

User Group Security Options

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There are User Group security options that control functions related to the Credit Request functionality. These security options are listed below with a definition of each option.

Credit Requests – Ability to create a Credit Request.

Ability to Change Assigned to on Credit Request – Ability to reassign a Credit Request to a different User when accessing a Credit Request from the Customer Explorer.

Ability to Change Assigned to on Credit Request List – Ability to see all Credit Requests regardless of whether the User created the Credit Request. The User will also be able to reassign the Credit Request to a different User. If this option is not selected, the User will not be able to view Credit Requests that were not created by or assigned to them.

Credit Memo – For Users that will have the authority to generate the Credit Memo from the Credit Request, this security option must be selected. For the Users that will not be able to generate the Credit Memo for the Credit Request, this security option must not be selected.

Ability to Credit Off Partial Invoice – Allows the User to create a Credit Request for an invoice that has been partially paid.

Ability to assign future auto apply for credit – Allows the User to select which types of future generated invoices the credit memo will automatically be applied to when the next invoice of the selected type(s) is saved (when using a Credit Template).