

TERNPOINT



USER GUIDE

TPS Item Order Restrictions

TERNPOINT.SOLUTIONS



TPS Item Order Restrictions

TPS Item Order Restrictions allows for the restriction of items that can be bought/sold at the Sales or Purchase order level. In sales, the restriction can be setup by specific Customer, All Customers or groups of Customers. In purchasing the restriction can be setup at the specific Vendor or All Vendor level. In combination with the Customer or Vendor, the restriction is setup with a specific Item, Item Category Code or All Item. For greater flexibility exceptions and inclusion filters can be added to the Customer, Vendor, or Item when the All type is used.

TABLE OF CONTENTS

Licensing3

Permissions..... 4

Item Restrictions Setup..... 4

Setting up Item Restrictions Rules 4

Setting up Product Restrictions Using Exceptions and Filters.....5



LICENSING

A companion app to manage licensing is automatically installed with the first app that is installed from Ternpoint Solutions

1. A new **Permissions Set** was added as part of the app install. **TPS LM LICENSE MGT.** Assign this permission sets to users in advance of use, on the **User Setup** card.
2. Extension Setup
 - a. Search for and open **Extension Management**.
 - b. Select **Ternpoint License Management** and open.
 - c. Ensure *Allow HttpClient Requests* is activated

The screenshot shows the 'Ternpoint License Management' configuration screen. It has a 'Group' header. Below it, there are four fields: 'App ID' with value '320dac76-d021-4827-a159-f37...', 'Publisher' with value 'Ternpoint Solutions LP', 'Name' with value 'Ternpoint License Management', and 'Allow HttpClient Requests' which is a toggle switch currently turned on.

3. Ternpoint Product Registration
 - a. Search for and open **Ternpoint Product Registration**.
 - i. On this page all subscription type Ternpoint Solutions apps that have been installed are shown. Also from this page contacting Support, viewing your subscription status, creating a trial license, applying for an extension to your trial license or requesting a full one year license can be done.
 - ii. Enter appropriate Contact Info and select **Register** in the ribbon.
 1. *If registering the app in a separate company from one already purchased, ensure the same contact information is used across all Business Central companies to avoid a second monthly subscription fee. The license fee is per Business Central tenant,*
 - iii. In the line section of the page select **Create Trial License**.
 1. A 30 day trial license will be created for evaluation purposes.
 2. If more time is needed to evaluate the app please select the **Extend License** or **Contact Support**.
 3. In order to purchase a full license please select **Request Full License**.
 4. *Email setup must be enabled in order to send emails requesting licenses or to contact support using the link.*
 - iv. In order to uninstall the app, navigate to **Extension Management**, select the app and select **Uninstall** in the ribbon.

The screenshot shows the 'Product Registration' screen. It has a header with 'Retrive All Licenses', 'Contact Support', and 'More options'. Below is a 'General' section with fields for 'Subscription ID', 'Environment' (set to 'Production'), 'Registered' (toggle), 'Registered On' (7/21/2023), 'Verify License for Sandbox' (toggle), 'Contact Info' (First Name: Jason, Last Name: Sanders, E-Mail: jsanders@outlook.com, Phone No: 555-555-2323, Contact ID: (045618b3-2b29-4082-b534-1f91278e04)), and 'Company'. At the bottom is a table with columns: App ID, App Name, Subscription Type, Subscription Status, Installed On, Expires On, and Product ID. The table contains one row with App ID '1ef229b3c-3e79-471c-b0e5-f9d680682ed9', App Name 'Vendor Certificates', Subscription Type 'Production', Subscription Status 'Active', Installed On '7/21/2023 11:41 AM', Expires On '7/21/2024 6:50 PM', and Product ID '1ec1907a7-22e1-4280-8379-629f126a9b3f'.

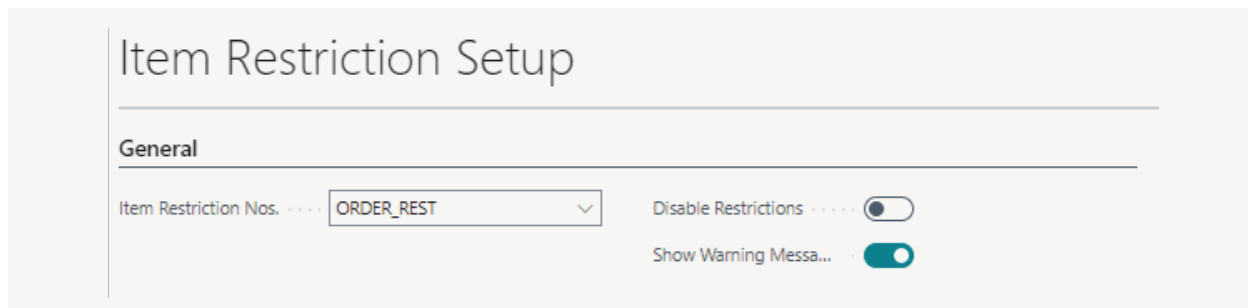


PERMISSIONS

1. Three new Permissions Sets were added as part of the app install. TPS IRT ITEM RESTR., TPS IRT ITMREST EDIT, and TPS IRT ITMREST READ. Assign these new permissions sets as appropriate to users in advance of use, on the User card

ITEM RESTRICTIONS SETUP

1. Search for Item Restrictions Setup.
2. Create and enter an Item Restriction Nos.
3. To disable the Item Restrictions product, enable the **Disable Restrictions** setting.
 - a. Item Restrictions will not apply to any Sales or Purchase Line if this setting is enabled.
4. To display a warning dialog box every time a Restricted Item is entered on a Sales Line, enable the **Show Warning Message** setting.



SETTING UP ITEM RESTRICTION RULES

When setting up item restriction rules previously entered sales and purchase order lines are not revalidated against the rule. The rule will be checked for newly created sales and purchase lines only.

1. Search for Item Restrictions.
2. To create and enter a new Item Restriction rule, use the menu ribbon to select +New.
3. Enter a Description.
 - a. The Code field can automatically populate from the No. Series, if setup accordingly.
4. Select the Assign-to Type.
5. Select the Assign-to No. field based on the Assign-to Type.
6. Enter a Starting Date and Ending Date.
 - a. Note: The Order Date on sales and purchase orders is used to check for active rules based on the Starting and Ending Dates.
7. Select a Restriction Type.
 - a. Warning
 1. When a Restricted Item is entered on a Sales Line, the Sales Order will still be editable and may need to be sent for further approval before it can be released.
 - b. Error
 1. When a Restricted Item is entered on a Sales Line, an error message will be displayed, and the Sales Order will not be editable/transactable until the item has been removed from the Sales Line.



8. In the **Lines**, select the **Product Type**.
9. Select a **Product No.** based on the **Product Type**.
10. Repeat **Steps 8-9** for each **Product Type** line that needs to be added to the rule.
11. Set the **Status** to **Active** when the rule is ready to be used.
12. Exit the page to save all changes

Item Restriction

Item Restriction IOR0009

Exceptions Filters Automate Fewer options

General

Code IOR0009 Status Draft
 Description Non FG block Restriction Type Error
 Assign-to Type All Customers Filter Text
 Assign-to No. Starting Date 1/1/2023
 Ending Date 12/31/2023

Lines Manage

Product Type	Product No.	Description	Variant Code	Unit of Measure Code	Filter Text	Table Filters
All Items		All Items				Gen. Prod. Posting Group 03, RAW MATERIAL,04, PACKAGING

Item Restriction

Item Restriction IOR0011

Exceptions Filters Automate Fewer options

General

Code IOR0011 Status Active
 Description Kirkland Restriction Type Warning
 Assign-to Type All Customers Filter Text
 Assign-to No. Starting Date 1/1/2023
 Ending Date 12/31/2030

Lines Manage

Product Type	Product No.	Description	Variant Code	Unit of Measure Code	Filter Text	Table Filters
→ Item	75463	Kirkland Signature Mixe...		CS		—
Item	75464	Kirkland Signature Proz...		CS		—
Item	75465	Kirkland Signature Proz...		CS		—
Item	75466	Kirkland Signature Proz...		CS		—
Item	75467	Kirkland Signature Proz...		CS		—
Item	75468	Kirkland Signature Proz...		CS		—

SETTING UP ITEM RESTRICTIONS RULES USING FILTERS AND EXCEPTIONS

1. Search for **Item Restrictions**.
2. To create and enter a new **Item Restriction** rule, use the menu ribbon to select **+New** or open an existing rule and set the **Status** to **Draft**.
3. Enter a **Description**.



4. Select All Customers or All Vendors as the Assign-to Type.
 - a. Note: exceptions and filters in the rule header can only be used with the All Customers or All Vendors type. In the lines, exceptions and rules can only be used with the All Items type.
5. In the menu ribbon, select **Filters**.
6. Enter the Fields and Field Filters for Customers that should be included in the rule.

Field Number	Field Caption	Field Filter
→ 29	Salesperson Code	<>KS

7. In the menu ribbon, select **Exceptions**.
8. Enter the Customer, Vendor, Customer Price Groups, or Customer Disc. Groups that should be excepted from the rule.

Item Restriction

Item Restriction IOR0011

Exceptions Filters Automate Fewer options

General

Code: IOR0011 Status: ...

Description: Kirkland Restriction: ...

Assign-to Type: All Customers Filter Text: ...

Assign-to No.: Starting Date: ...

Ending Date: ...

Lines Manage

Product Type	Product No.	Description
Item	75463	Kirkland Signature N
Item	75464	Kirkland Signature F
Item	75465	Kirkland Signature F
Item	75466	Kirkland Signature F
Item	75467	Kirkland Signature F
Item	75468	Kirkland Signature F

Source Type Exceptions

Search + New Edit List Delete

Assign-to Type	Assign-to No.	Description
→ Customer	C00035	Costco West

9. If setting up Exceptions on fields other than the Customer No., Vendor No., Customer Price Group or Customer Disc. Group, then use the NOT operator (<>) in the Field Filters of an inclusion Filter instead.
10. Enter a Starting Date and Ending Date.
 - a. Note that the Order Date on sales and purchase orders is used to check for active rules based on the Starting and Ending Dates.
11. Select a Restriction Type.
 - a. Warning
 1. When a Restricted Item is entered on a Sales Line, the Sales Order will still be editable and may need to be sent for further approval before it can be released.



b. Error

1. When a Restricted Item is entered on a Sales Line, an error message will be displayed, and the Sales Order will not be editable/transactable until the item has been removed from the Sales Line.
12. To enter a rule for a non-standard group of Items, follow the steps below.
 - a. Select All Items as the Product Type and leave the Product No. field blank.
 - b. To use inclusionary Item related filters select Manage then Filters.
 1. Enter the Fields and Field Filters for Items that should be included in the rule.

Edit - Table Filter - Item

Search

+ New

Edit List

Delete

↗

✕

	Field Number		Field Caption	Field Filter
→	8	⋮	Base Unit of Measure	<> LB

c. Select Manage, then Exceptions.

1. These options only appear if the line in focus is type All Items.
2. Enter the Items that should be excepted from the rule.

Item Restriction Line Exceptions

Not saved

↗

✕

Search

+ New

Edit List

Delete

↗

⌵

☰

	Product No.		Description	Variant Code	Unit of Measure Code
→	75463		Kirkland Signature Mixed Smoothie Blend		

13. Set the Status to Active when the rule is ready to be used.
14. Exit the page to save all changes.

