SOP Item History Genie

User's Manual

Table of Contents

SOP Item History Genie 3
Maintenance 5
Grid Setup 7
Utilities 8
Data Reload 8
Data Truncate 8
Setup 9
Installation and Registration 10
Installation 10
Copy DLL to GP AddIns Directory 10
Company Setup 11
Registration 13
Install 14
Remove 14

SOP Item History Genie

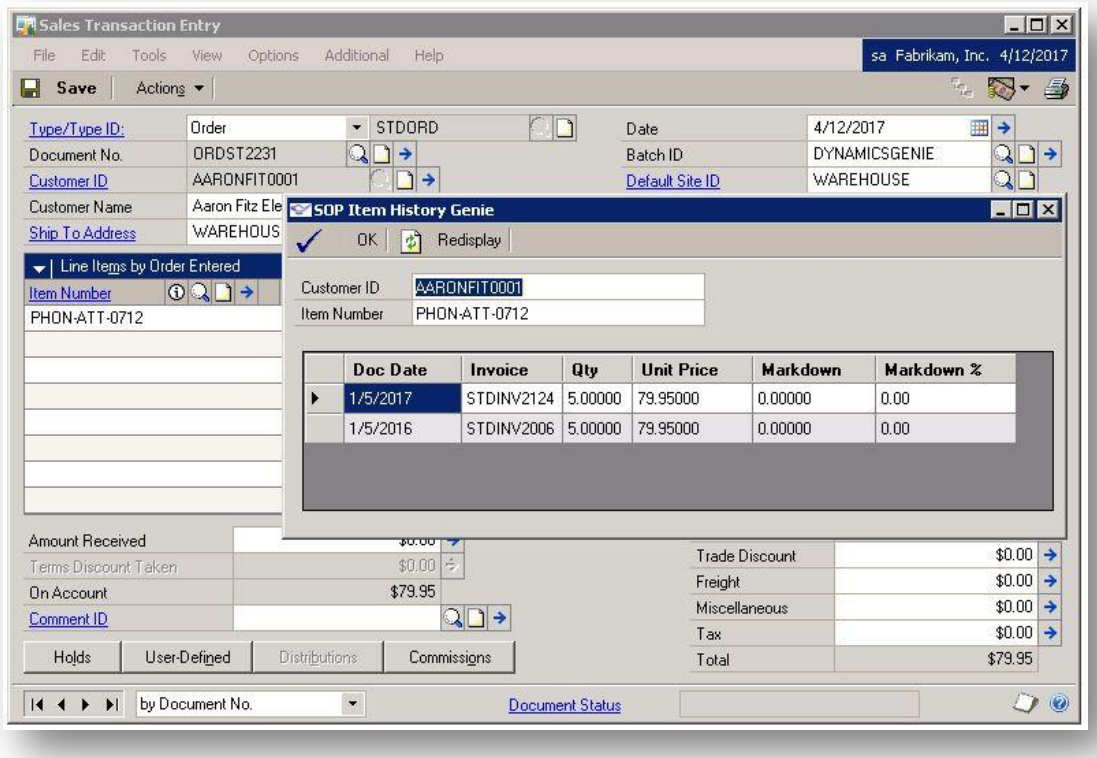
SOP Item History Genie (IHG) allows the user to query sales line history at the time of order entry. When a user is entering the sales line they can use the hotkey combination of “Ctrl+H” to open the sales history of the line item they are currently on. The IHG window will open and display the invoice history of that item and customer.

The information displayed is completely configurable so that you can display the data that is relevant to your business process. IHG provides an important sales tool that is easy to use, fast, and provides information that:

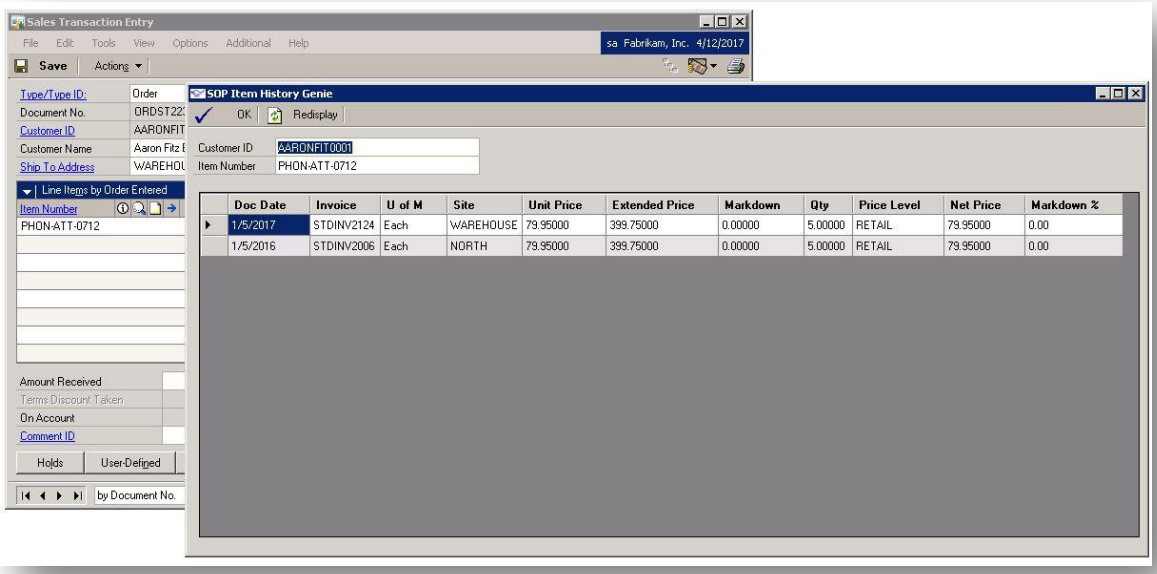
- Improves pricing accuracy
- Adds the potential for up selling
- Supplies pertinent data at the right time

Once IHG is open the user can enter other Customer IDs or Item Numbers to query or simply close it and continue with the order.

In this screenshot IHG displays a customized view which is easily configured during setup:

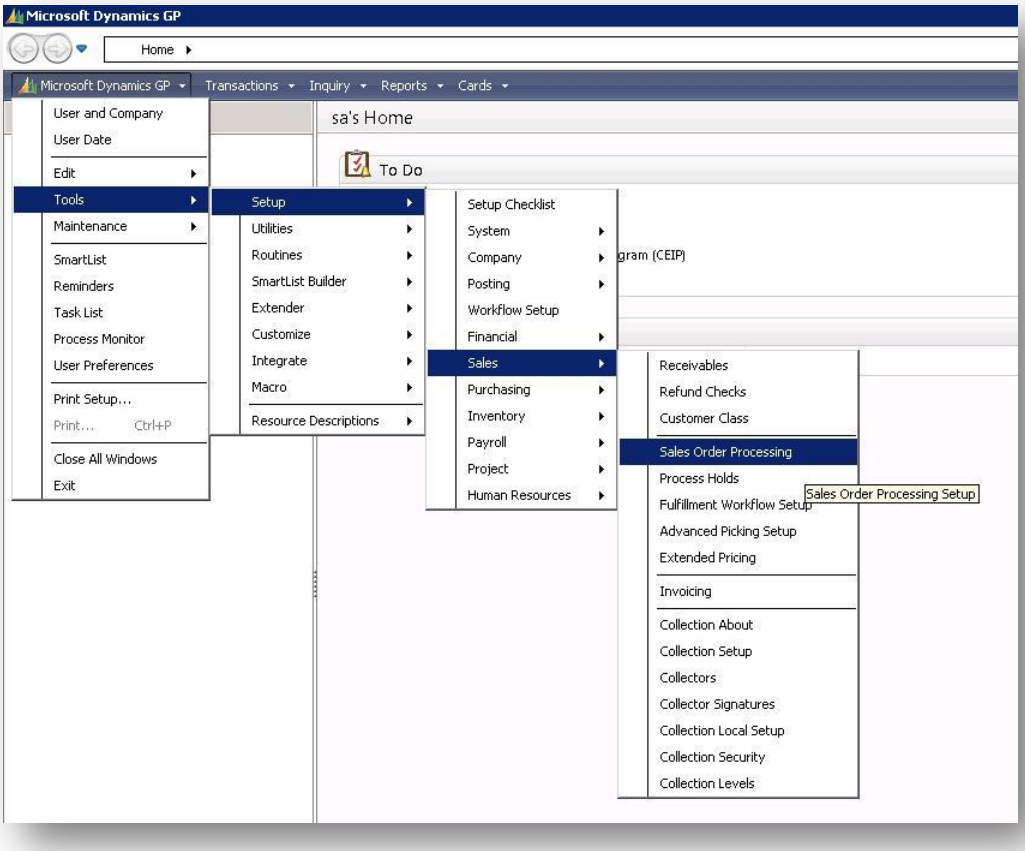


This screenshot of IHG displays all of the available columns:

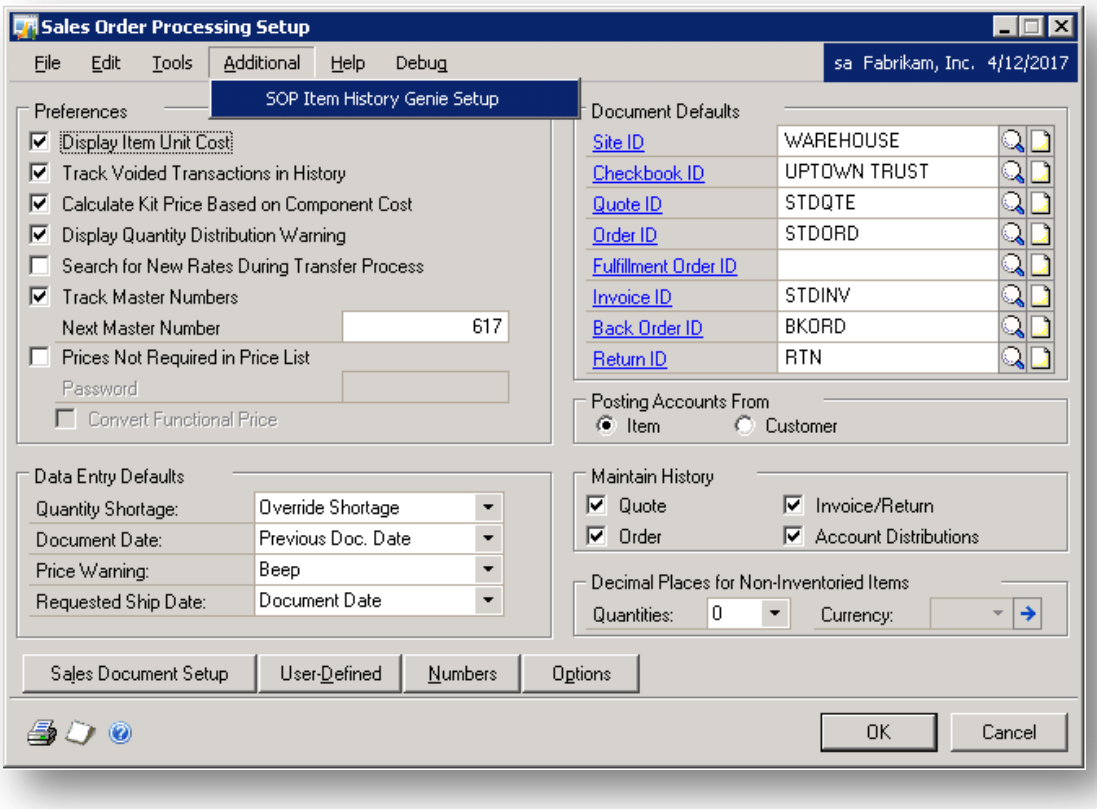


Maintenance

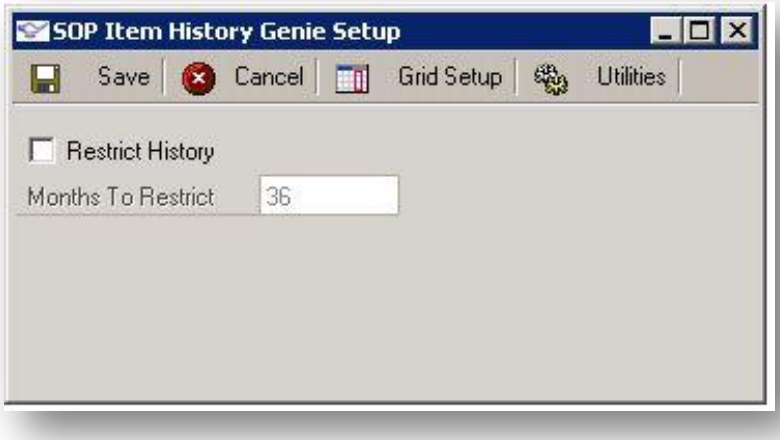
Configuring IHG is accomplished through the SOP Item History Genie Setup window. The Sales Order Processing Setup window must first be opened to access the SOP Item History Genie Setup window. The Sales Order Processing Setup window can be opened via: Microsoft Dynamics GP menu >> Tools >> Setup >> Sales >> Sales Order Processing.



Once the Sales Order Processing Setup window is opened, click on the “Additional” menu and “SOP Item History Genie Setup” will be available.:



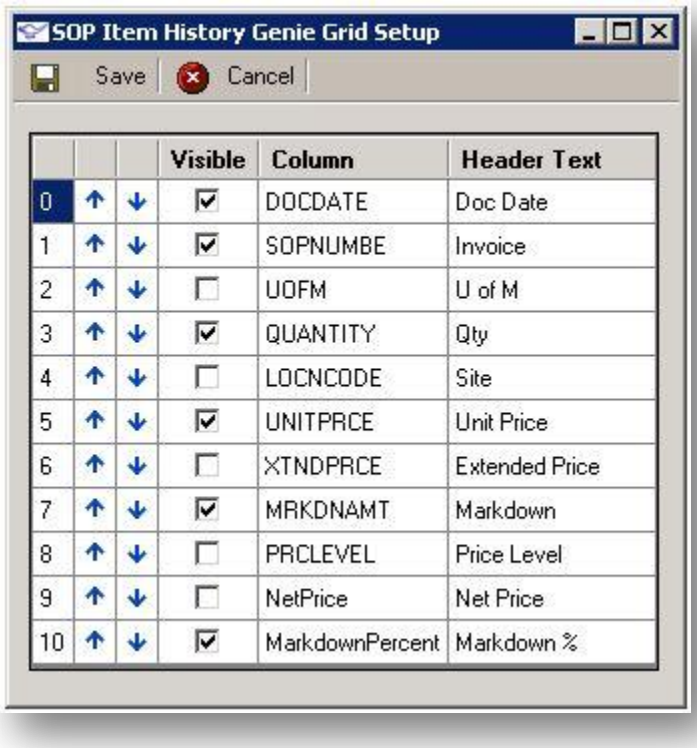
Select the “SOP Item History Genie Setup” menu item and the following setup window will appear:



Grid Setup

Click on the “Grid Setup” button to configure which columns will be displayed, the order, and the header name.

- Order
  - Use the Arrow Buttons to move a row up or down. The order that they are in is how they will display in the IHG widow.
- Visible
  - Check the Visible Checkbox to make a column visible or uncheck it to have it not display in the IHG window.
- Header Text
  - To change the column header text that is displayed in the IHG window, enter a new valuein the corresponding Header Text cell.



			Visible	Column	Header Text
0	↑	↓	☑	DOCDATE	Doc Date
1	↑	↓	☑	SOPNUMBE	Invoice
2	↑	↓	☐	UOFM	U of M
3	↑	↓	☑	QUANTITY	Qty
4	↑	↓	☐	LOCNCODE	Site
5	↑	↓	☑	UNITPRCE	Unit Price
6	↑	↓	☐	XTNDPRCE	Extended Price
7	↑	↓	☑	MRKDNAMT	Markdown
8	↑	↓	☐	PRCLEVEL	Price Level
9	↑	↓	☐	NetPrice	Net Price
10	↑	↓	☑	MarkdownPercent	Markdown %

Click the “Save” button to save your changes. You can always come back and make changes. The changes will take effect the next time the SIG window is opened.

Utilities

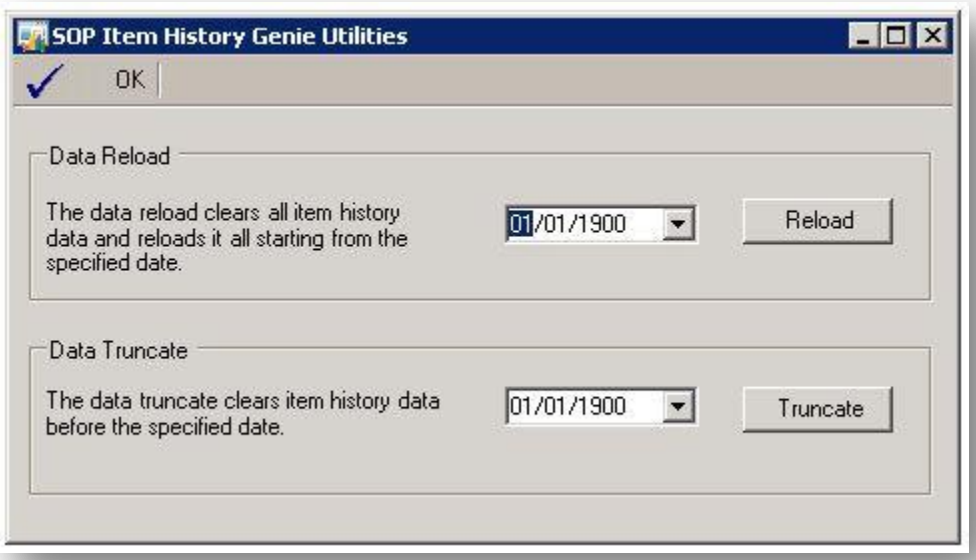
In order for IHG to be as fast as it is, we use a custom indexed table to store just the line history you are interested in. Before IHG will display any information the history data must be initialized.

Data Reload

Put in a date that you want to IHG to start to load data from. Keep in mind that depending on your sales line history, the further you go back, the more IHG may slow down. This date can be changed at any time so you can start at 2 years and see how the IHG window responds and then fine tune it. Click the "Reload" button to have IHG create the item history data. IMPORTANT, the reload process deletes the data in the custom IHG table prior to the reload.

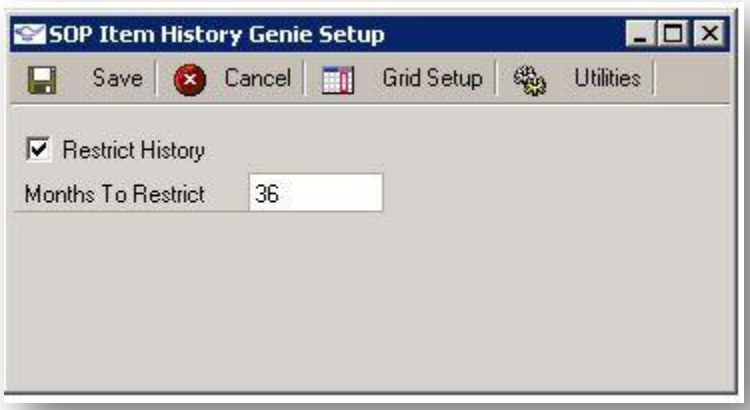
Data Truncate

The Data Truncate utility allows you to delete data prior to the date you specify. For instance let's say that you want to keep a rolling IHG history of 2 years. After 3 years of use, you may want to get rid of the IGH data that is over 2 years old. That's where the Data Truncate utility comes in handy. Entering a date and Clicking the "Truncate" Button will delete all data in the IHG table prior to that date.



Setup

The main IHG Setup Window allows you to restrict the IHG item history data that is queried and works in conjunction with the data that was loaded using the Reload utility. Setting a restriction here will allow you to limit the results returned in the IHG Window without truncating or reloading data. If you have several years of sales line history in the IHG table and you don't want to truncate the older data, you can restrict the data returned by entering the number of months that IHG will look in the IHG data. This gives you the best flexibility in managing how much sales line data to store in IHG and the number of records to return when IHG is used.

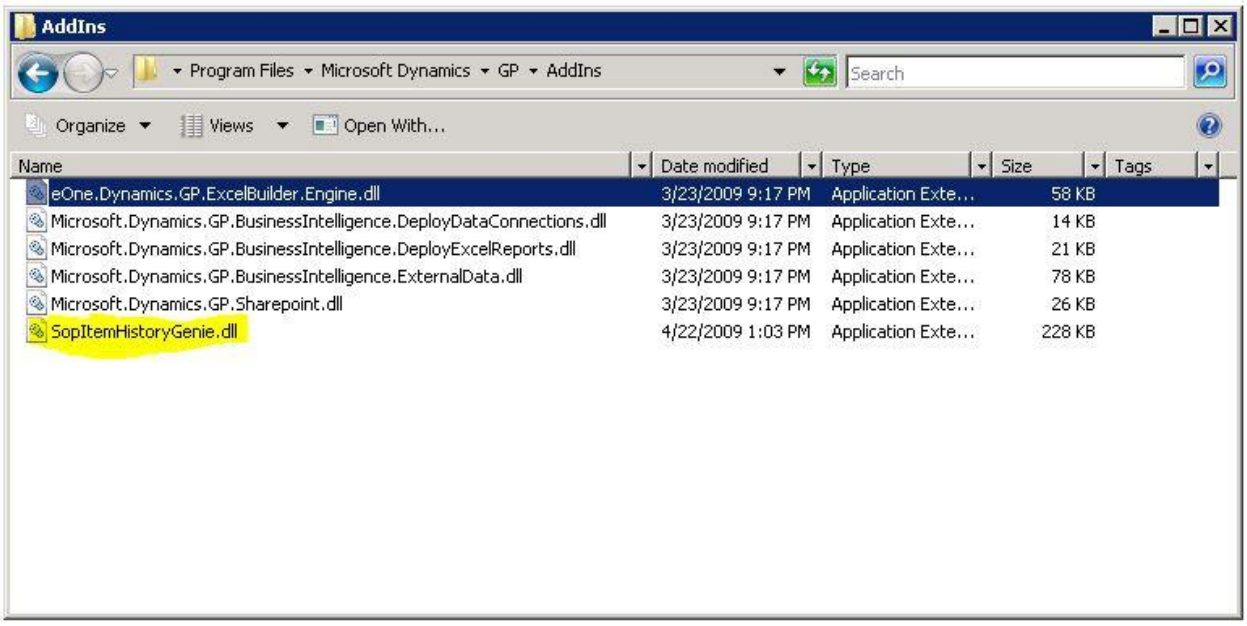


Installation and Registration

Installation

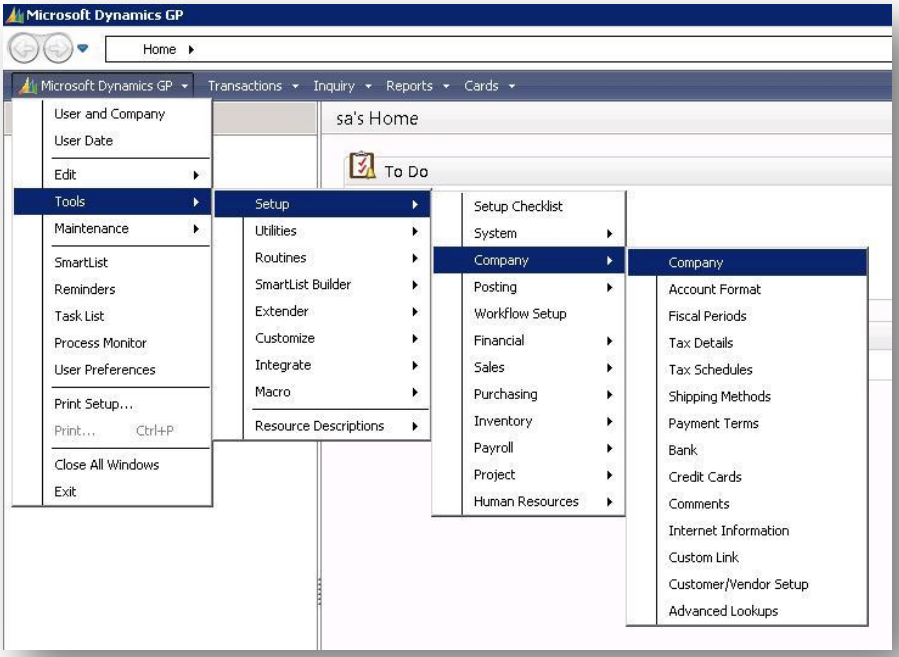
Copy DLL to GP AddIns Directory

The "SopItemHistoryGenie.dll" file needs to be copied into the GP AddIns folder on every client and server that will be using SOP Item History 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.

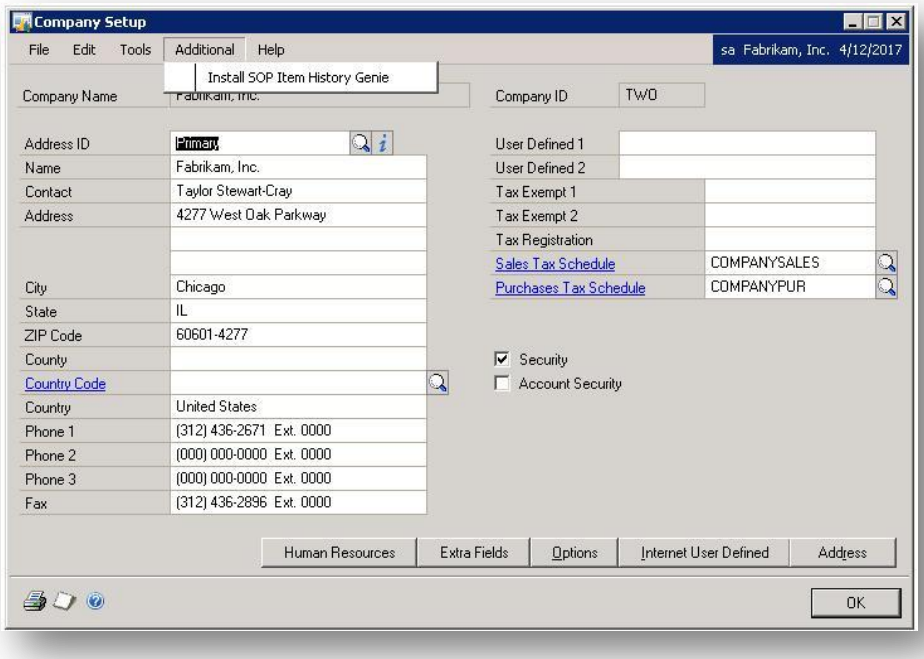


Company Setup

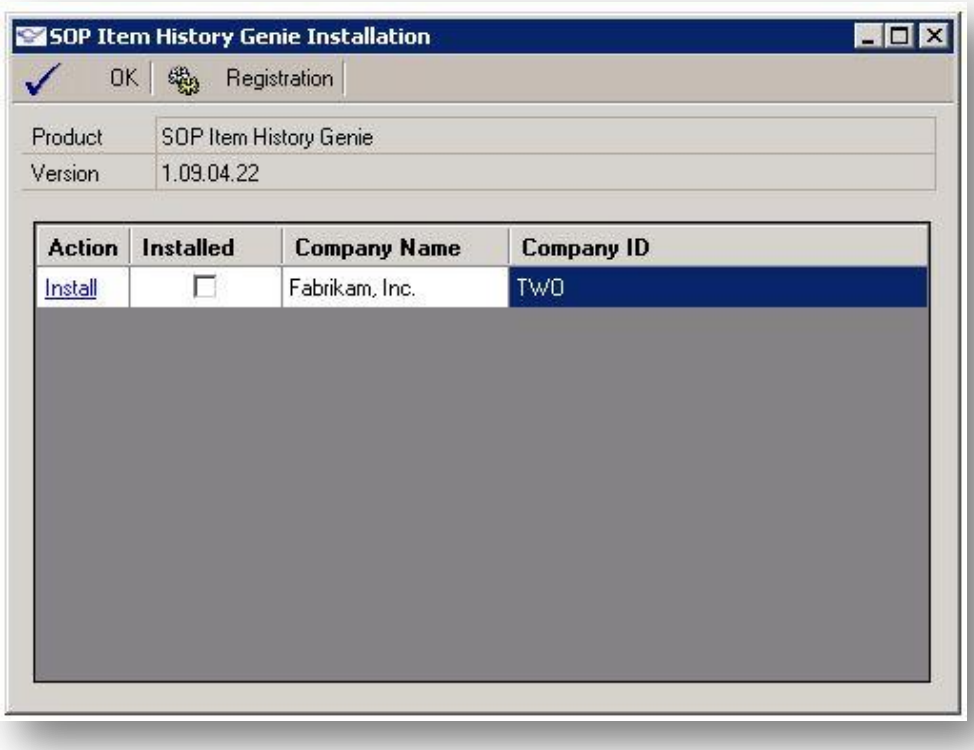
Once the dll is installed, launch Dynamics GP and login as “sa”. Open the Company Setup window: Microsoft Dynamics GP menu >> Tools >> Setup >> Company >> Company.



Click on the “Additional” menu.

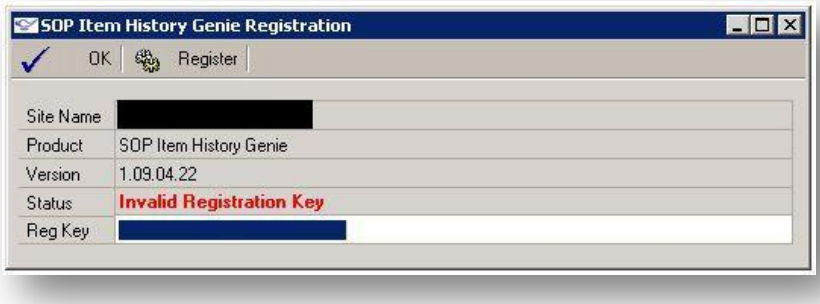


Click on “Install SOP Item History Genie” and the SOP Item History Genie Installation window will open.

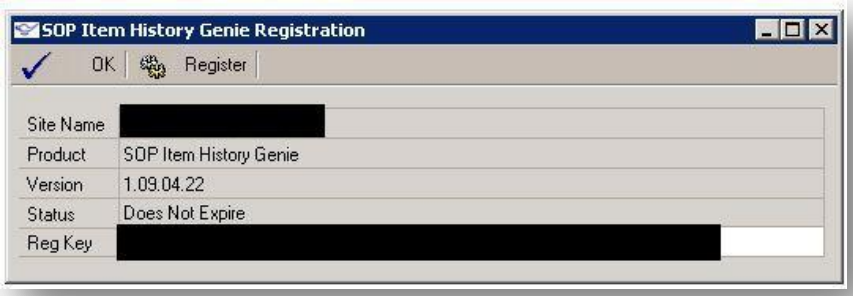


Registration

Prior to installing IHG on any company, it should first be registered. Click the “Register” button and the SOP Item History Genie Registration window will open.

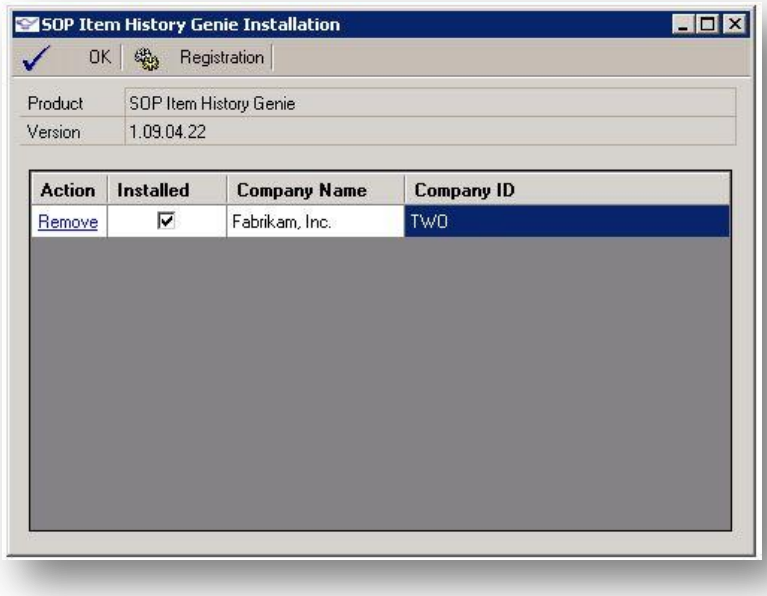


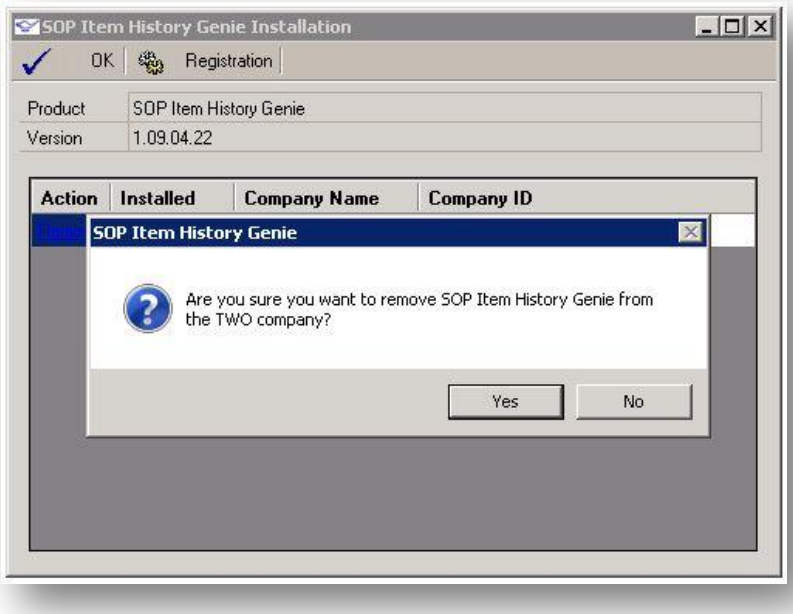
Enter your registration key and click the “Register” button to validate. The status of the registration will be updated after the key is validated



Install

Clicking the “OK” button will return you to the SOP Item History Genie Installation window. Click the blue “Install” action for each company that you want to use IHG in. Upon successful installation the “Installed” checkbox will be checked and the Action will change to “Remove”.



Remove

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