# ASICOMP.COM



## How Do You Use Salesperson Security?

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## How Do You Use Salesperson Security?

User Salesperson Security allows an administrator/owner to determine which salesperson(s) a user has information access to. If a user has access to a salesperson(s), they will have access to records to which that salesperson(s) is assigned. (ie. Customers, Quotes, Orders, and Invoices) Within lists and lookups, the user will only see records to which those salespersons are assigned.

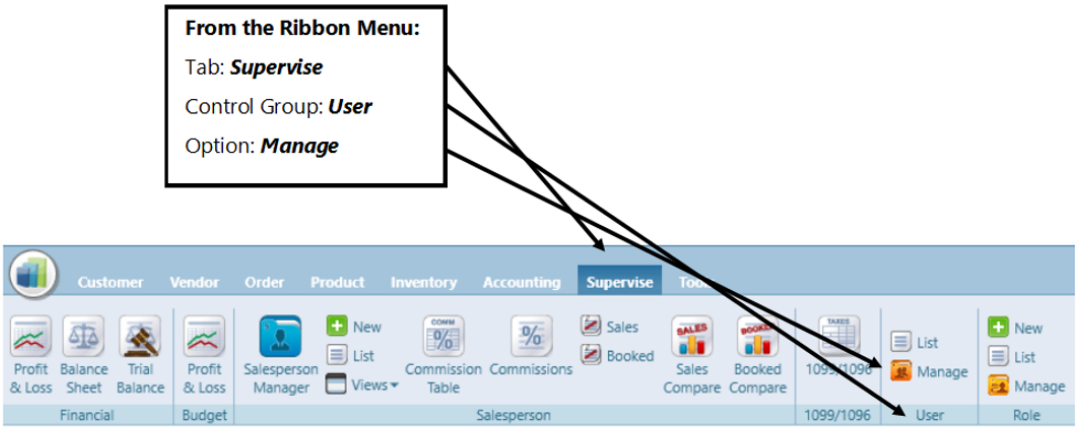
Examples:

**Customer Service employee** – This user might be given access to multiple salespersons for whom they work with. This will allow them to see any customers, quotes, orders, or invoices to which their salespersons are assigned.

**Salesperson** – This user might be given access just to records to which they are assigned.

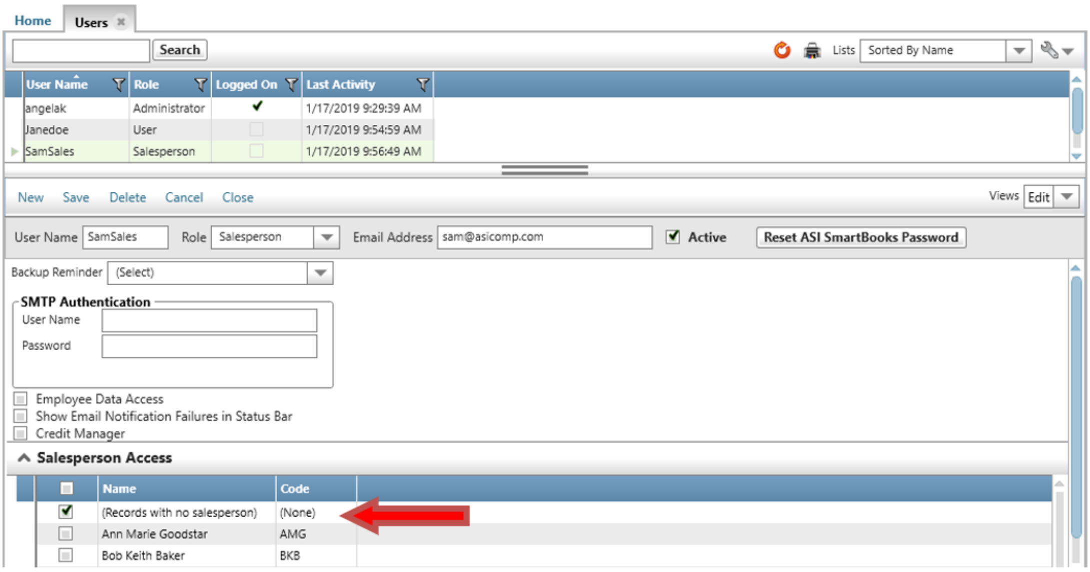
### Manage Users

**Short answer:** Find Salesperson Access in User Manage.

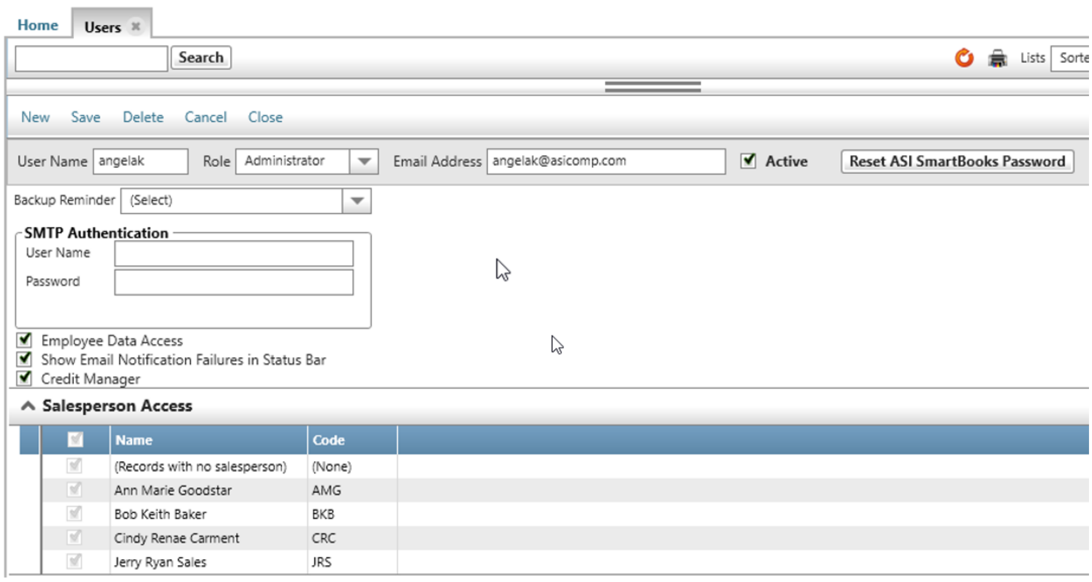


When the software is installed, all users will have access to all salespersons. The ability to change this access, if you only want a user to have access to selected salesperson(s), is maintained within User Manage. An expander titled “Salesperson Access” allows you to check/uncheck selected salespersons. If a salesperson is checked, the user will have access to information assigned to that salesperson.

Records with no salesperson checkbox – This allows you to give access or restrict the operator from viewing records (Customers, Quotes, Orders, and Invoices) that contain no salesperson.




**Administrator** – If the user has an Administrator role, all salespersons checkboxes will be checked and grayed out as that user has access to all information.



**User, Salesperson, or Customer Service –** If the user has a User, Salesperson, or Customer Service role; all checkboxes will be active and may be selectively checked/unchecked.