CRM for Outlook: SAP B1 Licence Requirements & User Permissions

SAP B1 Licence Requirements

CRM for Outlook requires an SAP Business Licence in order to function. The module can run alongside any type of SAP Business One license, including an Indirect User, but the restrictions that apply to the SAP B1 user type will also apply to CRM for Outlook user (e.g. if the user can view but not edit data in SAP Business One then the same will apply).

Similarly, if the SAP Business One installation in question doesn't have a certain function (e.g. Activity), then you can't run this function from CRM for Outlook.

User Permissions

If your SAP Business One installation has bespoke user permissions set up (e.g. with the B1 Usability Pack) then these permissions will not be carried across into CRM for Outlook. Instead, these permissions can be set up on the Boyum portal.

The following are screenshots of the options available for these permissions:

Create Absence
Create Activity
Create Business Partners
Create Contact Person
Create Customers
Create Leads
Create Sales Opportunity
Create Service Call
Create Suppliers
Create Tracking
Link Contact
Report Group 1

Report Group 9
Update Business partner
Update Contact person
Update UDF
View A/P invoice
View A/P order
View A/P Quotation
View A/R invoice
View A/R order
View A/R Quotation
View Absence
View Activity

View BP Balance
View Confidential Employee Information
View Customer
View Deliveries
View Incoming Payments
View KPIs
View Leads
View Outgoing Payments
View Sales Opportunities
View Service calls
View Suppliers
View Top 5 Items
View Tracking
View UDFs