
Security by Division

AR-1152

Overview

This Extended Solution to the Accounts Receivable module adds security by Division to specific locations in Sales Order, Accounts Receivable and Inventory Management. Users without clearance will not be allowed to enter Division Codes in specific reports, data entry, and inquiry Screens. You can setup your list to include or exclude Users.

Installation

Before installing this Extended Solution, please verify that the version level(s) printed on the CD label are the same as the version level(s) of the MAS 90 MAS 200 module(s) you are using. For further information, please see the Upgrades and Compatibility section below. Check your Shipping Manifest for a complete list of Extended Solutions shipped.

For detailed installation instructions, please refer to the Sage website at:

http://support.sagesoftwareonline.com/mas/extended_solutions/main.cfm

Installing Your Extended Solutions under Windows

From a CD

If you have the *autorun* function turned on for your PC, the installation program will start up automatically. If not, find the **autorun.exe** file on your CD-ROM drive and double-click it to start the installation program. Follow the on-screen instructions.

From the Sage FTP site

When your Extended Solution is ready to be downloaded, you will receive an email from 'extendedsolutions.na@sage.com' telling you that it is ready. The email will contain the Customer Name, Cross Reference, a case-sensitive Password, a link via which you can download your Extended Solution, instructions, and a Shipping Manifest. If you have any problems with this order, please email extendedsolutions.na@sage.com and we will assist you during normal business hours.

Extended Solutions Control Center

Installing any Extended Solution will add an Extended Solutions Control Center to the MAS 90 MAS 200 Library Master Utilities menu. When you open the Control Center, the following options will be available:

- Extended Solutions Manuals
- Remove Extended Solutions
- Unlock Extended Solutions
- Merge Installation Files
- Extended Solutions Setup options

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Custom Office

If you customize your MAS 90 MAS 200, then you must run the Update Utility *every time* you install a Sage Software Extended Solution.

Setup

Upon completion of software installation, you will need to access Extended Solutions Setup from the Accounts Receivable Setup menu. Select this part number, and the Setup screen for this Extended Solution will appear (Figure 1). Check the 'Enable Extended Solution' box to activate this Extended Solution. The manual for this Extended Solution can be viewed by clicking the 'Manual' button next to the 'Enable Extended Solution' check box. It can also be viewed via the Extended Solutions Control Center (see Installation, above).

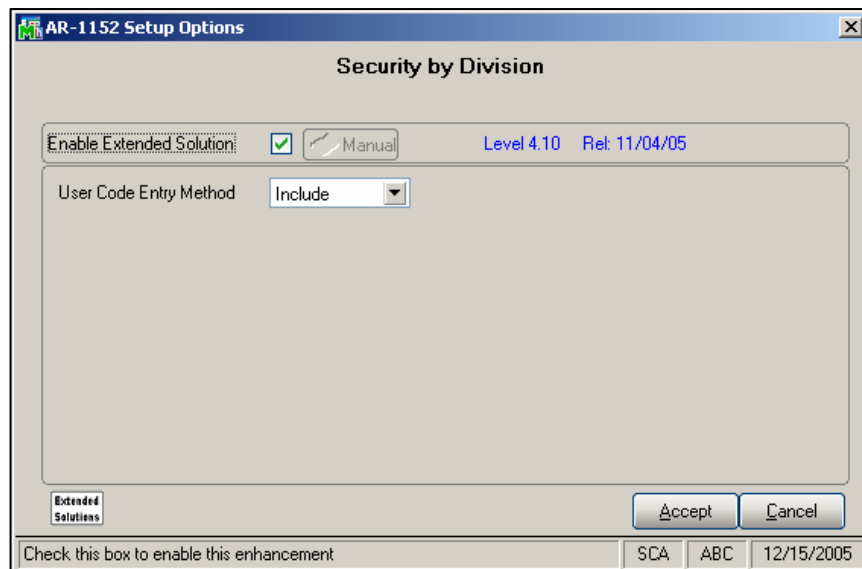


Figure 1

Answer the following prompts:

USER CODE ENTRY METHOD: Select 'Include' to allow the listed Users (entered in the 'Security' option of Division Maintenance) access to the particular Division. Select 'Exclude' to prohibit the listed Users access to the specified Division.

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



A new security event 'Allow Access to Security Option in Division Maintenance and All divisions' will be added to the Accounts Receivable module in Role Maintenance. Check this option to allow access to Security by Division Maintenance as well as

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access to all divisions. You should review your security setup in Role Maintenance and make appropriate changes.

Operation

Division Maintenance has been modified with a Security button (Figure 2). It is available to those users associated with the Security Event 'Allow Access to Security Option in Division Maintenance and All divisions'. Clicking the Security button will present you with Security By Division Maintenance (Figure 3).

A/R Division Maintenance (ABC) 12/1/2005

Division No. 01

Description EAST SALES OFFICE

Accounts Receivable	105-00-01	Accts. receiv. - East Warehse
Cash Sales	111-00-00	Other Receivables
Discounts Allowed	950-02-04	Discounts allowed
Freight	400-03-01	Freight charges - East
Sales Tax	235-01-00	Sales tax payable - East Cnty
Finance Charge	960-00-04	Miscellaneous

Post to Location

Security Accept Cancel Delete

Figure 2

Security by Division Maintenance

User Code LHD User Name Luke Dean

User Code	User Name
LHD	Luke Dean
NDC	NATASHA CHANG
SCA	Steven Anderson

Accept Cancel Delete

Figure 3

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If you chose to include all User Codes in Setup, all User Codes you enter will be allowed access to the Division. If you chose to exclude all User Codes in Setup, all User Codes you enter will be prevented from accessing or using the Division

If a User attempts to access data associated with a division which they are not allowed, they will be denied access (Figure 4).

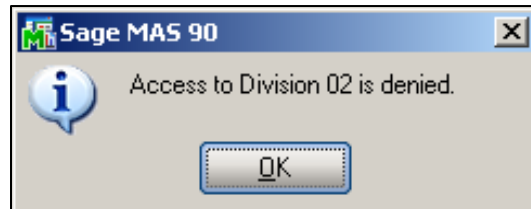


Figure 4

The following security measures will be taken for Users who are restricted to particular divisions:

Accounts Receivable Customer Maintenance

Users will be prevented from creating new customers, or entering a customer that references a division they are not authorized to use.

Sales Order and Invoice Entry

Users will be prevented from entering a customer on an order or invoice that references a division they are not authorized to use. This protection applies only to Sales Order Entry, Sales Order Invoice Data Entry, creating Customers on-the-fly when using Master/Repeating orders and in the use of the 'Copy From' function in Sales Order Entry.

Once an Order or Invoice has been created, any user not authorized for a Customer's Division will not be able to retrieve that Order or Invoice for editing, nor will they be able to Invoice an Order that references a Customer Division for which they are not authorized.



The features of this Extended Solution are not available in Sales Order Shipping Data Entry.

Reports and Forms Printing

For reports and forms printing that contain a Customer Number selection range, users will be unable to enter a Customer that references a division they are not authorized to use. Users will need to define meaningful ranges in accordance with what their User security allows. If the range includes divisions for which the user is not authorized, that user will be told 'Access to Division xx is denied,' where 'xx' equals the first division it comes across to which the user is prohibited access.

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The 'Sales Order Recap' and 'Open Sales Order Report' have sort options by customer, but have no selection by Customer unless sorted by Customer. With this Extended Solution enabled, the program will force the sort option to Customer and prevent users from entering a Customer that references an unauthorized division.

The S/O 'Monthly Recap by Division Report' will only display information for divisions for which the user is authorized.

Security is in effect in the following places:

ACCOUNTS RECEIVABLE*Main Menu*

- Customer Maintenance
- Invoice History Inquiry

Reports Menu

- Accounts Receivable Aged Invoice Report
- Accounts Receivable Trial Balance Report
- Customer Sales Analysis
- Accounts Receivable Invoice History Report
- Invoice History Printing

SALES ORDER*Main Menu*

- Sales Order Entry
- Invoice Entry
- Sales Order Printing
- Invoice Printing

Reports Menu

- Customer Sales History
- Sales Recap by Division
- Open Sales order Report
- Open Orders by Item Report
- Open Orders by Promise Date Report
- Sales Order Recap

INVENTORY MANAGEMENT*Inventory Maintenance and Inventory Inquiry*

- Price Lookup by Customer
- Price Inquiry by Customer
- Sales History by Customer
- Inquiry Tab - with S/O clicked, will only display Orders for the Customers which the User has Security authorization to see. Totals at the bottom of the Tab will display only what is listed in the box.

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Reports Menu

Sales History Report

Upgrades and Compatibility

The installation CD is labeled with the version of the MAS 90 MAS 200 module for which this Extended Solution was prepared. This Extended Solution will check its compatibility with the appropriate MAS 90 MAS 200 modules and will be disabled if an incompatibility is found. If you upgrade your MAS 90 MAS 200 modules, this Extended Solution must be upgraded as well. Your MAS 90 MAS 200 dealer can supply this upgrade.

Documentation

Only changes made by Sage Software Inc. to the standard operation of Sage Software, Inc. MAS 90 MAS 200 have been documented in this manual. Operations not documented in this manual are standard procedures of MAS 90 MAS 200 processing. Standard MAS 90 MAS 200 processes, data entry screens, inquiry screens, reports, updates, etc., have not been changed unless addressed in this document.

Parts of this document may refer to the *Specific Purpose Rule*. When referenced, the described feature was developed for a specific client to its specifications and may not conform to generally accepted MAS 90 MAS 200 standards and procedures. These features may or may not benefit you in your application of MAS 90 MAS 200.

Acknowledgments

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