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**DS0157**  
**Salesperson Security**



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## Problem Definition

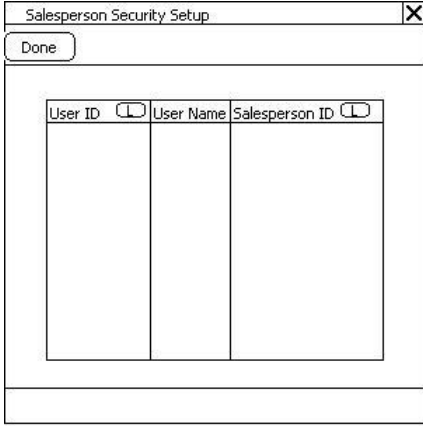
<b><i>Problem Definition</i></b>	<b>CCDA</b>
<p>ACMECO needs to restrict Salespeople's ability to view the Sales and Customer information for other Salespeople.</p> <p>Some security will be set using GP security, thereby completely removing access to a particular GP window. The following windows will be used by all Salespeople, and need to only display information that belongs to a given salesperson:</p> <ul style="list-style-type: none"> <li>• Sales Transaction Entry (Transactions &gt;&gt; Sales &gt;&gt; Sales Transaction Entry)</li> <li>• Print Sales Documents (Transactions &gt;&gt; Sales &gt;&gt; Print Sales Documents)</li> <li>• Customer Maintenance (Cards &gt;&gt; Sales &gt;&gt; Customer)</li> <li>• Customer Address Maintenance (Cards &gt;&gt; Sales &gt;&gt; Addresses)</li> <li>• Sales Order Processing Document Inquiry (Inquiry &gt;&gt; Sales &gt;&gt; Sales Documents)</li> <li>• Sales Order Processing Item Inquiry (Inquiry &gt;&gt; Sales &gt;&gt; Sales Items)</li> <li>• Customer Inquiry (Inquiry &gt;&gt; Sales &gt;&gt; Customer)</li> <li>• Customers and Prospects (The Customer Number Lookup)</li> <li>• Sales Document Numbers (The Sales Document Lookup)</li> </ul>	



## Solution Overview

<b><i>Solution Overview</i></b>	<b>CCDA</b>
<p>The SOP Security modification will be driven by a new User ID – Salesperson ID Setup window. Based on this relationship, the information that Users can see in different windows will be restricted.</p> <p>For example, in Sales Transaction Entry when a User creates a new transaction they will only see their Customers in the Customer Number Lookup. When looking up existing documents, the Lookup will only show their transactions, and the window will only scroll through their documents. From the user’s perspective it will appear as if their transactions are they only transactions in the system.</p> <p>All security changes will be applied at run-time through code, and will not require changes to windows (modified forms).</p>	

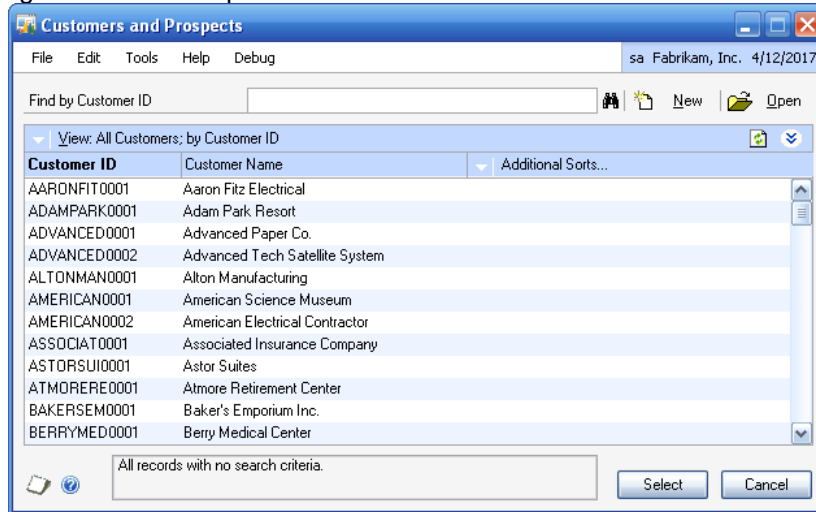
## Design Features

<b>Salesperson Security Setup</b>	<b>CCDA</b>										
<p>Salesperson Security Setup is used to create a relationship between a GP User ID and a Salesperson ID. This relationship drives all other security functionality in this module.</p> <p>The window is accessed from Tools &gt;&gt; Setup &gt;&gt; Sales &gt;&gt; Salesperson Security Setup.</p> <div data-bbox="520 602 940 1024" data-label="Image">  </div> <p data-bbox="562 1036 720 1057">☐ = Lookup Button</p> <p>If a User ID is assigned to a Salesperson ID, the Salesperson Security restrictions will be activated. If a User ID is NOT in this list, the user will be able to view ALL customer information.</p> <table border="1" data-bbox="191 1151 1272 1312"> <thead> <tr> <th>Field</th> <th>Function</th> </tr> </thead> <tbody> <tr> <td>User ID</td> <td>User enters a User ID, or selects a User ID from the Lookup</td> </tr> <tr> <td>User Name</td> <td>Displays the User Name</td> </tr> <tr> <td>Salesperson ID</td> <td>User enters a Salesperson ID, or selects one from the Lookup</td> </tr> <tr> <td>DONE</td> <td>Closes the window</td> </tr> </tbody> </table>	Field	Function	User ID	User enters a User ID, or selects a User ID from the Lookup	User Name	Displays the User Name	Salesperson ID	User enters a Salesperson ID, or selects one from the Lookup	DONE	Closes the window	
Field	Function										
User ID	User enters a User ID, or selects a User ID from the Lookup										
User Name	Displays the User Name										
Salesperson ID	User enters a Salesperson ID, or selects one from the Lookup										
DONE	Closes the window										

## Customers and Prospects Lookup

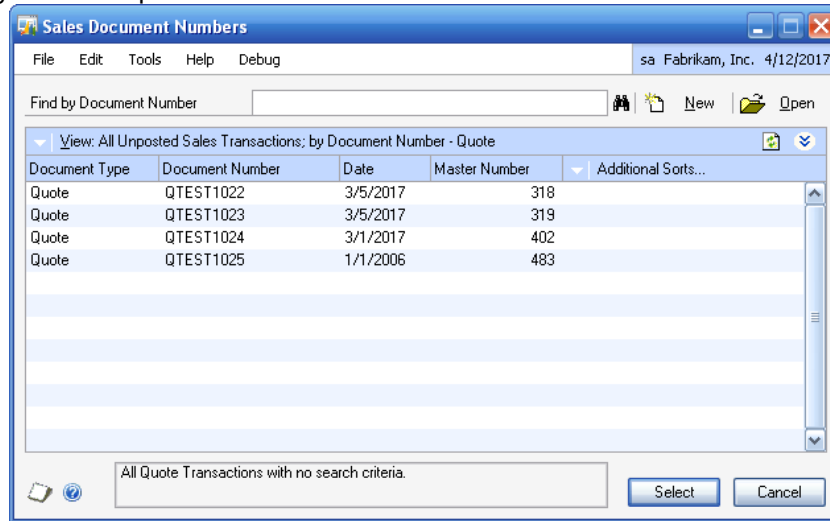
CCDA

The Customers and Prospects Lookup will be restricted so that it only displays Customers that are assigned to the Salesperson.



<b>Sales Document Numbers</b>	<b>CCDA</b>
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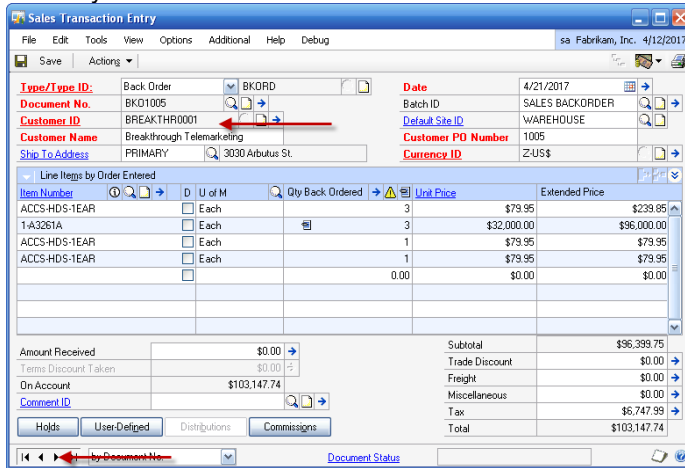
The Sales Document Numbers window will be restricted to only show documents assigned to the logged-in Salesperson ID.



## Sales Transaction Entry

CCDA

Sales Transaction Entry will be restricted so that the User can only enter a Customer ID that belongs to them. The Lookup will be restricted to only show their documents, and the Scrolling buttons will only scroll to their documents.



Also, if the User is assigned to a Salesperson, the Salesperson and Territory fields will be locked (uneditable) on Sales Customer Detail Entry (shown below).



Sales Customer Detail Entry

File Edit Tools Help Debug sa Fabrikam, Inc. 4/12/2017

Customer ID	BREAKTHR0001	Customer PO Number	1005
Name	Breakthrough Telemarketing	<input type="checkbox"/> Ship Complete Document	
Bill To Address ID	BILLING	Shipping Method	GROUND
Ship To Address ID	PRIMARY	Ship To Tax Schedule ID	CANALLGST-7
Display	<input checked="" type="radio"/> Bill To Address <input type="radio"/> Ship To Address	Price Level	RETAIL
		UPS Zone	
Name	Breakthrough Telemarketing	Payment Terms	Net 30
Contact	Marie Perry	Salesperson ID	FRANCINE B.
Address	15 Arbutus St	Territory ID	TERRITORY 5
		Tax Registration No.	
City	Montreal	Tax-Exempt 1	
State	PQ	Tax-Exempt 2	
ZIP Code	H3R 3T2		
Country Code			
Country	Canada		

Holdjs User Defined Customer Activity Period Year Payments

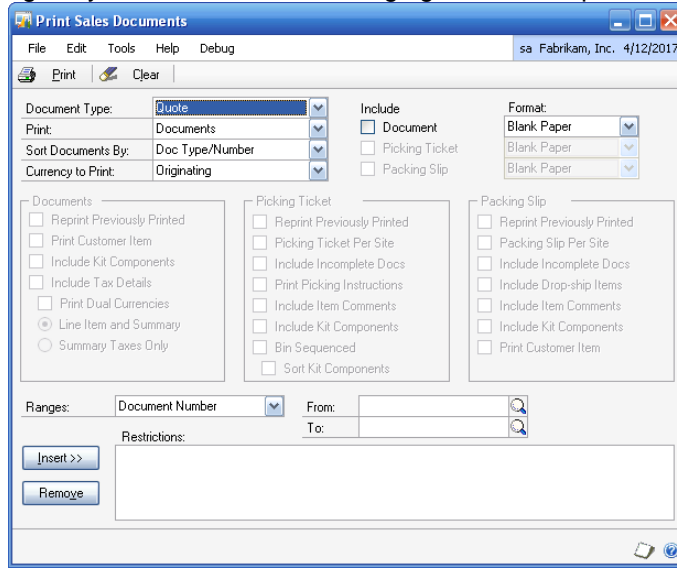
OK Cancel

Two red arrows point to the Salesperson ID and Territory ID fields.

## Print Sales Documents

CCDA

Print Sales Documents will be restricted so that regardless of the Ranges of documents selected for printing, only those documents belonging to the Salesperson will be printed.

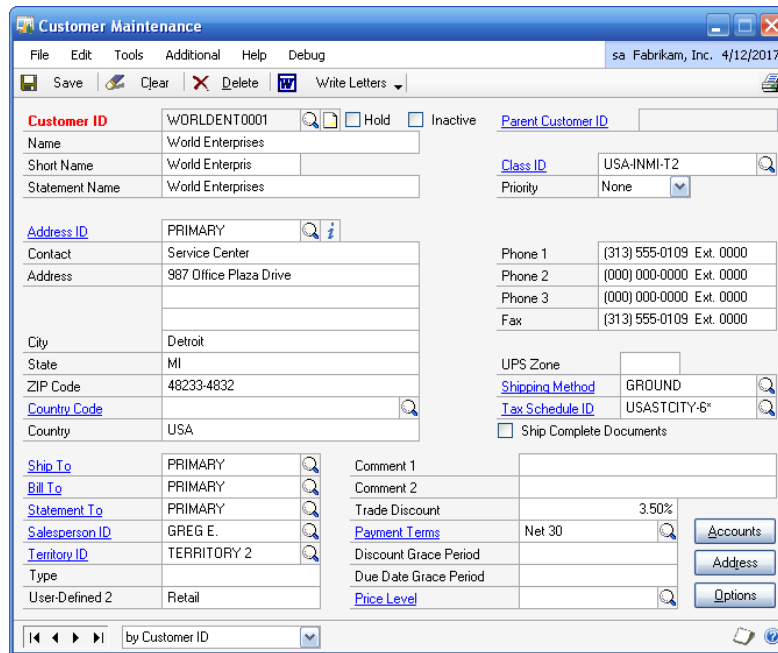


For example, if the Document Number range is ORD0001 to ORD0999, and only ORD0033 belongs to the Salesperson who is logged-in, then only that document will print. No controls will be put on the FROM and TO fields, so a user could enter a SOP Number that does not belong to them, however, only their documents will print.

## Customer Maintenance

CCDA

Customer Maintenance will be restricted so that (1) the user can only enter a Customer ID that belongs to them, (2) the Lookup only shows their customers, and (3) the Scrolling buttons only scroll through their customers. Additionally, the Salesperson ID and Territory ID fields will be locked.



The screenshot shows a software window titled "Customer Maintenance" with a menu bar (File, Edit, Tools, Additional, Help, Debug) and a toolbar (Save, Clear, Delete, Write Letters). The main area contains a form for customer information:

- Customer ID:** WORLDENT0001 (with search, hold, and inactive checkboxes). **Parent Customer ID:** (empty field).
- Name:** World Enterprises
- Short Name:** World Enterpris
- Statement Name:** World Enterprises
- Class ID:** USA-INMI-T2 (with search icon)
- Priority:** None (dropdown menu)
- Address ID:** PRIMARY (with search and info icons)
- Contact:** Service Center
- Address:** 987 Office Plaza Drive
- Phone 1:** (313) 555-0109 Ext. 0000
- Phone 2:** (000) 000-0000 Ext. 0000
- Phone 3:** (000) 000-0000 Ext. 0000
- Fax:** (313) 555-0109 Ext. 0000
- City:** Detroit
- State:** MI
- ZIP Code:** 48233-4832
- Country Code:** (with search icon)
- Country:** USA
- UPS Zone:** (empty field)
- Shipping Method:** GROUND (with search icon)
- Tax Schedule ID:** USASTCITY-6\* (with search icon)
- Ship Complete Documents
- Ship To:** PRIMARY (with search icon)
- Bill To:** PRIMARY (with search icon)
- Statement To:** PRIMARY (with search icon)
- Salesperson ID:** GREG E. (with search icon)
- Territory ID:** TERRITORY 2 (with search icon)
- Type:** (empty field)
- User-Defined 2:** Retail
- Comment 1:** (empty field)
- Comment 2:** (empty field)
- Trade Discount:** 3.50%
- Payment Terms:** Net 30 (with search icon)
- Discount Grace Period:** (empty field)
- Due Date Grace Period:** (empty field)
- Price Level:** (with search icon)

At the bottom right, there are buttons for "Accounts", "Address", and "Options". At the bottom left, there are navigation arrows and a dropdown menu set to "by Customer ID".

## Customer Address Maintenance

CCDA

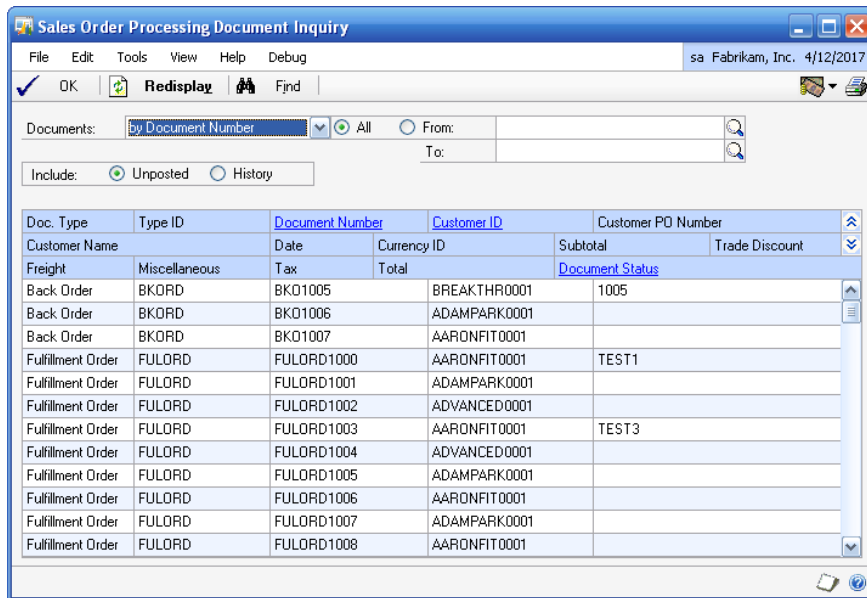
Customer Address Maintenance will be restricted so that (1) the user can only enter a Customer ID that belongs to them, (2) the Lookup only shows their customers, and (3) the Scrolling buttons only scroll through their customers. Additionally, the Salesperson ID and Territory ID fields will be locked.

The screenshot shows the 'Customer Address Maintenance' application window. The 'Customer ID' field is highlighted with a red box and contains the value 'AARONFIT0001'. Below it, the 'Name' field contains 'Aaron Fitz Electrical'. The 'Address ID' is set to 'PRIMARY'. The 'Contact' is 'Bob Fitz' and the 'Address' is 'One Microsoft Way'. The 'City' is 'Redmond', 'State' is 'WA', and 'ZIP Code' is '98052-6399'. The 'Country' is 'USA'. The 'Salesperson ID' field is highlighted with a red box and contains 'PAUL W.'. The 'Territory ID' field is also highlighted with a red box and contains 'TERRITORY 1'. At the bottom left, the navigation buttons are highlighted with a red box. The 'EFT Bank' button is visible at the bottom right.

## Sales Order Processing Document Inquiry

CCDA

The Sales Order Processing Document Inquiry window will be restricted so that regardless of the Document Range entered, the window displays only documents that belong to the logged-in Salesperson.

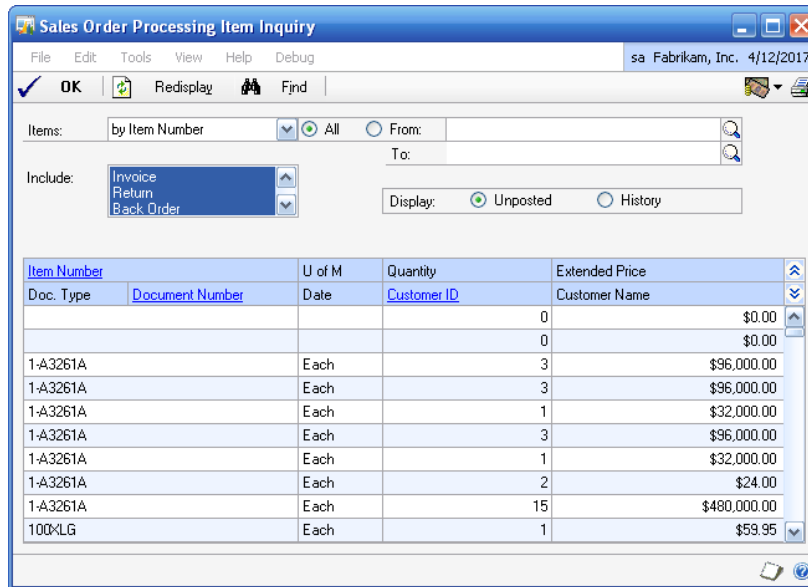


It may take longer for the scrolling window to fill. This would be especially noticeable if the Salesperson does not have many documents.

### Sales Order Processing Item Inquiry

CCDA

The Sales Order Processing Item Inquiry window will be restricted so that regardless of the Document Range entered, the window displays only documents that belong to the logged-in Salesperson.

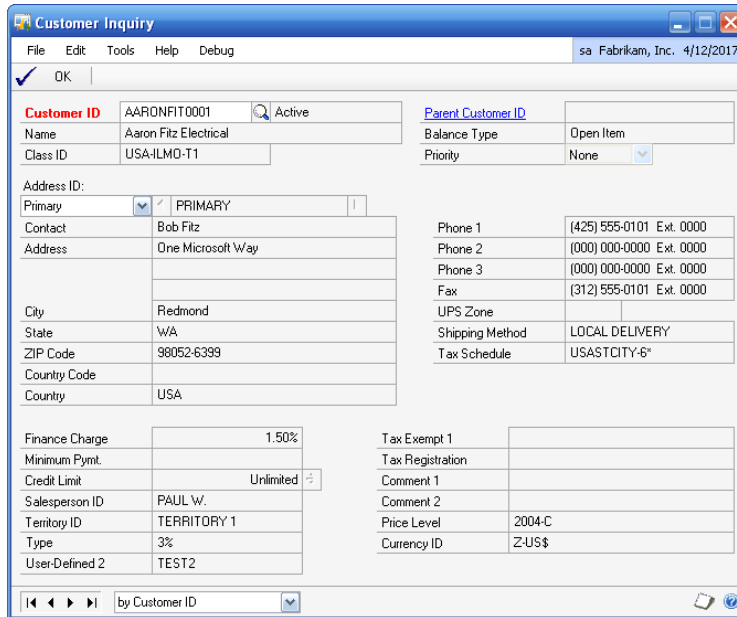


It may take longer for the scrolling window to fill. This would be especially noticeable if the Salesperson does not have many documents.

## Customer Inquiry

## CCDA

The Customer Inquiry window will be restricted so that (1) the user can only enter a Customer ID that belongs to them, (2) the Lookup only shows their customers, and (3) the Scrolling buttons only scroll through their customers.



The screenshot shows a 'Customer Inquiry' window with the following data:

<b>Customer ID</b>	AARONFIT0001	Active	<b>Parent Customer ID</b>	
<b>Name</b>	Aaron Fitz Electrical		<b>Balance Type</b>	Open Item
<b>Class ID</b>	USA-ILMO-T1		<b>Priority</b>	None
<b>Address ID:</b>				
<b>Primary</b>	PRIMARY			
<b>Contact</b>	Bob Fitz			
<b>Address</b>	One Microsoft Way			
<b>City</b>	Redmond			
<b>State</b>	WA			
<b>ZIP Code</b>	98052-6399			
<b>Country Code</b>				
<b>Country</b>	USA			
<b>Phone 1</b>	(425) 555-0101 Ext. 0000			
<b>Phone 2</b>	(000) 000-0000 Ext. 0000			
<b>Phone 3</b>	(000) 000-0000 Ext. 0000			
<b>Fax</b>	(312) 555-0101 Ext. 0000			
<b>UPS Zone</b>				
<b>Shipping Method</b>	LOCAL DELIVERY			
<b>Tax Schedule</b>	USASTCITY-6*			
<b>Finance Charge</b>	1.50%			
<b>Minimum Pymt.</b>				
<b>Credit Limit</b>	Unlimited			
<b>Salesperson ID</b>	PAUL W.			
<b>Territory ID</b>	TERRITORY 1			
<b>Type</b>	3%			
<b>User-Defined 2</b>	TEST2			
<b>Tax Exempt 1</b>				
<b>Tax Registration</b>				
<b>Comment 1</b>				
<b>Comment 2</b>				
<b>Price Level</b>	2004-C			
<b>Currency ID</b>	Z-US\$			

Navigation: by Customer ID

