DSD Business Systems

Sage 100 Enhancements

R157

Security for Customer/Salesperson by User Code

AR-1157

Version 5.40

Information in this document is subject to change without notice.

Security for Customer/Salesperson by User Code User's Manual
Version 5.40

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Section A: Introduction

This manual contains a description and instructions for this DSD product. Operating instructions are included for the features added by this product to Sage 100. For instructions on using Sage 100, refer to the appropriate Sage 100 manual, or call your Sage 100 reseller. DSD Business Systems offers excellent Sage 100 support, at an hourly rate.

Web Resources

DSD web site: http://www.dsdinc.com

The Enhancement page contains:

> *Current Release Schedule*
> *Purchasing Information*
> *Installation Instructions*
> *Product Support*
> *Enhancement Links*

R157 Security for Customer/Salesperson by User Code:

http://www.dsdinc.com/enhancement/security-for-customersalesperson-by-user-id-2

The product web page contains:

> *Product Description*
> *Web Links*
> *Current Product Version Table*
> *Product Installation File Download*
> *Product Manual in .pdf Format*
> *Revision History*
> *FAQ*

Support

DSD provides product support through Sage 100 resellers. Support is provided for the current version. Older versions are supported at an hourly rate. DSD's telephone number is **858-550-5900**. Fax: **858-550-4900**.

For a hard error, where the program displays an error dialog, report:

> *Error number.*
> *Program name.*
> *Line number.*
> *Program version.*

> *Exact sequence that caused the error, including menus and menu selections.*
> *Other pertinent information.*

If leaving a message or faxing, please include:

> *Your name.*
> *Your phone number (and fax if applicable) and extension.*

It is possible to be unable to duplicate a problem, because of data corruption or because we have not exactly duplicated a particular operating environment. In such circumstances, we can only continue to try to fix the problem if we can either access the system with Symantec PCAnywhere or by some other means access or duplicate the system.

Security for Customer/Salesperson by User Code Features

This DSD Extended Solution adds the ability to set up security for Customers or Salespersons by User Code in the Sales Order and Accounts Receivable modules. Only authorized users or users not entered in the security file will be able to access specified Customer or Salesperson data.

Section B: Getting Started

- **If you reinstall or upgrade one of the Sage 100 modules listed in the following table, you must also reinstall this Enhancement.**

- Enhancements from different Sage Developers are generally not designed to work together. If installed together, problems are likely to occur.

- **Check with DSD before installing more than one Enhancement.**

Required Levels

Sage 100 Module	Module Required	Required Level
A/R	Y	5.40

Installation

1. **Back-up:** Exit all Sage 100 sessions. Back-up existing Sage 100 data.
2. **Check Levels:** Sage 100 module levels **must match** those listed above.
3. *Run Enhancement Setup Program:* Save the executable installation program (sent to you or downloaded from our website) in a convenient location on the Sage 100 server. Launch the program from Windows Explorer or by selecting Start/Run, and then browse for the file in the location you saved it. Follow on-screen instructions.
4. *Send your Sage Serial Number to your DSD Representative:* Send your Sage Serial Number to your DSD representative in order for us to send you back the encrypted keys to unlock your system. This serial number can be found in Library Master\Setup\System Configuration, Tab 3. Registration as Serial Number.
5. **Re-Start Sage 100:** Sage 100 will be updated.
6. **Unlock the Enhancement:** DSD Enhancements must be unlocked to run. When any part of the Enhancement is run for the first time, the **DSD Enhancement License Agreement and Activation** window will appear. Follow the steps shown on that window. *You can click the Help button for more detailed instructions.*

    Note: On the next page is a screenshot of the DSD Enhancement License Agreement and Activation window.

    After accepting the License Agreement, you can then select the type of unlocking that you'd prefer. The choices are File, Web, Demo and Manual Entry.

    File Unlock: After receiving your encrypted serial number key file from DSD, and placing that file in the MAS90/SOA directory, selecting this option will unlock all products keys contained in the file. This means you can unlock all enhancements at once using this option.

Web Unlock: If the system that is running the DSD Enhancement *has web access* and you *have sent DSD your Sage Serial number*, you can unlock the Enhancement without assistance using Web Unlock. When this option is selected, the program will attempt to download encrypted serial number key file from DSD *and then proceed to unlock all enhancements contained in the file.*

- *The Sage 100 system that is being used must have web access for this option to be effective.*
- *You can send your Sage Serial Number to your DSD Enhancements sales representative.*

Demo Unlock: If a Demo mode is available for the Enhancement you're running, you will be able to Demo unlock the product without assistance from DSD for demo purposes.

- *Creating a Demo Unlock is a good way to temporarily unlock DSD Enhancements off-hours, if you do not have web or email access. Later, you can unlock the product fully, during business hours.*

Manual Entry Unlock: If you want to unlock a single enhancement using a single encrypted key, you can select this option and enter the 64 character key you receive from DSD by copy and paste.

*Note: You can also unlock a DSD Enhancement through the **DSD Enhancement Control Panel** found on the Library Master Utilities Menu. Then, select the Enhancement with your mouse from the list of Enhancements and click the **Unlock Product** button on the right side of the window.*

7. **Convert Data:** After unlocking, the DSD Conversion Wizard will appear. Follow on-screen instructions to complete data conversion. *You can exit the conversion program without converting data. The Enhancement will not proceed, however, until data is converted. If you enter an enhanced program and data has not been converted, the conversion program will run again.*

DSD Enhancement Control Panel

Starting with version 3.61, all DSD Enhancement products include DSD's Enhancement Control Panel. The **DSD Enhancement Control Panel is accessed from the Library Master Utilities menu**.

The DSD Enhancement Control Panel is a simple to use yet powerful system to help maintain DSD Enhancements installed on a Sage 100 system. To use it, select an Enhancement product from the list on the window and then click the button, on the right side of the window, which corresponds with the desired task.

View Manual: This button will display the product manual for the selected Enhancement using Adobe Acrobat. For this to be possible, the PDF file for the corresponding manual must be in the

"MAS90/PDF" folder in the Sage 100 system. If the file is not present, and the system has web access, the correct PDF file will be automatically downloaded from the DSD website, put into the "MAS90/PDF" folder and then displayed.

Check the Web for Updates: This button will check the DSD website to see what the current build is the selected Enhancement and alert the user if a later version is available. *This requires an internet connection on the Sage 100 system.*

Unlock Product: This will cause the DSD Enhancement License Agreement and Activation window to appear. Using this window is described on the previous page. *This button is disabled if the selected Enhancement is already unlocked or if unlocking is not required.*

Unlock All Products: This will cause the DSD Enhancement All License Agreement and Activation window to appear. This window is similar to the one described on the previous page, but has only web and file as options to unlock. *This button is never disabled.*

Convert Data: After verification, the selected Enhancement's data conversion program will run. Data conversion is non-destructive, and may be triggered any number of times. Sometimes this is required to fix data records imported or updated from a non-enhancement installation.
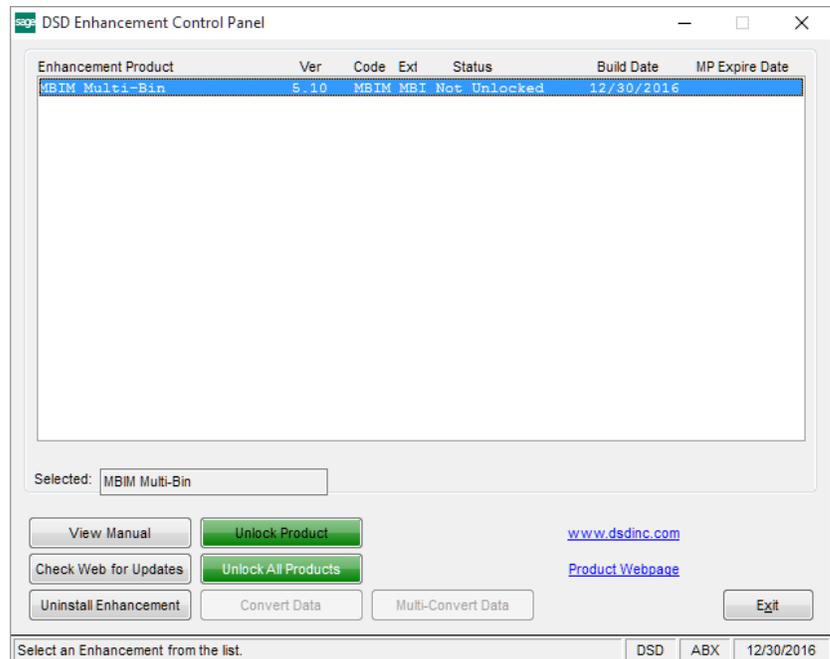
Multi-Convert Data: Multiple Companies can be converted at the same time for a given Enhancement. (*If you have a large number of Companies to convert, please do in batches of 20 or fewer due to memory limitations.)*
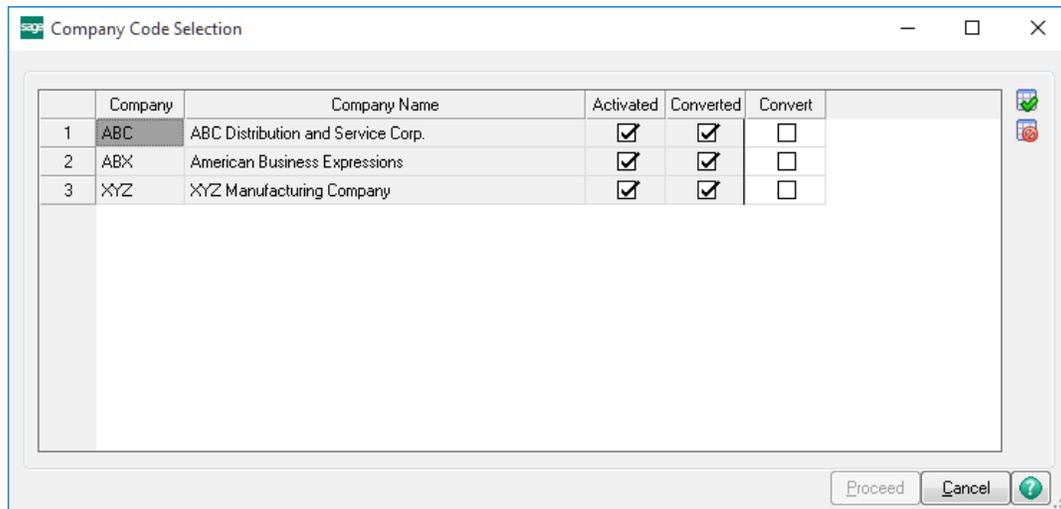
Help: The Help button, located at the bottom right of the window, opens an HTML help file.

Get Adobe Acrobat: Opens the Adobe Acrobat website to the page where Acrobat can be downloaded and installed.

Uninstall Enhancement If this option is available, then selecting this button will start the un-install process, removing the enhancement from the system. (for more information see Uninstall DSD Enhancements)

Section C: Setup

Upon completion of software installation, you will need to access the DSD Extended Solutions Setup option from the Accounts Receivable Setup menu. Select this part number and the Setup screen for this DSD Enhancement will appear. Check the 'Enable Enhancement' box to activate this DSD Enhancement.

Answer the following prompts:

Authorize User for Multiple Customers/Salespersons: Check this box to specify multiple Customers/Salespersons per User.

Restrict Listing of Unauthorized Customers: Check this box to restrict the Lookup on the Customer field to those customers for which the current user is authorized.

Restrict Listing of Unauthorized Sales Orders: If you check this box, the Lookup function on the Sales Order Number field will not list S/O Numbers that reference unauthorized Customers and Salespersons.

Roles/Tasks

The following Task has been added to Accounts Receivable, Setup Options:

- User Code Security Maintenance

Users who are authorized to run any of the above should be granted permissions for the prospective tasks and security events. Please review your security setup in Role Maintenance and make appropriate changes.

You should visit this Setup screen after each upgrade or reinstallation of this Extended Solution.

Section D: System Operations

User Code Security Maintenance

User Code Security Maintenance allows you to enter a User Code and an associated Customer Number and/or Salesperson Code. If you checked the 'Authorize User for Multiple Customers/Salespersons' box in Setup, an unlimited number of User Code or Customer/Salesperson combinations can be set up and maintained. If you did not check this box, then only one Customer Number and/or one Salesperson Code can be entered for each User Code. The Extended Solution is active only for User Codes that have been set up via this new screen; those who are not will have no security restrictions.
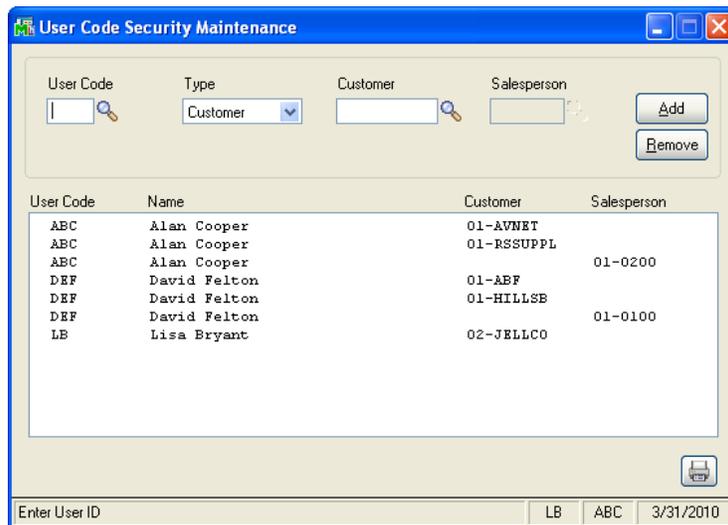
The User Security Report can be printed by clicking the printer button. This report details the security set up for this Extended Solution. The User Security Report prints one line per User ID, including the Type of security (C=Customer or S=Salesperson), and the Customer or Salesperson that can be accessed by this User ID.

Sales Order Data Entry

During Sales Order Data Entry, the user will be prevented from entering an on-file Sales Order Number if the Customer Number or the Salesperson Code referenced on the order has not been entered in Setup for the User Code of the person attempting the entry. Clicking the browse buttons will bring up only the Sales Orders that the user is allowed to view. Unauthorized Customer Numbers will not be accepted.

> **Note:** the First and Last buttons will not bring up any records if the user is not authorized to see the first and last records on file. Also, browsing may seem slow, as the Extended Solution reads though each record on file.

Accounts Receivable Customer Maintenance

The user will be prevented from entering an on-file Customer Number in Customer Maintenance if that Customer Number is not specified for the User Code or where the Customer Masterfile holds a Salesperson Code that has not been entered in Setup for the User Code of the person attempting the entry.

Additionally, a user will be prevented from drilling down on Invoice or Sales Order History documents if the Customer Number associated with the document is not specified for the User Code or where the history document holds a Salesperson Code that has not been entered in Setup for the User Code of the person attempting the entry.

Inventory Item Code Maintenance

The user will be prevented from drilling down on Sales Order History documents if the Customer Number associated with the document is not specified for the User Code or where the history document holds a Salesperson Code that has not been entered in Setup for the User Code of the person attempting the entry

Accounts Receivable Invoice History Inquiry

During Accounts Receivable Invoice History Inquiry, the user will be prevented from entering an Invoice Number where the Customer Number referenced or the Salesperson Code referenced has not been entered in Setup for the User Code of the person attempting the entry.

Sales Order History Inquiry

During Sales Order History Inquiry, the user will be prevented from entering a Sales Order Number where the Customer Number referenced or the Salesperson Code referenced has not been entered in Setup for the User Code of the person attempting the entry.

Restrict Listing of Unauthorized Customers

If you checked the 'Restrict Listing of Unauthorized Customers' box, then the Lookup on the Customer field will be restricted to those customers for which the current user is authorized.

**Restrict Listing of Unauthorized Sales Orders**

If you checked the 'Restrict Listing of Unauthorized Sales Orders' box, then the Lookup on the Sales Order Number field will be restricted to those Sales Orders for which the current user is authorized.

Helpful Hint

- The Customer and Sales Order Lookups may contain extra, empty columns that would contain information if specific options were selected in other Extended Solutions. You can use the 'User Lookup Wizard' in Library Master to remove those columns, if desired.

Section E: Uninstall DSD Enhancements

A DSD Enhancements Uninstall Utility has been provided for the purposes of removing DSD Enhancements from your Sage 100 System. This utility may be accessed from the **DSD Enhancement Control Panel** menu option on the **Library Master / Utilities** menu.
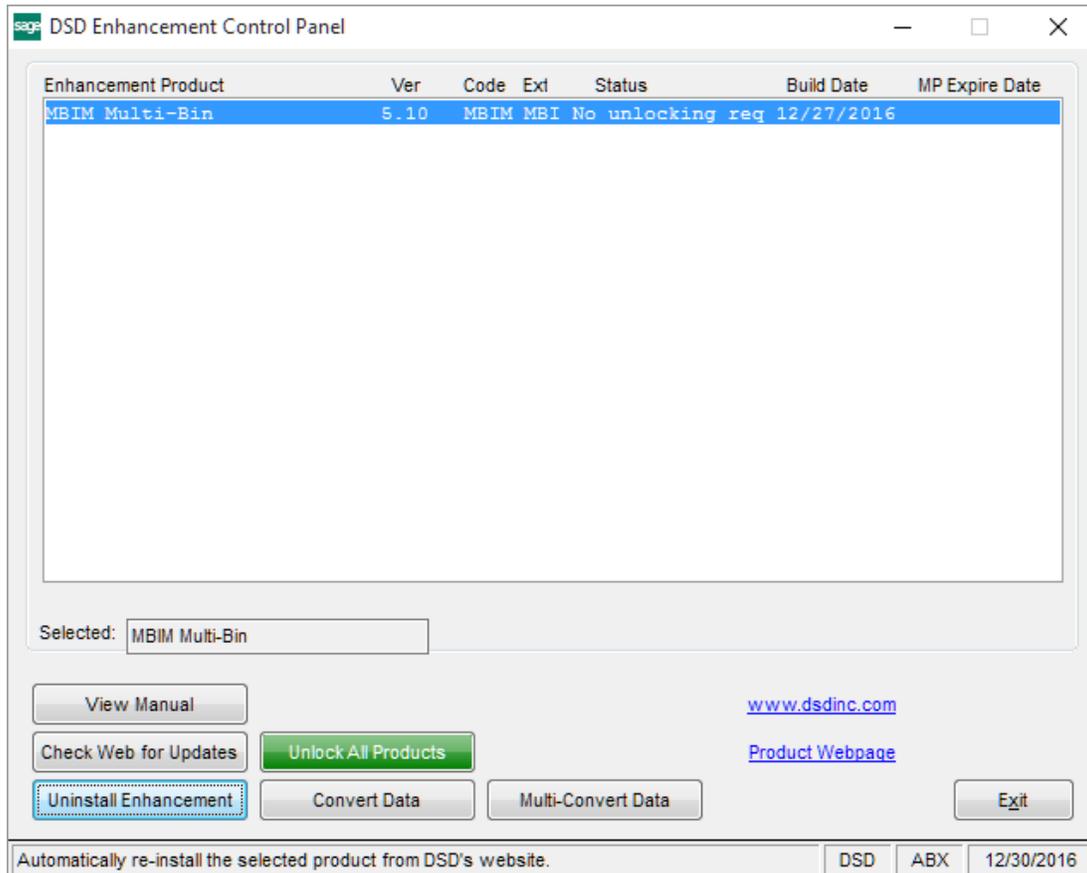
When accessing the **DSD Enhancement Control**, select the enhancement that you wish to Uninstall, and then select the **Uninstall Enhancement** button. The following message box will appear:
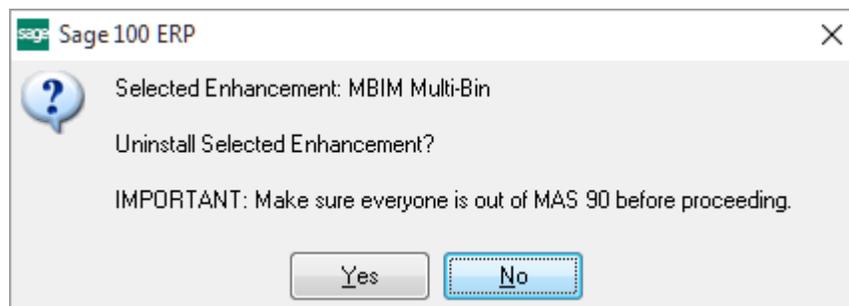
Select **No** to exit the Uninstall Process.
Select **Yes** to continue with the Uninstall Process.

The following message box will appear, to remind you that a complete backup of your entire Sage 100 system should be completed prior to uninstalling a DSD product.
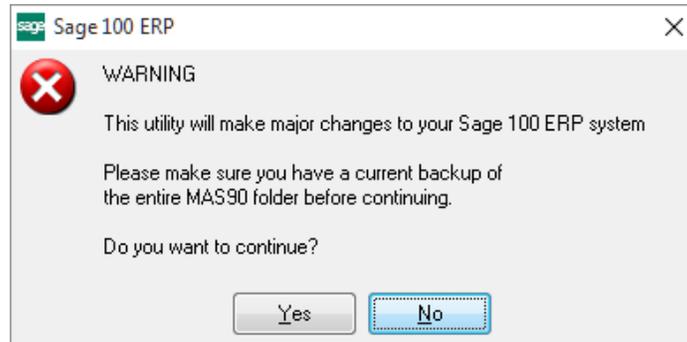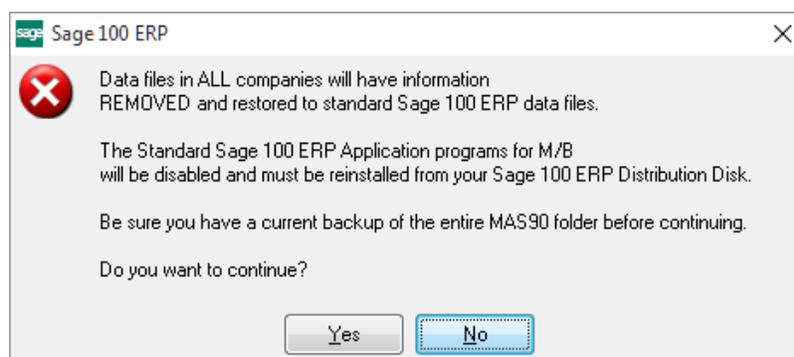
Select **No** to exit the Uninstall Process.
Select **Yes** to continue with the Uninstall Process.

After the Uninstall of the DSD Enhancement, you MUST reinstall certain standard Sage 100 modules, followed by reinstallation of Product Updates and Hot Fixes, if applicable.

A message box will appear, and will display which of those specific Sage 100 modules you must reinstall afterwards.

Select **No** to exit the Uninstall Process.
Select **Yes** to continue with the Uninstall Process.

The following message box will appear, displaying the final warning message.

Select **No** to exit the Uninstall Process.
Select **Yes** to continue with the Uninstall Process. At this point, the DSD Enhancement will be removed from the Sage 100 system.

After completion of the Uninstall, the following message box will appear. Select OK to continue.

Now that the Uninstall process is completed, you must:

- Reinstall the applicable standard Sage 100 modules
- Reinstall the latest Sage 100 Service Pack/Updates, if applicable.
- Reinstall any other DSD Enhancements or Developer products that are affected from the reinstallation of the standard Sage 100 module(s).