

# ASICOMP.COM

Portal > Knowledgebase > ASI SmartBooks Knowledgebase > Supervising > How Do You Use Salesperson Security?

## How Do You Use Salesperson Security?

Tammy Mason - 2022-07-20 - in Supervising

### 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.

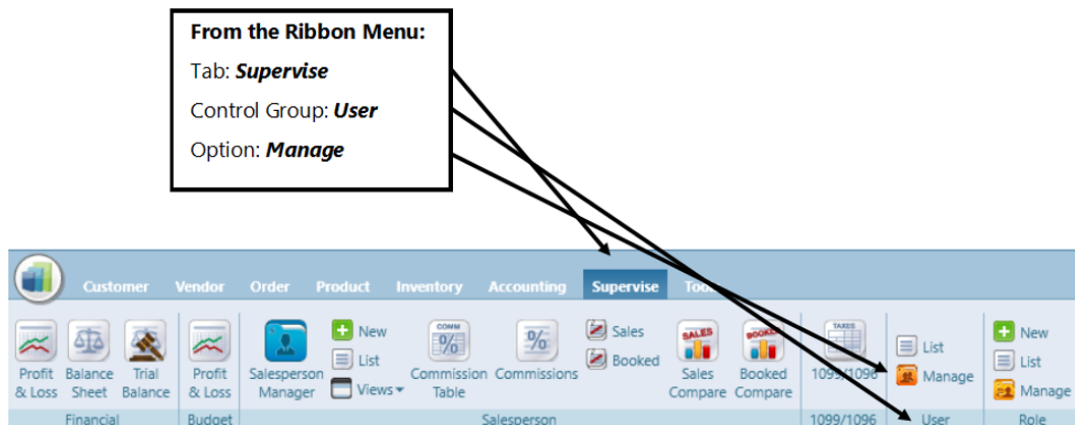
Examples:

**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.

The screenshot shows the 'Users' management interface. The user 'SamSales' is selected, with role 'Salesperson' and email 'sam@asicomp.com'. The 'Salesperson Access' section contains a table with the following data:

<input type="checkbox"/>	Name	Code
<input checked="" type="checkbox"/>	(Records with no salesperson)	(None)
<input type="checkbox"/>	Ann Marie Goodstar	AMG
<input type="checkbox"/>	Bob Keith Baker	BKB

A red arrow points to the checked checkbox for '(Records with 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.

The screenshot shows the 'Users' management interface for user 'angelak', who has the role 'Administrator'. The 'Salesperson Access' section contains a table with the following data:

<input checked="" type="checkbox"/>	Name	Code
<input checked="" type="checkbox"/>	(Records with no salesperson)	(None)
<input checked="" type="checkbox"/>	Ann Marie Goodstar	AMG
<input checked="" type="checkbox"/>	Bob Keith Baker	BKB
<input checked="" type="checkbox"/>	Cindy Renae Carment	CRC
<input checked="" type="checkbox"/>	Jerry Ryan Sales	JRS

All checkboxes in the table are checked and grayed out.

**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.

The screenshot shows a user management interface with a table of users and a form for editing a user. Annotations with arrows point from a text box on the right to specific elements in the interface:

- An arrow points from the text "User" to the "User" role in the table.
- An arrow points from the text "Salesperson" to the "Salesperson" role in the table.
- An arrow points from the text "Customer Service" to the "Customer Service" role in the table.
- An arrow points from the text "The User role also shows in the Role Search Box." to the "Salesperson" role in the form's "Role" dropdown menu.

User Name	Role	Logged On	Last Activity
angelak	Administrator	<input checked="" type="checkbox"/>	1/17/2019 9:29:39 AM
Janedoe	User	<input type="checkbox"/>	1/17/2019 9:54:59 AM
SamSales	Salesperson	<input type="checkbox"/>	1/17/2019 9:56:43 AM
Tara	Customer Service	<input type="checkbox"/>	1/17/2019 9:57:46 AM

Form fields for user editing:

User Name: SamSales | Role: Salesperson | Email Address: sam@ascorp.com |  Active | Reset ASI SmartBooks Password

Backup Reminder: (Select)

SMTP Authentication

User Name:

Password:

Employee Data Access  
 Show Email Notification Failures in Status Bar  
 Credit Manager

**Salesperson Access**

<input type="checkbox"/>	Name	Code
<input checked="" type="checkbox"/>	(Records with no salesperson)	(None)
<input type="checkbox"/>	Ann Marie Goodstar	AMG
<input type="checkbox"/>	Bob Keith Baker	BKB