MERCHANT

Delivering Competitive Edge

Client Service Bulletin

MERCHANT Sales Order Processing

Enhanced Password Levels for Price/Discount Amendment

Important Information

Publication No. 64-13007-04A

October 2004

1st Edition

ELECTRONIC DATA PROCESSING PLC

1st Edition, October 2004

It is the policy of **Electronic Data Processing PLC**, and its subsidiaries, to improve products as new technology, components, software and firmware become available. **Electronic Data Processing PLC**, and its subsidiaries, therefore, reserve the right to change specifications without prior notice. All software products are licenced to users under the terms of the **Electronic Data Processing PLC** Program Products Licence.

All features, functions, and operations described herein may not be marketed by **Electronic Data Processing PLC**, and its subsidiaries, in all parts of the world. Therefore, before using this document, consult your system supplier for information that is applicable and current.

Copyright Notice

Disclaimer

Introduction

This Client service Bulletin describes the standard facility in Merchant to give greater control of password access to the amendment of selling prices and discounts. This new functionality is based on the ability to create multiple levels of passwords for use in Sales Order Entry.

In prior product release, the standard system uses a single global password which was valid throughout all order types - quotations, despatch notes, invoices etc. This functionality can now be replaced by a set of password privilege levels which are linked to specific orders types. In this way a master password can be set up to allow amendment of prices and discounts in all types, with a series of lower level passwords which are configured to include/exclude particular patterns of order types. This avoids the previous need to give an operator who may change discounts on quotation orders the ability to amend prices and discounts throughout all order and invoice lines.

The new functionality provides additional management control of system operations, restricting who may amend prices and discounts. There are three stages to this new functionality:

- Firstly, there is the maintenance of the privilege levels and the associated passwords.

- Secondly, there is the entry and validation of the passwords in order entry, together with the recording of the amendment and, optionally, invalid password entry/attempted access violation.

- Thirdly, there is the enquiry and reporting of the recorded price/discount amendment history.

First Stage: Standalone Password Setup & Maintenance Program

The first stage is a standalone password set up and maintenance function. Password privilege level numbers are entered to build a series of levels against each of which is held a password and a table of "Y"s corresponding to the order types where access to price/discount amendment is permitted. Passwords are not displayed en clair for security reasons and, as in other password maintenance functions, the existing password must be entered before line amendment is permitted. What is being set up here is a series of order type price/discount access rules where **this** password permits the ability to amend prices and discounts in **these** order types. In addition, at the acceptance option, the question is asked whether to update a file of invalid password entries where a history of attempted access violations is held. Some users/companies may wish to record such a history separately for management of the monitoring, selection and reporting data. A complete access history is always held on the sales line record.

```
SYS REF: PDA          edp >>>>> M E R C H A N T <<<<<    28/09/04    SCREEN 1
                            PRICE/DISCOUNT ACCESS LEVELS

Privilege Level       QO  DO  DI  FO  PL  DN  SI  RI  CN  CR      Password
         1            Y                                           Enabled
         2            Y       Y                                   Enabled
         3            Y           Y   Y   Y                       Enabled
         4                                  Y       Y   Y         Enabled
         5            Y   Y   Y   Y   Y   Y   Y   Y   Y   Y        Enabled




                                     ┌─────────────────────────────┐
                                     │    Esc - Escape             │
                                     │      Y - Accept             │
                                     │    "n" - Add/Amend a Level  │
                                     │   I"n" - Insert a Level     │
                                     │   D"n" - Delete a Level     │
                                     │ F/P/N/L - Display Pages     │
                                     └─────────────────────────────┘

OPTION: _
```

Second Stage: Password Entry (access denied) in Sales Order Entry

For the second stage, in Sales Order Entry, what is required is that all operators/terminals have access to the price/discount amendment options, but the different passwords permit only for amendment of specific order types.   In other words, all users can see the "P", "N", "NP", "D1", "D2", "D3" and "C" options in the help box and enter these options on the product screen.   However, on entering the option a password is demanded. The entered password will be validated against those held in the table for the appropriate order type.

```
SYS REF: SOP/DN        edp >>>>> M E R C H A N T <<<<<    28/09/04    SCREEN 6
                                  DESPATCH NOTE
                                                               Act      1000
   Product UPC608                      Price                   Free      994
   3/2 MINI-POPPET VALVE                1.50          Per PACK
   BUTTON OPERATED c/w             Disc 1    0.00%    Stock Unit EACH
   4mm FITTINGS.                   Disc 2    0.00%    Ordered           6
                                   Disc 3             Despatched        6
   Catalog No. UPC608             No CSD              Outstanding       0
   Bin number.                    Nett Price 1.50
   Prod Group  P7      PNEMATICS KITS, SPARES
                                  Nett Cost  1.00     Per EACH

                                                      Margin %       33.33
                                                      Mark Up %      50.00


 Enter Password or <Esc> to Escape ***



This Password is NOT valid for DN Orders_
```

As an example, one password may only permit the ability to amend prices/discounts in "QO", quotation orders. Another master password would allow amendment in all types of orders. Operators, users and terminals are actually irrelevant, since it is part of the requirement that a manager with knowledge of such a master password with superior access can go to any operator's terminal and amend price/discounts with that appropriate password.   A full history of operator, terminal, date, time, current prices/discounts together with a record of invalid password entry is kept on the sales line. Optionally, a separate file can be updated if invalid passwords are entered. This may be required to highlight repeated attempts to discover valid passwords.

Third Stage: Price/Discount History Enquiry

The third stage is an enquiry to view a history of the price and discount amendments for each order line to identify when and by which operator the options were used, what the resulting amended prices and discounts were, as well as identifying attempted password violations. This history enquiry starts with the entry of a current or invoiced sales order number.

```
SYS REF: PDH          edp >>>>> M E R C H A N T <<<<<    28/09/04    SCREEN 2
                            PRICE/DISCOUNT HISTORY

Line   Product Description              Price      D1%     D2%     D3%    CSD%
1      100mm Fibolite 3.5N Std Block     7.00
       440x215mm standard face          BLOCK
       Ultra lightweight aggregate
09:23 24/09/04 JENNY IRETON          *** ACCESS DENIED ~ 6 Invalid Passwords

2      Everdry RH Corner Starter         5.00
       Timloc Cavity Tray x340mm        EACH
       to suit 50-74mm Cavity           13:21 28/09/04 DAVID JOHNSON
       to BS6073:pt1:1981
Original Price CARL JAY               15.00

3      3/2 MINI-POPPET VALVE             1.50
       BUTTON OPERATED c/w              PACK
       4mm FITTINGS.
```

From here the customer, delivery address, order date and number of lines are displayed for confirmation, after which follows a display of all order lines showing details of product and description, price and discounts together with the operator, date and time of amendments. Also shown are the details of invalid password entries where access was denied.

Implementation Details

There are three new BP programs and one new file, which are linked to one new parameter control record. In addition there is one new field in the **SLINES** file.

❶ The first stage password maintenance program is:

BP EDP.PRICE.DISCOUNT.ACCESS. The table of passwords and associated order types is held in **COMPANY PRICE.DISCOUNT.ACCESS**. Attribute 1 is a multi-value list of the valid passwords held in an encrypted form and attribute 2 holds sub-value lists of the associated order types. Attribute 3 is "Y" if the file of invalid password entry is to be maintained.

The new file is **EDP.PRICE.DISCOUNT.INVALID.PASSWORDS**. Relatively full details of the sales line are kept since the line may have been deleted or not completed following the attempted amendment. The attribute layout of the file is as follows…

IP0 - USER*DATE*TIME
IP1 - OPERATOR
IP2 - USER/TERMINAL
IP3 - DATE
IP4 - TIME
IP5 - ORDER TYPE
IP6 - INVALID ATTEMPTS
IP7 - STATUS
IP8 - PRICE
IP9 - UNIT OF MEASURE
IP10 - DISC 1 %
IP11 - DISC 2 %
IP12 - DISC 3 %
IP13 - CSD RATE
IP14 – INVALID PASSWORDS
IP15 - PRICE ID
IP16 - PRODUCT DESCRIPTION
IP17 – QUANTITY ORDERED
IP18 – INVOICE ACCOUNT
IP19 – DELIVERY ACCOUNT
IP20 – DELIVERY ADDRESS

❷ The second stage password entry is handled by:

BP EDP.PRICE.DISCOUNT.AMEND.UFO. This is a ufo to be plugged into SOP.FORMAT PRICE.DISCOUNT.AMEND.UFO attribute 1. A list of order types in which these rules will be ignored may optionally be held in attribute 2. This means, for example, that all Direct Order entry may be exempted from password control since it is usually the case that selling prices are manually entered here. Amendment and password entry details are kept on the sales line record. There is a new previously unused field in the SLINES file **SL4** for the amendment history details. The layout of this history is as follows. It consists of a series of multi-values, one for each time a price/discount option is entered. Within each multi-value there is a set of sub-values as follows...

1 - operator code

2 - terminal number/user name

3 - date

4 - time

5 – order type

6 - invalid password entry count

7 - "OK" if valid password entered or "ESCAPE" if access was denied

The rest of the history is null if access was denied, otherwise it holds the price/discount details prior to the amendment.

8 - price

9 - sales unit of measure

10 - discount 1 percentage

11 - discount 2 percentage

12 - discount 3 percentage

13 - csd percentage

❸ The third stage price/discount amendment history enquiry is handled by:

BP EDP.PRICE.DISCOUNT.AMEND.HISTORY.

Regional Offices

SCOTLAND
Douglas House
Avondale Campus, Pochard Way
Strathclyde Business Park
Lanarkshire
Bellshill, ML4 3HB
Telephone: 01698 842425
Fax: 01698 845166

NORTH
Beauchief Hall
Beauchief
Sheffield S8 7BA
Telephone: 0114 262 1621
Fax: 0114 262 1126

SOUTH MIDLANDS
Sunrise Parkway
Linford Wood
Milton Keynes MK14 6LJ
Telephone: 01908 665522
Fax: 01908 249798

BML (OFFICE COMPUTERS) LIMITED

Maypole House
Maypole Road
East Grinstead
West Sussex
RH19 1HU
Telephone: 01342 313141
Fax: 01342 313181
www.edp.fastfreenet.com

The Barns
Stretton Road
Stretton
Warrington
Cheshire WA4 4NP
Telephone: 01925 732300
Fax: 01925 730828

DISYS ASSOCIATES LIMITED

Sunrise Parkway
Linford Wood
Milton Keynes
MK14 6LJ
Telephone: 01908 665522
Fax: 01908 249798
www.disys.uk.com

The Barns
Stretton Road
Stretton
Warrington
Cheshire WA4 4NP
Telephone: 01925 732300
Fax: 01925 730828

BCT SOFTWARE SOLUTIONS LIMITED

The Barns, Stretton Road
Stretton, Warrington
Cheshire WA4 4NP
Telephone: 01925 732300
Fax: 01925 730828
www.bct-solutions.co.uk

Douglas House
Avondale Campus, Pochard Way
Strathclyde Business Park
Bellshill, Lanarkshire, ML4 3HB
Telephone: 01698 842425
Fax: 01698 845166

edp
ELECTRONIC DATA PROCESSING PLC

**GROUP HEADQUARTERS
(RESEARCH & DEVELOPMENT CAMPUS)**
Beauchief Hall, Beauchief, Sheffield S8 7BA
Telephone: 0114 262 1621 Fax: 0114 262 1126
Website: www.edp.fastfreenet.com