



DS0548

Item-Country Security



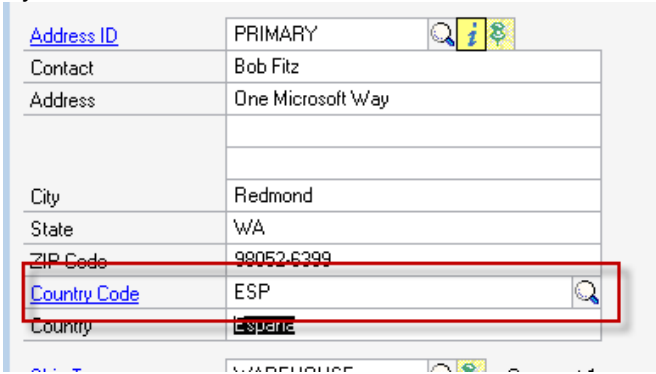
Table of Contents

Table of Contents	2
Problem Definition	3
Problem Definition	3
Solution Overview	4
Solution Overview	4
Design Features	5
Item-Country Maintenance	5
Approval User Setup	6
Sales Transaction Entry	7
Override Entry	10

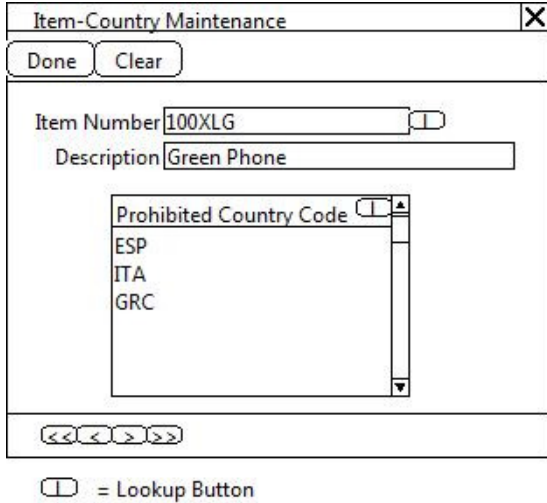
Problem Definition

<i>Problem Definition</i>	CCDA
<p>Some ACME Co. products are restricted by federal law from being sold to certain countries. ACME needs a way to track in GP which countries are prohibited for an item, and to prevent use of that item in Sales Transaction Entry if it is prohibited based on the Customer's Ship to Address. The following controls are needed:</p> <ol style="list-style-type: none"> 1) Record which countries are forbidden for an item 2) Prevent using an item on Sales Transaction Entry if the Item is not allowed for a given Ship To Address's country code 3) Not allow changing of the Ship To Address Code on a transaction where the change would result in items being disallowed 4) Require Country Code on Ship To and Bill To Addresses used in Sales Transaction Entry 5) Specify certain users as having the ability to Override the following condition and allow use of a forbidden item: If the Bill To is Forbidden but the Ship To is Allowed. When this override occurs, create an audit trail of who did it and when. 6) Prevent changes of Ship To Address information on the Sales Transaction (all changes must be recorded on the Customer Address Maintenance window). 	

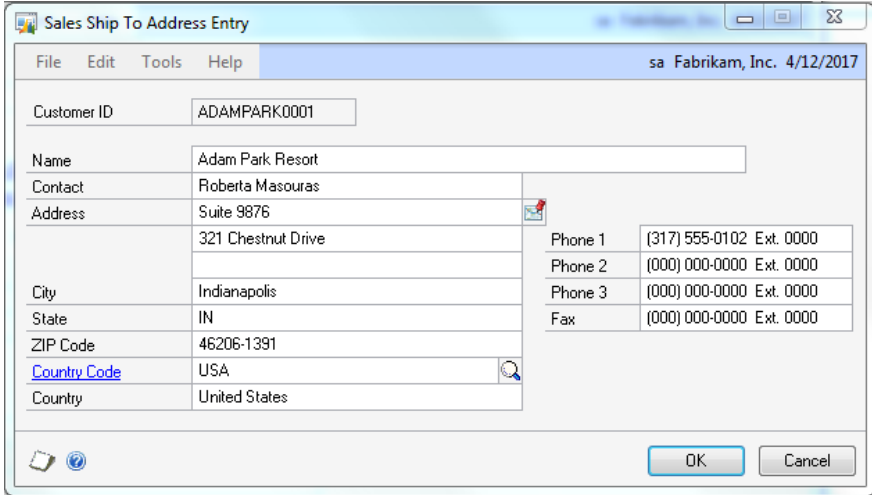
Solution Overview

<i>Solution Overview</i>	CCDA
<p>The Country Code field on Customer Maintenance, and Customer Address Maintenance, will store the Country Code for the address.</p>  <p>A new window will be added to assign "Prohibited" Countries to an Item.</p> <p>Another window will be added to record a list of User IDs which are allowed to override a Bill-To-Disallowed & Ship-To-Allowed conflict.</p> <p>In Sales Transaction Entry, the desired controls listed above will be applied to control which items can be used, and what changes can be made to the Ship To Address Code.</p>	

Design Features

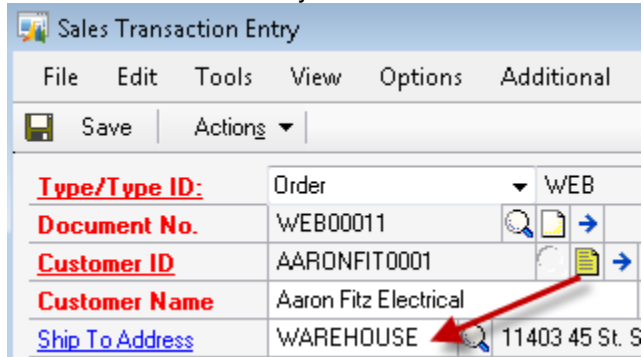
<i>Item-Country Maintenance</i>	CCDA						
<p>Navigation: Cards >> Inventory >> Item-Country, or from Item Maintenance >> Additional >> Item-Country</p> <p>This window is used to maintain the list of Country Codes to which the Item CANNOT be sold.</p> 							
<table border="1"> <thead> <tr> <th>Field</th> <th>Function</th> </tr> </thead> <tbody> <tr> <td>Item Number</td> <td>User enters an Item Number, or selects one from the Lookup</td> </tr> <tr> <td>Country Code</td> <td>User enters a Country Code, or selects one from the Lookup</td> </tr> </tbody> </table>	Field	Function	Item Number	User enters an Item Number, or selects one from the Lookup	Country Code	User enters a Country Code, or selects one from the Lookup	
Field	Function						
Item Number	User enters an Item Number, or selects one from the Lookup						
Country Code	User enters a Country Code, or selects one from the Lookup						

Approval User Setup		CCDA				
<p>Navigation: Setup >> Sales >> Approval User Setup</p> <p>This window is used to maintain the list of Users who may approve a restricted Bill To Address Code with a non-restricted Ship To Address Code on a Sales Document.</p> <div data-bbox="569 511 890 914" style="border: 1px solid black; padding: 5px; margin: 10px auto; width: fit-content;"> <div style="border: 1px solid black; padding: 2px;">Approval User Setup X</div> <div style="border: 1px solid black; padding: 2px; margin-bottom: 5px;">Done</div> <div style="border: 1px solid black; padding: 2px;"> <div style="border-bottom: 1px solid black; padding: 2px;">User ID Ⓜ</div> <div style="padding: 2px;">SA LESSONUSER2</div> </div> </div> <p style="text-align: center;">Ⓜ = Lookup Button</p>						
<table border="1"> <thead> <tr> <th data-bbox="170 998 457 1036">Field</th> <th data-bbox="457 998 1270 1036">Function</th> </tr> </thead> <tbody> <tr> <td data-bbox="170 1036 457 1156">User ID</td> <td data-bbox="457 1036 1270 1156">User ID will be entered or selected from the Lookup. Only User ID's entered will be granted privileges to approve Bill To Addresses with restricted Country Codes. The Password for each User ID will be their Dynamics GP Password.</td> </tr> </tbody> </table>	Field	Function	User ID	User ID will be entered or selected from the Lookup. Only User ID's entered will be granted privileges to approve Bill To Addresses with restricted Country Codes. The Password for each User ID will be their Dynamics GP Password.		
Field	Function					
User ID	User ID will be entered or selected from the Lookup. Only User ID's entered will be granted privileges to approve Bill To Addresses with restricted Country Codes. The Password for each User ID will be their Dynamics GP Password.					

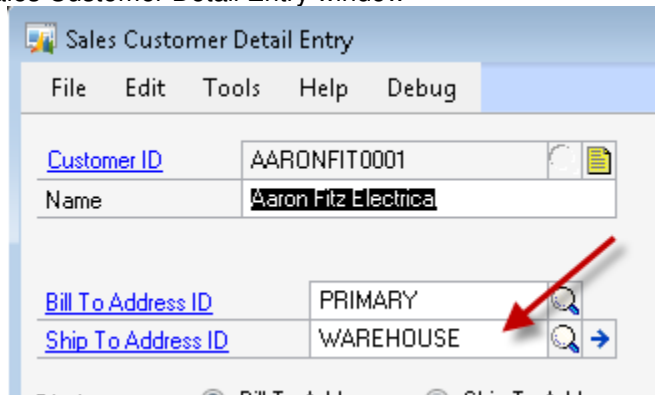
Sales Transaction Entry	CCDA
<p>Require Country Code: When creating a new Sales Transaction the enhancement will require that both the Bill To and Ship To Addresses have a Country Code. If either is blank, NO lines will be allowed on the transaction. The Bill To and Ship To cannot be changed on the Sales Transaction—all changes must be done on Customer Address Maintenance.</p> <p>Lock Ship To Address Entry: Navigation: Transactions >>Sales >> Sales Transaction Entry >> Sales Customer Detail Entry >> Sales Ship To Address Entry</p>  <p>When the Sales Ship To Address Entry window is accessed from the Sales Document, all fields on the window will be locked and unable to be edited.</p> <p>Control Change of Ship To Address Code:</p>	

There are two locations on a Sales Transaction where the Ship To Address Code can be changed:

- 1) On the main Sales Transaction Entry window



- 2) On the Sales Customer Detail Entry window



When the Ship To Address ID is changed in either of these locations, the system will check if the change is allowed. It is only allowed if the Country Code on the new Ship To does NOT conflict with any of the Item-Country assignments from the Item-Country Maintenance window. If the change is NOT allowed, the user will be warned and the Ship To Address ID will reset to the original value.

Item Entry Controls**Condition: Ship To- NOT ALLOWED**

When an item is added to a Sales Transaction, the enhancement will check if the Ship To's Country Code is prohibited for the Item. If so, the Item will not be allowed.

Condition: Ship To-ALLOWED, Bill To-ALLOWED

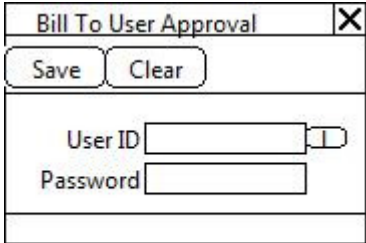

When an item is added to a Sales Transaction, the enhancement will check if the Ship To's Country Code is prohibited for the Item. If not prohibited, it will next check if the Bill To's Country Code is prohibited for the Item. If not, the Item will not be allowed.

Condition: Ship To-ALLOWED, Bill To-NOT ALLOWED

When an item is added to a Sales Transaction, the enhancement will check if the Ship To's Country Code is prohibited for the Item. If not prohibited, it will next check if the Bill To's Country Code is prohibited for the Item. If it is prohibited, the Override Entry window will open (see next Section).

SOP Line Ship To Address ID:

The Ship To Address ID field and Lookup will be disabled on the Sales Line. The Ship To cannot be changed on a per-line basis.

Override Entry	CCDA						
<p>When a user enters an item on a Sales Transaction where the Ship To Address Country Code is allowed, but the Bill To Address Country Code is restricted, the following window will open requiring a User ID and Password to continue:</p> <div data-bbox="548 483 911 724" data-label="Image">  </div> <p style="text-align: center;">  = Lookup Button </p> <table border="1" data-bbox="191 813 1272 911"> <thead> <tr> <th>Field</th> <th>Function</th> </tr> </thead> <tbody> <tr> <td>User ID</td> <td>User will enter or select their User ID from the Lookup</td> </tr> <tr> <td>Password</td> <td>User enters their corresponding Dynamics GP Password</td> </tr> </tbody> </table> <p>If an authorized user is not available to provide the override, or cannot provide the correct User ID and Password, the Item will NOT be allowed on the transaction. Once an Override is provided for a Transaction, it applies to all new lines added to the transaction (the Override is only provided once for the document). A record will be kept of which documents were overridden, by who, and when.</p>	Field	Function	User ID	User will enter or select their User ID from the Lookup	Password	User enters their corresponding Dynamics GP Password	
Field	Function						
User ID	User will enter or select their User ID from the Lookup						
Password	User enters their corresponding Dynamics GP Password						