CRESTWOOD CHECKBOOK SECURITY
For Microsoft Dynamics GP (Great Plains)

Social Media

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Contact
Crestwood Sales
sales@crestwood.com

Overview

Crestwood Associates is an award-winning Acumatica and Microsoft certified partner with proven success in 5,000+ ERP implementations. For more than 20 years, Crestwood Associates has been providing innovative technology solutions to accelerate operational efficiencies for mid-market organizations. Best known for delivering unparalleled value to their clients, Crestwood serves thousands of clients nationwide, and is rapidly expanding reach across the United States.

For more information about Crestwood or ERP solutions, visit **crestwood.com**

### Lock Down Checkbook Access (and more) in Dynamics GP

Like many businesses, you probably use multiple checkbooks. By default, Dynamics GP allows all users to see all checkbooks, and there's no easy way to restrict checkbook access down to the user level. Dynamics GP does come with checkbook security out of the box, meaning you can restrict a user from having access to ALL checkbooks, but wouldn't it be great if you could restrict users to see only the checkbooks they need? Crestwood Associates has developed a Dynamics GP solution which provides this functionality, Checkbook Security.

What can Checkbook Security do for you?

Crestwood Associates' tool, Checkbook Security, is written in Dexterity and is fully integrated within Dynamics GP. It acts as a monitor over the entire system, preventing the use and display of checkbook IDs on any window and on any report for any module in the system. This level of security allows users to only see those checkbooks which they have been assigned access to. The enhancement works on a per-user basis and not on a per-class basis, allowing the security model to be as granular as you need it to be. Once installed, users are easily assigned to checkbooks through the Security Matrix.

Figure 1 – User Checkbook Security Setup Window

By default, all users have access to all checkbooks. This ensures that there are no interruptions in the normal day-to-day processing since any restricted checkbooks are essentially invisible to the system and cannot be read or viewed by Dynamics GP. (A "restricted" checkbook is one to which a user does not have access.)
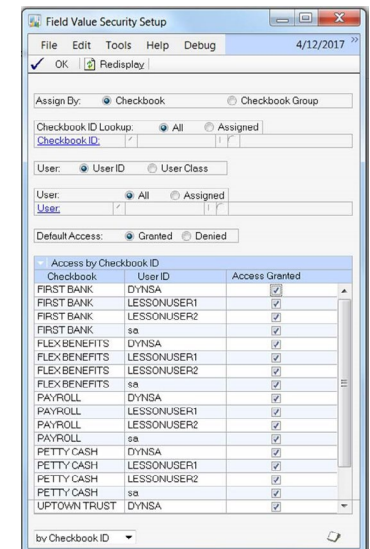
KEY BENEFITS

- Lock down checkbooks
- Specify field value restrictions
- Automatically updates for all products, windows, forms,
- and reports
- Easily install and then "set and forget"
- Lock down by user
- Transparent

- Works in the web client
- Takes field level security one step further by allowing "Checkbook
- security"
- Up to 100 users and 25 checkbooks

CRESTWOOD CHECKBOOK SECURITY
Written in Dexterity and is fully integrated in Dynamics GP

Crestwood Associates
ERP Solution Experts

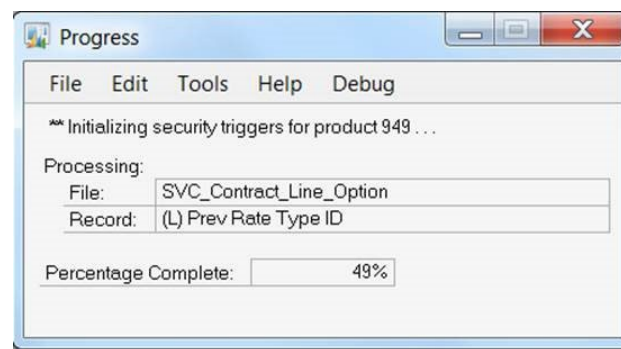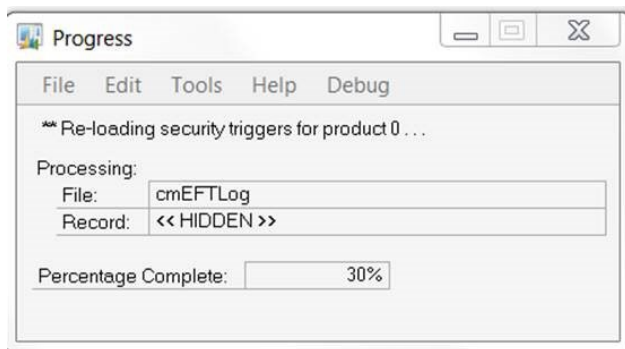**When a user is denied access to a checkbook, the following occurs:**

- The restricted checkbook no longer appears in any lookup in any module, including all add-ons, customizations, and ISV products.
- Any windows that would normally display that checkbook would have <HIDDEN> in the appropriate field(s).
- Any reports that would normally display that checkbook would have <HIDDEN> displayed in the appropriate sections of the reports.
- Browsing through the Checkbook Maintenance window would "skip over" the restricted check book(s).
- Trying to enter the checkbook ID in an editable field would result in the below warning: "You do not have access to the selected
- checkbook. Please contact your system administrator for more information."

Seamless Integration

There are no alternate or modified windows as part of this enhancement. All processing is dynamic and done seamlessly within Dynamics GP. Any version changes or module installations across products will automatically inherit the security upon next login. No need to redo the security matrix over and over again. The initial startup progress windows shown here, in Figure 1, will be displayed as the system configures the checkbook security.

Figure 2 – Security Initialization

In summary, the Checkbook Security product is a lightweight custom overlay in Dynamics GP that will allow checkbooks to be restricted on a per-company basis over all modules and add-ons in Dynamics GP. A system administrator will configure the checkbook security once and the enhancement will monitor all checkbook access so that restricted checkbooks are not even displayed, allowing for a rigid security framework surrounding sensitive checkbook information.