



Order Entry Authorization Keys

Release 9.0.6

EPICOR®

Disclaimer

This document is for informational purposes only and is subject to change without notice. This document and its contents, including the viewpoints, dates and functional content expressed herein are believed to be accurate as of its date of publication. However, Epicor Software Corporation makes no guarantee, representations or warranties with regard to the enclosed information and specifically disclaims any applicable implied warranties, such as fitness for a particular purpose, merchantability, satisfactory quality or reasonable skill and care. As each user of Epicor software is likely to be unique in their requirements in the use of such software and their business processes, users of this document are always advised to discuss the content of this document with their Epicor account manager. All information contained herein is subject to change without notice and changes to this document since printing and other important information about the software product are made or published in release notes, and you are urged to obtain the current release notes for the software product. We welcome user comments and reserve the right to revise this publication and/or make improvements or changes to the products or programs described in this publication at any time, without notice. The usage of any Epicor software shall be pursuant to an Epicor end user license agreement and the performance of any consulting services by Epicor personnel shall be pursuant to Epicor's standard services terms and conditions. Usage of the solution(s) described in this document with other Epicor software or third party products may require the purchase of licenses for such other products. Where any software is expressed to be compliant with local laws or requirements in this document, such compliance is not a warranty and is based solely on Epicor's current understanding of such laws and requirements. All laws and requirements are subject to varying interpretations as well as to change and accordingly Epicor cannot guarantee that the software will be compliant and up to date with such changes. All statements of platform and product compatibility in this document shall be considered individually in relation to the products referred to in the relevant statement, i.e., where any Epicor software is stated to be compatible with one product and also stated to be compatible with another product, it should not be interpreted that such Epicor software is compatible with both of the products running at the same time on the same platform or environment. Additionally platform or product compatibility may require the application of Epicor or third-party updates, patches and/or service packs and Epicor has no responsibility for compatibility issues which may be caused by updates, patches and/or service packs released by third parties after the date of publication of this document. Epicor® is a registered trademark and/or trademark of Epicor Software Corporation in the United States, certain other countries and/or the EU. All other trademarks mentioned are the property of their respective owners.

Copyright © Epicor Software Corporation. All rights reserved. No part of this publication may be reproduced in any form without the prior written consent of Epicor Software Corporation.

Publication Date: April 29, 2019

Table of Contents

Authorization Keys Overview	1
Superuser Authorization	2
New and Revised Authorization Keys for this Release	4
Creating User-Defined Authorization Keys.....	5
Assigning Detail Authorizations	7
Adjustment Order Entry (AOE) Authorization Keys.....	8
COGS and Cost Authorization Keys	9
Commissions Authorization Keys	15
Customer Calling Queue Authorization Keys	16
Order Entry Authorization Keys	17
Products in Order Entry Authorization Keys.....	23
Sales Budgeting Authorization Keys	26
Sales Order Entry Authorization Keys.....	27
Valid and Invalid Lines and Types Authorization Keys.....	55
Work Order Entry Authorization Keys	59
Index	63

Authorization Keys Overview

Authorization keys define users' permissions. To grant permissions, you need to assign authorization keys to users in their 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 if set to level 1 and in edit mode if set to 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 and consistent way to assign all the authorization keys required for a particular job. 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 Eclipse personnel can use this authorization key.

SUPERUSER

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

Job Roles	Administrators and Managers.
Levels	None. Check Important note below.
Dependencies	None. Check Important note below.
Additional Information	Any authorization key assigned in addition to the SUPERUSER key overrides the SUPERUSER level of authorization for that key.
	Users assigned a lower-level authorization key authority are restricted to that authorization key. This allows users full access to the system, but be restricted to certain areas, if needed, such as overriding replacement product descriptions with OE.PRODUCT.DESC.OVRD.
	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.

Job Roles	Administrators and Managers.	
Important	Superuser authorization <i>does not include</i> several authorization keys. These authorization keys limit a user's access and require that you enter additional detail information when you assign them, therefore they are not included in SUPERUSER access.	
	Authorization Key	When this key is not assigned...
	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 Auto Scheduling option on the POE Body window 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 Auto Scheduling option on the SOE Body window to a default value.
	TOE.SCHEDULE	the system does not set the Auto Scheduling option on the TOE Body window 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.	

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 Feature Summary 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 Image Auth Keys** control maintenance record, assign it to an image profile Document Profile Maintenance, and then to your users in User Maintenance.

In Sell Matrix Maintenance and Product Lifecycle Maintenance, you can use user-defined authorization keys to control a user's ability to override a price restriction on a sell matrix or a product lifecycle.

In Eclipse Reports, you can use user-defined authorizations to limit what a user views, such as limiting categories, report sources, and data elements in the report sources. For more about Eclipse Reports, launch the online help from the Eclipse Reports application.

For applying user-defined rules to fields, you can create authorization keys that limit the user's ability to edit fields or view data.

Important: We recommend creating and using a standard naming convention when creating your authorization keys, such as beginning all key names with UD. In addition, to make searching for your authorization keys easier, do not use spaces or special characters in the names.

User-defined authorization keys always display at the bottom of a standard authorization key list. For example, if you are entering a key and you press **F10** for a list to scroll through, the user-defined keys always display at the bottom.

To create user-defined authorization keys:

1. From the **Tools** menu, select **User Defined Authorization Keys** to display User Defined Authorization Keys Maintenance.

You can also access the window from the following menu paths:

- **Tools > PDW > User Defined Authorization Keys**
- **Tools > System Files > Document Imaging > User Defined Authorization Keys**
- **System > System Files > User Defined Authorization Keys**
- **System > Custom > Add On Products > Document Imaging > 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. For example, to assign three different levels to the authorization key, enter 1 in the first field and 3 in the second.

Note: Levels are *required* for user-defined authorization keys, but can create an authorization key with only one level.

4. In the **Default Level** field, enter the default authorization level for the authorization key, if you are assigning levels to the authorization key.
5. Save the authorization key and exit the window.

Assigning Detail Authorizations

Authorization keys provide access to different parts of the system based on user IDs. For several authorization keys, you can also limit the use based on other criteria in combination with the assigned authorization keys. Use the **Detail** window for each key to enter additional parameters.

To assign detail authorization:

1. From the **System > System Files** menu, select **User Maintenance** and display the user for which you want to assign detail authorization for an authorization key.
2. From the **Maintenance** menu, select **Authorization Keys** to display the Authorization Key/Template Maintenance window.
3. Select one of the authorization keys to assign detail.

Not all authorization keys have detail limitations. Select from the following:

- AR.ADJUSTMENT.ALLOWED
- CR.CREDIT.ALLOWED
- GL.ACCOUNTS
- INVALID.PRODUCT.LINES
- INVALID.VEN.TYPES
- MESSAGE.GROUP.TYPES
- SOE.CLOSED.ORDER.EDIT.VIA
- SOE.CLOSED.PRC.EDIT - Limit users to edit a price based on the ship via.
- SOE.CLOSED.QTY.EDIT - Limit users to edit a quantity based on the ship via.
- SOE.CREDIT.REL.RANK
- VALID.BLINES
- VALID.PLINES
- VALID.PRODUCT.LINES
- VALID.VEN.TYPES

Note: While the **Detail** option is accessible on other authorization keys, if you add detail information to an authorization key not on this list, the system may not respect the parameters.

4. Click **Assign** to move the authorization key to the right-hand column.
5. From the **Edit** menu, select **Detail** to display the detail parameters.
6. Enter the parameters to limit the authorization key and click **OK**.

The associated detail parameters are validated fields based on the authorization key with which you are working. For example, if you select the VALID.PLINES authorization key, the system validates your entries to active price lines in the system.

7. Save your changes and exit the window.

Adjustment Order Entry (AOE) Authorization Keys

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

AO.PRICE.VIEW

Allows users to view the costs on adjustments on the Inventory History Ledger. More:

Levels	None.
Required For:	Inventory History Ledger cost views.
Additional Information	None

AOE.CLOSED.ORDER.CANCEL

Allows access to cancel inventory adjustment generations on closed orders. More:

Levels	<ul style="list-style-type: none"> • Level 1 - Allows access to cancel an inventory adjustment generation in a closed order if the shipping or pricing branch of the order is the same as the user's home <i>branch</i>. • Level 2 - Allows access to cancel an inventory adjustment generation in a closed order if the shipping or pricing branch of the order is the same as the user's home <i>territory</i>. • Level 3 - Allows access to cancel an inventory adjustment generation in a closed order for <i>any</i> shipping or pricing branch to which the user has access.
Dependencies	The INV.ADJ.CREATE.BR authorization key must be set to level 2.
Additional Information	None

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. More:

Levels	None
Dependencies	None
Additional Information	When an item is added to a transaction, the system checks the projected inventory level (PIL). If an item fails the check, the system warns that you are about to affect inventory levels set to the maximum days' supply limit. The system prompts users not assigned this key to enter a password to override a maximum days supply limit.

COGS and Cost Authorization Keys

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

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. More

Job Roles	Sales staff with authority to adjust COGS amount for stock, direct, and nonstock items.
Levels	<p>This key has 10 levels. The level number determines which local basis names display in the user's selection list.</p> <ul style="list-style-type: none"> • 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 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.
Dependencies	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.
Additional Information	When changing the cost for a group of products, on a window 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 selection list.
	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 <i>Call When Complete</i> , the system removes the override on the stock item and reassigns the original COGS. The nonstock item retains its override.
Required For:	<ul style="list-style-type: none"> • Copying and Pasting Products in Order Entry • Creating and Copying Bids • Change the Price of a Nonstock Product • Subtotaling and Repricing Orders • Updating Order Entry Statuses

- COGS.EDIT.DIRECT applies to direct items. More

Job Roles	Sales staff with authority to adjust COGS amount for stock, direct, and nonstock items.
Levels	<p>This key has 10 levels. The level number determines which local basis names display in the user's selection list.</p> <ul style="list-style-type: none"> • 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 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.
Dependencies	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, Uesr Must Have Level control maintenance record.
Additional Information	When changing the cost for a group of products, on a window 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 selection list.
	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.
Required For:	<ul style="list-style-type: none"> • Change the Price of a Nonstock Product • Updating Order Entry Statuses

- COGS.EDIT.NONSTOCK applies to nonstock items. More

Job Roles	Sales staff with authority to adjust COGS amount for stock, direct, and nonstock items.
Levels	<p>This key has 10 levels. The level number determines which local basis names display in the user's selection list.</p> <ul style="list-style-type: none"> • 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 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.

Order Entry

Dependencies	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.
Additional Information	When changing the cost for a group of products, on a window 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 selection list.
	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.
Required For:	<ul style="list-style-type: none"> • Change the Price of a Nonstock Product • Updating Order Entry Statuses

COGS.VIEW

Allows access to view COGS information in many areas of the system. More

Job Roles	Sales staff with authority to view COGS information on views and reports as follows:
Options	Show and override the DFLT-COST (Default/Commission/Generic Cost) on various windows and reports. When you run reports that are able to show cost, Generic Cost is an option in the Display Cost window.
	Select the Unit Price/Cost/Margin view in order entry.
	Use the View option on the Product Kits Maintenance window to view the Basis assigned to the Global basis name designated as the Default Cost.
	Use the Quick Price option from sales order entry to view the Cost field on the Last Price Verification window, and use F10 in that field to view the Profit Wheel.
Levels	None.
Dependencies	None.
Required For:	

COST.VIEW

Allows access to view COST information in many areas of the system. More

Job Roles	Sales staff with authority to view COGS information on views and reports as follows:
	Show and override the DFLT-COST (Default/Commission/Generic Cost) on various windows and reports. When you run reports that are able to show cost, Generic Cost is an option in the Display Cost window.
	Select the Unit Price/Cost/Margin view in order entry.
	Use the View option on the Product Kits Maintenance window to view the Basis assigned to the Global basis name designated as the Default Cost.
	Use the Quick Price option from sales order entry to view the Cost field on the Last Price Verification window, and use F10 in that field to view the Profit Wheel.
Levels	None.
Dependencies	None.
Required For:	<ul style="list-style-type: none"> • Viewing ABC Customer Sales History • Viewing Monthly ABC Customer Sales History • Viewing the ABC Allocations Summary • Activity-Based Cost Logging Summary • Inquiring About Branch Costs • Viewing Business Summary Information • Comparing Monthly Or Yearly Customer Specific Sales • Running the Inventory GMROI by Price Class Report • Inventory History Ledger Printing • Viewing the Inventory History Ledger • Running the Inventory GMROI by Sell Group Report • Job Bid Maintenance • Reprinting Sales Orders • Managing Elements from POE Totals • Forecast Parameters Maintenance • Creating Product Kits • Entering Products and Prices on Sales Orders • Changing Views on the Body Tab • Changing Prices Using the Profit Wheel

COST.VIEW.INQUIRY

Allows users to see costs in Inventory Inquiry for all branches. [More](#)

Job Roles	Sales staff with authority to view COST information for multiple branches.
Detail Levels	Right-click on the authorization key and click Detail to limit users to specific branches or territories, as needed. If the Detail is left blank, the system displays costs for those branches that are assigned through User Accessible Branches in User Maintenance as order entry branches, however, these are only the branches associated with a user's Home Territory, Inventory Inquiry Territory, or Inventory Inquiry branches related to the user's Home branch in Branch Maintenance.
Dependencies	None.
Required For:	Inquiring About Branch Costs
Additional Information:	During upgrade, a conversion routine runs that assigns this authorization key to all users (and all authorization key templates) that have COST.VIEW assigned.
	If costs need to be visible for an entire group of branches, use the Detail screen to enter the branches or territory that represents all these branches. Note: The Detail entries are not validated against a branch or territory's ID and must be entered exactly. For example if the Territory STOCK is entered on the Detail screen as Stock, the system does not recognize it and costs for related branches may not be visible.

SPJ.COGS.EDIT

Allows users to edit COGS values from the Small Project Jobs window in Sales Order Entry. [More:](#)

New in Release 8.7.7

Job Roles	Sales staff with authority to view COGS information and need to edit the contract pricing in sales orders for small project jobs.
Levels	None.
Dependencies	None.
Additional Information	If users have COGS.EDIT they do not need this authorization key to edit the COGS. However, you can grant access to <i>only</i> the Small Project Jobs, by assigning this authorization key and not COGS.EDIT.
Required For:	<ul style="list-style-type: none"> Small Project Jobs

SPJ.PRICE.EDIT

Allows users to edit the unit price of the selected products in the Small Project Jobs window in Sales Order Entry. [More:](#)

New in Release 9.0.3

Job Roles	Sales staff with authority to view price information and need to edit the contract pricing in sales orders for small project jobs.
Levels	None.
Dependencies	None.
Additional Information	To edit only COGS, you can assign users the SPJ.COGS.EDIT or COGS.EDIT authorization key. Grant access to <i>only</i> the Small Project Jobs, by assigning SPJ.COGS.EDIT.
	Use the SPJ.PRICE.EDIT to allow users to edit any price, but only on Small Project Job orders.

Commissions Authorization Keys

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

COMM.MAINT.EDIT, COMM.MAINT.VIEW

Define the level of access to the Salesperson Commissions information. More:

Job Roles	Sales personnel who work on commission.
Levels	None.
Dependencies	None.
Additional Information	<ul style="list-style-type: none"> • COMM.MAINT.EDIT - Allows users to access and edit the Payroll ID and Commission Draw Amt columns in Salesperson Commission Maintenance. • COMM.MAINT.VIEW - Allows users access to Salesperson Commission Maintenance in view-only mode. • Users without either authorization key cannot access the Salesperson Commission Maintenance window.

COMMISSIONS.USER.AUTH

Allows access to run the Commissions Report for any user. More:

Job Roles	Salespeople who work on commission.
Levels	None.
Dependencies	Users not assigned this authorization key can only run the report for their own ID.
Additional Information	<ul style="list-style-type: none"> • When this key is <i>assigned</i>, the user can enter any user ID in the Salesperson/Writer ID field and the Writers option is active. • When this key is <i>not assigned</i>, the Salesperson/Writer ID field defaults to the ID of the currently logged on user, and the Writers option is not active.
	Also allows access to display the CPlan \$ / CPlan % view in sales order entry from the SOE Totals window using the ViewAll Totals option and then the View option.
Required For:	<ul style="list-style-type: none"> • Running the Commissions Report • Changing Views for the Commissions information on the Body Tab

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. More

Job Roles	General Sales Order Entry
Levels	<ul style="list-style-type: none">• Level 1 - Allows access to the user's own orders.• Level 2 - Allows access to any user's orders.
Dependencies	None
Examples	None
Required For:	<ul style="list-style-type: none">• Customer Calling Queue• Customer Calling Queue Report• P/O Expedite Queue• Trouble Notification Queue

Order Entry Authorization Keys

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

CUT.PRODUCT.CONTROL

Allows users to edit through Cut Product Maintenance.

CUT.PROD.GROUP.MAINT

Users can create and edit cut groups and assign them to branches.

DTS.ALLOWED

Allows users to convert sales orders to Direct Through Stock orders. Without this authorization key assigned, users display Direct Through Stock orders in view-only mode. If you have this authorization key and are trying to change amounts for an adjustment, you may also need DTS.ADJ.INCREASE or DTS.ADJ.DECREASE assigned.

New in Release 8.7.7

OE.CLOSED.SERIAL.EDIT

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

OE.COPY.BID

Allows access to use the **Mode** option in the order entry programs to copy an order or bid to another bid.
More

Job Roles	Sales personnel / sales managers.
Levels	None.
Dependencies	If the user does not have this authorization, the system prompts for a password from a manager.
	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.
Additional Information	Use to award a job to a customer, to verify bill-to and ship-to customers, add job instructions, and to add additional information during the award process.

OE.CUT.TAG.EDIT

Allows users to break tags and edit cut product line items on an order after a cut item has been placed in process in the Cut Product Queue. Users with access to only order entry without this tag, can modify cut items up until the items are placed in process in the queue.

OE.EDIT.INV.ACCT

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

Job Roles	Sales personnel / sales managers.
Levels	<ul style="list-style-type: none"> • Level 1 - Allows access to edit the entry in the Inventory Acct Ovrđ 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 Ovrđ 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.
Dependencies	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 Ovrđ column for the order.
Additional Information	Users assigned any of these order entry views but not this authorization key can only view the entry in the Inventory Acct Ovrđ column.

OE.JOB.MAINT

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

Job Roles	Sales personnel / sales managers.
Levels	None.
Dependencies	None.
Additional Information	Also allows access to view the junior orders contained within a master order using the Job Bid Totals Summary window, which you display from the Inquiries window in sales order entry. The Job Totals option is enabled only for Master Job Bids.

OE.LOT.OVRD.TYPE.DUPS

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

Job Roles	Sales personnel / sales managers.
Levels	None.
Dependencies	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.
Additional Information	None.

OE.NSTK.PLINE.EDIT

Allows access to exclude a price line from nonstock entries using the **Exclude NonStock** option 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 window. More

Job Roles	Sales personnel / sales managers.
Levels	None.
Dependencies	To allow a user to access the NonStock Entry window, 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.
Additional Information	None.

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. More

Job Roles	Sales personnel / sales managers.
Levels	Price class and authorization levels can be 1-999.
	To allow users to view price class information with a price class of ALL, assign the OE.PRICE.VIEW.LEVEL authorization key at a level equal to their 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.
Dependencies	None.
Additional Information	None.

OE.PRICE.DATE.EDIT

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

Job Roles	Sales personnel / sales managers.
Levels	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.
Dependencies	None.

Job Roles	Sales personnel / sales managers.
Additional Information	None.

OE.PRICE.VIEW.LEVEL

Allows access to view and edit cost and price basis fields. More

Job Roles	Sales personnel / sales managers.
Levels	The level number, 1-9, determines what the user can view.
	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: <ul style="list-style-type: none"> 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.
Dependencies	None.
Additional Information	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 higher than the VLvL assigned to the basis name.
	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 windows respect the view level (VLvL) assigned to the local cost basis names in Price Line Maintenance window 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 window) that is assigned to AVG-COST on the Price Line Maintenance window.
	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

New in Release 9.0.2

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

Note: This authorization key validates on the price line. The users must have this key assigned and the product they are trying to update the replacement description for must also be in a price line listed in this authorization key. If no price line is listed, the system validates only the replacement product description.

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. More

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. More

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 users 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.TAG.EDIT.CLOSED.PERIOD

Allows users to break a sales order tag in a close G/L period. Users must be assigned this authorization when tags are required to be broken after the general ledger period has closed. For example, you may need to change a tagged line item on an open sales order generation to cancel the item for a stock location.

OE.TAGGED.QTY.EDIT

Allows access to edit an item in sales order entry, purchase order entry, and transfer order entry that has been 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.

OE.VIEW.EDIT.PRC.BR.OVRD

Allows users create and edit orders if the price branch matches the customer's price branch override.

SELL.SUPERSEDED

Determines the type of prompt a user sees in order entry as well as how the system manages a superseded product. More:

Job Roles	Sales personnel / sales managers.
Details	If a user has this authorization key or is a superuser and tries to sell a product that supersedes an older product and the older product still has remaining inventory, then the user gets prompted to sell the original product instead of the replacement.
Dependencies	None.
Additional Information	This prompt that allows them to continue to sell the replacement product or choose to sell the original product is triggered from the Add PIL flag in the Add Demand window.
	If this authorization is <i>not</i> assigned the original product will be put on the order if there is remaining inventory regardless of the user's entry for the replacement product on the order.

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. More:

Job Roles	Users required to edit locations for products.
Levels	Level 1 - Allows access in view-only mode.
	<p>Level 2 - Allows access to reallocate product between existing locations, without changing the total on-hand quantity.</p> <ul style="list-style-type: none"> Does <i>not</i> allow access to adjust the quantity on an in-process item. Allows access to use the Edit Location option on the Inventory History Ledger window. Allows access to the RF Cycle Count window 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 Yes, 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 does <i>not</i> apply to a level 3 user.
	<p>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 Received Date field.</p> <p>Note: Neither a superuser nor a user 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 windows.</p>

Job Roles	Users required to edit locations for products.
Required For	Inventory Inquiry Inventory History Ledger Lot Maintenance Split Locations Purchase Order Inquiries Product Location Maintenance Creating Product Records Returned Goods Queue Cycle Counting Cycle Counting by Locations Adjusting Product Location Quantities in RF Sales Order Inquiries Transfer Order Inquiries Tote In-Process Queue Warehouse Location Maintenance Warehouse In-Process Queue Warehouse In-Process Status Work Order Inquiries

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. More:

Required for the following:

- Assigning Customers to Product Zones
- Inventory Allocation Method
- Performing Zone Picking in RF
- Assigning Price Lines to Product Zones
- Excluding Zones Using Zone Maintenance
- Defining Zones and Pick Groups for RF
- RF Label Printing
- Picking Non-Manifest Orders Using RF
- Entering Serial Numbers During RF Processes
- Handling Location Shortages During RF Picking
- Increasing Pick Quantities to Package Amounts During RF Picking

Order Entry

- Merging and Breaking Apart Totes
- Using RF System-Directed Put Away
- Using RF User-Directed Put Away
- Selecting RF Daily Replenishment Tasks to Pick

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.

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. More:

Job Roles	Sales managers allowed to override a denied check.
Levels	<ul style="list-style-type: none">• 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.
Dependencies	None.
Additional Information	None.

CONVERT.PROSPECT

Allows access to enter an order or bid for a prospective customer in sales order entry converting the customer to a regular customer (no longer a prospect only). More:

Job Roles	Sales personnel or manager required to convert prospective customers to regular customers by opening an order or a bid for that customer.
Levels	None.
Additional Information	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 Ship-To fields.
	Important: You cannot convert a customer back to a prospect if there are open bids, open orders, or history associated with the customer.

GIFT.CERTIFICATE.EDIT

Allows access to accept an expired gift certificate as payment.

INV.INV.STAT

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

MIPO.USER.ONLY

Restricts users to see only their order in the My In-Process Orders Queue. Without this authorization key, users can view all orders regardless if they are assigned to them.

OVERRIDE.RETURN.PAYMENT

Allows user to override returning an item that does not meet the criteria for returns, such as there are none of the item on the order specified or that the customer has already returned the item on a different order.

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. More:

Job Roles	All sales personnel required to enter orders.
Levels	<ul style="list-style-type: none"> • 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.
Additional Information	Users not assigned the SOE.ALLOWED key can view orders using options on other windows.
Required For:	<ul style="list-style-type: none"> • AR Inquiry • Sales Inquiry • Sales Order Entry

SOE.ALLOWED.ADDR.CHANGE

Allows users to change the ship-to address on orders when the **Ship-To Address Changes Restricted** option is selected in Customer Maintenance.

SOE.ALLOW.NONRETURN

Allows users to enter a negative quantity for items set to **Never** in the **Customer Return Allowed** column in Product User Control Parameters in Primary Inventory Maintenance. More:

* New in Release 8.7.8. Solar Only.

Job Roles	Warehouse personnel, sales order entry counter personnel
Levels	None.
Dependencies	None.
Additional Information	For information about managing product settings at the user level, see <i>Setting Product User Control Parameters</i> in the Forecasting online help documentation.

SOE.BATCH.REPRINT.ALLOWED

New in Release 9.0.3.11

Order Entry

Allows users to change the print flag to B when an invoice has already been printed. More:

Job Roles	Sales personnel requiring access to managing invoices through the Status tab .
Levels	None.
Additional Information	Users must have the SOE.PRINT.INVOICE authorization key assigned.

SOE.BID.APPRV.EXPIRED

Allows access to use expired pricing on a bid. Required for pricing overrides. To restrict users to changing only expiration dates on bids, assign the SOE.BID.EDIT.EXP.PRC.DATE.

SOE.BID.COST.EDIT

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

Job Roles	Sales personnel required to change COST or COGS on products.
Levels	None.
Additional Information	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.
Important:	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. More:

Job Roles	Sales personnel required to change COST or COGS on nonstock products.
Levels	None.
Additional Information	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.
Important:	The SOE.BID.COST.EDIT and SOE.COST.EDIT.NONSTOCK authorization keys override this authorization key.

SOE.BID.EDIT.EXP.PRC.DATE

New in Release 9.0.4

Allows users to edit the price expiration date on a bid. More:

Job Roles	Sales personnel required to change price expiration dates for bids.
Levels	None.

Job Roles	Sales personnel required to change price expiration dates for bids.
Additional Information	If users are assigned the SOE.BID.APPRV.EXPIRED authorization key, they do not need this authorization key.

SOE.BID.FLWUP.USER.EDIT

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

Job Roles	Sales personnel required to update Bid Followup Notes.
Levels	None.
Additional Information	When this authorization key is not assigned, the user cannot edit another user's comments on the Bid Followup window, which you access from the Status window in sales order entry. This window displays in view-only mode.
	When this authorization key is not assigned, 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.BID.PRC.OVRD.TO.OPEN

New in Release 9.0.3

Allows users to convert a bid to an open order and maintain price overrides. Users are not required to have SOE.OPEN.PRC.EDIT.

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. More:

Job Roles	Users required to cancel invoiced orders.
Levels	None.
Additional Information	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.

	For this authorization to take effect, also assign the SOE.CLOSED.ORDER.EDIT and SOE.CLOSED.ORDER.CANCEL authorization keys.
Required For:	Updating Sales Order Statuses

SOE.CLOSED.CHANGE.CUST

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

Job Roles	Sales personnel required to change the invoice owner (customer) for closed orders or after the invoice has potentially already been sent to a customer.
Levels	None.
Additional Information	If you assign SOE.CLOSED.ORDER.EDIT at any edit level, you might allow certain fields to be changed on an invoiced order, but not the actual customer. If you want to limit who can change a customer on an order that has already been fully invoiced, where an invoice was printed/mailed to the customer, then assign the SOE.CLOSED.CHANGE.CUST authorization key to those users you want to be able to change who the invoice belongs to after an invoice document was potentially sent to the customer.
Required For:	Changing Entities for Closed Invoices

SOE.CLOSED.CHANGE.SHIPDATE

Allows access to change the ship date on a closed, paid sales order. More:

Job Roles	Sales personnel required to change ship dates for closed orders.
Levels	None.
Additional Information	The system displays a warning when you change the date on the following windows: <ul style="list-style-type: none"> • OE Status window • OE Scheduling window • Inventory Preview Queue • Warehouse Status window • Warehouse In Process window
Required For:	Changing ship dates on the line item scheduling window.

SOE.CLOSED.ORDER.CANCEL

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

Job Roles	Sales personnel required to delete items on closed generations.
Levels	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.

Job Roles	Sales personnel required to delete items on closed generations.
	Level 3 - Allows access for any shipping or pricing branch to which the user has access.
Additional Information	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.
Required For:	Using the Invoice Preview Queue

SOE.CLOSED.ORDER.EDIT

Allows access to manually change the status of an order after the order is closed. More:

Job Roles	Sales personnel required to change the status of an order after the order is closed. Users with Level 3 access can change the status to S for <i>Shipping Branch</i> manually. This does not include Invoicing. If a user is required to invoice closed orders, they should be assigned the SOE.ORDER.TO.INVOICE authorization key.
Levels	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.
	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.
Levels 2 through 6 display A/R Items as an option on the Fast Select list in order entry.	
Additional Information	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 option on the Print Invoices window. A user not assigned this key can only view a closed order generation.
	This authorization key is required when any of the following keys are assigned: <ul style="list-style-type: none"> • SOE.CLOSED.ORDER.EDIT.SHIP • SOE.CLOSED.ORDER.OPEN • SOE.CLOSED.PRC.EDIT • SOE.CLOSED.QTY.EDIT

	If you assign SOE.CLOSED.ORDER.EDIT at any edit level, you might allow certain fields to be changed on an invoiced order, but not the actual customer. If you want to limit who can change a customer on an order that has already been fully invoiced, where an invoice was printed/mailed to the customer, then assign the SOE.CLOSED.CHANGE.CUST authorization key to those users you want to be able to change who the invoice belongs to after an invoice document was potentially sent to the customer.
Important:	If the Print Paid-In-Full Invoices control maintenance record is set to No , a level 1 user only has access to paid-in-full invoices in view-only mode.
	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.
Required For:	<ul style="list-style-type: none"> Reconciling Lot Item Shipments Entering Sales Order Header Information Using the Invoice Preview Queue

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 and what the shipping branch is. More:

Job Roles	Managers who need to restrict users from editing closed order generations based on ship tickets.
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 1	<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 2	
Level 3	
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.
Additional Information	The user must have a home branch equal to the generation's shipping branch in order to make changes to the order.
	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.
	For this authorization to take effect, also assign users the SOE.CLOSED.ORDER.EDIT authorization key.

SOE.CLOSED.ORDER.EDIT.VIA

Use this authorization key to restrict a user from editing a closed (invoiced) order generation, based on the ship via on the order. More:

Job Roles	Managers who need to restrict users from editing closed order generations based on ship vias.
Levels	None.
Additional Information	Use the right-click Detail option to set the ship vias for which the user can edit a closed order. If a closed order's ship via is not in the user's defined list, the user cannot make edits to the order.
	If no ship vias are set in the details, or the order is for a direct, the system ignores this authorization key.

SOE.CLOSED.ORDER.FAX

Allows access to fax a closed (shipped) generation from the SOE Status window. You must also assign the SOE.PRINT.INVOICE authorization key for SOE.CLOSED.ORDER.FAX to work.

SOE.CLOSED.ORDER.OPEN

Allows access to change the status of an invoiced sales order generation from **I** (for Invoice) to any open order status. More:

Job Roles	Sales personnel required to change an order status from Invoice to an open status.
Levels	None.
Additional Information	You must also assign the SOE.CLOSED.ORDER.EDIT authorization key for SOE.CLOSED.ORDER.OPEN to work.
	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.
Required For:	Using the Invoice Preview Queue

SOE.CLOSED.PRC.EDIT

Allows access to change the selling prices on a closed order generation. More:

Job Roles	Sales personnel required to change selling prices on closed orders.
Levels	Use the Edit > Detail option to enter ship vias by which to restrict this user. Each ship via entered limits the editing function. For example, if a user has PICK UP NOW listed, then that user can <i>only</i> change prices on orders with that ship via.
Additional Information	Users not assigned this key cannot change prices, basis names, formulas, costs, or gross profit percentages.
	You must also assign the SOE.CLOSED.ORDER.EDIT authorization key to this authorization key to work.

SOE.CLOSED.QTY.EDIT

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

Job Roles	Sales personnel required to edit quantities or descriptions on closed orders.
Levels	Level 1 - Allows access to edit the quantity and description of a stock item. Also allows access to use the Substitutes option on the SOE Body and the SOE Schedule windows 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 item from an invoiced generation. To allow users to delete the last item from an invoiced generation, also assign the SOE.CLOSED.ORDER.CANCEL authorization key.
Additional Information	You must also assign users the SOE.CLOSED.ORDER.EDIT authorization key for this authorization key to work.

SOE.CONSIGNMENT.ALLOWED

Allows access to create customer consignment orders. More:

Job Roles	Sales personnel required 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.	
Levels	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.
Required For:	Customer Consignments

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

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

Job Roles	Sales personnel required to change costs on open orders and bids.
Levels	Each key has 10 levels. The level number determines which local basis names display in the user's selection list.
	<p>Each cost and price basis name defined in Price Line Maintenance is assigned a view level (VLvL).</p> <ul style="list-style-type: none"> • 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.
Additional Information	<p>SOE.COST.EDIT applies to any item on a sales order.</p> <p>Note: This key overrides the SOE.BID.COST.EDIT authorization key.</p>
	SOE.COST.EDIT.DIRECT applies to stock and nonstock items on a direct order.
	<p>SOE.BID.COST.EDIT.NONSTOCK applies to nonstock items on a sales order.</p> <p>Note: This key overrides the SOE.BID.COST.EDIT.NONSTOCK authorization key.</p>
	When changing the cost for a group of products on a window, 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.
Important:	If a user who is assigned the SOE.COST.EDIT.DIRECT and SOE.BID.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 window from the SOE Totals window 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** option on the SOE Body window 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. More:

Job Roles	Sales credit managers.
Levels	<p>Users not assigned this authorization key can release orders for any customer, based on their level assignment in the SOE.CREDIT.RELEASE authorization key.</p> <p>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.</p> <ul style="list-style-type: none"> • 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.
Additional Information	<p>You must also assign the SOE.CREDIT.RELEASE authorization key for this authorization key to work.</p> <p>Superuser authorization does not include this authorization key.</p> <p>After assigning the authorization key, use the Detail option to display the Detail Selection window. Type each customer rank for which to authorize this user to release a credit hold on a separate line of the window and then save and exit the window. For more information, see Assigning Authorization Keys to Users.</p> <p>When an order is released, the system sends a message to the Credit Manager.</p> <p>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.</p>

SOE.CREDIT.RELEASE

Allows access to override a credit hold on a customer order. More:

Job Roles	Personnel required to override credit holds.
Levels	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.

Job Roles	Personnel required to override credit holds.
Additional Information	If a customer has a defined percentage in the Credit Release Percentage Override field on the Additional Customer Credit Data window 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 1-998, the user can exceed a customer's credit limit by that percentage. For example, a user assigned 350 can exceed the credit limit by 350%.
	If the assigned percentage is 999, the user has no restriction on exceeding a customer's credit limit.
	On a customer's Credit Control Parameters window, the following four credit restrictions work with the SOE.CREDIT.RELEASE authorization key: <ul style="list-style-type: none"> • 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.
	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.
Important:	Do not confuse this key with the SOE.CASH.REQD.EDIT key, which allows users to override cash required for C.O.D. customers.
Required For:	Overriding Credit Holds or Denying Credit

SOE.DEL.CLASS.OVRD

New in Release 9.0.5

Allows users to schedule a delivery even if the delivery classification is not assigned to that customer.
More:

Job Roles	Personnel required to override delivery classifications for order shipments.
Levels	None.
Additional Information	Use the Valid Delivery Classifications control maintenance record to set classifications for your company.
Required For:	Scheduling Sales Order Deliveries

SOE.DIRECT.EDIT

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

Job Roles	Sales personnel required to create and edit direct shipment orders.
Levels	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.
Additional Information	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 Change Order Mode option in sales order entry.
Required For:	<ul style="list-style-type: none"> Order Reprinting Options Order Entry Scheduling

SOE.DISALLOW.PRCBR.CHG

Restricts users from changing the price branch regardless of authorization. More:

Job Roles	Restrict users from changing price branches.
Levels	None.
Additional Information	Normally, if you have SOE.OPEN.ORDER.EDIT or SOE.CLOSED.ORDER.EDIT you can change the price branch on any generation of an order. Assigning this authorization key, still allows users to edit orders, but keeps them from changing the price branch.
Required For:	Sales Order Header

SOE.DUP.ORDER.OK

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

Job Roles	Sales personnel required to duplicate orders.
Levels	None.
Additional Information	This authorization key takes effect only if the Duplicate Order Check control maintenance record is set to Yes . 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.

Job Roles	Sales personnel required to duplicate orders.
	<p>If a user orders an item that is already on another order for the customer, the system displays the Possible Duplicate Orders Found window and a prompt that requires authorization to continue.</p> <p>If this authorization key is assigned, then the system prompts the user to continue entering the item on the order. If this key is unassigned, the system requires a password from a manager or another user with the authorization assigned.</p>

SOE.EDIT.CLOSED.PERIOD

Allows access to edit specific fields on the SOE Header window for an order in a closed G/L period.

- **Shipping Instructions**
- **Internal Notes**
- **Ordered by**
- **Phone Number**
- **Customer P/O #**
- **Customer Rel #**
- **Batch ID**

SOE.EDIT.IAO.INV.COGS

Allows access to edit COGS on IAO line items on sales orders. More:

Job Roles	Sales personnel required to edit COGS and IAO items.
Levels	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.
Additional Information	An IAO item is a stock or nonstock product assigned an Inventory Account Override.

SOE.EDIT.IAO.INV.COST

Allows access to edit COST on IAO line items on sales orders. More:

Job Roles	Sales personnel required to edit COST and IAO items.
Levels	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.
Additional Information	An IAO item is a stock or nonstock product assigned an Inventory Account Override.

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. More:

Job Roles	Sales personnel required to edit PRICE and IAO items.
Levels	Level 1 - Allows access to edit PRICE on an IAO line item of a new sales order.
	Level 2 - Allows access to edit PRICE 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.
Additional Information	An IAO item is a stock or nonstock product assigned an Inventory Account Override.

SOE.EDIT.LOCKED.DIRECT

Allows access to edit a locked sales order for a direct shipment purchase order. More:

Job Roles	Sales personnel required to edit locked orders for directs.
Levels	None.
Additional Information	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 window, when the order is in view-only mode.

SOE.EXPORT.ALLOWED

Allows users to set sales order Export Status to **Approved** and allow the phantom processes to process the order when it is scheduled for shipment out of country and going through export compliance. More

Job Roles	Export department personnel who can approve sales orders scheduled for shipment out of country.
Levels	None
Additional Information	Users with this authorization key can also change the Export Order flag on the order until it is invoiced.
	Users without authorization can change the Export Order flag on a sales order when they first create the order, if the customer's Export Only field is set to No or Prompt in the customer record.
	All export orders are reviewed through the Open Order Status Review Queue and subsequently checked for credit status by the standard Automatic Shipping Ticket Printing phantom.

More Information	Setting Up Export Orders Managing Export Orders
-------------------------	--

SOE.FREIGHT.EDIT

Allows access to edit the **Freight** and **Total Freight** fields and use the **Freight** option on the SOE Totals window.

SOE.GP.CONTROL.EDIT

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

To access this parameters window:

1. Open a sales order.
2. From the **Edit Order** menu, select **Pricing**.
3. From the **Edit** menu, select **GP% Controls**.

SOE.HANDLING.EDIT

Allows access to edit **Handling** and **Total Handling** fields and use the **Freight** option on the SOE Totals window.

SOE.JM.EDIT.CUST.PO

New in Release 9.0.1

Allows users running Job Management to edit the **Customer PO #** field in the Sales Order Entry **Header** tab. More

Job Roles	Sales personnel managing Job Management orders.
Levels	None
Additional Information	Users must also have the following authorization keys for editing a sales order: SOE.ALLOWED, Level 3 SOE.CLOSED.ORDER.EDIT, Level 6 SOE.DIRECT.EDIT, Level 2 SOE.EDIT.CLOSED.PERIOD SOE.OPEN.ORDER.EDIT

SOE.KITS

Allows access from the SOE Scheduling window to Product Kit Maintenance. More:

Job Roles	Sales personnel who are required to create product kits.
Levels	Level 1 - Allows access to view product kit information.
	Level 2 - Allows access to edit product kit information.
Additional Information	To create kits, display Product Kit Maintenance from Product Maintenance.

SOE.MANIFEST.EDIT

Allows access to the Shipping Manifest program. More:

Job Roles	Sales personnel who are required to edit manifests.
Levels	Level 1 - Allows access to view a closed manifest or edit an open manifest.
	Level 2 - Allows access to a closed manifest for editing.

SOE.MASTER.BID.EDIT

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

Job Roles	Sales personnel required to handle master orders.
Level 1	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> 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. <p>Note: Users <i>cannot</i> edit Total Lot Cost or Total Lot Price on the junior order.</p>
Level 3	<ul style="list-style-type: none"> 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. <p>Note: Users <i>cannot</i> edit Total Lot Cost or Total Lot Price on the junior order.</p>
Level 4	<ul style="list-style-type: none"> 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.
Required For:	<ul style="list-style-type: none"> Job Bid Maintenance Lot Item Status Editing Lot Item Materials

SOE.MAX.COLLECTION.DAYS

Allows access to view and edit the Commission % by Collection Days window. More:

Job Roles	Sales personnel who are required to manage commission percentage by collection days.
Levels	Level 1 - Allows access in view-only mode.
	Level 2 - Allows user to edit information on the screen.
Required For:	Basing Commission Percentages on Collection Days

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. More:

Job Roles	Sales personnel required to override maximum discounts.
Levels	None.
Additional Information	You can assign a maximum discount from standard price 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.
Required For:	Changing Price Control Parameters

SOE.MAX.PRICE

Allows access to override the maximum price for an item. More:

Job Roles	Sales personnel required to override the maximum price for an item.
Levels	None.
Additional Information	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% Required** set for a sales order, product, price line, or user. More:

Job Roles	Sales personnel required to override the Minimum GP% Required value set.
Levels	None.

Order Entry

Job Roles	Sales personnel required to override the Minimum GP% Required value set.
Additional Information	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.
Required For:	Changing Price Control Parameters

SOE.NONRETURN.PROCESS

Allows users to process credit return generations with items that are set to **Never** in the **Customer Return Allowed** or **Vendor Return Allowed** columns in Product User Control Parameters in Primary Inventory Maintenance. More:

* New in Release 8.7.8. Solar Only.

Job Roles	Warehouse personnel, sales order entry counter personnel
Levels	None.
Dependencies	None.
Additional Information	Items can be marked as non-returnable in the Product User Control Parameters off Primary Inventory Maintenance. This authorization key allows users to return products regardless of this setting. Setting either the Customer Allowed or Vendor Allowed fields to Never , by branch, requires this authorization key to process a credit return for these products.
	To process a return, users must also have the SOE.RETURN.PROCESS authorization key assigned.
	For information about marking products as non-returnable, see Setting Product User Control Parameters in the Forecasting online help documentation.

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. More:

Job Roles	Sales personnel required edit open orders and bids.
Levels	None.
Additional Information	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. More:

Job Roles	Sales personnel required to adjust selling price on open sales order generations.
Levels	None.
Additional Information	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 option on the SOE Body window to enter a valid quote amount. Users cannot make any other pricing changes without the appropriate authorization keys.
	You must also assign the SOE.OPEN.ORDER.EDIT authorization key for this authorization key to work.
Required For:	Changing Sales Order Prices

SOE.OPEN.QTY.EDIT

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

Job Roles	Sales personnel required to edit quantities and descriptions on open sales orders.
Levels	Level 1 - Allows access to edit the quantity of a stock item. Also allows access to use the Substitutes option on the SOE Body window and the Scheduler window to view and order substitute products.
	Level 2 - Allows access to also edit the quantity of a nonstock item.
Additional Information	Remote customers assigned an order status of B-Bid can edit bids, but only view orders that are not bids.
	You must also assign the SOE.OPEN.ORDER.EDIT authorization key for this authorization key to work.
	If you are using Tract Housing Management, this authorization key must be assigned at level 2 for the Tract Housing MiscChrg Product orders.
Required For:	Editing Sales Order Details

SOE.ORDER.PAD

Allows access to the Reorder Pad through sales order entry.

SOE.ORDER.TO.BID

Allows access to change the status of a sales order segment to Bid on the Schedule, Detail Scheduling, or Status window or using the **Change Order Mode** option.

Note: You must also assign the SOE.OPEN.ORDER.EDIT authorization key for the authorization key to work.

SOE.ORDER.TO.INVOICE

New to Release 9.0.1

Allows users to invoice an order directly from Sales Order Entry.

Order Entry

Note: Prior to Release 9.0.1, users could invoice if assigned SOE.CLOSED.ORDER.EDIT. Users *must be* assigned this new authorization to maintain that level of authority.

SOE.OVERRIDE.CLIENT.PRICE

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

SOE.OVRD.NO.PRC.CHANGE

Allows access to change the price on an item. More:

Job Roles	Use when restriction prices based on the following: <ul style="list-style-type: none">• A customer whose Restrict Price Changes in Sales Order Entry (Y/N) field in the Customer Pricing Information window is set to Y.• A product whose Restrict Price Changes in Sales Order Entry (Y/N) field on the Additional Price Maintenance window is set to Y.
Levels	Level 1 - Users are prompted for a user name and password when trying to change restricted prices.
	Level 2 - New in Release 8.7.9, allows users to override restricted prices for items on Small Project Jobs.
	Level 3 - Allows users to change restricted prices throughout the system.
Required For:	Overriding Prices On Orders

SOE.PACKAGE.QTY

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

Job Roles	Sales personnel required to override products' sell package quantities.
Levels	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.
Additional Information	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.
	You can set the sell package quantity on the Product Price Maintenance window.
Required For:	<ul style="list-style-type: none">• Changing a Sales Orders Shipping Branch• Shipping Sales Orders Directly From Other Branches

SOE.PAYMENT.APPLY

Allows access to apply payments to outstanding invoices. More:

Job Roles	Sales personnel required to apply payments to outstanding invoices.
Levels	Level 1 - Allows access to use the Apply Payment option on the SOE Totals window to apply cash received through sales order entry to outstanding invoices.
	Level 2 and Level 3 - The same as Level 1.
Required For:	Applying Payments to Sales Orders

SOE.PAYMENT.EDIT

Allows access to edit payments received in sales order entry. More:

Job Roles	Sales personnel required to edit payments received on orders.
Levels	None.
Additional Information	Assign this authorization key to managers who resolve problems in reconciliation of the Cash Box Journal.
	If this authorization key is not assigned, the user can use the Payment option on the SOE Totals window to receive payments, but not edit payments.
	If this authorization key is not assigned, the user can use the Payment option on the SOE Totals window to receive payments. The user can select the payment to edit. Then, in the Cash or Change field, edit the payment date, time, collecting user, location, or branch.
Required For:	SOE Totals window

SOE.PAYMENT.TERMS.EDIT

Allows access to change a customer's payment terms on the SOE Header window or in the Close Counter Order window.

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, e-mail, fax, or reprint or resend invoices from the **Status** tab in sales order entry or the A/R Ledger. More:

Job Roles	Sales personnel requiring access to managing invoices through the Status tab.
Levels	None.
Additional Information	This key also allows you to reprint invoices using the Order Reprinting Options window. If you assign this key, you do not need to assign the SOE.REPRINT.INVOICE key.

Order Entry

Job Roles	Sales personnel requiring access to managing invoices through the Status tab.
Required For:	<ul style="list-style-type: none">• Sales Order Entry Status tab• Order Reprinting Options

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 Auth to Process Sales Order With Open Serial Numbers** control maintenance record is set to **Y**.

SOE.PROGRESS.BILLING

Allows users to tag sales orders for progress billing on the Sales Order Entry **Totals** tab of a sales order.

SOE.REPRICE.BID.SELL.PRC

Allows users to convert bids with expired pricing. More:

Job Roles	Sales personnel required to reprice bids or to convert bids with expired pricing.
Levels	None.
Dependencies	Users must also have these assigned: SOE.BID.APPRV.EXPIRED SOE.BID.COST. EDIT SOE.COST.EDIT
Required For:	Converting Bids to Sales Orders

SOE.REPRINT.INVOICE

Allows access to print invoices that have already been printed. More:

Job Roles	Sales personnel required to reprint invoices.
Levels	None.
Additional Information	Users assigned this key, but not the SOE.PRINT.INVOICE key do not have print options available in the Print field of the sales order entry Status tab if the invoice has not been printed.
	Assign this key instead of the SOE.PRINT.INVOICE key to users that you do not want to grant access to print, e-mail, or fax original invoices.
Required For:	<ul style="list-style-type: none">• A/R Inquiry printing options• Reprinting Invoices• Printing Purchase Orders• Printing Invoices• Reprinting Sales Orders

SOE.REPRINT.PICK.TICK

Allows access to reprint pick tickets. More:

Job Roles	Sales personnel required to reprint pick tickets.
Levels	None.
Additional Information	Users not assigned this key must enter a password before reprinting a ticket.
Required For:	<ul style="list-style-type: none"> • Printing Purchase Orders • Printing Invoices • Reprinting Sales Orders • Tracking Sales and Transfer Orders Through the Warehouse (Warehouse Picking Confirmation Queue)

SOE.REPRINT.SHIP.TICK

Allows access to reprint shipping tickets from the Order Reprinting Options screen. More:

Job Roles	Sales personnel required to reprint shipping tickets.
Levels	None.
Additional Information	Users not assigned this key must enter a password before reprinting a ticket.
Required For:	<ul style="list-style-type: none"> • Printing Purchase Orders • Reprinting Sales Orders

SOE.RESERVE.ORDER.EDIT

Enables a user to create a new or edit an existing Reserve Inventory Order. More:

Job Roles	Sales personnel required to create a new or edit an existing reserve inventory.
Levels	None.
Additional Information	Reserve status orders commit inventory for a bill-to customer, and allows other orders to the bill-to's ship-to customers to buy the reserved products. However, the products on the reserve sales order do not appear available in inventory for other customer's to buy.
Required For:	Reserve Inventory Order

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. More:

Job Roles	Sales personnel required to return a product after a specified time limit.
Levels	Level 1 - Allows the user to make a return after the return time period for stock items. Assign this level to return stock items without an original sales order number.
	Level 2 - Allows the user to make a return for all items, regardless of time. In addition, users can create returns that exceed the original order quantity. Assign this level to return stock or non-stock items without an original sales order number.
Additional Information	The system displays a warning prompt when users return items after the return period. Unauthorized users must enter a password to continue.
Required For:	Returned Goods Verification

SOE.RETURN.PROCESS

Determines who is allowed to process a credit sales order generation. More:

* New in Release 8.7.8. Solar Only.

Job Roles	Warehouse personnel, sales order entry counter personnel.
Levels	None.
Dependencies	Users must also have the SOE.RGA.REQUIRED authorization to return goods to vendors that require RGA numbers.
Additional Information	Required to process a credit order, change the status to Pick Up Now , or invoice the order. To enter negative sales orders, users must have the SOE.RETURN.ALLOWED authorization key.
	If you have the Disable Phantom Processing For Credit Sales Orders control maintenance record set to No, the system processes the credit order regardless of this authorization key assignment.
	Not required for users with the SUPERUSER authorization key.

SOE.RGA.REQUIRED

Allows users to process credit return orders that have products that require returned goods authorization numbers. More:

* New in Release 8.7.8. Solar Only.

Job Roles	Warehouse personnel, sales order entry counter personnel.
Levels	None.
Dependencies	Users must also have the SOE.RETURN.PROCESS authorization to process credit return generations.

Job Roles	Warehouse personnel, sales order entry counter personnel.
Additional Information	Many vendors require returned goods agreement (RGA) numbers before accepting item returns. This control maintenance record allows users to process RGA-required orders without the RGA number. The Vendor Return Allowed column in the in Product User Control Parameters.
	If you have the Disable Phantom Processing For Credit Sales Orders control maintenance record set to No , the system processes the credit order regardless of this authorization key assignment.

SOE.SALES.SOURCE.EDIT

New in Release 9.0.3

Allows users to edit the Sales Source field in Sales Order Entry even if the **Disable Edit Ability Of Sales Source** control maintenance record is set to **Yes**.

SOE.SALESPERSON.EDIT

Allows access to change the **Outside Salesperson** or **Inside Salesperson** on the SOE Header window. More:

Job Roles	Sales personnel required change salesperson on the sales order.
Levels	None.
Additional Information	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 window. If not assigned, users can still adjust their own commission percentage.
Required For:	<ul style="list-style-type: none"> • Editing Commission Percentages • Splitting Commissions • Reporting on Tier Date Range by Commission Groups

SOE.SCHEDULE

Determines whether the **Auto Scheduling** option on the SOE Body window is set to **On** or **Off** when the user accesses sales order entry. More:

Job Roles	Sales personnel required to use auto-scheduling for sales orders.
Levels	Level 1 - The Auto Scheduling option is set to Off . The Schedule window displays only if there is an open quantity, such as a backorder, on that line item.
	Level 2 - The Auto Scheduling option is set to On . The Schedule window displays upon entry of every line item, regardless of its open quantity status.
Additional Information	Users not assigned this key can still use the Auto Scheduling option on the SOE Body window to change the setting at any time.
	Superuser authorization does not include this authorization key. To set this key for a superuser, assign it in addition to the SUPERUSER authorization key.
Required For:	SOE Body

SOE.SCHEDULE.TAGS

Allows users to change or add tags to sales orders, but does not allow users to break tags. You must have the OE.TAGGED.QTY.EDIT to edit purchase order tags or transfer order tags.

SOE.SINGLE.INVOICE

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

Job Roles	Sales personnel required to edit invoicing fields.
Levels	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.
Required For:	SOE Totals

SOE.SOURCING

Allows access to automatic-sourcing selections for items out of stock. More:

Job Roles	Enhanced functionality for sales personnel required to backorder items when the items are out of stock.
Levels	Level 1 - Allows access to display auto-sourcing window if the product being added has to be backordered.
	Level 2 - Automatically displays the auto-sourcing window for the user.
Additional Information:	Not required for selecting backorder sources for items that are out of stock. If assigned, this authorization key supersedes the SOE.SCHEDULE authorization key.

SOE.COST.EDIT.SOURCING

Allow users to edit cost for a stock item, but only if it is procured. More:

Job Roles	Sales personnel required to backorder items when the items are out of stock.
Levels	None.
Required For:	Edit without causing variances since the cost on the sales order is tagged to the cost on the purchase order.
Example:	With this authorization key assigned users can specify the cost of sourcing an item from an emergency procurement vendor. The procurement purchase order inherits this cost when created. This workflow reduces the amount of free-form notes passed from sales to purchasing in the internal notes if your sales folks cannot create procurement purchase orders. If you the Update Cost On Sales Order From Tagged Purchase Order control maintenance record set to Yes then the cost will flow back to the sales order once the PO has been created.

SOE.SPLIT.PRICING

Allows access to override split quantity pricing. More:

Job Roles	Sales personnel required to override split quantities.
Levels	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 Quantity Pricing set to Y , the system displays the following prompt: Split Quantities (Y/N).
	Level 3 - Allows user to approve the extension of expire quantities to include the current order quantity.
Required For:	Split Quantity Pricing

SOE.TAX.EDIT

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

Job Roles	Sales personnel required to edit the tax-related aspects of a sales order.
Levels	Level 1 - Allows access to edit only the Tax Exempt ID # field on the SOE Header window or the Exempt # field on the New Customer Entry window.
	Level 2 - Allows access to also edit the Tax Jurisdiction field on the SOE Header window.
	Level 3 - Allows access to also edit the Sales Tax field on the SOE Totals window.
Additional Information	Assigning this key also grants access to the Sales Tax and Tax Groups menu options in Customer Maintenance.
Required For:	<ul style="list-style-type: none"> • Customer Maintenance • SOE Header • SOE Totals • New Customer Entry

SOE.WRITER.EDIT

Allows access to edit the writer ID on the SOE Header window of an existing order. More:

Job Roles	Sales personnel required to edit the writer ID.
Levels	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.
Additional Information	With this authorization key assigned, users can only view G/L posting information (Alt~) for sales orders that they have written.
Required For:	SOE Header G/L Posting

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 window, position the cursor on the assigned key and use the **Detail** option to display the Detail Selection window. To add items to the window, press **F10** and select from the list.

INVALID.PRODUCT.LINES

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

Job Roles	Managers who need to give access to price lines.
Levels	None.
Dependencies	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 option to list the product lines to which the user does not have access.
	If you list the same price line under the VALID.PRODUCT.LINES and INVALID.PRODUCT.LINES authorization keys, the system uses the invalid designation.
Additional Information	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.
	Superuser authorization does not include this authorization key. To set this key for a superuser, assign it in addition to the SUPERUSER authorization key.
Required For	Sorting Products in Price Lines

INVALID.VEN.TYPES

Limits access to use all vendor records except those assigned to designated vendor types. More:

Job Roles	Managers who need to give access to vendor types.
Levels	None.
Dependencies	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 option to list the vendor types to which the user does not have access.
Additional Information	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.

Valid and Invalid Lines and Types Authorization Keys

Job Roles	Managers who need to give access to vendor types.
	If the VALID.VEN.TYPES authorization key has vendor types assigned, the system does not check the INVALID.VEN.TYPES authorization key.
	Superuser authorization does not include this authorization key. To set this key for a superuser, assign it in addition to the SUPERUSER authorization key.
Required For	Creating Vendor Records

VALID.BLINES

Limits access to edit product and buy line records in designated buy lines. More:

Job Roles	Managers who need to give access to buy lines.
Levels	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.
Dependencies	None.
Additional Information	Records not included in the designated buy lines are view-only.
	Use the right-click Detail option to specify to which buy lines the users are allowed to make these changes. For more information, see Assigning Authorization Keys to Users.
	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.
	Superuser authorization does not include this authorization key. To set this key for a superuser, assign it in addition to the SUPERUSER authorization key.
Required For	Maintaining Buy Lines

VALID.PLINES

Limits access to edit product, price line, and price sheet records in designated price lines. More:

Job Roles	Managers who need to give access to price lines.
Levels	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.
Dependencies	None.
Additional	Records not included in the designated price lines are view-only.

Order Entry

Job Roles	Managers who need to give access to price lines.
Information	Use the right-click Detail option to specify to which price lines the users are allowed to make these changes. For more information, see Assigning Authorization Keys to Users.
	Superuser authorization does not include this authorization key. To set this key for a superuser, assign it in addition to the SUPERUSER authorization key.
Required For	Creating Price Lines

VALID.PRODUCT.LINES

Limits access to sell products in designated product price lines. More:

Job Roles	Managers who need to give access to price lines.
Levels	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.
Dependencies	If you list the same price line under the VALID.PRODUCT.LINES and INVALID.PRODUCT.LINES authorization keys, the system uses the invalid designation.
Additional Information	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 option to list the price lines to which the user has access.
	Superuser authorization does not include this authorization key. To set this key for a superuser, assign it in addition to the SUPERUSER authorization key.
Required For	Creating Price Lines

VALID.VEN.TYPES

Limits access to use vendor records assigned to designated vendor types. More:

Job Roles	Managers who need to give access to vendor types.
Levels	None.
Dependencies	Define vendor types in the Valid Vendor Types control maintenance record and assign them to a vendor in Vendor Maintenance.
	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.
Additional Information	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 option to list the vendor types to which the user has access.

Valid and Invalid Lines and Types Authorization Keys

Job Roles	Managers who need to give access to vendor types.
	If a vendor does not have an assigned vendor type, all users can access that vendor's records.
	Superuser authorization does not include this authorization key. To set this key for a superuser, assign it in addition to the SUPERUSER authorization key.
Required For	<ul style="list-style-type: none"> • AP Preview Queue • Vendor Maintenance • Reconciling Checks

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. More:

Job Roles	Users required to access work order entry.
Levels	Level 1 - Allows access to view orders.
	Level 2 - Allows access to create and edit orders.
Dependencies	Users not assigned the WOE.ALLOWED key can view orders using menu options on other windows.
Additional Information	None.
Required For	Work Order Entry

WOE.AUTO.REC

Allows access to set the **Auto Reconcile** hot key on the Work Order Entry Body window to **On** or **Off**. More:

Job Roles	Users required to access work order entry auto reconciling.
Levels	None.
Dependencies	None.
Additional Information	Users also need 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 window.
Required For	<ul style="list-style-type: none"> • Work Order Entry • Auto-Reconciling Work Orders

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 an open step when the work order has closed steps on it. More:

Job Roles	Users managing work orders.
Levels	None.
Dependencies	If the step is reopened and you have this authorization key assigned, you can change the vendor.

Additional Information	You cannot change a vendor on a closed step or a closed work order. Changing vendors after a work order is closed can disrupt general ledger postings and is therefore not allowed.
Required For	Editing Work Orders

WOE.CLOSED.ORDER.CANCEL

Allows access to cancel a closed (complete) work order step using the **X-Cancel** option on the WOE body window.

WOE.CLOSED.ORDER.EDIT

Allows access to change the date or status of a closed (complete) work order step. More:

Job Roles	Users managing work orders.
Levels	None.
Dependencies	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: <ul style="list-style-type: none"> • WOE.CLOSED.PRC.EDIT • WOE.CLOSED.QTY.EDIT
Required For	<ul style="list-style-type: none"> • Canceling Work Orders • Updating Work Order Statuses

WOE.CLOSED.PRC.EDIT

Allows access to change the cost on a closed (complete) work order step. More:

Job Roles	Users managing work orders.
Levels	None.
Dependencies	You must also assign the WOE.CLOSED.ORDER.EDIT authorization key for this authorization key to work.
Required For	Editing Work Orders

WOE.CLOSED.QTY.EDIT

Allows access to edit the quantity on a closed (complete) work order step. More:

Job Roles	Users managing work orders.
Levels	Level 1 - Allows the user to edit the quantity of a stock item.
	Level 2 - Allows access to also edit the quantity of a nonstock item.
Dependencies	For this authorization key to work you must also assign the WOE.CLOSED.ORDER.EDIT authorization key.
Required For	Editing Work Orders

WOE.OPEN.ORDER.EDIT

Allows access to edit an open work order step. More:

Job Roles	Users editing work order steps.
Levels	None.
Dependencies	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: <ul style="list-style-type: none"> • WOE.CLOSED.PRC.EDIT • WOE.CLOSED.QTY.EDIT
Required For	<ul style="list-style-type: none"> • Editing Work Orders • Inserting and Deleting Work Order Steps

WOE.OPEN.PRC.EDIT

Allows access to change the cost on an open work order step. More:

Job Roles	Users managing work orders.
Levels	None.
Dependencies	You must also assign the WOE.CLOSED.ORDER.EDIT authorization key for this authorization key to work.
Required For	Editing Work Orders

WOE.OPEN.QTY.EDIT

Allows access to edit the quantity on an open work order step. More:

Job Roles	Users managing work orders.
Levels	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.
Dependencies	You must also assign the WOE.OPEN.ORDER.EDIT authorization key for this authorization key to work.
Required For	Editing Work Orders

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. More:

Job Roles	Users managing work orders.
Levels, Dependencies	None.
Additional Information	The system prompts users not assigned this key to enter a password to override a maximum days supply limit.
Required For	Editing Work Orders

WOE.WRITER.EDIT

Allows access on the Work Order Entry Header window to change the **Written by** ID on an existing work order step.

Index

A

authorization keys

- about 1
- calling queue 16
- order entry
 - adjustments 8
 - commissions 15
 - general 17
 - sales 27
 - work orders 59
- products
 - in order entry 23
 - lines and types 55
- sales
 - budgeting 26
 - commissions 15
- user-defined 5
 - ELC Courses 5
- what's new 4

authorization, superuser 2

C

- CK.CHECK.AUTH.OVRD authorization key 27
- COGS.EDIT authorization key 9
- COGS.EDIT.DIRECT authorization key 9
- COGS.EDIT.NONSTOCK authorization key 9
- COGS.VIEW authorization key 9
- COMM.MAINT.EDIT authorization key 15
- COMM.MAINT.VIEW authorization key 15
- COMMISSIONS.USER.AUTH authorization key 15
- CONVER.PROSPECT authorization key 27
- COST.VIEW authorization key 9
- COST.VIEW.INQUIRY authorization key 9

CUT.PROD.GROUP.MAINT authorization key 17

CUT.PRODUCT.CONTROL authorization key 17

D

DTS.ALLOWED authorization key 17

E

ELC Courses

- authorization keys
- user-defined 5

G

GIFT.CERTIFICATE.EDIT authorization key 27

I

INV.INV.STAT authorization key 27

M

MIPO.USER.ONLY authorization key 27

O

OE.CLOSED.SERIAL.EDIT authorization key 17

OE.COPY.BID authorization key 17

OE.CUT.TAG.EDIT authorization key 17

OE.EDIT.INV.ACCT authorization key 17

OE.JOB.MAINT authorization key 17

OE.LOT.OVRD.TYPE.DUPS authorization key 17

OE.NSTK.PLINE.EDIT authorization key 17

OE.NSTK.UM.EDIT authorization key 17

OE.OVERCOMMIT.STOCK authorization key 17

OE.PRICE.CLASS.LEVEL authorization key 17

OE.PRICE.DATE.EDIT authorization key 17

OE.PRICE.VIEW.LEVEL authorization key 17

- OE.PRODUCT.DESC.OVRD authorization key 17
- OE.PRODUCT.TYPE.EDIT authorization key 17
- OE.PRODUCT.USE.DELETE authorization key 17
- OE.PRODUCT.USE.REVIEW authorization key 17
- OE.TAG.EDIT.CLOSED.PERIOD authorization key 17
- OE.TAGGED.QTY.EDIT authorization key 17
- OE.VIEW.EDIT.PRIC.BR.OVRD authorization key 17
- OVERRIDE.RETURN.PAYMENT authorization key 27
- P
- POS.OPEN.DRAWER authorization key 27
- R
- release 8
 - authorization keys 4
- S
- SELL.SUPERSEDED authorization key 17
- SOE.ALLOW.NONRETURN authorization key 27
- SOE.ALLOWED authorization key 27
- SOE.ALLOWED.ADDR.CHANGE authorization key 27
- SOE.BID.APPRV.EXPIRED authorization key 27
- SOE.BID.COST.EDIT authorization key 27
- SOE.BID.COST.EDIT.NONSTOCK authorization key 27
- SOE.BID.FLWUP.USER.EDIT authorization key 27
- SOE.BID.PRC.EDIT authorization key 27
- SOE.CANCEL.PARTIAL.KIT authorization key 27
- SOE.CASH.REQD.EDIT authorization key 27
- SOE.CLOSED.CANCEL.AR authorization key 27
- SOE.CLOSED.CHANGE.CUST authorization key 27
- SOE.CLOSED.CHANGE.SHIPDATE authorization key 27
- SOE.CLOSED.ORDER.CANCEL authorization key 27
- SOE.CLOSED.ORDER.EDIT authorization key 27
- SOE.CLOSED.ORDER.EDIT.SHIP authorization key 27
- SOE.CLOSED.ORDER.FAX authorization key 27
- SOE.CLOSED.ORDER.OPEN authorization key 27
- SOE.CLOSED.PRC.EDIT authorization key 27
- SOE.CLOSED.QTY.EDIT authorization key 27
- SOE.CONSIGNMENT.ALLOWED authorization key 27
- SOE.COST.EDIT authorization key 27
- SOE.COST.EDIT.DIRECT authorization key 27
- SOE.COST.EDIT.NONSTOCK authorization key 27
- SOE.COST.EDIT.SOURCING authorization key 27
- SOE.CREDIT.OVERRIDE authorization key 27
- SOE.CREDIT.QTY authorization key 27
- SOE.CREDIT.REBILL authorization key 27
- SOE.CREDIT.REL.RANK authorization key 27
- SOE.CREDIT.RELEASE authorization key 27
- SOE.DIRECT.EDIT authorization key 27
- SOE.DISALLOW.PRCBR.CHG authorization key 27
- SOE.DUP.ORDER.OK authorization key 27
- SOE.EDIT.CLOSED.PERIOD authorization key 27
- SOE.EDIT.IAO.INV.COGS authorization key 27

Order Entry

SOE.EDIT.IAO.INV.COST authorization key 27
SOE.EDIT.IAO.INV.PRICE authorization key 27
SOE.EDIT.LOCKED.DIRECT authorization key 27
SOE.EDIT.VIEW.ONLY.NOTES authorization key 27
SOE.EXPORT.ALLOWED authorization key 27
SOE.FREIGHT.EDIT authorization key 27
SOE.GP.CONTROL.EDIT authorization key 27
SOE.HANDLING.EDIT authorization key 27
SOE.JM.EDIT.CUST.PO authorization key 27
SOE.KITS authorization key 27
SOE.MANIFEST.EDIT authorization key 27
SOE.MASTER.BID.EDIT authorization key 27
SOE.MAX.COLLECTION.DAYS authorization key 27
SOE.MAX.DISC authorization key 27
SOE.MAX.PRICE authorization key 27
SOE.MIN.GP authorization key 27
SOE.NONRETURN.PROCESS authorization key 27
SOE.OPEN.ORDER.EDIT authorization key 27
SOE.OPEN.PRC.EDIT authorization key 27
SOE.OPEN.QTY.EDIT authorization key 27
SOE.ORDER.PAD authorization key 27
SOE.ORDER.TO.BID authorization key 27
SOE.ORDER.TO.INVOICE authorization key 27
SOE.OVERRIDE.CLIENT.PRICE authorization key 27
SOE.OVRD.NO.PRC.CHANGE authorization key 27
SOE.PACKAGE.QTY authorization key 27
SOE.PAYMENT.APPLY authorization key 27
SOE.PAYMENT.EDIT authorization key 27

SOE.PAYMENT.TERMS.EDIT authorization key 27
SOE.PIL.DAYS.OVRD authorization key 27
SOE.PRINT.INVOICE authorization key 27
SOE.PROCESS.OPEN.SERS authorization key 27
SOE.PROGRESS.BILLING authorization key 27
SOE.REMOTE.REVIEW authorization key 27
SOE.REPRICE.BID.SELL.PRC authorization key 27
SOE.REPRINT.INVOICE authorization key 27
SOE.REPRINT.PICK.TICK authorization key 27
SOE.REPRINT.SHIP.TICK authorization key 27
SOE.RESERVE.ORDER.EDIT authorization key 27
SOE.RETURN.ALLOWED authorization key 27
SOE.RETURN.PROCESS authorization key 27
SOE.RGA.REQUIRED authorization key 27
SOE.SALES.SOURCE.EDIT authorization key 27
SOE.SALESPERSON.EDIT authorization key 27
SOE.SCHEDULE authorization key 27
SOE.SCHEDULE.TAGS authorization key 27
SOE.SINGLE.INVOICE authorization key 27
SOE.SOURCING authorization key 27
SOE.SPLIT.PRICING authorization key 27
SOE.TAX.EDIT authorization key 27
SOE.WRITER.EDIT authorization key 27
superuser authorization
about 2
U
user-defined
authorization keys

creating 5

V

view levels

order entry for users 17

W

what's new in the release

authorization keys 4