



AutoPoint® Evolution – System Security Guide

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Conventions Used in this Manual

The following are explanations of the notations used in this manual to describe an action:

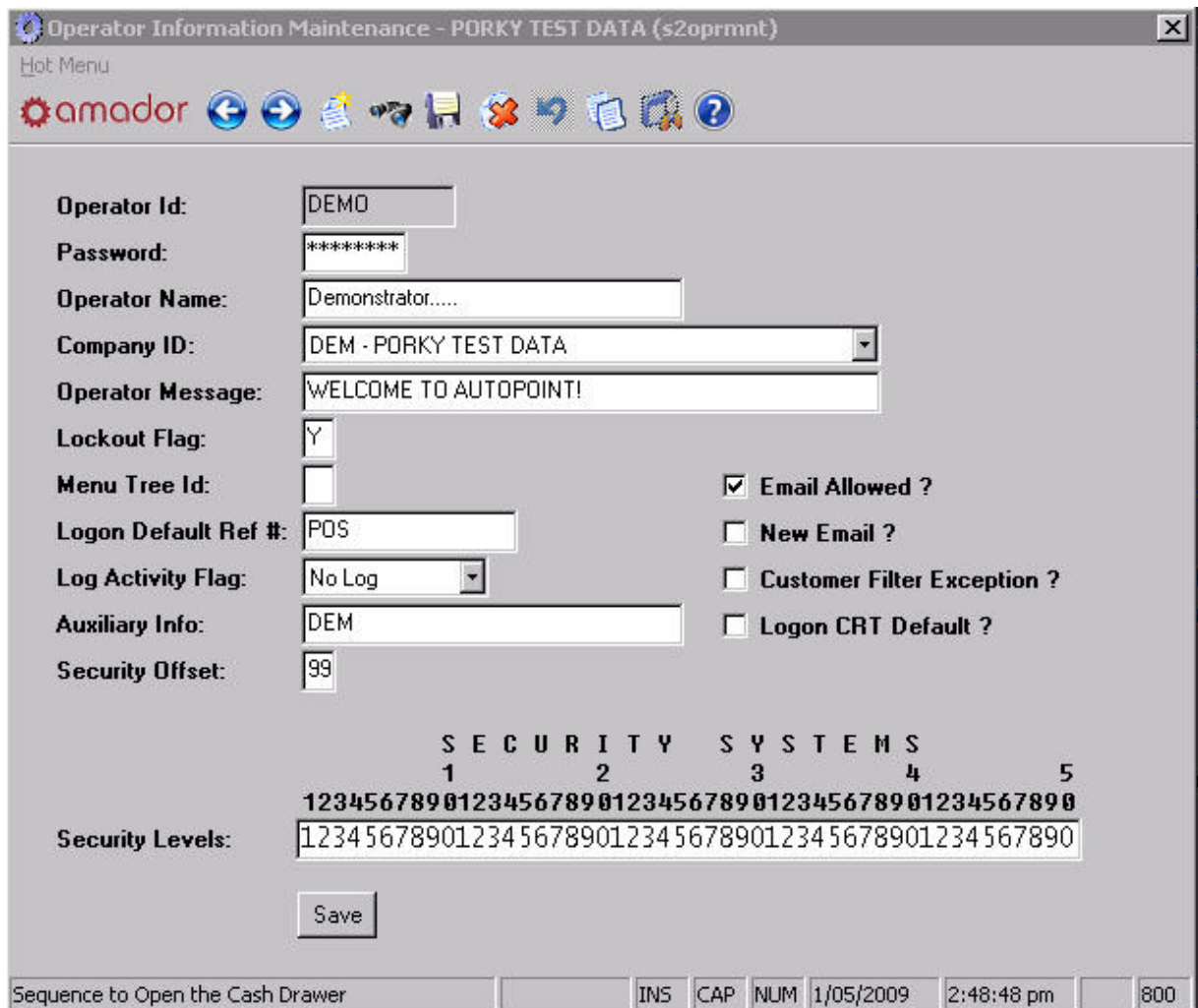
- A keystroke on the keyboard is described using the "<" and ">" characters. For example, the TAB key is displayed as "<TAB>". The function keys along the top of the keyboard are described as "<F5>" for FUNCTION key 5. Combinations of keys using the CTRL, SHIFT or ALT keys are described using prefixes to the key that must be pressed at the same time. For example, pressing the SHIFT and FUNCTION 5 keys is displayed as "SHIFT-<F5>".
- For instructions that describe following a menu structure, the "→" character separates the menu selections. For example, to get to the Stock Status Inquiry screen from the top "AM" menu, go to "6. Inquiries" → "1. Stock Status Inquiry". You can also jump to a particular program or menu from the "SELECT:" prompt by entering the menu entry numbers. In the Stock Status Inquiry screen example, you can enter "AM0601".
- Program names are described in all upper case. For example, the Stock Status Inquiry Screen is displayed as "AMSTOCKINQ". To bypass the menus and go into this program directly, enter the program name in upper-case at the "SELECT:" prompt in any menu, and press the <ENTER> key.
- Extra information that further explains a step or procedure is in italic characters, preceded by a "TIP:". A "NOTE:" will precede an exception or warning.
- Screen prints are included with the instructions to demonstrate what you can expect to see on the screen at a particular step in a procedure. Please note that your screen will not be exactly the same, and will be slightly different.

Operator Information Maintenance

Set up an OPERATOR ID for every *AutoPoint*® user who will be using your system.

For counter staff, you can set up a generic OPERATOR ID that can be used by multiple users. This generic OPERATOR ID should have minimal security (see SECURITY LEVELS below).

The following screenshot shows an example of an Operator Information record:



Operator Information Maintenance - PORKY TEST DATA (s2oprmt)

Hot Menu

amador

Operator Id: DEMO

Password: *****

Operator Name: Demonstrator.....

Company Id: DEM - PORKY TEST DATA

Operator Message: WELCOME TO AUTOPOINT!

Lockout Flag: Y

Menu Tree Id:

Logon Default Ref #: POS

Log Activity Flag: No Log

Auxiliary Info: DEM

Security Offset: 99

☒ Email Allowed ?

☐ New Email ?

☐ Customer Filter Exception ?

☐ Logon CRT Default ?

SECURITY SYSTEMS

1 2 3 4 5

1234567890123456789012345678901234567890

Security Levels: 1234 5678901234 5678901234 5678901234 567890

Save

Sequence to Open the Cash Drawer

INS CAP NUM 1/05/2009 2:48:48 pm 800



An Operator Information record is comprised of the following fields:

OPERATOR ID – The user (or login) name the operator uses to log into *AutoPoint®*.

If the user's UNIX (or Linux) login name is the same as her *AutoPoint®* OPERATOR ID, she will not have to log in to *AutoPoint®* after logging in to UNIX.

PASSWORD – The users' password. Asterisks are displayed instead of the actual password as you enter it. Whenever you create an operator or change a password, you must enter the password twice to confirm it.

OPERATOR NAME – The user's full name.

COMPANY ID – The three-letter COMPANY ID of the default company in which the user works. *AutoPoint®* displays the corresponding COMPANY NAME on the next line.

OPERATOR MESSAGE – A message that is displayed as the user logs into the system. On newer computers, this flashes by so fast there is no point in entering anything.

LOCKOUT FLAG – Enter Y[es] to lock the user out of *AutoPoint®*. Leaving this field blank allows the user to log into the *AutoPoint®* system.

MENU TREE ID – (for future use)

LOGON DEFAULT REF # – If you want a user to log in directly to a specific program or menu location (instead of the main *AutoPoint®* menu), enter the reference number of the menu location or program.

If you want the user to log into main menu to appear when the operator signs on, press **Enter** to leave this field blank.

LOG ACTIVITY FLAG – (for future use)

AUXILIARY OPER INFO – If the user will be using Order Entry, enter their Salesman/Counterperson ID. This determines under which Salesman/Counterperson ID *AutoPoint®* accumulates sales analysis data.

E-MAIL ALLOWED – Enter Y[es] to enable the user to use *AutoPoint®* email.

NEW E-MAIL – Press **Enter** to bypass this field when creating a new user. When the user receives email, *AutoPoint®* will automatically update this field.

SECURITY LEVELS – Setting security levels for a user determines what *AutoPoint®* programs users can access and what functions they can perform in each program.

The following chart shows what functions each position controls. If the position is not included in the chart, *AutoPoint®* does not currently use it. Security levels for each position vary from 0 (no access) to 9 (full access).



To restrict countertermen to Point of Sale and Stock Status Inquiry only, enter **1** in position 38 and **1** in position 39. If you want the countertermen to see cost in Stock Status Inquiry, enter **5** in position 39.

CUST FILTER EXCEPTION – Sets the global customer filter exceptions for this user. The lower this number, the fewer exceptions to Customer Filtering rules this user has, provided such rules have been set up. Customer Filtering controls which users can access customers in which branches and regions. If you may want to restrict some users' access to certain branches' and regions' customers, please contact Amador Customer Care for assistance.

SECURITY OFFSET – If this field is set to "00", then this user has no security offset. Otherwise, this field accepts the numbers "01" to "26" for the security offset assigned to it. If you want to scramble an individual user's Salesman/Countertermen Code (overrides any company or branch security offset, for this user only), assign a security offset in Operator Maintenance. To see what the scrambled code is, with sufficient File Maintenance security you can call up the Salesman/Countertermen Code that this user intends to use, in Salesman/Countertermen Maintenance, and press F7 to see the 26 possible scrambled codes. The Nth code is the one for this user, where N is the security offset. For example, for security offset 05, use the 5th scrambled code that displays with F7. If the user whose code is being scrambled does not have sufficient security to view the scrambled codes, then an administrator should display the scrambled codes as explained above, in order to inform the other user of their own new code. Note that, when changing the security offset for a user in Operator Information Maintenance, you need to log that user off and back on in order for the security offset to take effect and determine their new scrambled Salesman/Countertermen code.

Logon CRT Default – If set to "Y" then the user's CRT record will use the Operator CRT defaults, otherwise, if set to "N", the user's CRT record will use the CRT record assigned at login.



Security Systems Levels

Position	Function	Run/Inquire	Change	Add	Delete
2	<i>Accounts Receivable</i>				
2	Create Cash Receipts Worksheet (AM040101)	5			
2	Enter & Edit Cash Receipts (AM040102)	2	5	4	7
2	Print Cash Receipts Edit List (AM040102)	5			
2	Post Cash Receipts (AM040102)	5			
2	Print Open Payment Report	3			
2	Run Monthly Close Out Process (AM0402)	5			
2	Enter & Edit Sales Transactions (AM040301)	2	5	4	7
2	Print Sales Transaction Edit List (AM040302)	2			
2	Post Sales Transactions (AM040303)	5			
2	Calculate Finance Charges (AM040401)	5			
2	Adjust Calculated Finance Charges (AM040402)	2	5	4	7
2	Print Finance Charges Edit List (AM040403)	4			
2	Post Finance Charges (AM040404)	5			
2	Print GL Distribution Report (AM040405)	8			
2	Print AR Aging Report (AM040406)	5			



Position	Function	Run/Inquire	Change	Add	Delete
2	Print Statements (AM040407)	5			
2	Update AR Credit File (AM040408)	5			
2	Purge Monthly Detail (AM040409)	5			
2	Print AR Trial Balance and most other AR Reports (AM0405)	3			
2	Customer Open Item Inquiry (AM0406)	1			
10	<i>System Maintenance</i>				
10	Operator Information Maintenance (SM0101)	3	9	9	
10	Print Operator Information (SM0102)	3			
10	Terminal System Maintenance (SM0103)	3	9	9	9
10	Current Terminal & Operator Status (SM0104)	3			
10	Company Information Maintenance (SM0105)	5			
10	Change Branch (CB at SELECT prompt)	3			
10	Change Company ID (SM0106)	4			
10	License Registration (SM0109)	9			
10	File Analyze (SM02)	0	0	0	0
10	Queue Operation (SM03)				
10	<ul style="list-style-type: none"> 7 is required to execute, stop or delete items 				



Position	Function	Run/Inquire	Change	Add	Delete
	from the queue.				
10	CRT Records (SM04)	1	3	8	8
10	Printer Records (SM05)	1	3	8	8
10	Print/Delete saved reports (AM070605)	1			
10	Access Archived Spool Files [F11] from Print Spooled Reports (AM0706)	9			
22	<i>Quotations</i>				
22	Quotation Entry (AM1001)	1			
22	<ul style="list-style-type: none"> For additional security see Salesman/Counterpart Maintenance 				
22	Open Quotation Report (AM1002)	1			
22	Quotation Purge 9AM1003)	7			
22	Quotation Terms Maintenance (AM1004)	3	5	7	9
22	Quotation Control Record (AM1005)	3	7	8	9
22	Terms & Conditions Set Maintenance (AM1006)	3	7	8	9
22	Terms & Conditions Listing (AM1007)	0			
29	<i>Hot Menu</i>				
29	<ul style="list-style-type: none"> Access the Hot Menu (press TAB in AutoPoint®) 	1			



Position	Function	Run/Inquire	Change	Add	Delete
29	<ul style="list-style-type: none"> Access to programs within AutoPoint® through the Hot Menu is limited by the security requirements for particular programs. 				
29	Access Office Tools in the Hot Menu	2			
30	<i>Mail Groups (from within AutoPoint® email)</i>				
30	Look up mail groups	1			
30	Create and edit mail groups	5			
35	<i>Price Updates</i>				
35	Enter and Edit Price Updates (AM090403)	2	4	3	5
35	Print Price Update Edit List (AM090404)	5			
35	Post Updates to Item Records (AM090405)	8			
36	<i>Purchasing</i>				
36	Generate Recommendations from Sales (AM030101)	3			
36	Generate Recommendations from Inventory (AM030102)	3			
36	Maintain Recommended Purchase Orders (AM030103)	7	7	7	7
36	Print Recommended Purchase Orders (AM030104)	3			



Position	Function	Run/Inquire	Change	Add	Delete
36	Delete Recommended Purchase Orders (AM030105)	3			
36	Generate Pos from Recommendations (AM0302)	7			
36	Purchase Order Maintenance (AM0303)	5	7	7	9
36	<ul style="list-style-type: none"> 7 is required to release a PO; 9 is required to void a PO. 				
36	Print Purchase Orders (AM0304)	3			
36	Merchandise Receiving (AM0305)	3	4	4	7
36	<ul style="list-style-type: none"> 7 is required to unreceive a Purchase Order 				
36	Send Purchase Orders	7			
36	Purchase Order Status Report (AM030801)	3			
36	<ul style="list-style-type: none"> If the user has 5 or less in position 36 AutoPoint® will check the field 20 “PO Receiving Flag” in Branch Maintenance. If this field contains a 0, PO totals will not print on this report. 				
36	Purchase Order Backorder Report (AM030802)	3			
36	Purge Completed Pos (AM080202)	8			
37	<i>Physical Inventory</i>				
37	Freeze Inventory Status (AM090301)	2			
37	Print Inventory Worksheet	2			



Position	Function	Run/Inquire	Change	Add	Delete
37	<ul style="list-style-type: none"> 8 is required to print quantity on hand. 				
37	Enter & Edit Physical Quantities (AM090304)	2	4	3	5
37	Print Physical Inventory Edit List (AM090306)	7			
37	Post Physical Inventory to Item Records (AM090307)	6			
37	Delete Physical Inventory Files (AM090308)	7			
37	Inventory Adjustments (AM0905)	8			
37	Change Average Cost in Inventory Adjustments (AM0905)	9			
38	<i>Point of Sale</i>				
38	Point of Sale Entry (AM01)	1			
38	<ul style="list-style-type: none"> For additional security see Salesman/Counterperson Maintenance 				
38	Batch Point of Sale (AM0906)	3			
38	Run End of Day Process (AM080101)	8			
38	Maintenance Audit Report (AM080107)	8			
38	Run End of Month Process (AM080302)	8			
38	Print GL Distribution Report (AM080304)	8			
38	Sales Summary Report (AM080306)	8			



Position	Function	Run/Inquire	Change	Add	Delete
38	Initialize Invoice Printer (AM0901)	1			
39	<i>Item Maintenance</i>				
39	Item Maintenance including Item Branch Maintenance and Item History Maintenance (AM0501)	5	7	7	9
39	<ul style="list-style-type: none"> 8 is required to rename items or recode a product line 				
39	<ul style="list-style-type: none"> 9 is required to purge items. 				
39	Customer Maintenance (AM0503)	3	6	7	9
39	<ul style="list-style-type: none"> 9 is required to change a customer's core balance 				
39	Customer Price Maintenance (AM0504)	3	6	7	9
39	Company Maintenance (AM0505)	3	5	7	9
39	<ul style="list-style-type: none"> Several fields can only be changed by Amador staff. 				
39	Branch Maintenance (AM0506)	3	5	7	9
39	<ul style="list-style-type: none"> Several fields can only be changed by Amador staff. 				
39	Supplier Master Record (AM050701)	3	6	7	9
39	Supplier Branch Record (AM050702)	3	6	7	9
39	AP Vendor Record (AM050703)	3	6	7	9



Position	Function	Run/Inquire	Change	Add	Delete
39	Product Line Maintenance (AM050802)	3	6	7	9
39	Salesman/Counterpart Maintenance (AM0309)	3	6	7	9
39	<ul style="list-style-type: none"> If you are encrypting salesman initials, 9 is required to see the encrypted initials 				
39	Terms Code Maintenance (AM0510)	3	6	7	9
39	Ship Via Maintenance (AM0511)	3	6	7	9
39	Tax Authority Maintenance (AM051201)	3	6	7	9
39	Tax Group Maintenance (AM051202)	3	6	7	9
39	Core/Item Assignment (AM051301)	3	6	7	9
39	Superseded Items (AM051302)	3	6	7	9
39	Substitute Items (AM051303)	3	6	7	9
39	Kits & Assemblies (AM051304)	3	6	7	9
39	Related Items (AM051305)	3	6	7	9
39	Priority Code Maintenance (AM0521)	3	6	7	9
39	Accounting Period Maintenance (AM051501)	3	6	7	9
39	Account Number Maintenance (AM051502)	3	6	7	9
39	AR Control Record Maintenance (AM051503)	3	7	7	9
39	Inventory Resequencing Process (AM0516)	9			



Position	Function	Run/Inquire	Change	Add	Delete
39	Item Branch Creation Process (AM051801)	8			
39	Item Branch Change Process (AM051802)	8			
39	iCatRack® Manufacturer Cross Reference (AM052401)	8			
39	Stock Status Inquiry (AM0601)	1			
39	<ul style="list-style-type: none"> 5 is required to be able to see item costs; to control what other prices are visible to users, set field 19 “Top Price” in Company Maintenance accordingly. 				
39	Customer Inquiry (AM0602)	2			
39	<ul style="list-style-type: none"> 1 is required in position 2 as well. 				
39	REPORTS:				
39	Sales Analysis reports by Salesman, Product Line, Counterpart, Tax Authority, Customer, Customer Type (AM0701)	7			
39	Listings, including Customer, Salesman/Counterpart, Supplier, Product Line, Terms Code, etc. (AM0707)	3			
39	Stock Status Report (AM070201)	5			
39	Most inventory reports, including the Inventory Valuation Report, Lost Sales/Buyouts Report, On Order Report, Warranty on Hand Report, etc. (AM0702)	5			
39	Inventory Purchasing Report (AM070316)	3			



Position	Function	Run/Inquire	Change	Add	Delete
39	Full Price Report (AM070301)	5			
39	Counter Price Report (AM070302)	3			
39	Min/Max Calculation Report	5			
39	<ul style="list-style-type: none"> 8 is required to update min/max levels. 				
39	Demand Ranking/Pop Code Reclassification (AM0705)	5			
39	<ul style="list-style-type: none"> 8 is required to update pop codes. 				
43	<i>Order Processing</i>				
43	Order Entry (AM0201)	3			
43	Credit Entry (AM0202)	5			
43	Shipping Entry (AM0203)	7			
43	Print Invoices (AM0204)	8			
50	<i>Miscellaneous</i>				
50	Access command line by pressing F6 at SELECT prompt	5			
50	Run program by entering program name at SELECT prompt	1			

Add on Packages:

Position	Function	Security Requirements
3	<i>Accounts Payable</i>	
3	A/P Transaction Processing (AP01)	3
3	Enter & Edit A/P Transactions	4
3	Print a Transaction Edit List	3
3	Post Transactions to Open Item File	5
3	Payment Processing	6
3	Record Voided Cheques	7
3	Vendor Inquiry	6
3	Reports and Listings	6
3	Periodic and Year-End Processing	7
3	File Maintenance	7
3	Maintain A/P Transaction Dates	8
3	Vendor EDI X12 Maintenance	9
3	Installation and Set Up Procedures	9



Position	Function	Security Requirements
4	<i>General Ledger</i>	
4	Account Inquiry	3
4	Journal Entry Processing	5
4	Posting to Permanent Ledger	7
4	Financial Statements	5
4	Standard Reports and Listings	5
4	End of Period Processing	5
4	Year-End Processing	5
4	File Maintenance	5
4	Maintain Transaction Types	7
4	Deletion	9

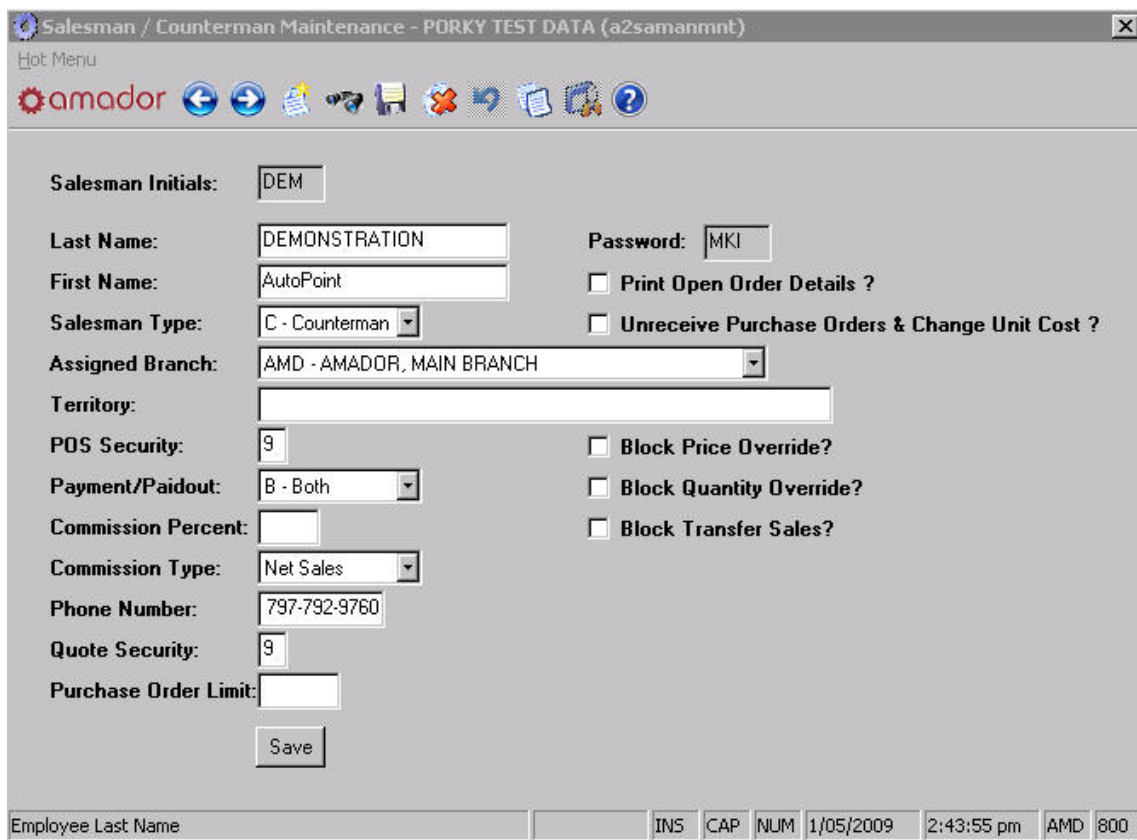
Salesman/Counterterm Maintenance

You must set up every **AutoPoint®** user who uses *Point of Sale* (AM01), *Order Entry* (AM02 - option), or *Quotations* (AM10 - option) in *Salesman/Counterterm Maintenance* (AM0509). **AutoPoint®** uses this information to track who creates orders and quotations, which provides for accountability and for measuring performance.

In *Salesman/Counterterm Maintenance*, you also set up the security access each user has in *Point of Sale* and *Quotations*.

If you assign a salesman to customers in *Customer Maintenance* (AM050), you can track sales by salesman. (There are several sales analysis reports that report sales by salesman.)

The following screenshot shows an example of the *Salesman/Counterterm Maintenance* screen.



A *Salesman/Counterterm Maintenance* record consists of the following fields:

SALESMAN INITIALS – Three initials or any other three letters used to identify an **AutoPoint®** user. A user must enter his/her initials to enter *Point of Sale* or *Order Entry* transactions. You can also enter salesman initials on customer records in *Customer Maintenance* if wish to assign customers to particular salesman.

This is commonly referred to as the "Salesman ID".

For security purposes, **AutoPoint®** can scramble SALESMAN INITIALS once you have entered them. Enter a value from 1 to 26 in field 20 "SECURITY OFFSET" in Company Maintenance. To scramble the initials again, enter a different value in this field.

LAST NAME – The last name of the user.

FIRST NAME – The first name of the user.

TYPE OF SALESMAN – Identify the user as being one of the following types:

- S[alesman]
- C[ounter]man]
- A[dministrative]
- [cashier]

This field is for your information only and the value you enter does not affect how **AutoPoint®** functions, except that when a cashier exits *Point of Sale*, her **AutoPoint®** session ends.

ASSIGNED BRANCH ID – The default branch for the user. Unless the user changes to a different branch after logging in, this is the branch this user works in under *Point of Sale*, *Order Entry*, or *Quotation Entry*.

TERRITORY – A salesman's territory (for information only).

POS SECURITY – Determines the user's access to privileged functions in *Point of Sale*:

- **9** – Allows the user to void an invoice that has already been printed and authorize a charge invoice if the sale puts the customer over their credit limit.
- **8** – Allows the user to void invoices and to override returns when you cannot find the original purchase invoice.
- **7** – Allows the user to override returns only.
- **0** – Prevents the user from performing the above functions

NOTE: If *System Option 38 "DISPLAY COST IN POS"* is set to **Y[es]**, all users with a security of **6** or higher will be able to see the item costs in *Point of Sale*.

ALLOW PAYMENT/PAIDOUT – Determines whether the user is able to accept payments from customer or make payments from the till:

- **P[ayments]** allows the user to accept payments from customers.

- [paid] **O**[uts] allows the user to issue payments from the cash drawer.
- **B**[oth] allows the user to perform both functions.
- Leaving the field blank prevents the user from performing either function.

COMMISSION PERCENT – The percentage to use when calculating commissions for this salesman. (For information only.)

COMMISSION TYPE – Indicates whether to calculate the salesman's commission on **N**[et sales] or **G**[ross profit]. (For information only.)

TELEPHONE NUMBER – A telephone number for the salesman that prints on any quotations done under this salesman ID.

QUOTE SECURITY – Determines the user's access to privileged functions in *Quotations*:

- **6** – Allows the user to modify enter and change item costs in *Quotation Entry* and to edit *Terms and Conditions*.
- **1** – Allows the user to enter and edit quotes.

OPEN ORDER PRINTING – Determines whether the user can print Open Order Details. If set to “N” then the user will be prompted for a 3 letter code to print the Open Order.

UNRCV PO/CHNG UNIT COST – Determines whether the user is required to input a three-letter code in order to unreceive a PO. If System Option 80, “Enable PO Unit Cost Security”, is enabled the user will also be required to enter a 3 letter code to change the unit cost of PO line items.

If you wish to allow the user to Unreceive and/or change Unit Cost on PO line items without being prompted for initials then enter a “Y” in this field. If you wish to limit which users are permitted to Unreceive and/or change Unit Cost then enter a “N” in this field.

PURCHASE ORDER LIMIT – Allows you to limit the value of the PO a user is authorized to Release. The limit identified in this field, once System Option 82 is enabled, will require the user to enter a three letter code to Release a Purchase Order valued higher than this value.

BLOCK PRICE OVERRIDE – Determines whether this user is allowed to override prices specified for items for customers in Point-Of-Sale.

BLOCK QTY OVERRIDE – Determines whether this user is allowed to override quantities in Point-Of-Sale should insufficient quantity be available at the time the order is created.

BLOCK XFER SALES – Determined whether this user is allowed to perform Transfer Type Sales.