

Item Restriction User Manual

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Overview

Item Restriction app allows you to restrict certain items to be sold to certain customers. The functionality works on the purchasing side as well. You can prevent certain items from being purchased from certain vendors as well.

The major features include:

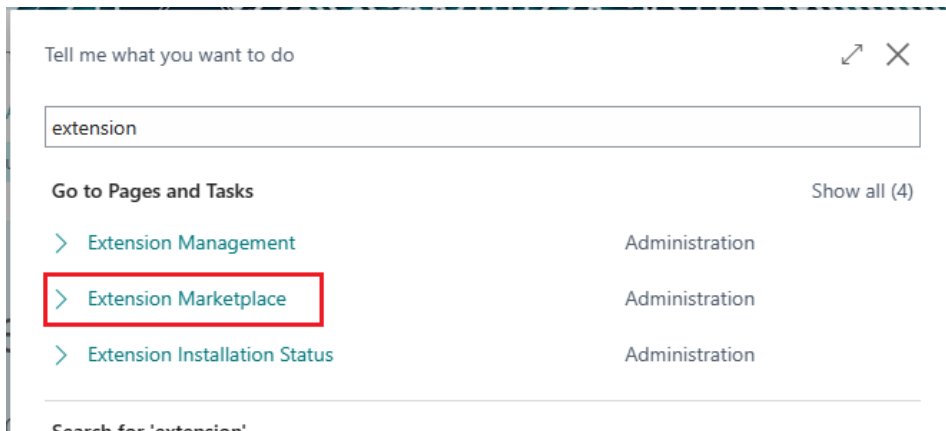
- Create customer restrictions from buying certain items
- Create vendor restrictions from buying certain items
- Keep track of the restriction rules
- Having starting/ending dates on the restrictions
- More features will be present in the next release...

Setup

The Item Restriction Management app is installed and setup per Tenant. When using this app with different tenants, you must follow the following instructions in each tenant.

Subscription Setup – Purchase your license

1. Open the Extension Marketplace



2. Search "Item Restriction Management" in the AppSource to find the Item Restriction Management app and open the information page.


AppSource | Apps for Business Central

Apps (0) Other apps ▾ Item Restriction Management 🔍

Search results for “Item Restriction Management” Sort By: Best match ▾

Showing 4 results in apps. [Clear search](#)

All results



Item Restriction Management


AP Commerce

Business Central

Restrict the use of your inventory exactly the way you need

★ 5.0 (7 ratings)

Starts at Free




Item Order Restrictions

Ternpoint Solutions LP

Business Central

It allows for the restriction of what items can be added to sales and purchase documents.

Starts at Free



Inventory Restrictions

NIC Systems Inc.

Business Central

Easily add and remove restrictions on item inventory, as well as create sub-lots.


Starts at Free

3. Click on **Buy Now**.

←

AppSource | Apps for Business Central

< Apps



Buy now ▾

Starts at
Add for free or buy an upgraded plan

Products
[Dynamics 365 Business Central](#)

Publisher
AP Commerce

Acquire Using
Work or school account

Version
1.0.1.15

Item Restriction Management

AP Commerce

★★★★★ 5.0 (7)

Overview [Plans + Pricing](#) [Ratings + reviews](#)

Restrict the use of your inventory exactly the way you need


Item Restrictions for Dynamics 365 Business Central

Do you need to block or allow certain items to be sold to specific Customers? Or do you have items that should not be sold to specific regions? Do you need the same functionality for the purchasing? If so, the Item Restrictions Management for Dynamics 365 Business Central is the solution for you!

The standard blocking functionality in Business Central allows you to define blocking at the customer or vendor level or at the item level. However, if you need to restrict certain items for specific customers, then the standard Business Central blocking functionality falls apart.


4. Click on **Buy now**

Apps > **Item Restriction Management**



Item Restriction Management

by AP Commerce

 Dynamics 365 Business Central

★ 5.0 (7 ratings)

Starts at **Free** **Buy now** [Contact me](#)

Overview **Plans + Pricing** Ratings + reviews Details + support

5. Select a plan and click **Next**.

Apps > Item Restriction Management > **Checkout**

Checkout

- Plan
- Price + billing
- Payment
- Complete purchase

Select a plan



Item Restriction Management

Standard Monthly Plan Free trial

Description

\$30 per user per month (minimum 4 users)

Number of users
4-1,000,000

Price/payment options
1-month subscription

- First month free, then \$30.00/user/1-month

Next

6. Go through the Billing information pages.

Checkout

- Plan
- Price + billing**
- Payment
- Complete purchase

Price + billing

Billing term ⓘ *

1-month subscription

Price/payment options ⓘ *

First month free, then \$30.00/user/1-month

Recurring billing ⓘ *

On

Off

Number of users (4-1,000,000) *

Up next, choose your payment method:

[Back](#)

[Next](#)

7. Enter your payment information.

Checkout

- Plan
- Price + billing
- Payment**
- Complete purchase

Payment

Product name		Price (USD)	Quantity	Subt
Offer	Item Restriction Management	First month free, then \$30.00/user/one-time payment	4	\$120.00 fc
Plan	Standard Monthly Plan			
	Free trial			
Billing term	1-month subscription			
Recurring billing	On			

Sold-to address *

Enter the address of the legal entity responsible for payment and identified on the invoice. The address provided here is used to determine your tax rate.

Billing account

[Edit](#)

AP Commerce, Inc.
12304 Santa Monica Blvd. STE 300
Los Angeles, CA 90025-2593
US

Bill to *

Select the billing profile you want to use for this purchase. You can also edit an existing profile. [Learn more about billing profiles](#)

Billing profile

[Edit](#) + [Add new](#)

[Back](#)

[Place order](#)

- Click on the **Place order**.

Summary

Subtotal after trial (before tax):
Estimated taxes: ⓘ
Total:

[Back](#) [Place order](#)

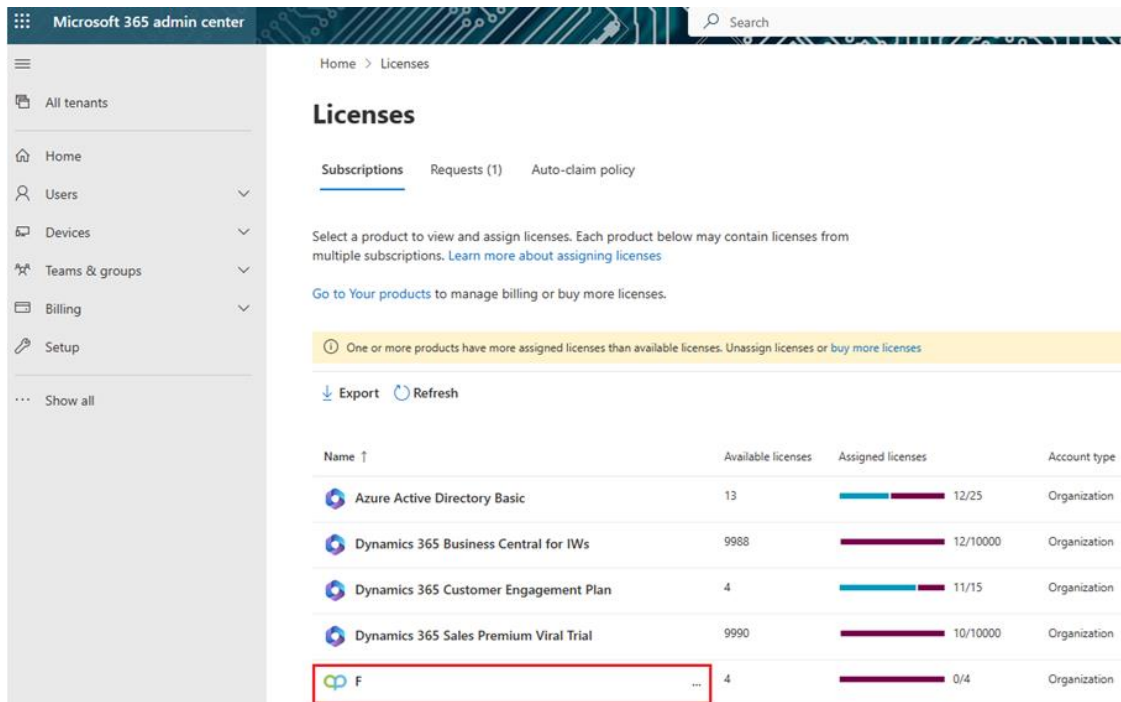
- After you place your order, click on **Assign license** to open the **Microsoft 365 admin center**.

Next steps

Now, assign the licenses you purchased to users in your tenant via [Admin center](#). From there you can proceed to install this app. To manage your licenses anytime, click on your account at the top right, open [Admin center](#) and go to [Licenses](#).

[Back](#) [Assign licenses](#)

- Click on the app that is just purchased.



The screenshot shows the Microsoft 365 admin center interface. The left sidebar contains navigation options: All tenants, Home, Users, Devices, Teams & groups, Billing, Setup, and Show all. The main content area is titled 'Licenses' and includes tabs for Subscriptions, Requests (1), and Auto-claim policy. A warning message states: 'One or more products have more assigned licenses than available licenses. Unassign licenses or buy more licenses'. Below this, there are 'Export' and 'Refresh' buttons. A table lists various products with their available and assigned license counts and account types. The last row, 'AP F', is highlighted with a red box.

Name ↑	Available licenses	Assigned licenses	Account type
Azure Active Directory Basic	13	12/25	Organization
Dynamics 365 Business Central for IWs	9988	12/10000	Organization
Dynamics 365 Customer Engagement Plan	4	11/15	Organization
Dynamics 365 Sales Premium Viral Trial	9990	10/10000	Organization
AP F	4	0/4	Organization

- Click on **Assign Licenses** to assign the licenses to the users that will be using the app.

Home > Licenses > License details

[Back to Licenses](#)



Published by AP Commerce

Plan

Licenses

4 available

0 assigned of 4 total

[Install this product](#)

Users

Manage and view licenses for your users.

[+ Assign licenses](#) [↓ Export users](#) [↻ Refresh](#)

<input type="checkbox"/>	Name	Email	Type
--------------------------	------	-------	------

12. If you already have the app installed, you do not need to complete steps 13 through 15.

13. Once you have assigned your licenses, click on **Install this Product** to install the app in your tenant.

Home > Licenses > License details

[Back to Licenses](#)



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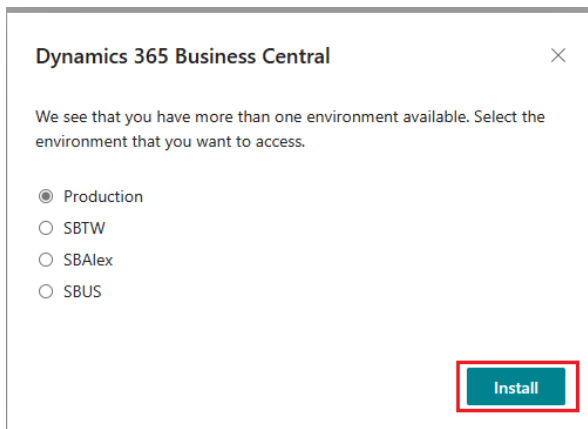
Licenses

4 available

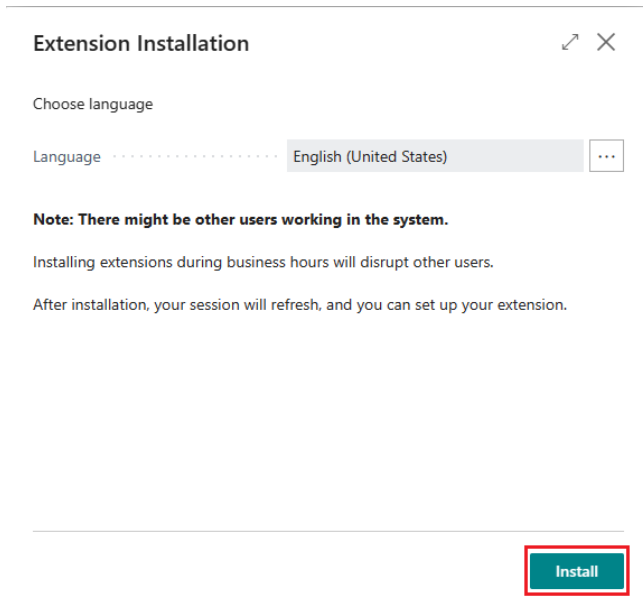
0 assigned of 4 total

[Install this product](#)

14. Select an environment and click on **Install**.




15. Choose a language and click on **Install**.



Canceling the Subscription

- 1) To Cancel Subscription, open the **Microsoft 365 admin center** and go to **Billing>>Your Products**.
- 2) Click on the app you want to cancel the subscription for and click on **Cancel Subscription**.

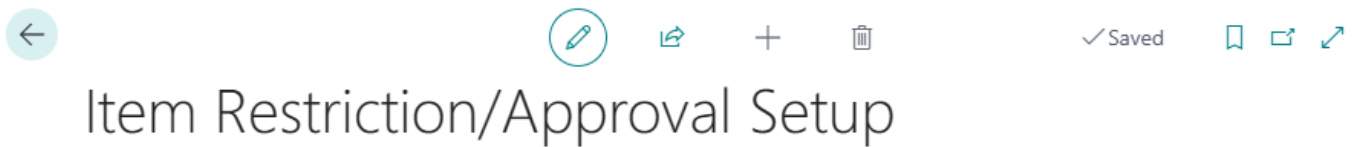
Assigning Permission Set

- 1) Choose the  icon to enter "**User**" and click on the related link to open the **Users** list.
- 2) On the Users list, select users that will require permissions to the Installment Payment Terms app.
- 3) On each of the selected **User Cards**, go to the **User Permission Sets** tab, add the necessary permission sets based on the role of the user:
 - **APEITEMRESTRICTION**
 - i) This permission is needed only for users that will be creating item restriction rules and any user that will be creating, updating, or processing Sales or Purchase Documents.
 - ii) A license is required for this permission.
 - **APEITEMRESTREAD**
 - i) Any user that may need to review but not update Sales or Purchase Documents.
 - ii) These users do not need to be assigned a license.
 - b) **APEITEMRESTRTEST**
 - i) A special license is available to be used to allow one account to test this app in a Sandbox.
 - ii) This permission set is only for use in a Sandbox environment and cannot be assigned to any user in a Production environment.

Permission Set ↑	Name	Type ↑	Extension Name
→ APEITEMRESTRICTION	Item Restriction User	System	Item Restriction Management
APEITEMRESTRREAD	Item Restriction Read	System	Item Restriction Management
APEITEMRESTRTEST	Item Restriction Tester	System	Item Restriction Management

Setup the Item Restriction App

In the Item Restrictions Setup page, there are 3 fields



General

Item Restriction Nos. Sales Restriction Policy
 Purchase Restriction P...

Item Restriction Nos. – This is the number series that will be used to create the item restriction records.


- You will need to either select an existing No. Series, or define a new No. Series for the Item Restriction Nos.

Sales / Purchase Restriction Policy – This is where you want to check the item restrictions:

- Release** – The restrictions are checked at the time of release
- Document Line Entry** – The restrictions are checked at the time of entry
- Both** – The restrictions are checked both during entry and on release

User Guide

Here are the main steps to follow when creating Item Restrictions:

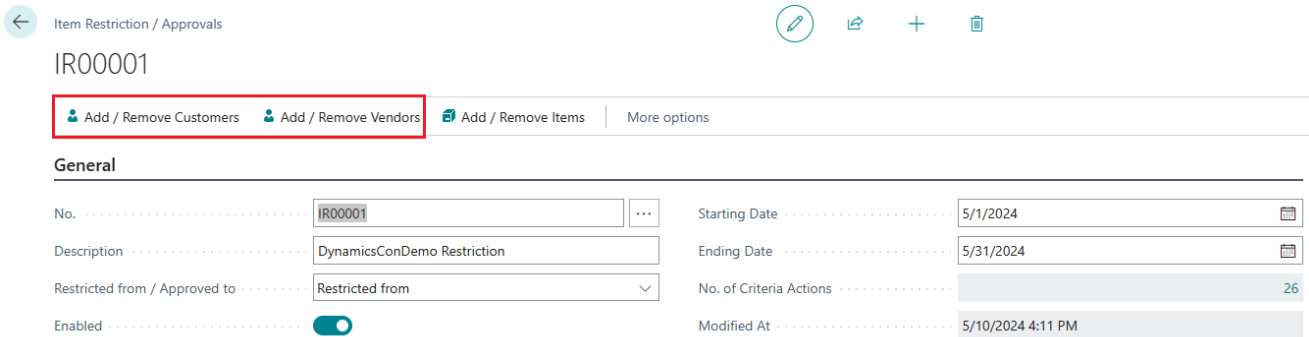
- Choose the  icon, enter Item Restrictions, then choose the related link
- Click on New to create a new entry
- On the header area, there are a few fields to note:
 - Restricted from / Approved to
 - Restricted From – Indicates that the customer, vendor, and items that are on this item restriction is blocked from sales / purchase.
 - Approved to – Indicates that the customer, vendor, and items that are on this item restriction can ONLY buy and sell from this list

- Starting Date – The start date of the restriction. Leave blank if not applicable
- Ending Date – The ending date of the restriction. Leave blank if not applicable
- Enabled – When ready, check this on to enable the item restriction rule

Adding or Removing Vendor / Customers to the Restriction

To add or remove customers and vendors to the restrictions, do the following:

1. Click on the **Add/Remove Customers** for customer or **Add/Remove Vendors** for vendors.



Item Restriction / Approvals

IR00001

General

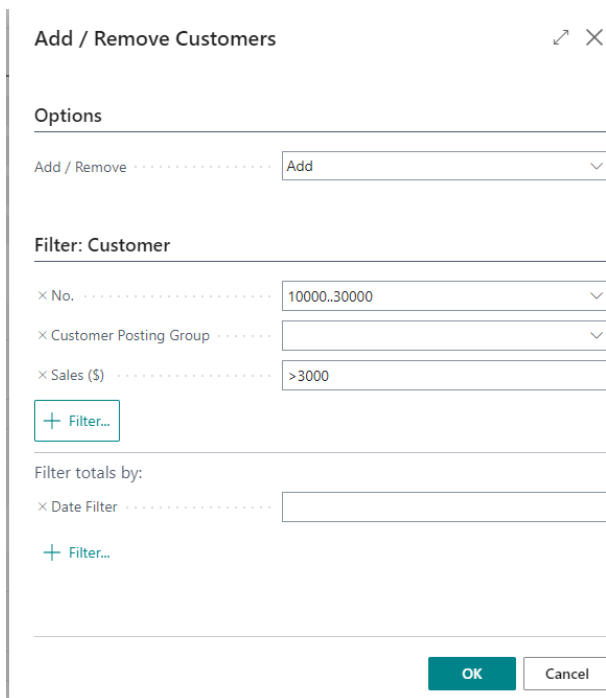
No. IR00001 ... Starting Date 5/1/2024

Description DynamicsConDemo Restriction Ending Date 5/31/2024

Restricted from / Approved to Restricted from No. of Criteria Actions 26

Enabled Modified At 5/10/2024 4:11 PM

2. Specify whether you want to add or remove the customers or vendors from this list
3. Define the filters that you would like the process to run to add the vendor or customers
4. Click Ok



Add / Remove Customers

Options

Add / Remove Add

Filter: Customer

× No. 10000..30000

× Customer Posting Group

× Sales (\$) >3000

+ Filter...

Filter totals by:

× Date Filter

+ Filter...

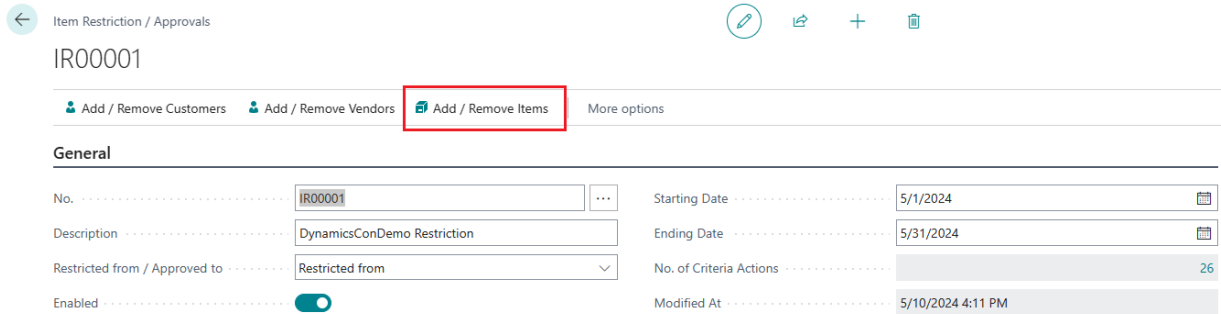
OK Cancel

To remove customers or vendors that are on this list, repeat the same process but select **Remove** from the Add / Remove from the Options tab.

Adding or Removing Items to the Restriction

To add or remove items to the restriction, do the following:

1. Click on **Add/Remove Items**



Item Restriction / Approvals

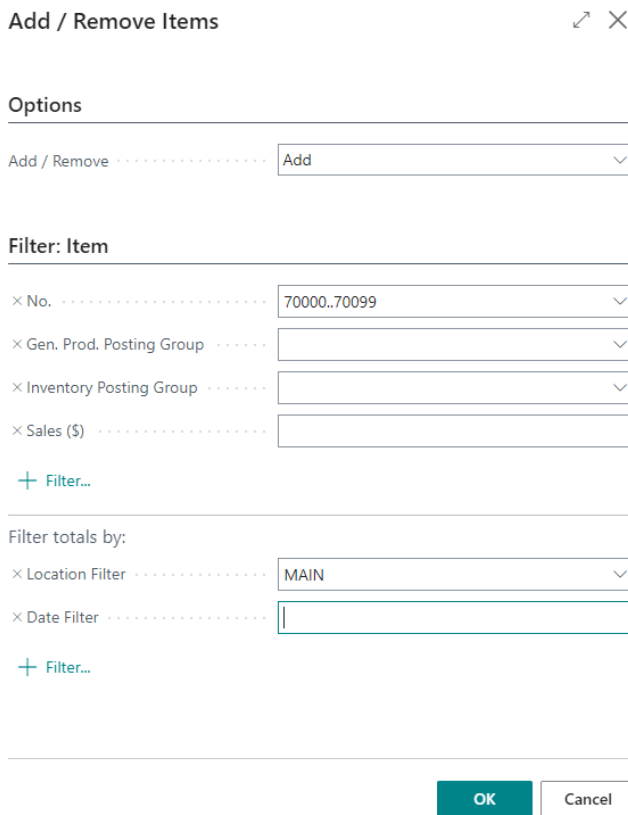
IR00001

[Add / Remove Customers](#)
[Add / Remove Vendors](#)
[Add / Remove Items](#)
[More options](#)

General

No.	IR00001	Starting Date	5/1/2024
Description	DynamicsConDemo Restriction	Ending Date	5/31/2024
Restricted from / Approved to	Restricted from	No. of Criteria Actions	26
Enabled	<input checked="" type="checkbox"/>	Modified At	5/10/2024 4:11 PM

- Specify whether you want to add or remove the items from this list
- Define the filters that you would like the process to run to add the items
- Click Ok



Add / Remove Items

Options

Add / Remove Add

Filter: Item

× No. 70000..70099
 × Gen. Prod. Posting Group
 × Inventory Posting Group
 × Sales (\$)

+ Filter...

Filter totals by:

× Location Filter MAIN
 × Date Filter

+ Filter...

OK Cancel

To remove the items that are on this list, repeat the same process but select **Remove** from the Add / Remove from the Options tab.

Enable Item Restriction/Approval

You must set the **Enabled** field to True when you have the Item Restriction/Approval record set up the way you want.

← Item Restriction / Approvals

IR00001

[Add / Remove Customers](#)
[Add / Remove Vendors](#)
[Add / Remove Items](#)
[More options](#)

General

No.	<input type="text" value="IR00001"/>	Starting Date	<input type="text" value="5/1/2024"/>
Description	<input type="text" value="DynamicsConDemo Restriction"/>	Ending Date	<input type="text" value="5/31/2024"/>
Restricted from / Approved to	<input type="text" value="Restricted from"/>	No. of Criteria Actions	26
Enabled	<input checked="" type="checkbox"/>	Modified At	5/10/2024 4:11 PM

Results:

With the Item Restriction/Approval record enabled, you will receive an error message if you try to use an item listed in the restriction.

Lines | [Manage](#) | Line | Order

[New Line](#)
[Delete Line](#)
[Select items...](#)

Type	No.	Item Reference No.	Description
Item	WRB-1000		Whole Roasted Beans, Columbi
Item	WRB-1001		Whole Roasted Beans, Brazil
✗ Item	✗ 1896-S		✗

Validation Results

Item Restriction found. Please refer to the Item Restrictions page. RECORD: Restriction = ITMR00001 Customer = 10000, Item = 1896-S

Subtotal Excl. Tax (USD) 604

FAQ

Can I define the restriction for the items by location?

Yes, the restriction is checked by location. If you define a Location Filter when you run the Add/Remove Items from the item restrictions page, it will populate the Location Code. If you leave the location code blank, it will check for all locations.

How come location is not available to be selected for non-item lines?

Non-item restrictions are not typically location specific. If needed, we can add this functionality in future updates. Please let us know.

Why are we not able to add or modify the lines on our own?

When you run the process to add/remove records to the item restrictions, the function keeps a log of the inserts and deletes. For performance and sanity reasons, we don't record a bunch of one-off changes to the item restrictions.

Why can't I enter resource or G/L lines lines if I enable the Approved For just a few items for a customer/vendor?

The reason is because you're only approving the user to enter certain lines. If you want to enable certain G/L accounts, you will need to add the G/L accounts to the approvals list. Same with resources and other types