



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.

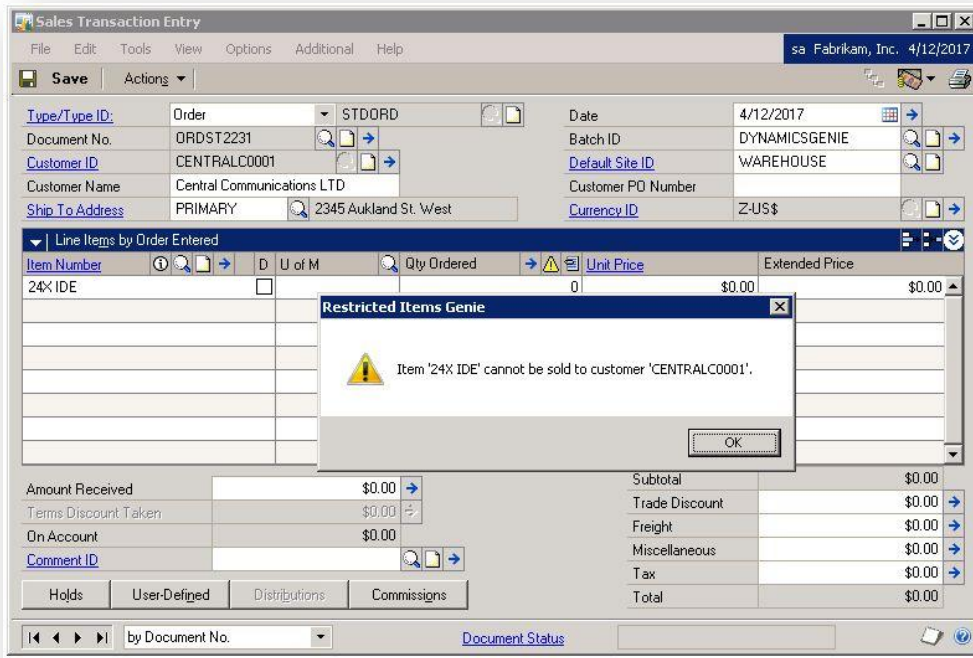
SOP Restricted Items Genie Advantages:

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

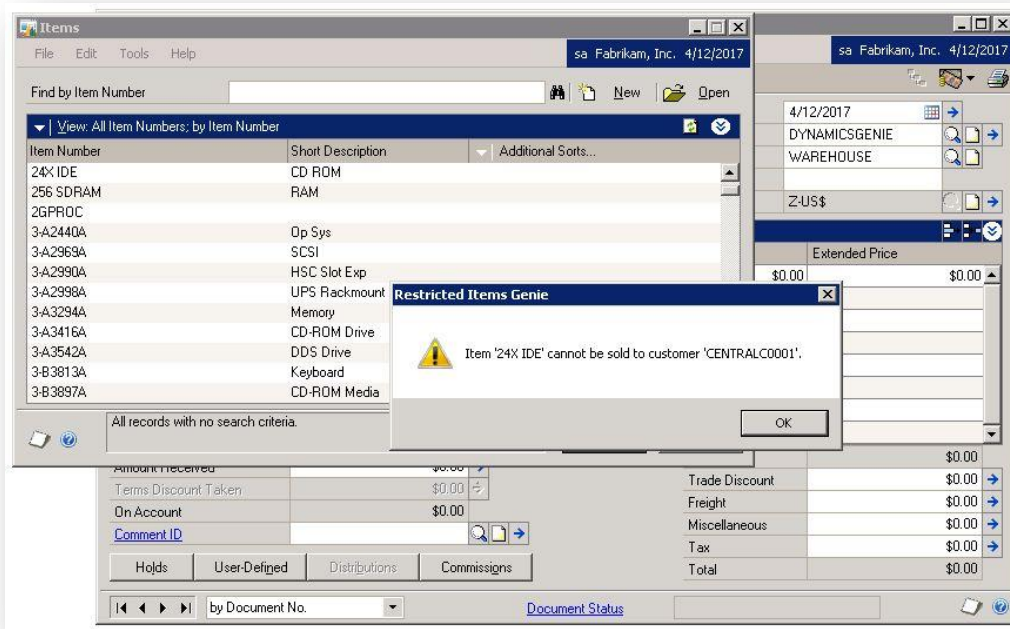
RIG works in the background of the Sales Transaction Entry window. When a user enters an item number on a sales line, RIG checks the authorization list in the following manner:

- 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
 - 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:

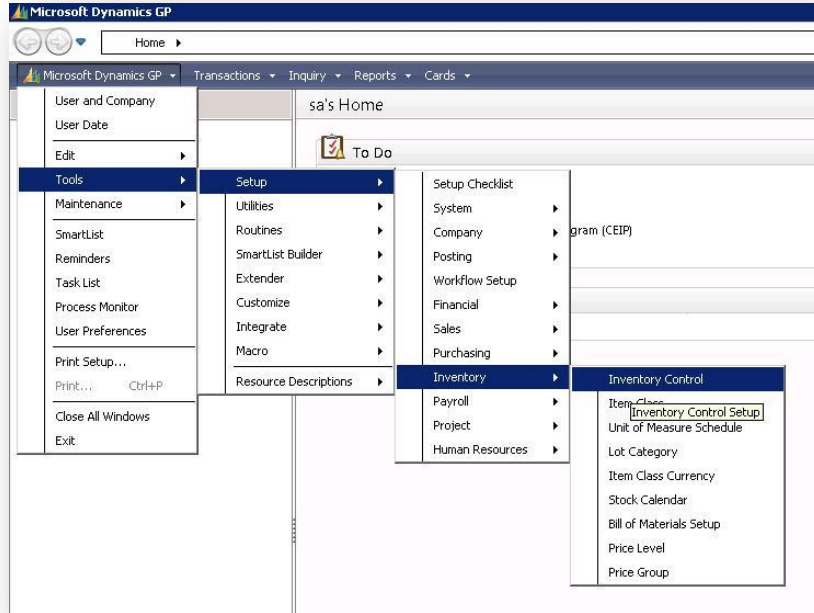


The following screenshot shows the message displayed when using the item lookup window on a sales order line for a restricted item and an unauthorized customer:

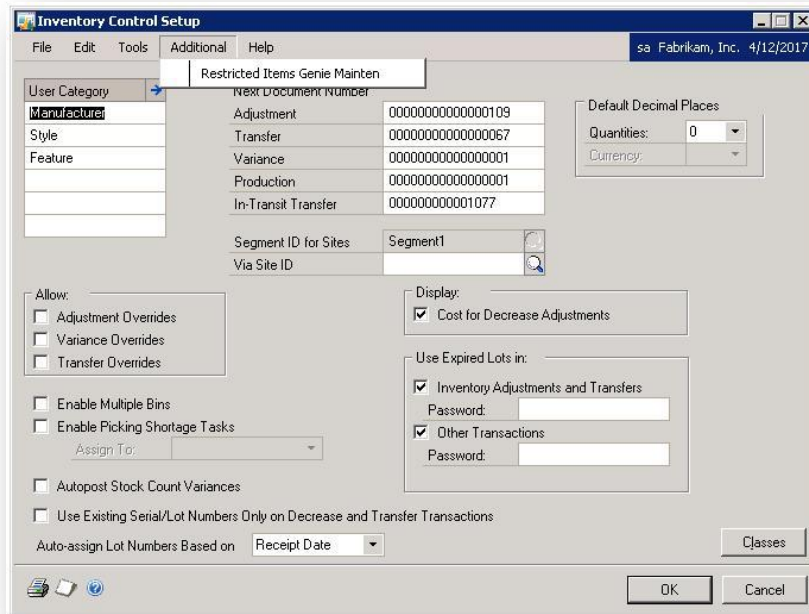


Maintenance

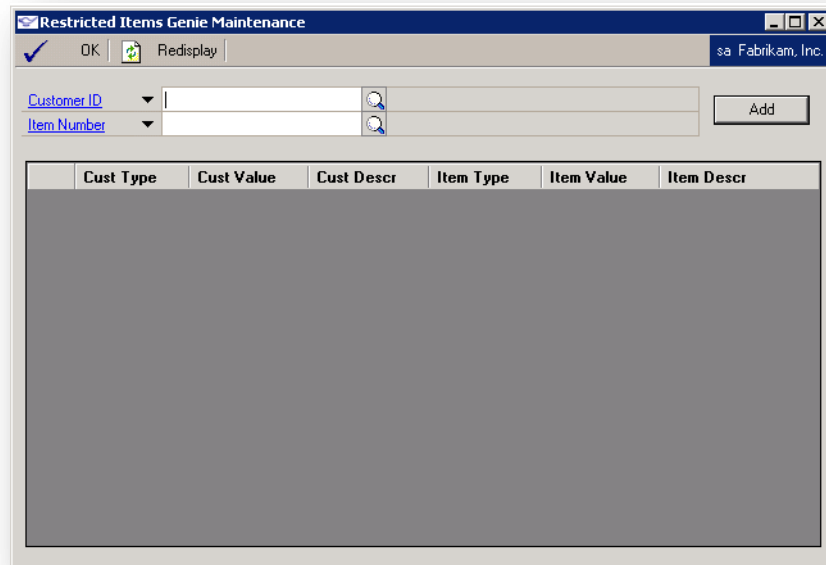
Setting up restricted items using RIG is very straightforward. Setup is located on the Inventory Control Setup window: Microsoft Dynamics GP menu >> Tools >> Setup >> Inventory >> Inventory Control



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

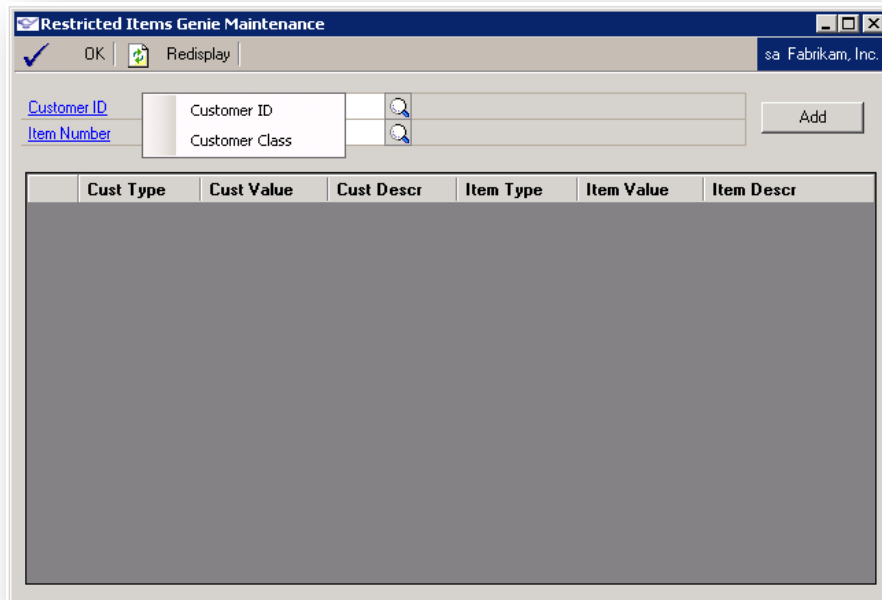


The Restricted Items Genie Maintenance window will appear.

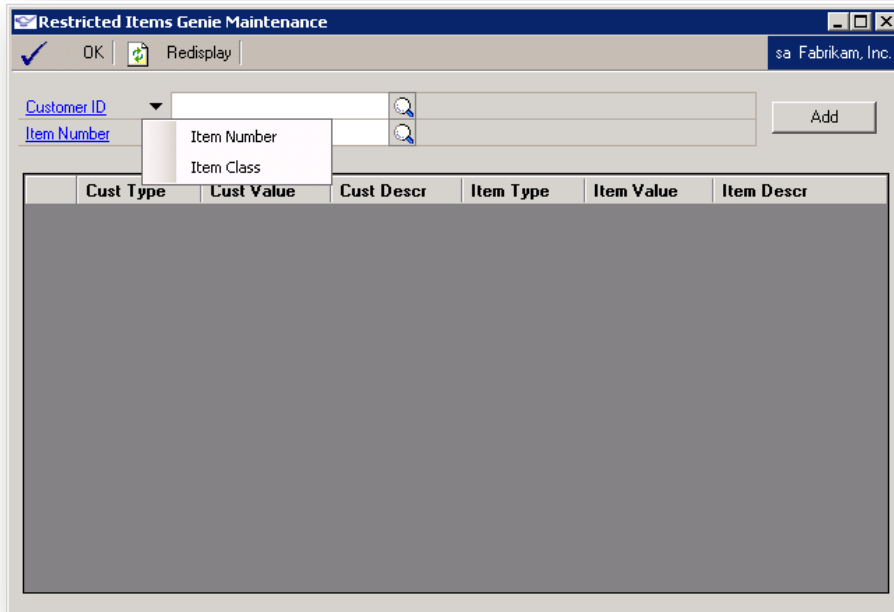


From here it is very easy to restrict items to specific customer(s) or customer classes(s) by lookup or entering a customer number or class and an item number or class and then clicking the "Add" button to include them in the list.

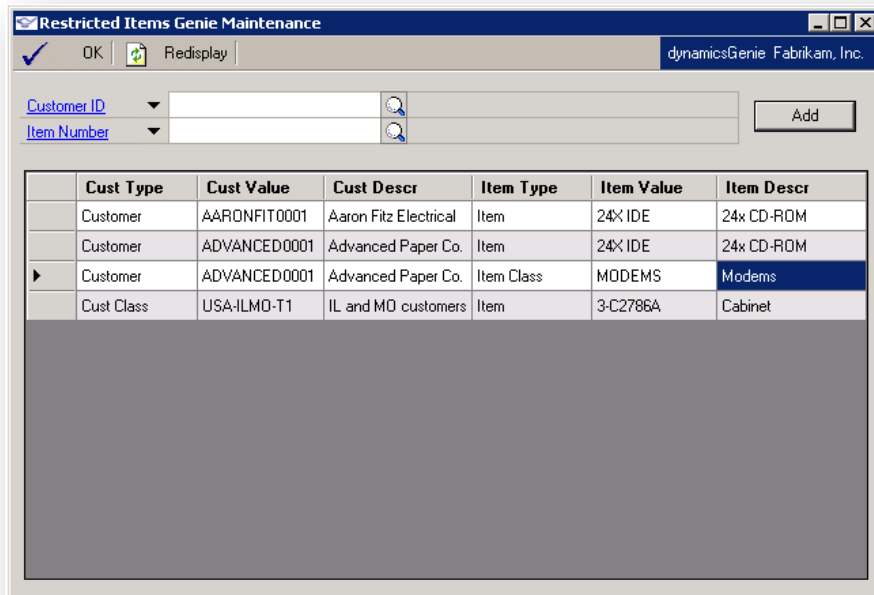
To switch between Customer ID and Customer Class click the Down Arrow Button next to Customer and make the desired selection.



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

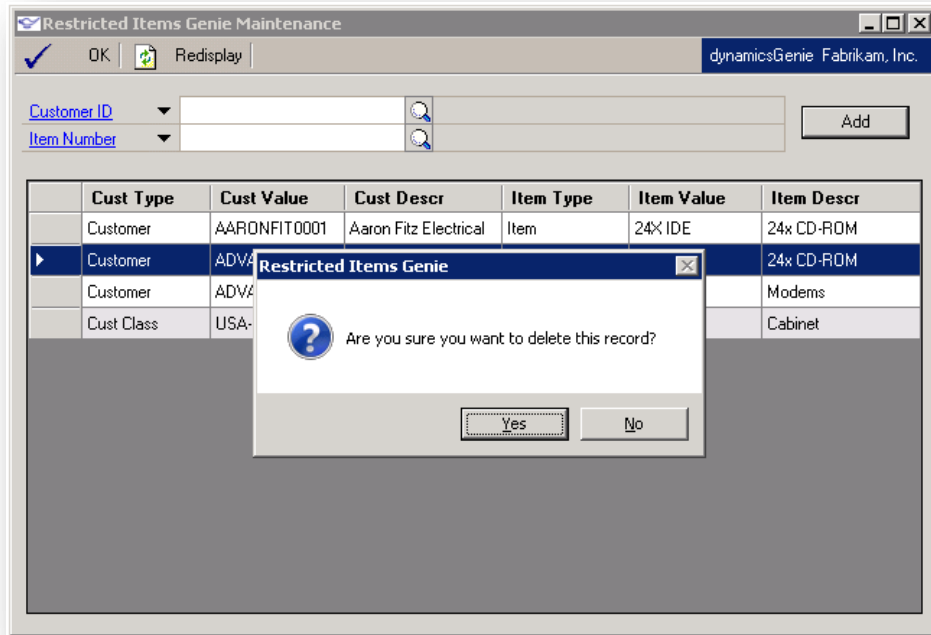


When an item is added to the Restricted Items Genie Maintenance window it becomes restricted to the customer(s) authorized to purchase the item. You can assign multiple customers to the same item.



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.



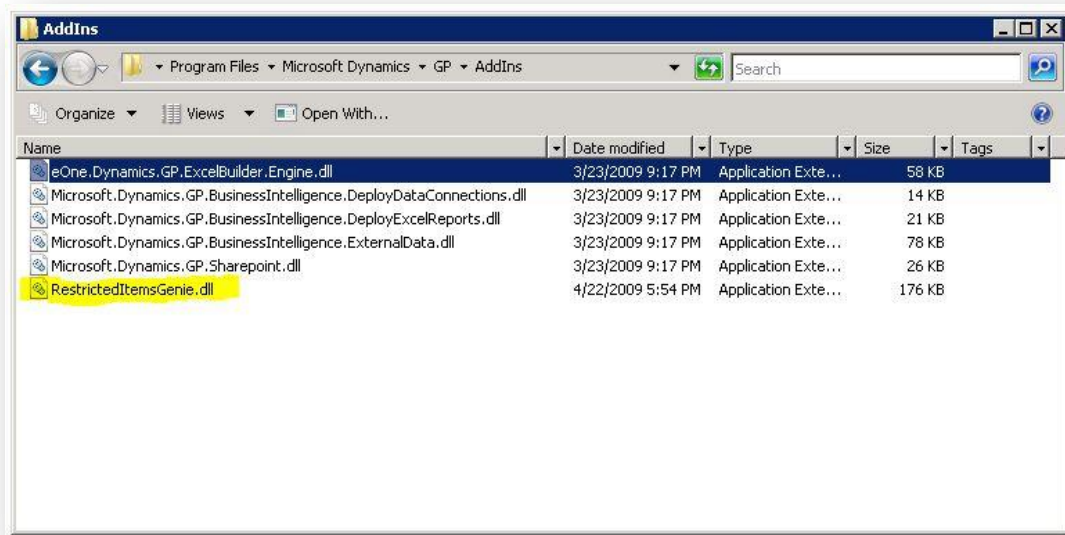
That’s all there is to it! Anything on the list gets enforced on all users of the Sales Transaction Entry window, regardless of their security settings.

Installation and Registration

Installation

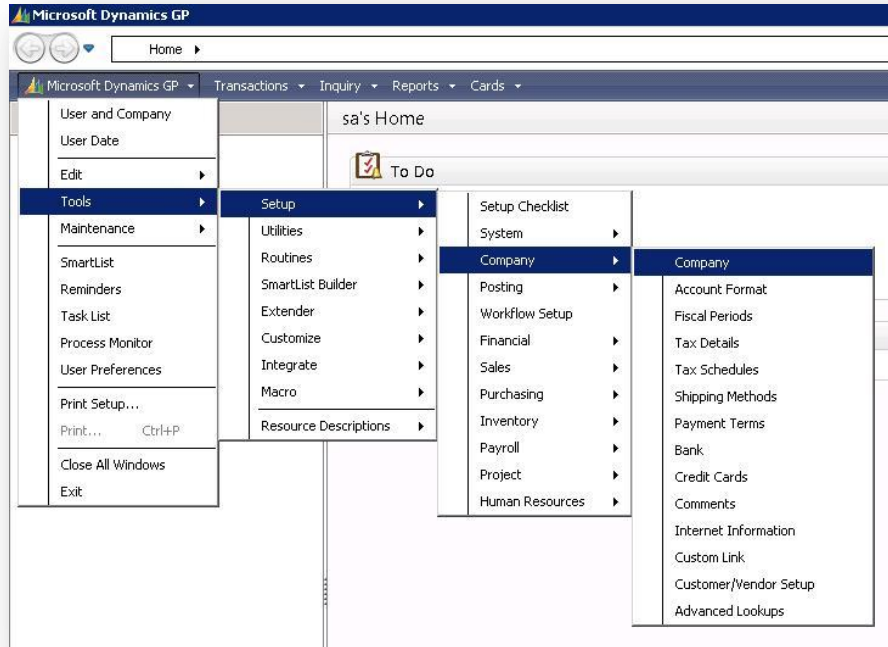
Copy DLL to GP AddIns Directory

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.

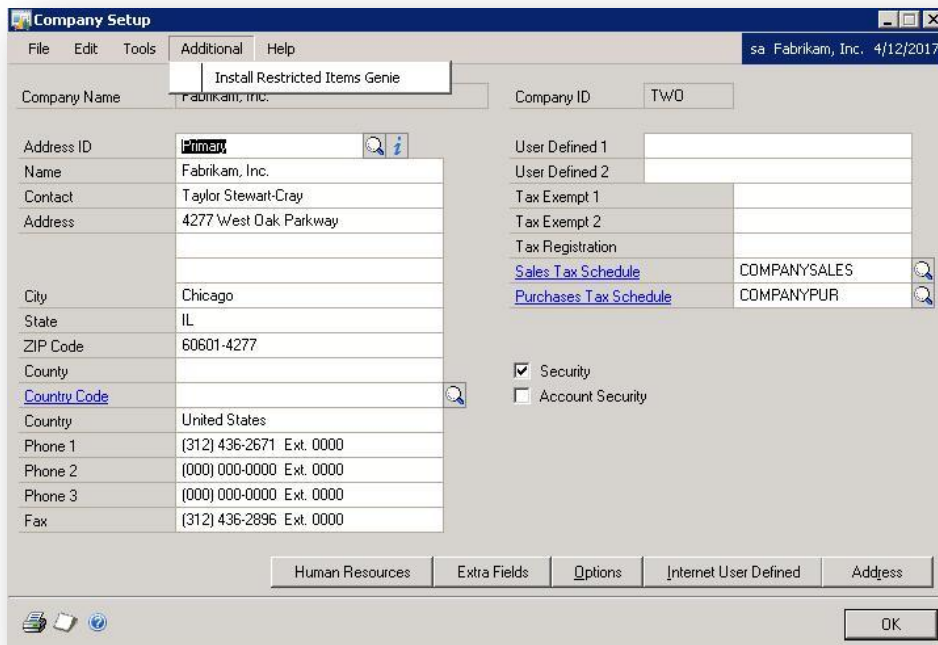


Company Setup

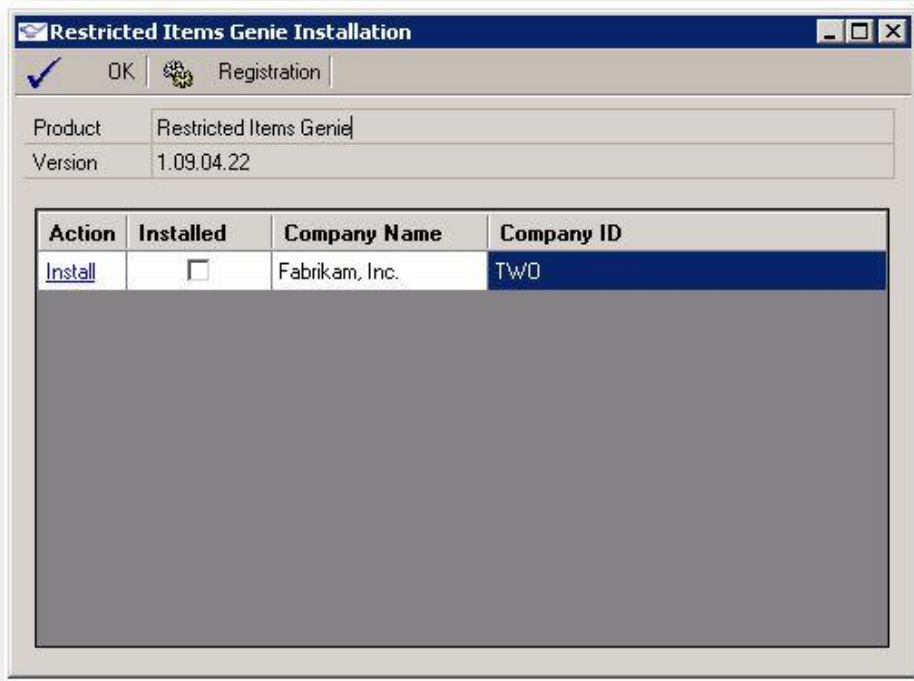
Once the DLL is installed, launch Dynamics GP and login as “sa”. Open the Company Setup window: Microsoft Dynamics GP menu >> Tools >> Setup >> Company >> Company



Click on the “Additional” menu.



Click on “Install Restricted Items Genie” and the Restricted Items Genie Installation window will open.



Registration

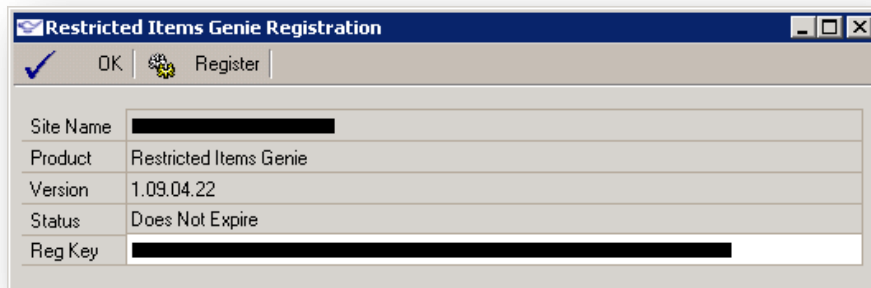
Prior to installing RIG on any company, it should first be registered. Click the “Register” button and the registration window will open.



The screenshot shows a dialog box titled "Restricted Items Genie Registration". It has a blue title bar with a checkmark icon, "OK", and "Register" buttons. The main area contains a table with the following information:

Site Name	[Redacted]
Product	Restricted Items Genie
Version	1.09.04.22
Status	Invalid Registration Key
Reg Key	[Redacted]

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

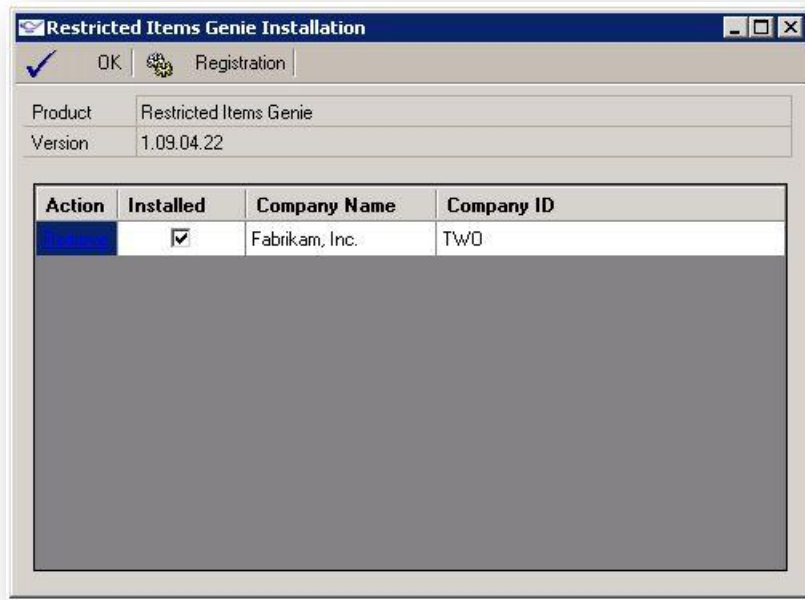


The screenshot shows the same dialog box as above, but with the status updated to "Does Not Expire" and the registration key field filled with a new key.

Site Name	[Redacted]
Product	Restricted Items Genie
Version	1.09.04.22
Status	Does Not Expire
Reg Key	[Redacted]

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”.



Remove

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

