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Portal > Knowledgebase > ASI SmartBooks Knowledgebase > Supervising > Using Salesperson Security

Using Salesperson Security

Angie K - 2022-07-28 - in Supervising

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:

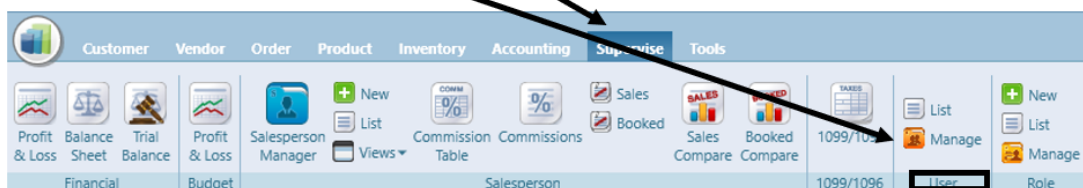
Customer Service employee - This user might be given access to multiple salespersons for whom they work with. This will allow them to see any customers, quotes, orders, or invoices to which their salespersons are assigned.

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

Manage users

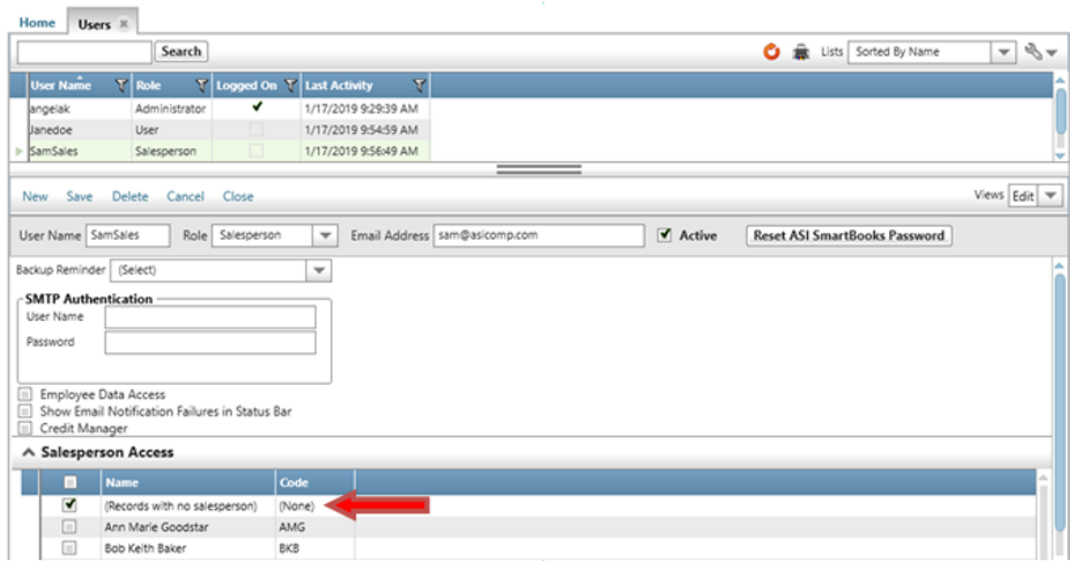
Short answer: Find Salesperson Access in User Manage.

From the Ribbon Menu:
Tab: *Supervise*
Control Group: *User*
Option: *Manage*

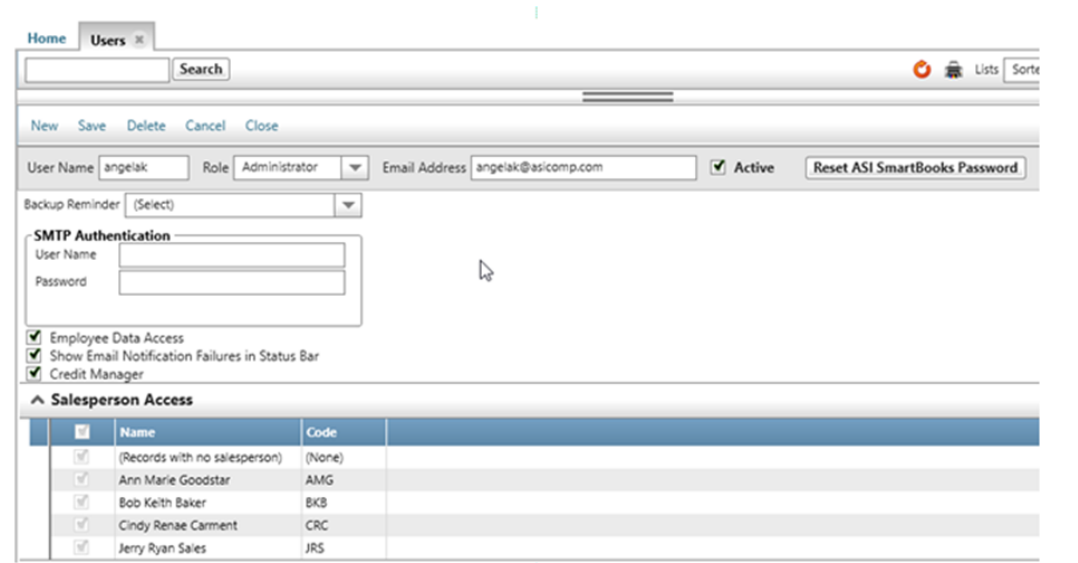


Initially, when the software is installed, all users will have access to all salespersons. The ability to change this access, if you only want a user to have access to selected salesperson(s), is maintained within User Manage. An expander titled Salesperson Access allows you to check/uncheck selected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

The screenshot shows the 'Users' management interface. At the top, there is a search bar and a 'Users' tab. Below it is a table with columns: User Name, Role, Logged On, and Last Activity. The table lists four users: 'Angeiak' (Administrator), 'Janedoe' (User), 'SamSales' (Salesperson), and 'Tara' (Customer Service). Below the table is a form for editing a user. The 'User Name' is 'SamSales', the 'Role' is 'Salesperson', and the 'Email Address' is 'sam@asicomp.com'. There are checkboxes for 'Active' and 'Reset ASI SmartBooks Password'. Below the form is a section for 'SMTP Authentication' with fields for 'User Name' and 'Password'. At the bottom, there is a section for 'Salesperson Access' with a table of salesperson codes and names.

User Name	Role	Logged On	Last Activity
Angeiak	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 9:56:49 AM
Tara	Customer Service	<input type="checkbox"/>	1/17/2019 9:57:46 AM

User
Salesperson
Customer Service
The User role also shows in the Role Search Box.

Manage Salespeople?

The screenshot shows the 'Salesperson' ribbon menu. The 'Supervise' tab is selected. The ribbon contains several control groups: 'Salesperson Manager' (with 'New', 'List', and 'Views' options), 'Commission Commissions' (with a 'Table' option), 'Sales Booked' (with 'Sales' and 'Booked' options), and 'Sales Compare' (with 'Sales Compare' and 'Booked Compare' options). A callout box points to the 'Supervise' tab, the 'Salesperson' control group, and the 'Salesperson Manager' option.

From the Ribbon Menu:
Tab: *Supervise*
Control Group: *Salesperson*
Option: *Salesperson Manager*

The ability to allow user access to a salesperson is also contained within the Salesperson resource. When the software is installed, all users will have access to all salespersons. If any changes to access are made within User Manage, they will already be reflected within a salesperson's resource. User salesperson access changes made either through User Manage or through the Salesperson's resource will work in conjunction with each other. There is no need to make changes twice.

Home Salespersons

New Copy Save Delete Cancel Close Views Edit

Code BKB Name Bob Keith Baker Status Active Employee

Commission Structure

Commission % 30.00% Based On Order Gross Profit % With Table (Select) Update Commission Rate

Commission Expense General Ledger 7003 Comm Exp/Salary Sales Per - bkb Edit

Primary Address

Address 1 1414 University Avenue Office +1 319-266-7426 Email Work BKB@asicomp.com

Address 2 Office Fax +1 Web Corporate www.asicomp.com

City Waterloo Other +1 County

State/Province IA Zip/Postal 50701 Country UNITED STATES

Addresses (1) Phones (3) Emails (1) Websites (1)

Alternate Addresses (0)

Users With Access

	User Name	Role
<input type="checkbox"/>	angelak	Administrator
<input checked="" type="checkbox"/>	Janedoe	User
<input type="checkbox"/>	SamSales	Salesperson
<input checked="" type="checkbox"/>	Tara	Customer Serv

Lists/Lookups

Within lists and lookups that pertain to customers, quotes, orders, invoices, and salespersons, records will only be displayed if the user has access to a salesperson assigned to that record. Information pertaining to the accessible records will then be viewable (customer resource details, order details, invoice details, etc).

Order Manage Example: When launching Order Manage, the upper list will only contain orders to which the logged in user has access to any of the salespersons assigned to those orders. The user can then select an order to view the details of that order.

New Order Example: When adding/editing an order and viewing the customer and salesperson lookups, the user would only see customers and salespersons to which they have access.

Home Order

All Open

Order	Bill To Name	Status	Products	Service	Contacts	Order	In Hand	Ship	PO/Reference	Salesperson	Customer Code	Cost
116	Covenant Clinic Pediatrics	Open	(2)		(3)	06/20/2010	06/28/2010	06/30/2010		John Smith	2389	
115	C & S Car Company	Open	(2)		(3)	06/18/2010	06/24/2010	06/25/2010		John Smith	9955	
114	Allied Insurance	Open	(2)		(3)	06/16/2010	06/23/2010	06/24/2010		Jane Doe	1230	
113	Holidman Motor Inc	Open	(1)		(3)	06/15/2010	06/22/2010	06/23/2010		John Smith	2000	
112	Cedar Falls Utilities	Open	(2)		(3)	06/10/2010	06/20/2010	06/23/2010		John Smith	3568	
110	Brookside Veterinary Hospital	Open	(2)		(3)	06/08/2010	06/16/2010	06/17/2010		Jane Doe	8604	
107	Johnson Dental Care	Open	(1)		(3)	06/06/2010	06/16/2010	06/17/2010		John Smith	9800	

New Copy Import Save Delete Cancel Close

Quote (Select) Edit Customer 8000 Cedar Valley Chiropractic + New Customer SMARTSALES

Order 478 Salesperson Jane Doe Status Open

Order

Order 5/22/2014 In Hand 6/15/2014 Ship 6/10/2014

Bill To Brett Long Acknowledge To Brett Long Ship To Brett Long

Bill Via Print Acknowledge Via Print Ship Via Best Way

Terms Net 10 PO/Reference Origin (Select) FOB Factory

Discount 0.75% Pay With (Select) Reorder

Addresses

Quote Lists – User will have access to a quote based on their access to salesperson(s) on the quote.

Order/Order Products/Customer Booked Lists – User will have access to an order based on their access to salesperson(s) on the order.

Order Costing List - User will have access to an order based on their access to salesperson(s) on the order.

Order Tracking Update - User will have access to an order based on their access to salesperson(s) on the order.

Invoice/Customer Sales Lists – User will have access to an invoice based on their access to salesperson(s) on the invoice.

Customer Open Receivables/Customer History Lists - User will have access to all open receivables for a customer based on their access to salesperson(s) on the customer resource. Otherwise, the options may be totally restricted within User Roles.

Salesperson Open Commissions/Booked/Sales Lists – Access will be based on the salesperson(s) they have access to within their User Manage. Otherwise, the options may be totally restricted within User Roles.

NOTE: Menu options that you may never want a user to have access will continue to be restricted within the User role.

Links

Within lists and views related to customers, quotes, orders, invoices and salespersons are various links. If the user clicks a link and they do not have access to the information loaded by the link, they will receive an “Access is restricted” message.

Example: Shown below is the Customer Invoices List for salesperson Alistair. All invoices are listed to which he is assigned. This list contains a link on the Salesperson column. However, Alistair does not have rights to view Salesperson Manage which is opened by clicking the link. If he clicks the link, he will receive the following restriction message:

Invoice	Bill To Name	Order	Status	Products	Contacts	Amount	Costing	Invoice D	PO/Reference	Primary Salesper	Customer Code	Package	Consolidated
10478	Brookside Veterinary Hospitz	659	Open	(10)	(2)	\$2,110.25		08/21/2015		Jane Doe	8604		
10477	Brookside Veterinary Hospitz	655	Open	(1)	(2)	\$1,594.57		08/19/2015		Jane Doe	8604		
10476	Dan Deery Toyota	654	Open	(3)	(2)	\$205.03		08/19/2015		John Smith (promos)	1000		
10475	Covenant Clinic	650	Open	(2)	(2)	\$0.00		08/17/2015		Jane Doe	9000		



User Role Additional Restriction Abilities

Additional restrictions to salesperson information within resources may also be designated within User Roles.

Example #1 - As all of the following options are checked, the user will have access to all information within the Salesperson expander.

Home ASIRole x	
New Copy Save Delete Cancel Close	
Role Name	User
<input checked="" type="checkbox"/>	Points Audit Transactions
<input checked="" type="checkbox"/>	Commission Table
<input checked="" type="checkbox"/>	Views
<input checked="" type="checkbox"/>	Edit
<input checked="" type="checkbox"/>	Lists
<input checked="" type="checkbox"/>	Sorted By Description
<input checked="" type="checkbox"/>	Commission Table Lookup
<input checked="" type="checkbox"/>	CommissionTableTypes
<input checked="" type="checkbox"/>	Lists
<input checked="" type="checkbox"/>	Commission Table Type Lookup
<input checked="" type="checkbox"/>	External Orders
<input checked="" type="checkbox"/>	Lists
<input checked="" type="checkbox"/>	Order Pending Approval List
<input checked="" type="checkbox"/>	View Salesperson in Customer/Quote/Order/Invoice Resource/Program Resource
<input checked="" type="checkbox"/>	Change Salesperson
<input checked="" type="checkbox"/>	View Salesperson Commission %
<input checked="" type="checkbox"/>	Change Salesperson Commission %
<input checked="" type="checkbox"/>	View Salesperson Calculated On

Sample of Example #1

Primary	Name	Commission %	Calculated On	With Table
	1400 Tina Fredericks	5.00%	Gross Profit %	Commission Table Based on GP%
	1000 Alistair Sturgis	55.00%	Sales Amount	(Select)

Example #2 - Based on the settings below, the user would only be restricted from seeing how the commission is calculated and the commission table.

Role Name

LISTS

- Sorted By Description
- Commission Table Lookup
- CommissionTableTypes**
 - Lists
 - Commission Table Type Lookup
- External Orders**
 - Lists
 - Order Pending Approval List
- View Salesperson in Customer/Quote/Order/Invoice Resource/Program Resource**
 - Change Salesperson
- View Salesperson Commission %**
 - Change Salesperson Commission %
- View Salesperson Calculated On**

Example #2

Primary	Name	Commission %
	1400 Tina Fredericks <input type="button" value="Edit"/>	5.00%
	1000 Alistair Sturgis <input type="button" value="Edit"/>	55.00%

Example #3 - The following user role is only allowing users to see the salespersons' names within salesperson expanders.

Role Name

LISTS

- Sorted By Description
- Commission Table Lookup
- CommissionTableTypes**
 - Lists
 - Commission Table Type Lookup
- External Orders**
 - Lists
 - Order Pending Approval List

Sample of Example #3

Primary	Name
	1400 Tina Fredericks <input type="button" value="Edit"/>
	1000 Alistair Sturgis <input type="button" value="Edit"/>

Sample of Example #3 within lists - If the user is restricted from seeing commission %s, the user will also not be able to view the commission amount column within Order and Invoice lists.

Invoice	Bill To Name	Order	Status	Products	Contacts	Amount	Cost	Invoice	Commission	PO/Reference
1000258	Word of Peace	100900	Open	(3)	(2)	\$13,962.22		03/14/2014	\$0.00	
1000257	AAA Michigan	100352	Open	(1)	(2)	\$249.50		03/14/2014	\$0.00	100352
1000256	Dubuque Greyhound Racing	100236	Open	(1)	(2)	\$1,981.47		03/05/2014	\$40.00	

Example #4 - The following user role restricts access to all salesperson information within salesperson expanders. If the user tries to click on a Salesperson expander, they will receive the following "Access Restriction" message.

Role Name

Lists

- Sorted By Description
- Commission Table Lookup
- CommissionTableTypes**
- Lists
 - Commission Table Type Lookup
- External Orders**
- Lists
 - Order Pending Approval List

Sample of Example #4

▼ Products (1)
▼ Totals
▼ Salespersons (2)

Access Restriction ?

Your role does not have access to this function