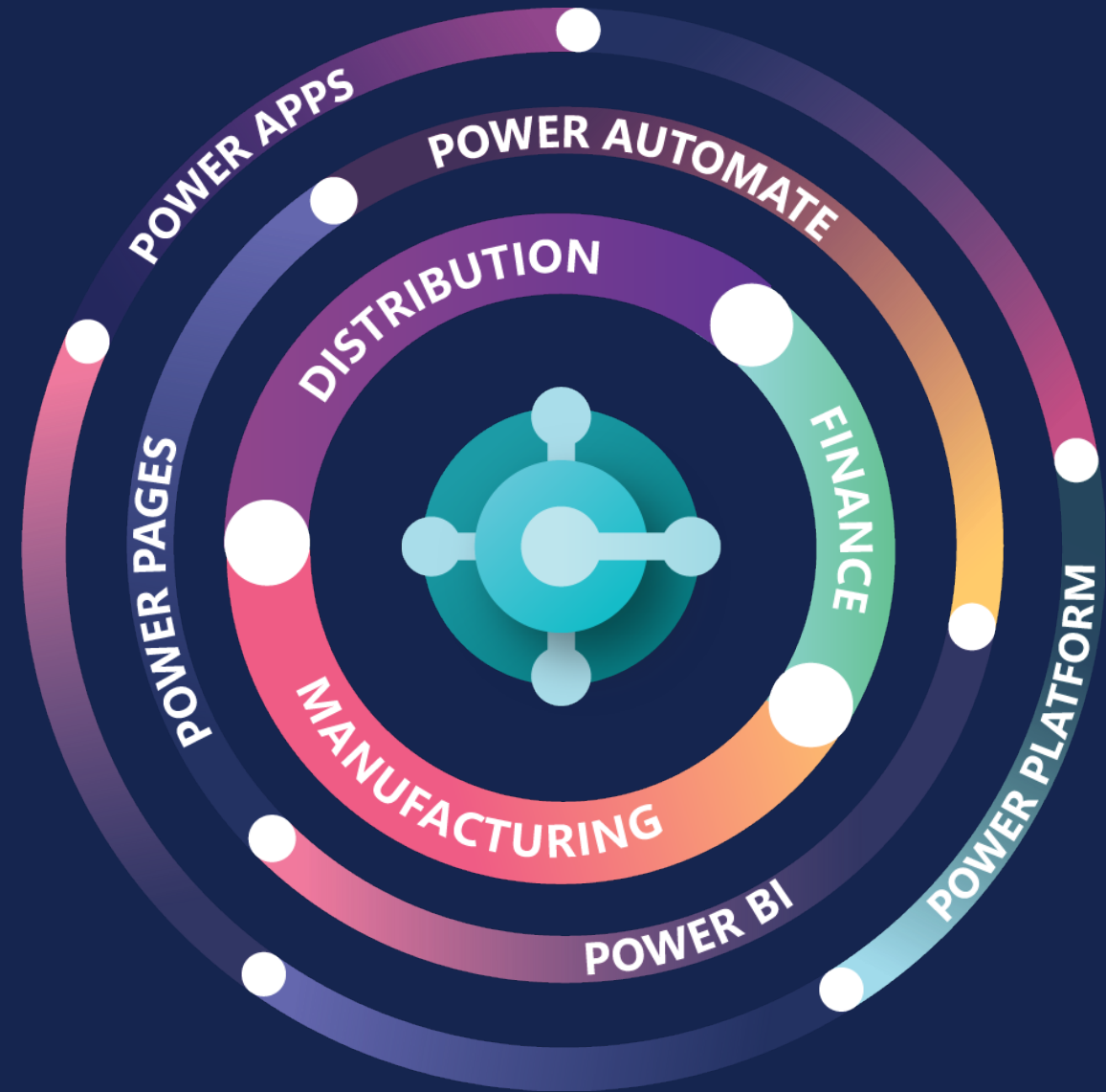


BUSINESS CENTRAL connect

Demystifying Permissions
(Understanding Permissions
and Lessons Learned)

18th & 19th NOVEMBER 2025



What we'll cover

Agenda

1. Permissions – the basics
2. The common problems
3. Quick wins
4. Going further with system security using Profiles





Permissions out of the box

Dynamics 365 Business Central Essential				
Permission Set	Description	Company	Extension Name	Permission Scope
AUTOMATE - EXEC	Automate - Exec	(first company sign-in)	System Application	System
D365 BUS FULL ACCESS	Dyn. 365 Full Business Acc.	(first company sign-in)	Base Application	System
EXCEL EXPORT ACTION	D365 Excel Export Action	(first company sign-in)	System Application	System
LOCAL	Country/region-specific func.	(first company sign-in)	Base Application	System
LOGIN	Login access	(first company sign-in)	System Application	System
Dynamics 365 Business Central Premium				
Permission Set	Description	Company	Extension Name	Permission Scope
AUTOMATE - EXEC	Automate - Exec	(first company sign-in)	System Application	System
D365 BUS PREMIUM	Dyn. 365 Prem. Bus. Full Acc.	(first company sign-in)	Base Application	System
EXCEL EXPORT ACTION	D365 Excel Export Action	(first company sign-in)	System Application	System
LOCAL	Country/region-specific func.	(first company sign-in)	Base Application	System
LOGIN	Login access	(first company sign-in)	System Application	System
Dynamics 365 Business Central Team Member				
Permission Set	Description	Company	Extension Name	Permission Scope
AUTOMATE - EXEC	Automate - Exec	(first company sign-in)	System Application	System
D365 READ	Dyn. 365 Read access all	(first company sign-in)	Base Application	System
D365 TEAM MEMBER	Dynamics 365 Team Member	(first company sign-in)	Base Application	System
EXCEL EXPORT ACTION	D365 Excel Export Action	(first company sign-in)	System Application	System
LOCAL	Country/region-specific func.	(first company sign-in)	Base Application	System
LOGIN	Login access	(first company sign-in)	System Application	System

What's good/bad about out of the box permission?

Good:

Let users do EVERYTHING they need to do on the system without **standard** errors!

Bad:

- Users can do EVERYTHING, including what they shouldn't do
 - Setup Pages
 - Edit Master data
 - See everything
 - Bank Details, Balance & Entries
 - All GL Balances & Entries
- Can *technically* delete companies
- No Apps/extensions! So **can cause errors**
- Even the more 'restrictive' out of the box sets tend to give more permissions than wanted

But how do they really work?

- Level of access to data, which give access to associated pages on BC
 - Or simply, what can a user do on a page
- Just a bunch of 'yes's for could a user do something
- Permission Sets assigned against users
 - If **ANY** set a user has lets them do something, it won't matter if the others say they shouldn't, they **WILL** be able to do this (we'll come back to this)

Permission Set



✓ Saved

_BC EXAMPLE (Tenant)

View all permissions | Actions Fewer options

General

Permission Set _BC EXAMPLE

Name

Permissions

Manage Allow Read Allow Insert Allow Modify Allow Delete Allow Execute Allow All



New Line Delete Line Select Objects... Add Read Permission to Related Tables



Type	Object Type ↑	Object ID ↑	Object Name	Object Caption	Read Permission	Insert Permission	Modify Permission	Delete Permission
→ Include	Table Data	23	Vendor	Vendor	Yes			
Exclude	Table Data	91	User Setup	User Setup			Exclude	
Exclude	Table Data	93	Vendor Posting Group	Vendor Posting Group		Exclude	Exclude	Exclude
Exclude	Table Data	94	Inventory Posting Group	Inventory Posting Group		Exclude	Exclude	Exclude
Exclude	Table Data	98	General Ledger Setup	General Ledger Setup		Exclude	Exclude	Exclude
Exclude	Table Data	189	VAT Setup	VAT Setup		Exclude	Exclude	Exclude
Exclude	Table Data	230	Source Code	Source Code		Exclude	Exclude	Exclude
Exclude	Table Data	242	Source Code Setup	Source Code Setup		Exclude	Exclude	Exclude
Exclude	Table Data	250	Gen. Business Posting Group	Gen. Business Posting Group		Exclude	Exclude	Exclude
Exclude	Table Data	251	Gen. Product Posting Group	Gen. Product Posting Group		Exclude	Exclude	Exclude

Permission Sets ▾

Type ↑	Permission Set ↑	Name	Scope
→ Include	D365 ASSEMBLY, VIEW	Dynamics 365 View asse...	System
Include	D365 BASIC	Dynamics 365 Basic access	System
Include	D365 CUSTOMER, EDIT	Dynamics 365 Create cus...	System

Result ▾

Permission Set	Name	Scope	Inclusion Status
→ D365 ASSEMBLY, VIEW	Dynamics 365 Vi...	System	Full
> D365 BASIC	Dynamics 365 B...	System	Partial
> D365 CUSTOMER, EDIT	Dynamics 365 C...	System	Partial

But how do they really work?

General

Permission Set _BC EXAMPLE

Name

Permissions							 	
Manage Allow Read Allow Insert Allow Modify Allow Delete Allow Execute Allow All								
 New Line  Delete Line  Select Objects...  Add Read Permission to Related Tables								
Type		Object Name	Object Caption	Read Permission	Insert Permission	Modify Permission	Delete Permission	
→ Include		Vendor	Vendor	<u>Yes</u>	-	-	-	
Exclude		User Setup	User Setup			Exclude		
Exclude		Vendor Posting Group	Vendor Posting Group		Exclude	Exclude	Exclude	
Exclude		Inventory Posting Group	Inventory Posting Group		Exclude	Exclude	Exclude	
Exclude		General Ledger Setup	General Ledger Setup		Exclude	Exclude	Exclude	
Exclude		VAT Setup	VAT Setup		Exclude	Exclude	Exclude	
Exclude		Source Code	Source Code		Exclude	Exclude	Exclude	
Exclude		Source Code Setup	Source Code Setup		Exclude	Exclude	Exclude	
Exclude		Gen. Business Posting Group	Gen. Business Posting Group		Exclude	Exclude	Exclude	
Exclude		Gen. Product Posting Group	Gen. Product Posting Group		Exclude	Exclude	Exclude	

But how do they really work?

Permissions							
Manage Allow Read Allow Insert Allow Modify Allow Delete Allow Execute Allow All							
New Line Delete Line Select Objects... Add Read Permission to Related Tables							
Type	Object Type ↑	Object ID ↑	Object Name	Object Caption	Read Permission	Insert Permission	Modify Permission
→ Include	⋮	Table Data	15	G/L Account	G/L Account	Yes	Indirect
Exclude		Table Data	18	Customer	Customer	Exclude	
Exclude		Table Data	23	Vendor	Vendor	Exclude	
Exclude		Table Data	91	User Setup	User Setup	Exclude	Exclude
Exclude		Table Data	92	Customer Posting Group	Customer Posting Group	Exclude	Exclude
Exclude		Table Data	93	Vendor Posting Group	Vendor Posting Group	Exclude	Exclude
Exclude		Table Data	94	Inventory Posting Group	Inventory Posting Group	Exclude	Exclude
Exclude		Table Data	98	General Ledger Setup	General Ledger Setup	Exclude	Exclude
Exclude		Table Data	189	VAT Setup	VAT Setup	Exclude	Exclude
Exclude		Table Data	230	Source Code	Source Code	Exclude	Exclude

But how do they really work?

Permission Sets 

Type ↑		Permission Set ↑	Name	Scope
→ <u>Include</u>	:	D365 ASSEMBLY, VIE...	Dynamics 365 View as...	System
Include	:	D365 BASIC	Dynamics 365 Basic a...	System
Include		D365 CUSTOMER, E...	Dynamics 365 Create ...	System
Include		D365 CUSTOMER, VI...	Dynamics 365 View c...	System
Include		D365 HR, VIEW	Dynamics 365 View B...	System
Include		D365 INV DOC, CRE...	Dyn. 365 Create inven...	System
Include		D365 INV DOC, POST	Dyn. 365 Post invento...	System

Result ▾

	Permission Set		Name	Scope	Inclusion Status
→	<u>D365 ASSEMBLY, VIEW</u>	:	Dynamics 365 Vi...	System	Full
>	D365 BASIC		Dynamics 365 B...	System	Partial
>	D365 CUSTOMER, EDIT		Dynamics 365 C...	System	Partial
	D365 CUSTOMER, VIEW		Dynamics 365 Vi...	System	Full
	D365 HR, VIEW		Dynamics 365 Vi...	System	Full
	D365 INV DOC, CREATE		Dyn. 365 Create ...	System	Full
	D365 INV DOC, POST		Dyn. 365 Post invento...	System	Full

But how do they really work?

- Permission Sets can be assigned manually to a user
 - (Or automatically via Security Groups)

User Card

✓ Saved

Bianca Pisani

Effective Permissions

Send Email

Sent Emails

Actions

Automate

Fewer options

General

Show more

User Name

BIANCAP

Contact Email

Full Name

Bianca Pisani

Microsoft 365

Status

Active

Authentication Email

BiancaP@M365x66183398.OnMicrosoft.com

Authentication Status

Active

User Permission Sets

New Line

Delete Line

Permissions

Permission Set ↑	Description	Company ↑	Extension Name	Permission Scope
AUTOMATE - EXEC	Automate - Exec	CRONUS UK Ltd.	System Application	System
D365 BUS PREMIUM	Dyn. 365 Prem. Bus. Ful...	CRONUS UK Ltd.	Base Application	System
EXCEL EXPORT ACT...	D365 Excel Export Action	CRONUS UK Ltd.	System Application	System
LOCAL	Country/region-specific...	CRONUS UK Ltd.	Base Application	System
→ LOGIN	Login access	CRONUS UK Ltd.	System Application	System
TROUBLESHOOT T...	Troubleshoot Tools	CRONUS UK Ltd.	System Application	System
_BC EXAMPLE				Tenant
SUPER	This role has all permis...			System



The common problems

Common problems

- All/many users are Super!
- Lot's of permission sets against a user muddy the water, causes any work to be overwritten
- Users lacking access to apps
- 'Where do we start?'
- 'We get too many errors'

Common problems

- Here's an example of bad setup:

User Card

✓ Saved

Bianca Pisani

Effective Permissions

Send Email

Sent Emails

Actions ▾

Automate ▾

Fewer options

General

Show more

User Name

BIANCAP

Full Name

Bianca Pisani

Status

Active ▾

Contact Email

Microsoft 365

Authentication Email

BiancaP@M365x66183398.OnMicrosoft.com

Authentication Status

Active

User Permission Sets

New Line

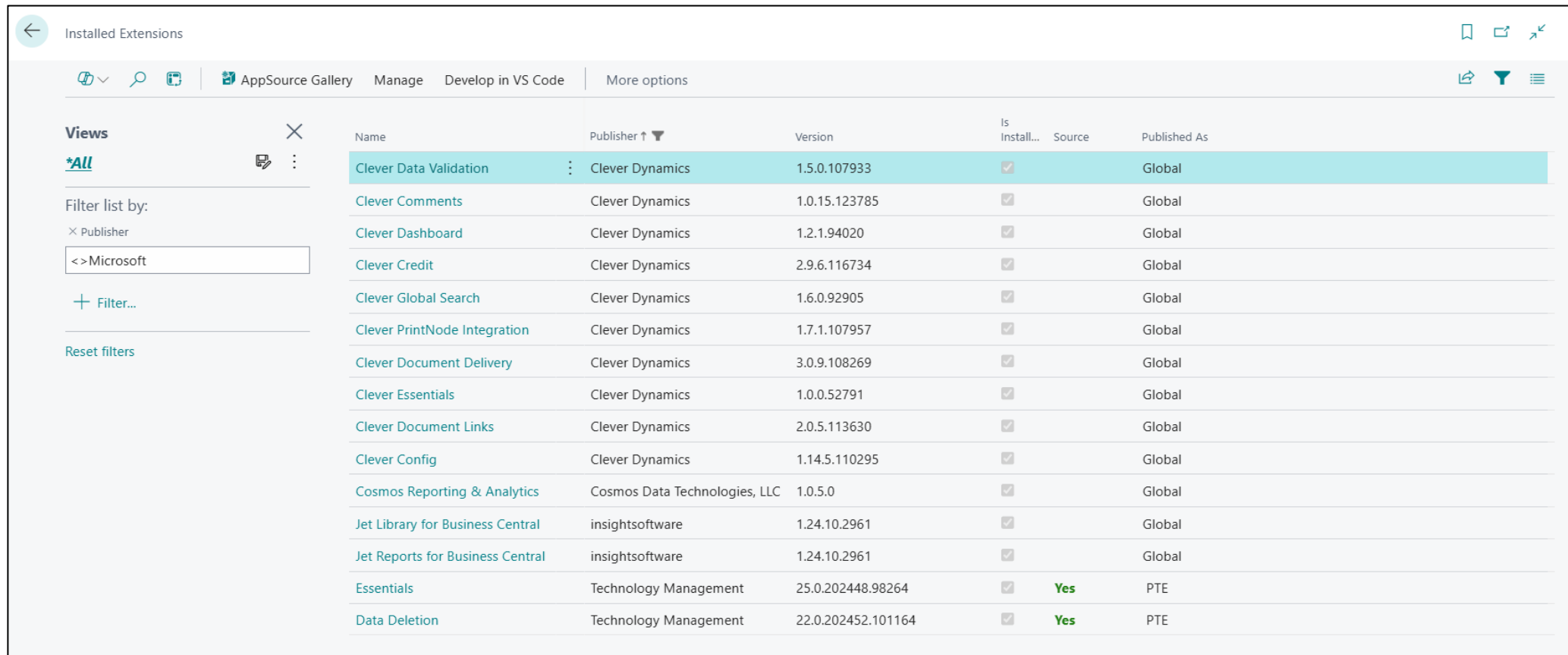
Delete Line

Permissions

Permission Set ↑	Description	Company ↑	Extension Name	Permission Scope
AUTOMATE - EXEC	Automate - Exec	CRONUS UK Ltd.	System Application	System
D365 BUS PREMIUM	Dyn. 365 Prem. Bus. Ful...	CRONUS UK Ltd.	Base Application	System
EXCEL EXPORT ACT...	D365 Excel Export Action	CRONUS UK Ltd.	System Application	System
LOCAL	Country/region-specific...	CRONUS UK Ltd.	Base Application	System
→ LOGIN	Login access	CRONUS UK Ltd. ▾	System Application	System
TROUBLESHOOT T...	Troubleshoot Tools	CRONUS UK Ltd.	System Application	System
_BC EXAMPLE				Tenant
SUPER	This role has all permis...			System

Common problems

- Users lacking access to apps
 - Extension Management shows all installed apps/extensions (rule of thumb, the none-Microsoft ones)
 - Can cross reference these, the error messages, and Permission Sets to find matching



Name	Publisher ↑	Version	Is Install...	Source	Published As
Clever Data Validation	Clever Dynamics	1.5.0.107933	✓	Global	Global
Clever Comments	Clever Dynamics	1.0.15.123785	✓	Global	Global
Clever Dashboard	Clever Dynamics	1.2.1.94020	✓	Global	Global
Clever Credit	Clever Dynamics	2.9.6.116734	✓	Global	Global
Clever Global Search	Clever Dynamics	1.6.0.92905	✓	Global	Global
Clever PrintNode Integration	Clever Dynamics	1.7.1.107957	✓	Global	Global
Clever Document Delivery	Clever Dynamics	3.0.9.108269	✓	Global	Global
Clever Essentials	Clever Dynamics	1.0.0.52791	✓	Global	Global
Clever Document Links	Clever Dynamics	2.0.5.113630	✓	Global	Global
Clever Config	Clever Dynamics	1.14.5.110295	✓	Global	Global
Cosmos Reporting & Analytics	Cosmos Data Technologies, LLC	1.0.5.0	✓	Global	Global
Jet Library for Business Central	insightsoftware	1.24.10.2961	✓	Global	Global
Jet Reports for Business Central	insightsoftware	1.24.10.2961	✓	Global	Global
Essentials	Technology Management	25.0.202448.98264	✓	Yes	PTE
Data Deletion	Technology Management	22.0.202452.101164	✓	Yes	PTE

Common problems

- Users lacking access to apps

Permission Sets

clever

+ New Edit List Delete Permissions Copy Permission Set... Import Permission Sets

Permission Set ↑	Name	Type ↑	Extension Name
→ CLEVER APPS CCTMN	Clever Apps	System	Clever Config
CLEVER CMTS CCMTTMN	Clever Comments	System	Clever Comments
CLEVER CONFIG CCTMN	Clever Config	System	Clever Config
CLEVER CRED IND TMN	Clever Credit Indirect	System	Clever Credit
CLEVER CREDIT TMN	Clever Credit	System	Clever Credit
DASHBOARD CDSBTMN	Dashboard	System	Clever Dashboard
DATA V. USER CDVTTMN	Clever Data Validation (Basic)	System	Clever Data Validation
DATA VALID. CDVTTMN	Clever Data Validation	System	Clever Data Validation
DOC. DELIVERY CDDTMN	Clever Document Delivery	System	Clever Document Delivery
DOC. LINKS CDLTMN	Clever Doc Links	System	Clever Document Links

Permission Sets

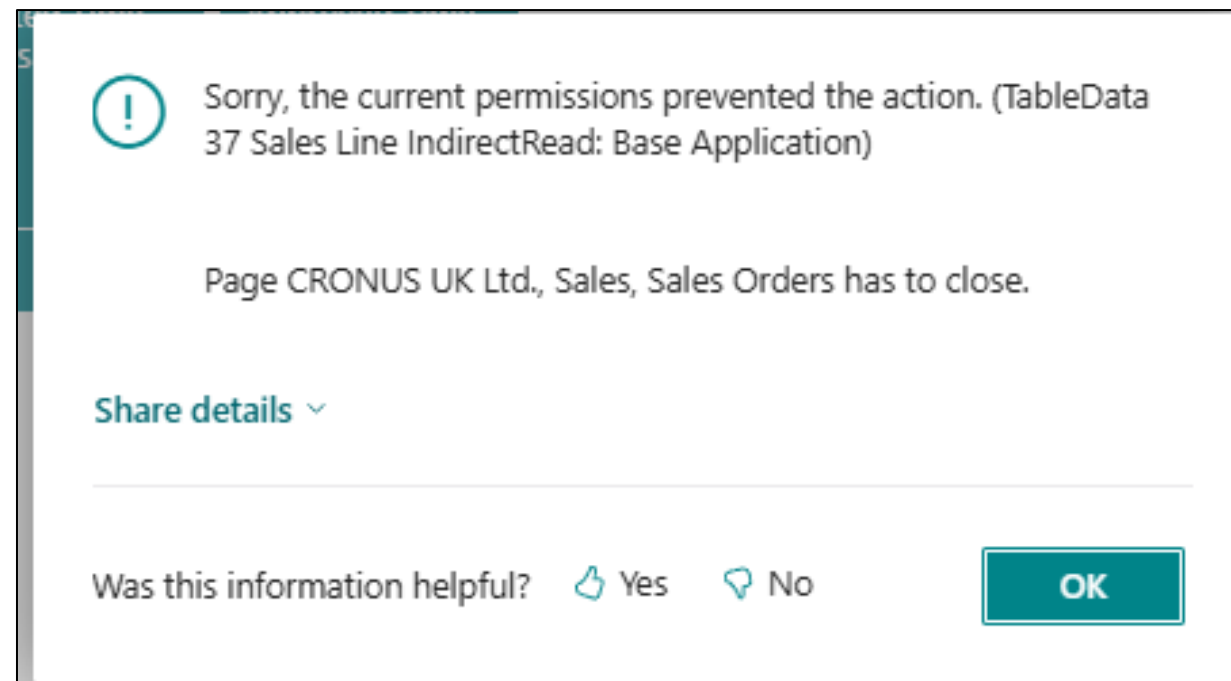
esse

+ New Edit List Delete Permissions Copy Permission Set... Import Permission Sets Export Permission Sets

Permission Set ↑	Name	Type ↑	Extension Name
→ ESSENTIALS TM9B92	ESSENTIALS TM9B92	System	Essentials

Common problems

- Error Messages are good! They give the solution to the problem
 - We need to find and give TableData 37 – Sales Line Read.
 - Or find a Permission Set including this (more on this later)





Quick wins!

Three quick approaches to tidy up Permissions

1. Consolidate what you already have
2. Use the default Business Central permission set alongside extensions
3. Only give focused permissions (this one's less quick)

1 - Quick Consolidation w/Exclusions

- Is it perfect? No
- Is it a first step that lets you build in Excludes? Yes!
- Copy a user's permissions (not Super!) into the bottom left of a new Permission Set, and build in standard Excludes
- Replace the multiple permissions with this one Consolidated Set.

Quick Consolidation w/Exclusions

User Card

Bob Sherunkle

Effective Permissions Send Email Sent Emails More options

General

Bob Sherunkle

BOB

bob@TrainingTecManDemos.co.uk

Active

Microsoft 365

Active

User Permission Sets

Permission Set ↑	Description	Company ↑	Extension Name	Permission Scope
D365 CUSTOMER, EDIT	Dynamics 365 Create custom...		Base Application	System
D365 ASSEMBLY, VIEW	Dynamics 365 View assembly		Base Application	System
D365 WHSE, VIEW	Dynamics 365 View warehouse		Base Application	System
D365 SALES	Post sales documents		Base Application	System
D365 VENDOR, EDIT	Dynamics 365 Create vendors		Base Application	System
D365PREM MFG, VIEW	Dyn. 365 View manufacturing		Base Application	System
D365 READ	Dyn. 365 Read access all		Base Application	System
D365 BASIC	Dynamics 365 basic access		Base Application	System
CLEVER CONFIG CCTMN	Clever Config		Clever Config	System
CLEVER CREDIT TMN	Clever Credit		Clever Credit	System

Combine a user's (many) permissions into one set. Great if this setup works for a job role!

Permission Set

_BC CONNECT 1 (Tenant)

View all permissions More options

Permissions Manage Allow Read Allow Insert Allow Modify Allow Delete Allow Execute Allow All

New Line Delete Line Select Objects... Add Read Permission to Related Tables

Type	Object Type	Object ID ↑	Object Name	Object Caption	Read Permission	Insert Permission
→ Include	Table Data	0	All objects of type Table Data	All objects of type Table Data	Yes	

Permission Sets

Ty...	Permission Set ↓	Name	Scope
Incl...	D365 SALES	Post sales documents	System
Incl...	D365 READ	Dyn. 365 Read acces...	System
Incl...	D365 CUSTOMER, EDIT	Dynamics 365 Creat...	System
Incl...	D365 BASIC	Dynamics 365 Basic ...	System
Incl...	D365 ASSEMBLY, VIEW	Dynamics 365 View ...	System
Incl...	CLEVER CREDIT TMN	Clever Credit	System
Incl...	CLEVER CONFIG CCTMN	Clever Config	System
Incl...	CLEVER CMTS CCMTMN	Clever Comments	System

Result

Permission Set	Name	Scope	Inclusion
→ > CLEVER APPS CCTMN	Clever Apps	System	Full
CLEVER CMTS CCMTMN	Clever Comments	System	Full
CLEVER CONFIG CCTMN	Clever Config	System	Full
CLEVER CREDIT TMN	Clever Credit	System	Full
D365 ASSEMBLY, VIEW	Dynamics 365 V...	System	Full
> D365 BASIC	Dynamics 365 B...	System	Full

Quick Consolidation w/Exclusions

Permission Set

✓ Saved

_BC CONNECT 1 (Tenant)

View all permissions

More options

General

Permission Set

_BC CONNECT 1

Name

Consolidated Set

Permissions

Manage

Allow Read

Allow Insert

Allow Modify

Allow Delete

Allow Execute

Allow All

New Line

Delete Line

Select Objects...

Add Read Permission to Related Tables

Type	Object Type	Object ID	Object Name	Object Caption	Read Permission	Insert Permission
Exclude	Table Data	313	Inventory Setup	Inventory Setup		Exclude
Exclude	Table Data	314	Resources Setup	Resources Setup		Exclude
Exclude	Table Data	315	Jobs Setup	Projects Setup		Exclude
Exclude	Table Data	323	VAT Business Posting Group	VAT Business Posting Group		Exclude
Exclude	Table Data	324	VAT Product Posting Group	VAT Product Posting Group		Exclude
Exclude	Table Data	325	VAT Posting Setup	VAT Posting Setup		Exclude
Exclude	Table Data	402	Change Log Setup	Change Log Setup		Exclude
Exclude	Table Data	743	VAT Report Setup	VAT Report Setup		Exclude
Exclude	Table Data	843	Cash Flow Setup	Cash Flow Setup		Exclude
Exclude	Table Data	905	Assembly Setup	Assembly Setup		Exclude

Add in Excludes for what you don't want that type of user to do. If this is the only set they have assigned, these will be effectively locking down our users quickly and easily.

2 - Using D365 BUS PREM/Full Access (default set)

- Opens up a lot of the system
- Guarantees for Core BC they can do whatever they need
- Exclusions on this will set up protection
- Simple to setup
- Great replacement if you're downgrading a user from Super permissions
- Make sure to include any apps/extension permissions
 - There's a set for Clever apps that gives access to all Clever apps

BUSINESS CEN

ecman

3 - Be more focused

- Same concept as previous, but rather than D365 BUS Premium/Full Access, use targeted sets that match a job role/system use
- If not using D365 BUS sets, add in D365 Basic
- Does require you to understand more about what the user does on the system and what a set may give access to.

Be more focused

Permission Set

✓ Saved

_BC CONNECT 3 (Tenant)

View all permissions

More options

Exclude	Table Data	91	User Setup	User Setup	Exclude
Exclude	Table Data	92	Customer Posting Group	Customer Posting Group	Exclude
Exclude	Table Data	93	Vendor Posting Group	Vendor Posting Group	Exclude
Exclude	Table Data	94	Inventory Posting Group	Inventory Posting Group	Exclude
Exclude	Table Data	98	General Ledger Setup	General Ledger Setup	Exclude
Exclude	Table Data	189	VAT Setup	VAT Setup	Exclude
Exclude	Table Data	230	Source Code	Source Code	Exclude
Exclude	Table Data	242	Source Code Setup	Source Code Setup	Exclude

Permission Sets

Ty...
↑

Permission Set ↑

Name

Scope

Incl...	D365 ACC. PAYABLE	Dynamics 365 Acco...	System
Incl...	D365 ACC. RECEIVABLE	Dyn. 365 Accounts r...	System
Incl...	D365 ASSEMBLY, VIEW	Dynamics 365 View ...	System
Incl...	D365 BANKING	Dynamics 365 Banki...	System
Incl...	D365 BASIC	Dynamics 365 Basic ...	System
Incl...	D365 CASH FLOW	Dynamics 365 Cash ...	System
Incl...	D365 COSTACC, EDIT	Dyn. 365 Edit Cost A...	System

Result

Permission Set

Name

Scope

Inclusion

→ > D365 ACC. PAYABLE	Dynamics 365 A...	System	Partia
> D365 ACC. RECEIVABLE	Dyn. 365 Accou...	System	Partia
D365 ASSEMBLY, VIEW	Dynamics 365 V...	System	Full
> D365 BANKING	Dynamics 365 B...	System	Partia
> D365 BASIC	Dynamics 365 B...	System	Partia
D365 CASH FLOW	Dynamics 365 C...	System	Partia

Easy Excludes!

- Exclude Table Data for essential areas you do not want a user to ever mess with
 - Setup pages
 - Bank information
 - Customer/Vendor/Item/Master data etc
- Exclude pages where things are vaguer and you want to just prevent access to core areas
 - Bank accounts
 - Chart of accounts
 - Users page
 - etc

	A	B	C	D	E	F	G	H	I	J	K	L
1												
2				Description: An example of the Include/Excludes that can be used to modify the default licence permissions to give a quick and effective lockdown of general users								
3				Rationale: Kept broad to allow holiday/absence cover deliberately, so suits the scenario where we don't care if they can see other parts of the system, just limit access to finance/banks and setup								
4				Instructions: Copy the required lines in to the main/middle section of your new permissions set, then review								
5												
6	Type	Object Type	Object ID	Object Name	Object Caption	Read Permission	Insert Permission	Modify Permission	Delete Permission	Execute P	Security Filter	Notes (don't include when copying!)
7	Include	Table Data	15	G/L Account	G/L Account	Yes	Indirect	Indirect	Indirect		G/L Account: No. 2=<LIMITED	INCLUDE: Will limit access to just the nominals that do not have "
8	Exclude	Table Data	18	Customer	Customer		Exclude		Exclude			EXCLUDE (if required): Removes the ability to create/insert a cu
9	Exclude	Table Data	23	Vendor	Vendor		Exclude		Exclude			EXCLUDE (if required): Removes the ability to create/insert a cu
10	Exclude	Table Data	91	User Setup	User Setup		Exclude	Exclude	Exclude			EXCLUDE: Setup pages are required for READ (so remains blank)
11	Exclude	Table Data	92	Customer Posting Group	Customer Posting Group		Exclude	Exclude	Exclude			EXCLUDE: Setup pages are required for READ (so remains blank)
12	Exclude	Table Data	93	Vendor Posting Group	Vendor Posting Group		Exclude	Exclude	Exclude			EXCLUDE: Setup pages are required for READ (so remains blank)
13	Exclude	Table Data	94	Inventory Posting Group	Inventory Posting Group		Exclude	Exclude	Exclude			EXCLUDE: Setup pages are required for READ (so remains blank)
14	Exclude	Table Data	98	General Ledger Setup	General Ledger Setup		Exclude	Exclude	Exclude			EXCLUDE: Setup pages are required for READ (so remains blank)
15	Exclude	Table Data	189	VAT Setup	VAT Setup		Exclude	Exclude	Exclude			EXCLUDE: Setup pages are required for READ (so remains blank)
16	Exclude	Table Data	230	Source Code	Source Code		Exclude	Exclude	Exclude			EXCLUDE: Setup pages are required for READ (so remains blank)
17	Exclude	Table Data	242	Source Code Setup	Source Code Setup		Exclude	Exclude	Exclude			EXCLUDE: Setup pages are required for READ (so remains blank)
18	Exclude	Table Data	250	Gen. Business Posting Group	Gen. Business Posting Group		Exclude	Exclude	Exclude			EXCLUDE: Setup pages are required for READ (so remains blank)
19	Exclude	Table Data	251	Gen. Product Posting Group	Gen. Product Posting Group		Exclude	Exclude	Exclude			EXCLUDE: Setup pages are required for READ (so remains blank)
20	Exclude	Table Data	252	General Posting Setup	General Posting Setup		Exclude	Exclude	Exclude			EXCLUDE: Setup pages are required for READ (so remains blank)
21	Exclude	Table Data	270	Bank Account	Bank Account		Exclude	Exclude	Exclude			Read permission must remain, required by Sales Order function
22	Exclude	Table Data	271	Bank Account Ledger Entry	Bank Account Ledger Entry	Reduce to indirect	Reduce to indirect	Reduce to indirect	Exclude			This prevents the user seeing bank balances, as the Balance Flow
23	Exclude	Table Data	273	Bank Acc. Reconciliation	Bank Acc. Reconciliation	Exclude	Exclude	Exclude	Exclude			EXCLUDE: Hides bank info from non finance users
24	Exclude	Table Data	274	Bank Acc. Reconciliation Line	Bank Acc. Reconciliation Line	Exclude	Exclude	Exclude	Exclude			EXCLUDE: Hides bank info from non finance users
25	Exclude	Table Data	275	Bank Account Statement	Bank Account Statement	Exclude	Exclude	Exclude	Exclude			EXCLUDE: Hides bank info from non finance users
26	Exclude	Table Data	276	Bank Account Statement Line	Bank Account Statement Line	Exclude	Exclude	Exclude	Exclude			EXCLUDE: Hides bank info from non finance users
27	Exclude	Table Data	277	Bank Account Posting Group	Bank Account Posting Group		Exclude	Exclude	Exclude			EXCLUDE: Hides bank info from non finance users
28	Exclude	Table Data	311	Sales & Receivables Setup	Sales & Receivables Setup		Exclude	Exclude	Exclude			EXCLUDE: Setup pages are required for READ (so remains blank)
29	Exclude	Table Data	312	Purchases & Payables Setup	Purchases & Payables Setup		Exclude	Exclude	Exclude			EXCLUDE: Setup pages are required for READ (so remains blank)
30	Exclude	Table Data	313	Inventory Setup	Inventory Setup		Exclude	Exclude	Exclude			EXCLUDE: Setup pages are required for READ (so remains blank)
31	Exclude	Table Data	314	Resources Setup	Resources Setup		Exclude	Exclude	Exclude			EXCLUDE: Setup pages are required for READ (so remains blank)
32	Exclude	Table Data	315	Jobs Setup	Jobs Setup		Exclude	Exclude	Exclude			EXCLUDE: Setup pages are required for READ (so remains blank)
33	Exclude	Table Data	323	VAT Business Posting Group	VAT Business Posting Group		Exclude	Exclude	Exclude			EXCLUDE: Setup pages are required for READ (so remains blank)
34	Exclude	Table Data	324	VAT Product Posting Group	VAT Product Posting Group		Exclude	Exclude	Exclude			EXCLUDE: Setup pages are required for READ (so remains blank)
35	Exclude	Table Data	325	VAT Posting Setup	VAT Posting Setup		Exclude	Exclude	Exclude			EXCLUDE: Setup pages are required for READ (so remains blank)
36	Exclude	Table Data	403	Change Log Setup	Change Log Setup		Exclude	Exclude	Exclude			EXCLUDE: Setup pages are required for READ (so remains blank)

<

>

Permissions excls (Genrl User)

Licence Permission sets

Tecman Mods

ISV-Clever

ISV-Jet

ISV-Continia

ISV-Cosmos

ISV-SANA

ISV-Shopify

+

Remember!

Useless if we do not set these against the user.

One Set with control, no conflicts!

User Card



✓ Saved 

Bob Sherunkle

 Effective Permissions

 Send Email

 Sent Emails

More options 

General

Show more

User Name

BOB

Contact Email

Full Name

Bob Sherunkle

Microsoft 365

Status

Active

Authentication Email

bob@TrainingTecManDemos.co.uk

Authentication Status

Active

User Permission Sets

 New Line

 Delete Line

 Permissions



Permission Set ↑	Description	Company ↑	Extension Name	Permission Scope
→ _BC CONNECT 1	Consolidated Set			Tenant

What Set contains a Permission I need?

- A permission Error always gives us a table ID and read/insert/modify/delete
- We can create a Permission Set for testing that combines all the permission sets in the system (bar a few)
- Excluding a Permission here will show us in the Results section what Sets on BC contain said permission
- Great for locating which Set(s) could be appropriate to give a user

[Business Central Troubleshoot: A Method to Fix Permission Errors](#)



Going further with security

Profiles! (Or Roles)

- Set against users, control appearance
- Can be used to either hide fields or lock fields from being edited
 - But can a user change their role to another where they can see/edit?

Profiles (Roles)									
Profiles (Roles): All ▾  ▾   + New Manage  Use as default profile  Copy profile...  Customise pages ...   									
Profile ID	Display Name ↑	Source	Role Centre ID	Enabled	Use as default profile	Show in Role Explorer			
_TM_GENERAL	_Tecman General User	(User-created)	9022	☒	☐	☐			
_TM_SOP	_Tecman Sales Team	(User-created)	9006	☒	☐	☐			
ACCOUNTANT	Accountant	Base Application	9027	☒	☐	☐			
ACCOUNTING MA...	Accounting Manager	Base Application	9001	☐	☐	☐			
AP COORDINATOR	Accounts Payable Coordinator	Base Application	9002	☐	☐	☐			
AR ADMINISTRAT...	Accounts Receivable Administrator	Base Application	9077	☒	☐	☐			

Profiles! (Or Roles)

Dynamics 365 Business Central

Environment: Production

Customising Tecman General User

Customer Card + Field

Clear customisation... Done Less

Customer Card

10000 · Adatum Corporation PLC

Home Approve Request Approval New Document Prices & Discounts Customer Report Credit Control

General Show more

No.	10000	...
Name	Adatum Corporation PLC	
Balance (LCY)	0.00	39,368.50
Balance (LCY) As Vendor	0.00	26,121.00
Balance Due (LCY)	0.00	
Credit Limit (LCY)	0.00	

Address & Contact Show more

Address

Address	Station Road, 21a	Phone No.	
Address 2		Mobile Phone No.	
Country/Region Code	GB	Email	robert.townes@contoso.com
City	Cambridge	Home Page	
County		Contact	
		Contact Name	Robert Townes

Add Field to Page

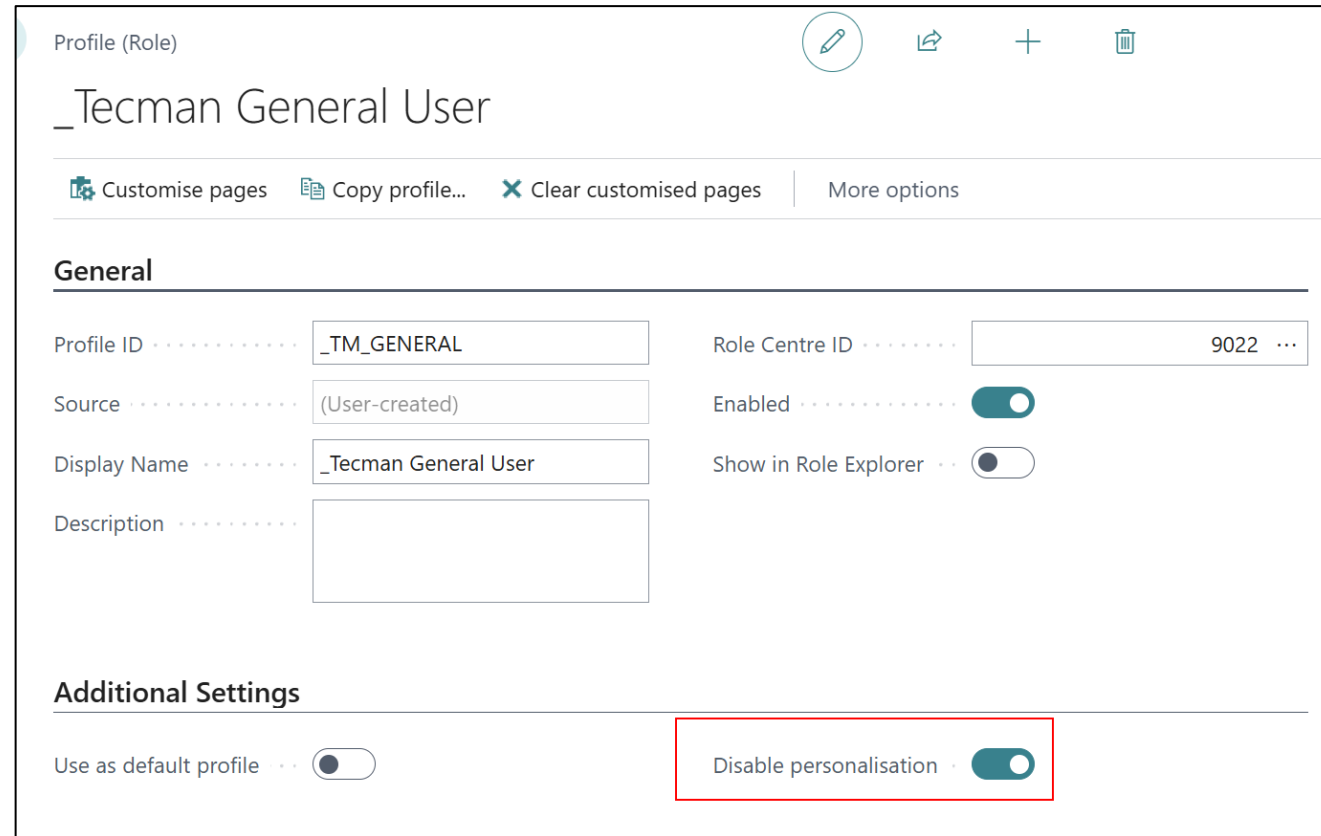
Place fields by dragging from the list to a position on the page.

All fields (Preview)

- Boolean: Allow Multiple Posting Groups
- Decimal: Amount
- Decimal: Balance
- Decimal: Balance (Credit Control)
- Decimal: Balance Due
- Integer: Bill-To No. of Blanket Orders
- Integer: Bill-To No. of Credit Memos
- Integer: Bill-To No. of Invoices
- Integer: Bill-To No. of Orders
- Integer: Bill-To No. of Pstd. Cr. Memos

Profiles! (Or Roles)

- If Hiding/Locking fields, be careful to ensure users can't
 - Swap profiles
 - Inspect data
 - **Personalise**



The screenshot shows the 'Profile (Role)' configuration page for '_Tecman General User'. The interface includes a top bar with icons for edit, share, add, and delete. Below the title, there are action links: 'Customise pages', 'Copy profile...', 'Clear customised pages', and 'More options'. The 'General' section contains fields for 'Profile ID' (set to '_TM_GENERAL'), 'Role Centre ID' (set to '9022'), 'Source' (set to '(User-created)'), 'Display Name' (set to '_Tecman General User'), and 'Description'. There are also toggle switches for 'Enabled' (checked) and 'Show in Role Explorer' (unchecked). The 'Additional Settings' section at the bottom has a 'Use as default profile' toggle (unchecked) and a 'Disable personalisation' toggle (checked), which is highlighted with a red rectangle.

Profile (Role)

_Tecman General User

Customise pages Copy profile... Clear customised pages More options

General

Profile ID _TM_GENERAL Role Centre ID 9022 ...

Source (User-created) Enabled ☒

Display Name _Tecman General User Show in Role Explorer ☐

Description

Additional Settings

Use as default profile ☐ Disable personalisation ☒

Profiles! (Or Roles)

- If Hiding/Locking fields, be careful to ensure users can't
 - Swap profiles
 - **Inspect data**
 - Personalise

Permission Set

_BC CONNECT 2 (Tenant)

View all permissions | More options

Type		Object ID ↑	Object Name	Object Caption	Read Permission	Insert Permission
Exclude	Table Data	99000765	Manufacturing Setup	Manufacturing Setup		Exclude
Exclude	Table Data	2000000006	Company	Company		Exclude
Exclude	Table Data	2000000073	User Personalization	User Personalisation		Exclude
Exclude	Table Data	2000000178	All Profile	All Profile		Exclude
Exclude	Table Data	2000000188	User Page Metadata	User Page Metadata		Exclude
Exclude	System	1350	Run table	Run table		
Exclude	System	1640	Delete a company	Delete a company		
→ Exclude	System	5330	Tools, Zoom	Tools, Zoom		-

Or simply make sure the user does not have the TROUBLESHOOT TOOLS set

Profiles! (Or Roles)

- If Hiding/Locking fields, be careful to ensure users can't
 - **Swap profiles**
 - Inspect data
 - Personalise

Permission Set ✎ 🔗 + 🗑️ ✓ Saved 🔍 ↶

_BC CONNECT 2 (Tenant)

🔍 View all permissions | More options

Type	Object ID	Object Name	Object Caption	Read Permission	Insert Permission
Exclude	Table Data	FA Setup	FA Setup		Exclude
Exclude	Table Data	5606 FA Posting Group	FA Posting Group		Exclude
Exclude	Table Data	5769 Warehouse Setup	Warehouse Setup		Exclude
Exclude	Table Data	5813 Inventory Posting Setup	Inventory Posting Setup		Exclude
Exclude	Table Data	99000765 Manufacturing Setup	Manufacturing Setup		Exclude
Exclude	Table Data	2000000006 Company	Company		Exclude
Exclude	Table Data	2000000073 User Personalization	User Personalisation		Exclude
Exclude	Table Data	2000000178 All Profile	All Profile		Exclude
Exclude	Table Data	2000000188 User Page Metadata	User Page Metadata		Exclude
Exclude	System	1350 Run table	Run table		
Exclude	System	1640 Delete a company	Delete a company		



Can this be taken even further?

Security Groups:

- Automatic Addition of Permission Set(s) to a user
- For best effect, requires the ability to have access to your Entra/Microsoft 365 Admin areas
- Only way to remove permissions given to a user this way would be to remove the user from the group, or remove the permission from the group itself

Security Groups

▼

+

New

▼

Delete

Members

Permissions

▼

More options

Code ↑

Name

SG-FINANCE

⋮

sg-Finance

SG-HR

sg-HR

SG-IT

sg-IT

SG-SALES AND MARKETI

sg-Sales and Marketing

Details

Attachments (0)

Permission Sets

Permission Set ↑

Company Name ↑

CLEVER APPS CCT...

⋮

D365 FINANCE

Members

User Name

ADELEV

⋮

CHRISTIEC

DIEGOS

CAMERONW

BUSINESS CENTRAL CONNECT 2025

tecman

License Configuration

- Simply put: What Permissions a brand-new user gets when added to BC
- Can be customised to specific sets
- Can have all sets removed
 - Meaning a New user will either get errors if not given permission sets manually, or assigned to a Security Group, stopping them ever having access to areas they should not

License Configuration

Licence Configuration

+

✓ Saved

Dynamics 365 Business Central Premium

✕ Customising permissions below will affect only newly created users who are assigned Dynamics 365 Business Central... ▾

👤 Users

⚙️ Business Central admin center

⚙️ Microsoft 365 admin center

More options

Licence Dynamics 365 Business Central Premium

Customise permissions ☒

Custom Permission Sets

⚙️ New Line

✕ Delete Line

Permission Set	Description	Company	Extension Name	Permission Scope
AUTOMATE -...	Automate - Exec	Cronus Training	System Application	System
→ D365 BUS PR...	Dyn. 365 Prem. ...	Cronus Training	Base Application	System
⚙️ New Line	D365 Excel Expo...	Cronus Training	System Application	System
✕ Delete Line	Country/region-...	Cronus Training	Base Application	System
☑ Select More	Delete the selected row	Cronus Training	System Application	System



Resources

	A	B	C	D	E	F	G	H	I	J	K	L
1												
2												
3				Description: An example of the Include/Excludes that can be used to modify the default licence permissions to give a quick and effective lockdown of general users								
4				Rationale: Kept broad to allow holiday/absence cover deliberately, so suits the scenario where we don't care if they can see other parts of the system, just limit access to finance/banks and setup								
5				Instructions: Copy the required lines in to the main/middle section of your new permissions set, then review								
6	Type	Object Type	Object ID	Object Name	Object Caption	Read Permission	Insert Permission	Modify Permission	Delete Permission	Execute P	Security Filter	Notes (don't include when copying!)
7	Include	Table Data	15	G/L Account	G/L Account	Yes	Indirect	Indirect	Indirect		G/L Account: No. 2=<LIMITED	INCLUDE: Will limit access to just the nominals that do not have "
8	Exclude	Table Data	18	Customer	Customer		Exclude		Exclude			EXCLUDE (if required): Removes the ability to create/insert a cu
9	Exclude	Table Data	23	Vendor	Vendor		Exclude		Exclude			EXCLUDE (if required): Removes the ability to create/insert a cu
10	Exclude	Table Data	91	User Setup	User Setup		Exclude	Exclude	Exclude			EXCLUDE: Setup pages are required for READ (so remains blank)
11	Exclude	Table Data	92	Customer Posting Group	Customer Posting Group		Exclude	Exclude	Exclude			EXCLUDE: Setup pages are required for READ (so remains blank)
12	Exclude	Table Data	93	Vendor Posting Group	Vendor Posting Group		Exclude	Exclude	Exclude			EXCLUDE: Setup pages are required for READ (so remains blank)
13	Exclude	Table Data	94	Inventory Posting Group	Inventory Posting Group		Exclude	Exclude	Exclude			EXCLUDE: Setup pages are required for READ (so remains blank)
14	Exclude	Table Data	98	General Ledger Setup	General Ledger Setup		Exclude	Exclude	Exclude			EXCLUDE: Setup pages are required for READ (so remains blank)
15	Exclude	Table Data	189	VAT Setup	VAT Setup		Exclude	Exclude	Exclude			EXCLUDE: Setup pages are required for READ (so remains blank)
16	Exclude	Table Data	230	Source Code	Source Code		Exclude	Exclude	Exclude			EXCLUDE: Setup pages are required for READ (so remains blank)
17	Exclude	Table Data	242	Source Code Setup	Source Code Setup		Exclude	Exclude	Exclude			EXCLUDE: Setup pages are required for READ (so remains blank)
18	Exclude	Table Data	250	Gen. Business Posting Group	Gen. Business Posting Group		Exclude	Exclude	Exclude			EXCLUDE: Setup pages are required for READ (so remains blank)
19	Exclude	Table Data	251	Gen. Product Posting Group	Gen. Product Posting Group		Exclude	Exclude	Exclude			EXCLUDE: Setup pages are required for READ (so remains blank)
20	Exclude	Table Data	252	General Posting Setup	General Posting Setup		Exclude	Exclude	Exclude			EXCLUDE: Setup pages are required for READ (so remains blank)
21	Exclude	Table Data	270	Bank Account	Bank Account		Exclude	Exclude	Exclude			Read permission must remain, required by Sales Order function
22	Exclude	Table Data	271	Bank Account Ledger Entry	Bank Account Ledger Entry	Reduce to indirect	Reduce to indirect	Reduce to indirect	Exclude			This prevents the user seeing bank balances, as the Balance Flow
23	Exclude	Table Data	273	Bank Acc. Reconciliation	Bank Acc. Reconciliation	Exclude	Exclude	Exclude	Exclude			EXCLUDE: Hides bank info from non finance users
24	Exclude	Table Data	274	Bank Acc. Reconciliation Line	Bank Acc. Reconciliation Line	Exclude	Exclude	Exclude	Exclude			EXCLUDE: Hides bank info from non finance users
25	Exclude	Table Data	275	Bank Account Statement	Bank Account Statement	Exclude	Exclude	Exclude	Exclude			EXCLUDE: Hides bank info from non finance users
26	Exclude	Table Data	276	Bank Account Statement Line	Bank Account Statement Line	Exclude	Exclude	Exclude	Exclude			EXCLUDE: Hides bank info from non finance users
27	Exclude	Table Data	277	Bank Account Posting Group	Bank Account Posting Group		Exclude	Exclude	Exclude			EXCLUDE: Hides bank info from non finance users
28	Exclude	Table Data	311	Sales & Receivables Setup	Sales & Receivables Setup		Exclude	Exclude	Exclude			EXCLUDE: Setup pages are required for READ (so remains blank)
29	Exclude	Table Data	312	Purchases & Payables Setup	Purchases & Payables Setup		Exclude	Exclude	Exclude			EXCLUDE: Setup pages are required for READ (so remains blank)
30	Exclude	Table Data	313	Inventory Setup	Inventory Setup		Exclude	Exclude	Exclude			EXCLUDE: Setup pages are required for READ (so remains blank)
31	Exclude	Table Data	314	Resources Setup	Resources Setup		Exclude	Exclude	Exclude			EXCLUDE: Setup pages are required for READ (so remains blank)
32	Exclude	Table Data	315	Jobs Setup	Jobs Setup		Exclude	Exclude	Exclude			EXCLUDE: Setup pages are required for READ (so remains blank)
33	Exclude	Table Data	323	VAT Business Posting Group	VAT Business Posting Group		Exclude	Exclude	Exclude			EXCLUDE: Setup pages are required for READ (so remains blank)
34	Exclude	Table Data	324	VAT Product Posting Group	VAT Product Posting Group		Exclude	Exclude	Exclude			EXCLUDE: Setup pages are required for READ (so remains blank)
35	Exclude	Table Data	325	VAT Posting Setup	VAT Posting Setup		Exclude	Exclude	Exclude			EXCLUDE: Setup pages are required for READ (so remains blank)
36	Exclude	Table Data	403	Change Log Setup	Change Log Setup		Exclude	Exclude	Exclude			EXCLUDE: Setup pages are required for READ (so remains blank)

< >

Permissions excls (Genrl User)

Licence Permission sets

Tecman Mods

ISV-Clever

ISV-Jet

ISV-Continia

ISV-Cosmos

ISV-SANA

ISV-Shopify

+

Strategy guide...Controlling user Permissions

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Please Note: There is an Excel file to accompany this booklet, this can be used to import some of the required lines, the file is "**Permissions – Exclude and Include for a general user.xlsx**"

Moving forward with permissions

Business Central has introduced several changes and new features to the Permissions security process in recent versions and is in the process of removing User Groups. This document introduces these in the context of outlining a potential process for effectively managing your users' permissions in the most practical way.

With recent versions of Business Central, many of the features previously found within User Groups have been combined into how Permission Sets now work, as well as new features that both make them easier to manage and give them greater potential than before. New BC environments now are created without User Groups.

Blogs!

- [Business Central Troubleshoot: A Method to Fix Permission](#)
- [Errors Business Central How-To: Locking First Text Field to Avoid Keyboard Mishaps](#)
- [Business Central How-To: Restricting Access to Sandbox Environments via Security Groups](#)

In review

What we covered:

1. Permissions – the basics
2. The common problems
3. Quick wins
4. Going further with system security using Profiles



Thank you.

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18th & 19th NOVEMBER 2025

