



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
- Create approvals so customers and vendors can only buy certain items
- Keep track of the approval and restriction rules
- Having starting and ending dates on the restrictions and approvals
- Refreshing the approvals/restrictions based on updated master data

Installation & Setup

This app is licensed through Microsoft. To purchase and deploy it in your production environment, follow the instructions in the link below:

[How to purchase and license the app through Microsoft AppSource](#)

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.



Setup the Item Restriction App

In the Item Restrictions Setup page, there are 3 fields

Item Restriction/Approval Setup

General

Item Restriction Nos. ITEMREST

Sales Restriction Policy Document Line Entry

Purchase Restriction P... Both


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:

1. Choose the  icon, enter Item Restrictions, then choose the related link
2. Click on New to create a new entry
3. On the header area, there are a few fields to note:
 - **Restricted from / Approved to**
 - i. **Restricted From** – Indicates that the customer, vendor, and items that are on this item restriction is blocked from sales / purchase.
 - ii. **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 / Ship-to Country to the Restriction

To add or remove customers, vendors and/or Ship-to Country to the restrictions, the process is the same as long as you click on what you're adding/removing.

Item Restriction / Approvals

RET-10000

Refresh Approvals/Restrictions Add / Remove Customers Add / Remove Vendors Add / Remove Items Actions Automate Fewer options

General

No. RET-10000 Starting Date 3/1/25

Description testing123 Ending Date 3/14/25

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

Enabled Modified At 10/16/2025 3:09 PM

Add / Remove Add / Remove Ship-to Country Add / Remove Resources Add / Remove G/L Accounts Other

In this example, we will focus on the **Add/Remove Customer** function:

1. Click on the **Add/Remove Customers** for customer
2. Specify whether you want to add or remove the customers from this list
3. Define the filters that you would like the process to run to add the customers
4. Click Ok



Add / Remove Customers



Options

Add / Remove

Filter: Customer

× No.

× Customer Posting Group

× Sales (\$)

+ Filter...

Filter totals by:

× Date Filter

+ Filter...

To remove customers 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 Approval / Restriction

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

1. Click on **Add/Remove Items**
2. Specify whether you want to add or redmove the items from this list
3. Define the filters that you would like the process to run to add the items
4. Click Ok



Add / Remove Items ↗ ✕

Options

Add / Remove ▾

Filter: Item

× No. ▾

× Gen. Prod. Posting Group ▾

× Inventory Posting Group ▾

× Sales (\$)

[+ Filter...](#)

Filter totals by:

× Location Filter ▾

× Date Filter

[+ Filter...](#)

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

Refreshing the Dataset Manually

To refresh the item approval / restriction based on any changes in your master data, click on the **Refresh Approval/Restrictions**. This process will “replay” the filtering criteria that you set based on any changes to your customer, vendor, item, and any other data in question.

← Item Restriction / Approvals

RET-10000

Refresh Approvals/Restrictions | Add / Remove Customers | Add / Remove Vend

General

No. RET-10000

Summar | Attachme



Refreshing the Dataset Automatically

To have the app refresh all of your approval and restrictions automatically, you can set the **Refresh item Restriction/Approval Criteria** (report 14167905) process to run automatically on the Job Queue. You will be able to define when you want the refreshing process to run to update your approval / restrictions.

Job Queue Entry Card

Report · 14167905 · Refresh Item Restriction/Approval Criteria

To edit the job queue entry, you must first choose the Set On Hold action. Set On Hold

Home Job Queue Automate Fewer options

Set Status to Ready Set On Hold Restart Run once (foreground) Show Error

General

Object Type to Run	Report	Maximum No. of Attempts	0
Object ID to Run	14167905	Rerun Delay (sec.)	0
Object Caption to Run	Refresh Item Restriction/Appro...	Last Ready State	10/16/2025 3:22 PM
Description	Refresh Item Restriction/Appro...	Earliest Start Date/Time	10/16/2025 3:22 PM
Parameter String		Expiration Date/Time	
Job Queue Category		Job Timeout	12 hours
Priority	Normal	Status	Ready
User ID	ALEX		

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