



SAP Business One

License User Types and Modules

Professional User License

- A Professional User has access rights to all core functionality within financials, sales, customers, and operations.
- This includes indirect access rights.

Limited CRM User

- This allows companies to manage sales opportunities from the first call from or to customers through to the desired purchase. Users will also have access to a variety of managerial reports such as the sales funnel report, leads utilization report, opportunity analyses, and more.
- The service functionalities enable companies to manage service processes such as service contracts, service calls, and tracking equipment at a customer site. Users have access to solution searches from a knowledge base within the system. In addition, users have access to operational and managerial reports.
- This includes indirect access rights.

Limited Financial User

- Routine activities are centered around creating journal entries and handling incoming and outgoing payments. A financial user cannot create or print sales invoices.
- This includes indirect access rights.

Limited Logistics User

- This enables all operational sales, purchasing, and warehousing activities. In addition, users will be able to maintain item and serial and batch data and to create inventory transactions and run inventory reports.
- This includes indirect access rights.

License Comparison Chart

The following chart details the access rights for the various SAP user licenses in the SAP Business One software.

Module/Functionality		Professional	Limited CRM	Limited Logistics	Limited Financial
Administration	Create new company	Full			
	Choose company	Full	Full	Full	Full
	Foreign currencies exchange rate	Full			Full
	System initialization	Full			
	Change Password	Full	Full	Full	Full
	Authorizations & data ownership	Full			
	System definitions	Full			
	Define user & sales employees	Full			
	License administration	Full	Full		
	Sales opportunities setting	Full			
	CRM service settings	Full	Full		
	Edit Chart of Accounts	Full			Full
	GL Account determination	Full			
	GL Account opening balance	Full			
	Approval procedures (stages, templates)	Full	Full		
	Approval procedures Reports	Full	Full	Full	Full
	Document settings (numbering, print preferences)	Full			
	BP settings	Full			
	Payment term settings	Full	Full		
	Financial settings	Full			
	Banking settings	Full			
	Inventory settings	Full			
	Data Import & Export	Full			
	Utilities	Full			
Restore	Full				
Add-on administration	Full				
Add-on manager	Full	Full	Full	Full	
Alerts management	Full	Full			
Messages/Alert Overview	Full	Full	Full	Full	
		Professional	Limited CRM	Limited Logistics	Limited Financial
Financials	chart of accounts	Full			Full
	Creating journal entries	Full			Full
	Journal vouchers	Full			Full
	Creating posting templates and recurring postings	Full			Full
	Creating reverse transactions	Full			Full
	exchange rate differences in JE	Full			Full
	Conversion differences	Full			Full
	Editing financial report templates	Full			Full
	Budget	Full			
	Cost Accounting	Full			
	Reposting control account of BP (APA)	Full			Full
	Financial reports	Full			Full
	Balance Sheet Report	Full			Full
	Trial Balance Report	Full			Full
Profit and Loss Report	Full			Full	
Document Journal Report	Full			Full	
		Professional	Limited CRM	Limited Logistics	Limited Financial
Sales Opportunities	Sales opportunities	Full	Full		
	Sales opportunities reports	Full	Full		
		Professional	Limited CRM	Limited Logistics	Limited Financial
Sales - A/R	Sales Quotations	Full	Full	View	
	Sales Order	Full	Full	Full	
	Delivery	Full	Full	Full	View
	SO to PO (Back to Back - PO confirm)	Full	Full	Full	
	Returns	Full	Full	Full	View
	Down Payment Request	Full		Full	
	Down Payment Invoice	Full	View	Full	View
	Down Payment on Order (US)	Full	Full	Full	View
	Invoice	Full	View	Full	View
	Invoice Payment	Full	View	Full	View
	Credit Memo	Full	View	Full	View
	Reserve Invoice	Full	View	Full	View

	Correction invoice/ reversal	Full	View	Full	View
	Dunning wizard	Full			Full
	Document generation wizard	Full		Full	
	A/R monthly invoice (APA)	Full		Full	View
	Exempt/Export/Debit memo (LA)	Full		Full	View
	Excise invoice (APA)	Full		Full	View
	Sales Reports	Full	Full	Full	
	Alternative items selection	Full	Full	Full	
	Change layout for document	Full	Full	Full	Full
	Open itmes list	Full	Full	Full	
	Document Printing	Full	Full	Full	
		Professional	Limited CRM	Limited Logistics	Limited Financial
Purchase - A/P	Purchase order	Full	Full	Full	View
	Good Receipt PO	Full		Full	View
	Reserve Invoice	Full	View	Full	View
	Down payment request	Full			Full
	Down payment invoice	Full			Full
	AP Invoice	Full			Full
	Good returns	Full		Full	View
	Credit memo	Full	View		Full
	PO correction invoice/ Reversal	Full	View	Full	View
	AP Monthly invoice (APA)	Full			Full
	Excise invoice (APA)	Full			Full
	Debit memo (LA)	Full			Full
	Purchase report	Full	Full	Full	
	Open items list	Full	Full	Full	
Landed costs	Full	Full		Full	
		Professional	Limited CRM	Limited Logistics	Limited Financial
Business Partner	Entering business partners data	Full	Full	Full	Full
	Activities	Full	Full	Full	Full
	Reconciling ²	Full			Full
	Business partners reports ²	Full	Full ¹	Full ¹	Full ¹
	Calender	Full	Full	Full	Full
		Professional	Limited CRM	Limited Logistics	Limited Financial
Banking	incoming and outgoing payments	Full			Full
	Depositing checks and credit card vouchers	Full			Full
	Reconciling bank statements	Full			Full
	Processing bank statements (BSP)	Full			Full
	Internal reconciliation	Full			Full
	Credit Cards management	Full			Full
	Checks management	Full			Full
	Managing Bills of Exchange	Full			Full
Automatic creation of payments (Wizard)	Full			Full	
		Professional	Limited CRM	Limited Logistics	Limited Financial
Inventory	Entering item data	Full	Full	Full	View
	Creating serial numbers and batches	Full		Full	
	Creating and updating price lists	Full	View	View	View
	all Inventory transactions	Full		Full	View
	Stock counting	Full		Full	View
	Cycle count	Full		Full	View
	Pick and Pack	Full		Full	
	Good issues	Full		Full	View
	Good Receipts	Full		Full	View
	Stock transfer	Full	Full	Full	View
	Inventory re-valuation	Full			View
	Inventory reports	Full	Full	Full	View ³
		Professional	Limited CRM	Limited Logistics	Limited Financial
Production	Defining BOM	Full		Full	
	Production Orders	Full		Full	View
	Receipt from production	Full		Full	View
	Issue from production	Full		Full	View
	Updating parent item prices	Full			
Production reports	Full	Full	Full		
		Professional	Limited CRM	Limited Logistics	Limited Financial
MRP	Defining production forecasts	Full			
	Generating recommendations	Full			
	Recommendation report	Full			
		Professional	Limited CRM	Limited Logistics	Limited Financial
CRM Service	Service calls	Full	Full		
	Tracking equipment	Full	Full		
	Creating service contracts	Full	Full		

	Knowledge base	Full	Full		
	Service reports	Full	Full		
		Professional	Limited CRM	Limited Logistics	Limited Financial
HR	Employees data	Full			
	HR reports	Full			
		Professional	Limited CRM	Limited Logistics	Limited Financial
Reports	Generating queries by user demands	Full	Full	Full	Full
	XLR	Full	Full	Full	Full
		Professional	Limited CRM	Limited Logistics	Limited Financial
General	Advanced (formatted) search	Full	Full	Full	Full
	User-defined fields	Full			
	User-defined tables	Full			
	User Menu	Full	Full	Full	Full
	User shortcuts	Full	Full	Full	Full
	Form Settings	Full	Full	Full	
	Message Alerts	Full	Full	Full	Full
	Drag & Relate	Full	Full	Full	Full

¹ In SAP Business One 2007 A the menu entries 'aging' and 'internal reconciliation' are not available to the limited CRM user

² This menu entry has been added in SAP Business One 2007

³ The view permissions only apply to the *inventory valuation report* and the *inventory audit report*.