not assigned this key to enter a password to override a maximum days supply limit.

TOE.SCHEDULE

Determines whether the **Sched** hot key on the TOE Body screen is set to **On** or **Off** when the user accesses transfer order entry.

- **Level 1** – The **Sched** hot key is set to **Off**. The Schedule screen displays only if there is an open quantity, such as a backorder, on that line item.
- **Level 2** – The **Sched** hot key is set to **On**. The Schedule screen displays upon entry of every line item, regardless of its open quantity status.

Users not assigned this key can still use the **Sched-On** or **Sched-Off** hot key on the TOE Body screen to change the Schedule option at any time.

Note: Superuser authorization does not include this authorization key. To set this key for a superuser, assign it in addition to the SUPERUSER authorization key.

TOE.WRITER.EDIT

Allows access to edit the **Written By** field on the TOE Header screen when the writer on the transfer order does not match the user making the change.

Note: Users without this authorization can change their own ID to someone else's ID.

TRANSFER.CONFIRMATION

Allows access to the Transfer Confirmation screen to view and confirm transfers.

- **Level 1** – Allows access in view-only mode.
- **Level 2** – Allows access in edit mode.

See Also:

Order Entry

Valid and Invalid Lines and Types Authorization Keys

The following authorization keys apply to limiting the price lines, buy lines, and vendor types that a user can access.

When you assign the following authorization keys, you must enter additional detail information. On the Authorization Key/Template Maintenance screen, position the cursor on the assigned key and use the **Detail** hot key to display the Detail Selection screen. To add items to the screen, press **F10** and select from the list.

INVALID.PRODUCT.LINES

Limits access to sell all products except those in designated product price lines. Assign this key to users who should have access to most, but not all, price lines.

To give a user access to the products in all but a few product price lines, leave the VALID.PRODUCT.LINES authorization key unassigned, assign the INVALID.PRODUCT.LINES authorization key, and then use the **Detail** hot key to list the product lines to which the user does not have access.

When you do not assign this authorization key, or assign it but do not designate price lines, the user can sell products in all price lines.

If you list the same price line under the VALID.PRODUCT.LINES and INVALID.PRODUCT.LINES authorization keys, the system uses the invalid designation.

Note: Superuser authorization does not include this authorization key. To set this key for a superuser, assign it in addition to the SUPERUSER authorization key.

INVALID.VEN.TYPES

Limits access to use all vendor records except those assigned to designated vendor types. Vendor types are defined in the Valid Vendor Types control maintenance record and assigned to a vendor in Vendor Maintenance.

To give a user access to all but a few vendor types, leave the VALID.VEN.TYPES authorization key unassigned, assign the INVALID.VEN.TYPES authorization key, and then use the **Detail** hot key to list the vendor types to which the user does not have access.

If a vendor does not have an assigned vendor type, all users can access that vendor's records.

When you do not assign the VALID.VEN.TYPES authorization key and do not assign this authorization key, or assign it but do not designate vendor types, the user can access all vendor types.

If the VALID.VEN.TYPES authorization key has vendor types assigned, the system does not check the INVALID.VEN.TYPES authorization key.

Note: Superuser authorization does not include this authorization key. To set this key for a superuser, assign it in addition to the SUPERUSER authorization key.

VALID.BLINES

Limits access to edit product and buy line records in designated buy lines. Records not included in the designated buy lines are view-only.

When you do not assign this authorization key, or assign it but do not designate buy lines, the user can edit records in all buy lines.

- To allow users to edit a product record, also assign the PRODUCT.MAINT authorization key at level 2 or 3.
- To allow users to edit a buy line record, also assign the BUY.LINE.MAINT authorization key at level 2 or 3.

Note: Superuser authorization does not include this authorization key. To set this key for a superuser, assign it in addition to the SUPERUSER authorization key.

VALID.PLINES

Limits access to edit product, price line, and price sheet records in designated price lines. Records not included in the designated price lines are view-only.

When you do not assign this authorization key, or assign it but do not designate price lines, the user can edit product, price line, and price sheet records in all price lines.

- To allow users to edit a product record, also assign the PRODUCT.MAINT authorization key at level 2 or 3.
- To allow users to edit a price line record, also assign the PRICE.LINE.MAINT authorization key at level 2 or 3.
- To allow users to edit a price sheet, also assign the PRICE.SHEET.ENTRY authorization key at level 2 or 3.

Note: Superuser authorization does not include this authorization key. To set this key for a superuser, assign it in addition to the SUPERUSER authorization key.

VALID.PRODUCT.LINES

Limits access to sell products in designated product price lines. Assign this key to users who should have access to a limited number of price lines.

To give a user access to the products in only a few price lines, leave the INVALID.PRODUCT.LINES authorization key unassigned, assign the VALID.PRODUCT.LINES authorization key, and then use the **Detail** hot key to list the price lines to which the user has access.

When you do not assign this authorization key, or assign it but do not designate price lines, the user can sell products in all price lines.

If you list the same price line under the VALID.PRODUCT.LINES and INVALID.PRODUCT.LINES authorization keys, the system uses the invalid designation.

Note: Superuser authorization does not include this authorization key. To set this key for a superuser, assign it in addition to the SUPERUSER authorization key.

VALID.VEN.TYPES

Limits access to use vendor records assigned to designated vendor types. Define vendor types in the Valid Vendor Types control maintenance record and assign them to a vendor in Vendor Maintenance.

To give a user access to only a few vendor types, leave the INVALID.VEN.TYPES authorization key unassigned, assign the VALID.VEN.TYPES authorization key, and then use the **Detail** hot key to list the vendor types to which the user has access.

If a vendor does not have an assigned vendor type, all users can access that vendor's records.

When you do not assign the INVALID.VEN.TYPES authorization key and do not assign this authorization key, or assign it but do not designate vendor types, the user can access all vendor types.

If the VALID.VEN.TYPES authorization key has vendor types assigned, the system does not check the INVALID.VEN.TYPES authorization key.

Note: Superuser authorization does not include this authorization key. To set this key for a superuser, assign it in addition to the SUPERUSER authorization key.

Work Order Entry Authorization Keys

The following authorization keys control a user's ability to view and edit work orders.

WOE.ALLOWED

Allows access to work order entry to view and edit work orders.

- **Level 1** – Allows access to view orders.
- **Level 2** – Allows access to create and edit orders.

Note: Users not assigned the WOE.ALLOWED key can view orders using hot keys on other screens.

WOE.AUTO.REC

Allows access to set the **Auto Reconcile** hot key on the Work Order Entry Body window to **On** or **Off**. The user also needs this authorization key for the system to accurately adjust unit cost against the material costs when this user changes quantity on the Work Order Entry Material Detail screen.

WOE.CLOSE.ORDER

Allows access to change the status of a work order step to **Complete** to close the step.

WOE.CLOSED.CHANGE.VENDOR

Allows access to change a vendor ship-from and pay-to entity on a closed (complete) work order step.

WOE.CLOSED.ORDER.CANCEL

Allows access to cancel a closed (complete) work order step using the **X-Cancel** hot key on the Work Order Entry Body screen.

WOE.CLOSED.ORDER.EDIT

Allows access to change the date or status of a closed (complete) work order step. Users not assigned this authorization key can only view a closed work order step.

This authorization key is required when any of the following keys are assigned:

- WOE.CLOSED.PRC.EDIT
- WOE.CLOSED.QTY.EDIT

WOE.CLOSED.PRC.EDIT

Allows access to change the cost on a closed (complete) work order step.

Note: For this authorization key to take effect, also assign the WOE.CLOSED.ORDER.EDIT authorization key.

WOE.CLOSED.QTY.EDIT

Allows access to edit the quantity on a closed (complete) work order step.

- **Level 1** – Allows access to edit the quantity of a stock item.
- **Level 2** – Allows access to edit the quantity of a stock or nonstock item.

Note: For this authorization key to take effect, also assign the WOE.CLOSED.ORDER.EDIT authorization key.

WOE.OPEN.ORDER.EDIT

Allows access to edit an open work order step. Users not assigned this authorization key can only view open work order steps.

This authorization key is required when any of the following keys are assigned:

- WOE.OPEN.PRC.EDIT
- WOE.OPEN.QTY.EDIT

WOE.OPEN.PRC.EDIT

Allows access to change the cost on an open work order step.

Note: For this authorization key to take effect, also assign the WOE.OPEN.ORDER.EDIT authorization key.

WOE.OPEN.QTY.EDIT

Allows access to edit the quantity on an open work order step.

- **Level 1** – Allows access to edit the quantity of a stock item.
- **Level 2** – Allows access to edit the quantity of a stock or nonstock item.

Note: For this authorization key to take effect, also assign the WOE.OPEN.ORDER.EDIT authorization key.

WOE.PIL.DAYS.OVRD

Allows access to override the maximum days supply limit for a product if an action in work order entry exceeds the days supply number. The system prompts users not assigned this key to enter a password to override a maximum days supply limit.

WOE.WRITER.EDIT

Allows access on the Work Order Entry Header screen to change the **Written by** ID on an existing work order step.

- **Level 1** – Allows access to edit the **Written by** ID for the user's own orders.
- **Level 2** – Allows access to also edit the **Written by** ID for any sales order.

Activity Based Costing (ABC) Authorization Keys

The following authorization keys apply to Activity Based Costing.

ABC.AUTO.CODES

Allows access to the **Auto Group** column of the ABC Code Maintenance program in edit mode.

ABC.DOWNLOAD

Allows access to download information from the ABC Log Viewing/Download screen to another file or program, such as an Excel spreadsheet.

ABC.EDIT

Allows access to edit ABC log entries.

- **Level 1** – Allows access to edit the user's own log entries. Entries from other users and entries the user has downloaded display in view-only mode.
- **Level 2** – Allows access to edit log entries from other users. Downloaded log entries display in view-only mode.
- **Level 3** – Allows access to edit downloaded log entries. Level 3 authorization is required to delete a log entry.

ABC.MAINT

Allows access to maintain ABC system related functions. These functions include the programs listed on the **Events > Activity Based Costing > Maintenance** menu.

ABC.MANUAL

Allows access to manually log ABC codes using ABC Log Entry.

Unquality Event Tracking (UET) Authorization Keys

The following authorization keys apply to unquality event tracking.

UET.DOWNLOAD

Allows access to download a record of selected unquality events from Unquality Event Tracking (UET) System Log Viewing to a file on a PC. Also allows access to download end-of-month customer and vendor data to a file on a PC, using the UET Monthly Download to PC program.

UET.EDIT

Allows access to view and edit unquality event codes.

- **Level 1** – Allows access to view all UET code entries, but edit only the user's own entries.
- **Level 2** – Allows access to edit any UET code entry, except those that users have downloaded to a file on a PC.
- **Level 3** – Allows access to edit any UET code entry, including those that users have downloaded to a file on a PC.

UET.MAINT

Allows access to maintain UET system related functions. These functions include UET Code Maintenance, UET Parameter Maintenance, UET/PC Customer Report Table, and UET/PC Vendor Report Table.

UET.MANUAL

Allows access to manually enter event data in the UET system through the UET Log Entry program. Access to view or edit unquality events is not allowed.

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