

Accounting Integration Restrictions

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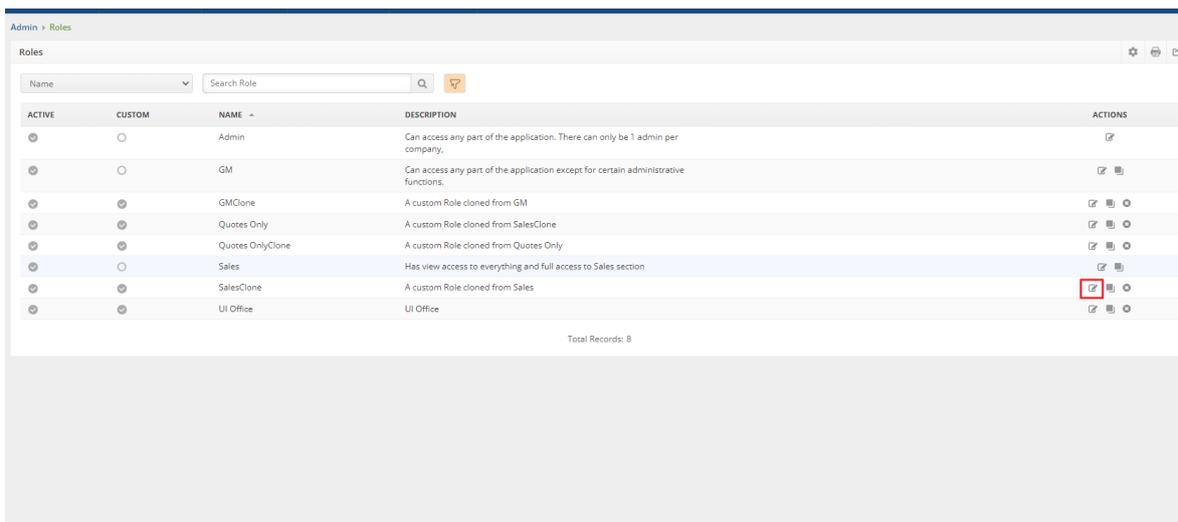
Overview:

Control the ability of a User role to manage the Accounting Integration. This option is designed to Allow or prevent Roles to have the ability to Prevent Sync or Undo Sync on a transaction.

Solution:

To control a Role's ability to manage the accounting integration tool you will need to find and edit the Role. The Roles can only be managed by the Master Admin account.

Admin > Roles



The screenshot shows the 'Admin > Roles' page with a table of roles. The 'SalesClone' role is highlighted, and its 'Accounting Integration' checkbox is checked. The table has columns for 'ACTIVE', 'CUSTOM', 'NAME', 'DESCRIPTION', and 'ACTIONS'. The 'SalesClone' role is a custom role cloned from 'Sales' and has full access to the Sales section. The 'Accounting Integration' checkbox is checked, which is highlighted with a red box in the original image.

ACTIVE	CUSTOM	NAME	DESCRIPTION	ACTIONS
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Admin	Can access any part of the application. There can only be 1 admin per company.	
<input checked="" type="checkbox"/>	<input type="checkbox"/>	GM	Can access any part of the application except for certain administrative functions.	
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	GMClone	A custom Role cloned from GM	
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Quotes Only	A custom Role cloned from SalesClone	
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Quotes OnlyClone	A custom Role cloned from Quotes Only	
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Sales	Has view access to everything and full access to Sales section	
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	SalesClone	A custom Role cloned from Sales	
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	UI Office	UI Office	

Total Records: 8

Then make sure the box to manage the Accounting Integration is unchecked. This will prevent any Users assigned to this role from being able to manage the Accounting Integration tool to Prevent Sync, Allow Sync or Undo Sync.

Role-SalesClone

Name

SalesClone

Description

A custom Role cloned from Sales

Active

Role can manage profile lists

Role can edit activity history

Role can edit default doc number

Can manage accounting integration

Can manage EDI/Ecommerce integrations

Can allocate inventory to Sales Orders

PO Limit

General

Sales

Purchasing

Production

Warehouse

IP Restrictions

Time Of Day Restrictions

TYPE	VIEW	CREATE	EDIT	PRINT/EXPORT
Import	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Attachment	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>