Required User Security in Sage 50 Quantum Accounting

MISys Transaction	Recommended User Security for Sage 50 Quantum	Required Minimum User Security for Sage 50 Quantum

Transfer To/From Sales	Company – Full COM & DDE Data Access in Tasks section
	Company – File Import/Export – Full Access
	Company – (for Jobs only) Maintenance Jobs – Full Access
	Vendors & Purchases – Full Access
	Inventory & Services – Full Access
	Banking & General Ledger – Full Access
		Company
		• Tasks
		  o COM & DDE Data Access – Full Access
		• File
		  o Import/Export – Full Access
		Vendors & Purchases
		• Maintenance
		  o Vendor Information – Add
		Inventory & Services
		• Maintenance
		  o Inventory Item Info – View Only
		• Tasks
		  o Inventory Adjustments – Full Access
		Banking & General Ledger
		• Maintenance
		  o Chart of Accounts – View Only
		Company (for Jobs only)
		• Maintenance
		  o Jobs – Full Access

PO Invoice	Company – Full COM & DDE Data Access in Tasks section
	Company – File Import/Export – Full Access
	Company – (for Jobs only) Maintenance Jobs – Full Access
	Vendors & Purchases – Full Access
	Banking & General Ledger – Full Access
		Company
		  ▪ Tasks
		     o COM & DDE Data Access – Full Access
		  ▪ File
		     o Import/Export – Full Access
		Vendors & Purchases
		  ▪ Tasks
		     o Purchase Orders – Full Access
		     o Vendor Credit Memos – Full Access
		Banking & General Ledger
		  ▪ Maintenance
		     o Chart of Accounts – View Only
		Company (for Jobs only)
		  ▪ Maintenance
		     o Jobs – Full Access

Period End	Company – Full COM & DDE Data Access in Tasks section
	Company – File Import/Export – Full Access
	(For transactions in prior periods) Company – File – Transactions in Prior Periods – Full Access
	Vendors & Purchases – Full Access
	Banking & General Ledger – Full Access
		Company
		  ▪ Tasks
		     o COM & DDE Data Access – Full Access
		     o (For transactions in prior periods) Transactions in Prior Periods – Full Access
		  ▪ File
		     o Import/Export – Full Access
		Vendors & Purchases
		  ▪ Maintenance
		     o Vendor Information – Add
		Banking & General Ledger
		  ▪ Maintenance
		     o Chart of Accounts – View Only
		  ▪ Tasks
		     o General Journal Entry – Add

Process Sales Orders	Company – Full COM & DDE Data Access in Tasks section
	Customers & Sales – Full Access
		Company
		  ▪ Tasks
		    o COM & DDE Data Access – Full Access
		Customers & Sales
		  ▪ Tasks
		    o Sales Orders/Proposals – View Only
		    o Sales/Invoicing – View Only

Initialize Schedule with Sales Orders/Quotes included, or Sales Inventory included	Company – Full COM & DDE Data Access in Tasks section
	Customers & Sales – Full Access
	Inventory & Services – Full Access
		Company
		  ▪ Tasks
		    o COM & DDE Data Access – Full Access
		Customers & Sales
		  ▪ Tasks
		    o Sales Orders/Proposals – View Only
		    o Sales/Invoicing – View Only
		Inventory & Services
		  ▪ Maintenance
		    o Inventory Item Info – View Only