SOP Restricted Items Genie User's Manual

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SOP Restricted Items Genie

SOP Restricted Items Genie (RIG) prevents someone in Sales Order Entry from selling an item to a customer that has not been authorized to purchase the item. The ability to strictly enforce product purchase authorization is not available in standard Dynamics GP. The only option is the time consuming and high maintenance process of using Price Levels which need to be maintained for every unique Customer/Item combination. Items that can only be purchased from specific customer(s) would need to be added to each respective Price Level causing redundancy and continual maintenance. Price Levels would also need to be set to "Required" in SOP setup, preventing any cross over sales or "on the fly" pricing.

RIG eliminates the complexity and high maintenance requirements from Dynamics GP by using a Customer/Item Maintenance setup window to assign items to specific customer(s). Once an item has been assigned to specific customer(s) it cannot be sold to other customers.

SOP Restricted Items Genie Advantages:

- Enforce product sale authorization by customer or customer class
- Use of multiple Price Levels not required
- Ease of maintenance
- No workarounds, strictly enforced

RIG works in the background of the Sales Transaction Entry window. When a user enters an item number on a sales line, RIG checks the authorization list in the following manner:

- If the item is absent from the RIG list:
 - It is ignored and standard GP handles the completion of the Sales Transaction
- If the item is present in the RIG list:
 - When the customer is assigned the item in RIG then the Sales Transaction is allowed to continue in GP
 - When the customer is not assigned the item in RIG then entry of the item is prevented on the Sales Transaction
- If the item belongs to an item class that is in the RIG list:
 - Customers assigned the item class are allowed to continue
 - o Customers assigned the specific item are allowed to continue
 - Customers not assigned the item or item class in RIG are prevented from purchasing the item
- Customer Classes
 - Customer classes can be used instead of specific customer IDs. The same rules are followed for enforcing item id and item class sales

The following screenshots show the messages displayed when the user tabs off the line after entering a restricted item number for a customer not authorized to purchase the item:

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The following screenshot shows the message displayed when using the item lookup window on a sales order line for a restricted item and an unauthorized customer:

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Item Number		Short Description	Additional Sorts		WAREHOUSE	
24X IDE		CD ROM			MAILENGOOL	
256 SDRAM		RAM			71164	
2GPROC					2.03\$	
3-A2440A		Op Sys				
3-A2969A		SCSI			Extended Price	
3-A2990A		HSC Slot Exp			\$0.00	\$0.00 🔺
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3-A3294A		Memory				
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3-A3542A		DDS Drive	Item '24X IDE' cannot be sold to	customer 'CENTRALC	0001'.	
3-B3813A		Keyboard			-	
3-B3897A		CD-ROM Media				
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Maintenance

Setting up restricted items using RIG is very straightforward. Setup is located on the Inventory Control Setup window: Microsoft Dynamics GP menu >> Tools >> Setup >> Inventory >> Inventory Control

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User Preferences	Integrate	 Sales Purchasing 	Sales		
Print Satur	Macro		۲		
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			Payroll	ж	Item Class Inventory Control Setup
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LAR			Human Resources	۲	Lot Category
					Item Class Currency
					Stock Calendar
					Bill of Materials Setup
					Price Level
					Price Group

Once the Inventory Control Setup window opens, click on the "Additional" menu and select "Restricted Items Genie Mainten" as shown below.

ile Edit Tools	Additional Help	2	sa Fabrikam	, Inc. 4/12/2017
	Restricted Items Genie Mainte	n	1. A.	
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The Restricted Items Genie Maintenance window will appear.

CRestricted Items Ger	nie Maintenance splay	2			a Fabrikam, Inc.
Customer ID ▼ Item Number ▼		Q			Add
Cust Type	Cust Value	Cust Descr	Item Type	Item Value	Item Descr

From here it is very easy to restrict items to specific customer(s) or customer classes(s) by lookup or entering a customer number or class and an item number or class and then clicking the "Add" button to include them in the list.

To switch between Customer ID and Customer Class click the Down Arrow Button next to Customer and make the desired selection.

Restricted Items	Genie Maintenanc edisplay	e			sa Fabrikam, Inc.
Customer ID Item Number	Customer ID Customer Class				Add
Cust Type	Cust Value	Cust Descr	Item Tune	Item Value	Item Descr

To switch between Item ID and Item Class click the Down Arrow Button next to Item.

Restricted Items	Genie Maintenanco edisplay	2			sa Fabrikam, Inc.
Customer ID 👻	Item Number Item Class				Add
Cust Type	Cust Value	Cust Descr	Item Type	Item Value	Item Descr

When an item is added to the Restricted Items Genie Maintenance window it becomes restricted to the customer(s) authorized to purchase the item. You can assign multiple customers to the same item.

isto m N	OK Ø Re merID ▼ Number ▼	display			dyna	micsGenie Fabrikam, Inc
	Cust Type	Cust Value	Cust Descr	Item Type	Item Value	Item Descr
	Customer	AARONFIT0001	Aaron Fitz Electrical	Item	24X IDE	24x CD-ROM
	Customer	ADVANCED0001	Advanced Paper Co.	Item	24×IDE	24x CD-ROM
	Customer	ADVANCED0001	Advanced Paper Co.	Item Class	MODEMS	Modems
	Cust Class	USA-ILMO-T1	IL and MO customers	Item	3-C2786A	Cabinet

You can add as many customer/item combinations as necessary. Items not present in the list can be purchased by any customer according to standard Dynamics GP rules.

To remove a customer/item combination from the list, simply click on the row header and press the "Delete" key.

Re: Isto	stricted Items G OK Ø Re omer ID • Number •	enie Maintenance display	Q Q		dyn	amicsGenie Fabrikam, Ind
_	Cust Type	Cust Value	Cust Descr	Item Type	Item Value	Item Descr
	Customer	AARONFIT0001	Aaron Fitz Electrical	ltem	24×IDE	24x CD-ROM
	Customer	ADV4 Restricted	l Items Genie	·	×	24x CD-ROM
	Customer	ADV/				Modems
			Are you sure you wan	to delete this re	cord?	
		h		<u>Yes</u>	No	

That's all there is to it! Anything on the list gets enforced on all users of the Sales Transaction Entry window, regardless of their security settings.

Installation and Registration

Installation

Copy DLL to GP AddIns Directory

The "RestrictedItemsGenie.dll" file needs to be copied into the GP AddIns folder on every client and server that will be using SOP Restricted Items Genie. Locate the AddIns folder, which is within the directory where the Dynamics GP client is installed, and copy the DLL there. The GP client should not be running when you copy the file.



Company Setup

Once the DLL is installed, launch Dynamics GP and login as "sa". Open the Company Setup window: Microsoft Dynamics GP menu >> Tools >> Setup >> Company >> Company

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Jose All Windows		Payroll Project Human Resources	•	Bank Credit Cards Comments Internet Information Custom Link Customer/Vendor Setup

Click on the "Additional" menu.

File Edit Tools	Additional Help					sa Fabrikam, Inc.	4/12/2017
	Install Restric	ted Items Genie			71.10		
Company Name	rabiikam, mc.			Company ID	TWU		
Address ID	Primary	Qi		User Defined 1			
Name	Fabrikam, Inc.			User Defined 2		20	
Contact	Taylor Stewart-Cray		-	Tax Exempt 1			
Address	4277 West Oak Pa	rkway		Tax Exempt 2			2
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Fax	(312) 436-2896 Ex	t. 0000					
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Click on "Install Restricted Items Genie" and the Restricted Items Genie Installation window will open.

10	(Seg Hei	gistration		
roduct	Restricted	Items Genie		
ersion	1.09.04.22			
Action	Installed	Company Name	Company ID	
Install		Fabrikam, Inc.	TWO	

Registration

Prior to installing RIG on any company, it should first be registered. Click the "Register" button and the registration window will open.

🖌 ок	🆓 Register	
Site Name		
Product	Restricted Items Genie	
Version	1.09.04.22	
Status	Invalid Registration Key	
Bea Keu		

Enter your registration key and click the "Register" button to validate. The status of the registration will be updated after the key is validated.

Restrict	ed Items Genie Registration	
🗸 ок	Register	
62 N		
Site Name		
Product	Restricted Items Genie	
Version	1.09.04.22	
Status	Does Not Expire	
Reg Key		- 1

Install

Clicking the "OK" button will return you to the Restricted Items Genie Installation window. Click the blue "Install" action for each company that you want to use RIG in. Upon successful installation the "Installed" checkbox will be checked and the Action will change to "Remove".

roduct ersion	Restricted Items Genie 1.09.04.22			
Action	Installed	Company Name	Company ID	
(and the set		Fabrikam, Inc.	TWO	

Remove

To remove RIG from a company Click the "Remove" action and follow the prompts.

oduct ersion	Restricted I 1.09.04.22	Restricted Items Genie 1.09.04.22	
Action	Installed	Company Name	Company ID
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