

AutoCount Item Scope Plug-in

Date	Name	Revision	Plug-in Version	Remark
19 th May 2013	H. Y. Lee	1.00	1.8.3	Initial Release

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1. Overview

In this latest plug-in offering by AutoCount Sdn Bhd, the administrator of an account book can now easily maintain item scopes for their stock inventories. These item scopes can then be assigned to certain users to limit their access to only that item scope. For example, a sales person is in charge of selling only mobile phones and not the other stock items. The administrator then could create an item scope that would only show the mobile phone item scope for that sales person to use in his/her documents. This in turn causes the sales person to only be able to access the items in that item scope when creating the documents that he/she wishes to create.

2. Installing AutoCount Item Scope Plug-in

Requirement

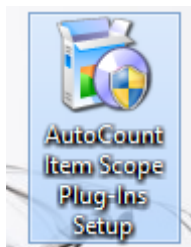
This plug-in requires AutoCount Accounting version 1.6.2a and above to be installed.

Notes

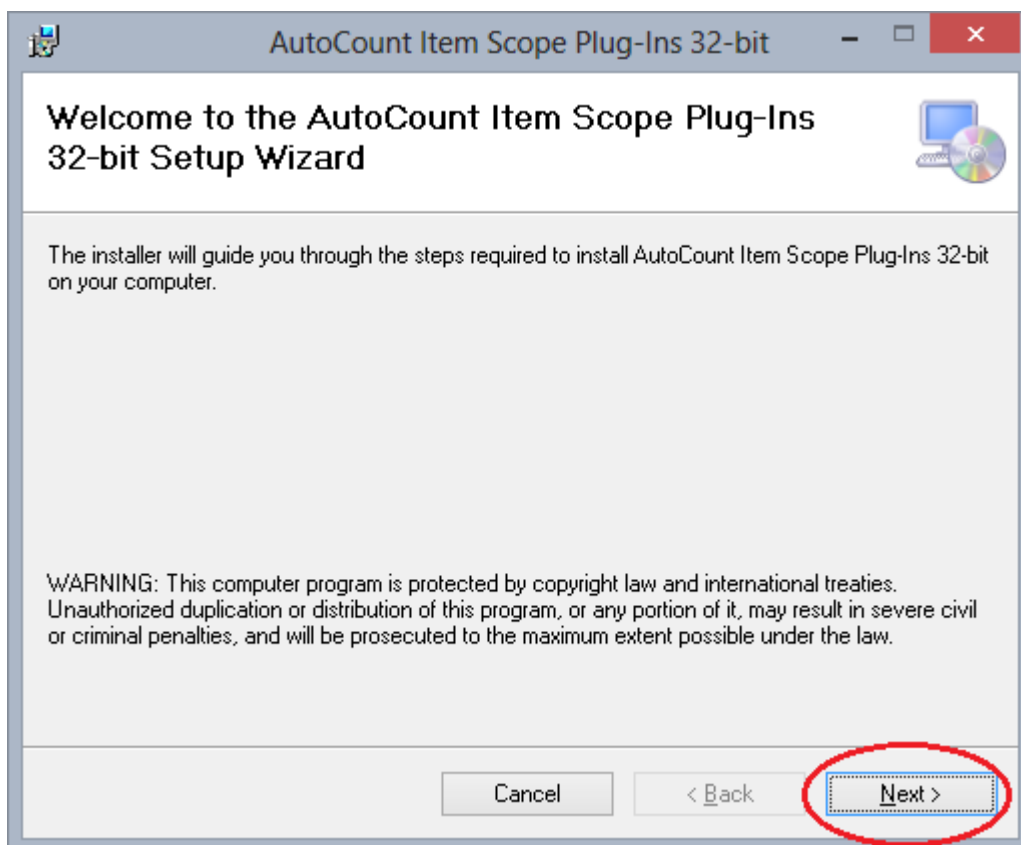
This plug-in does not support the Bill of Material (BOM) and Item Package modules.

Installation

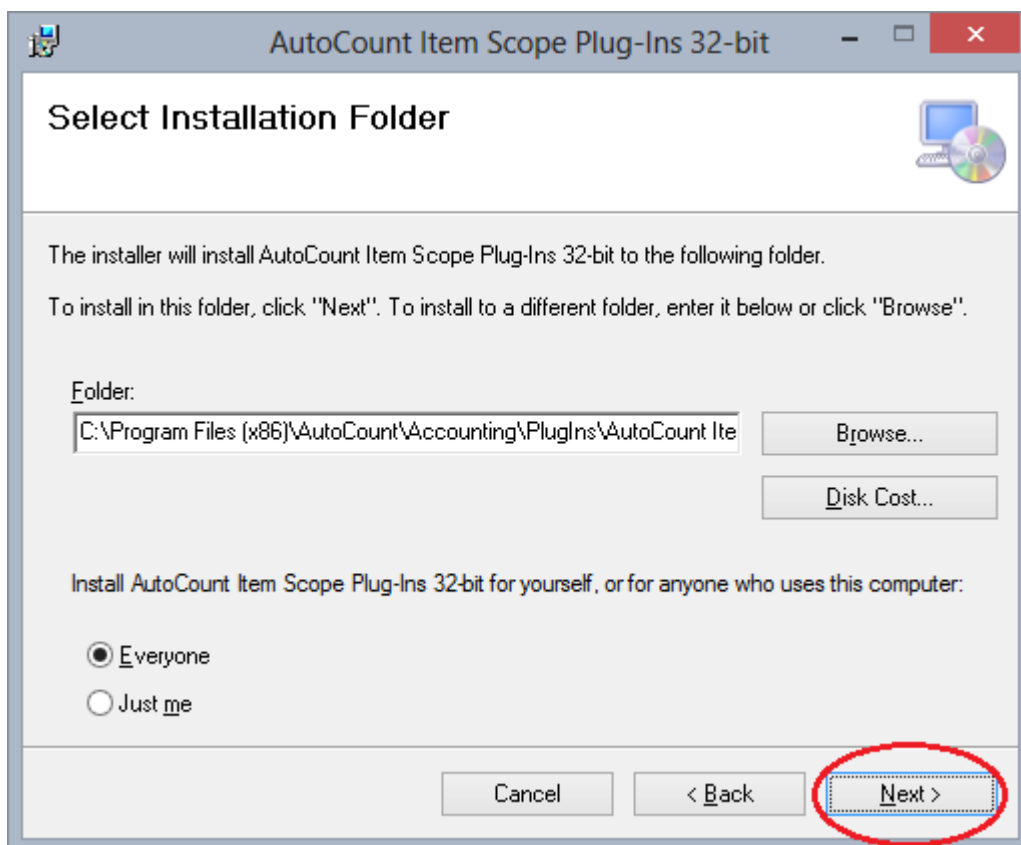
1. Run the AutoCount Item Scope Plug-Ins Setup.exe file.



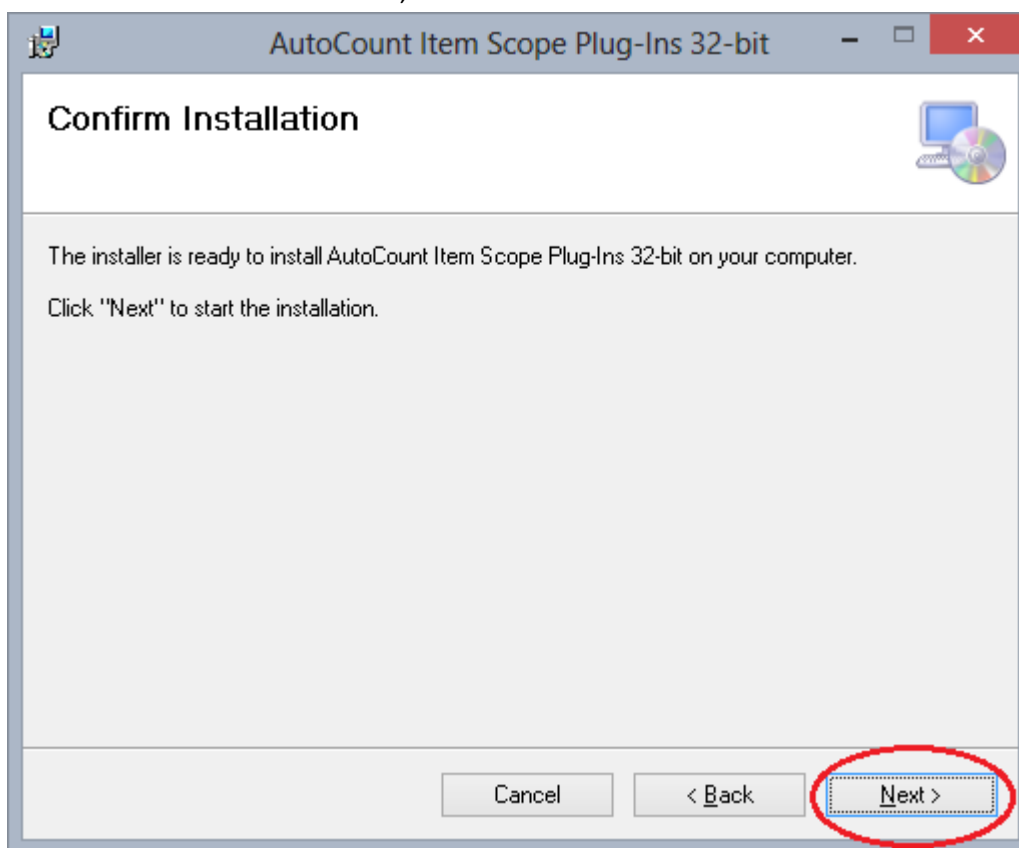
2. At the Welcome screen, click Next.



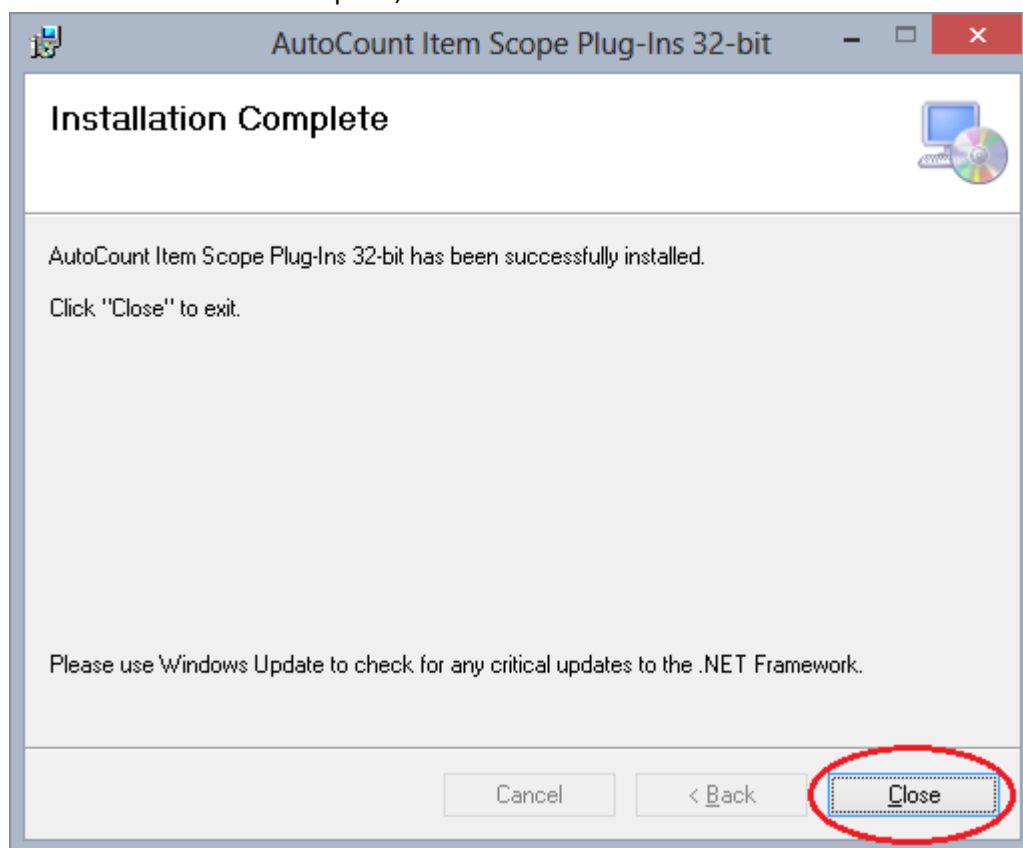
3. At the Select Installation Folder screen, you can either choose to use the default install location or browse to another location. You can also choose to install the plug-in for yourself or for anyone using the computer.



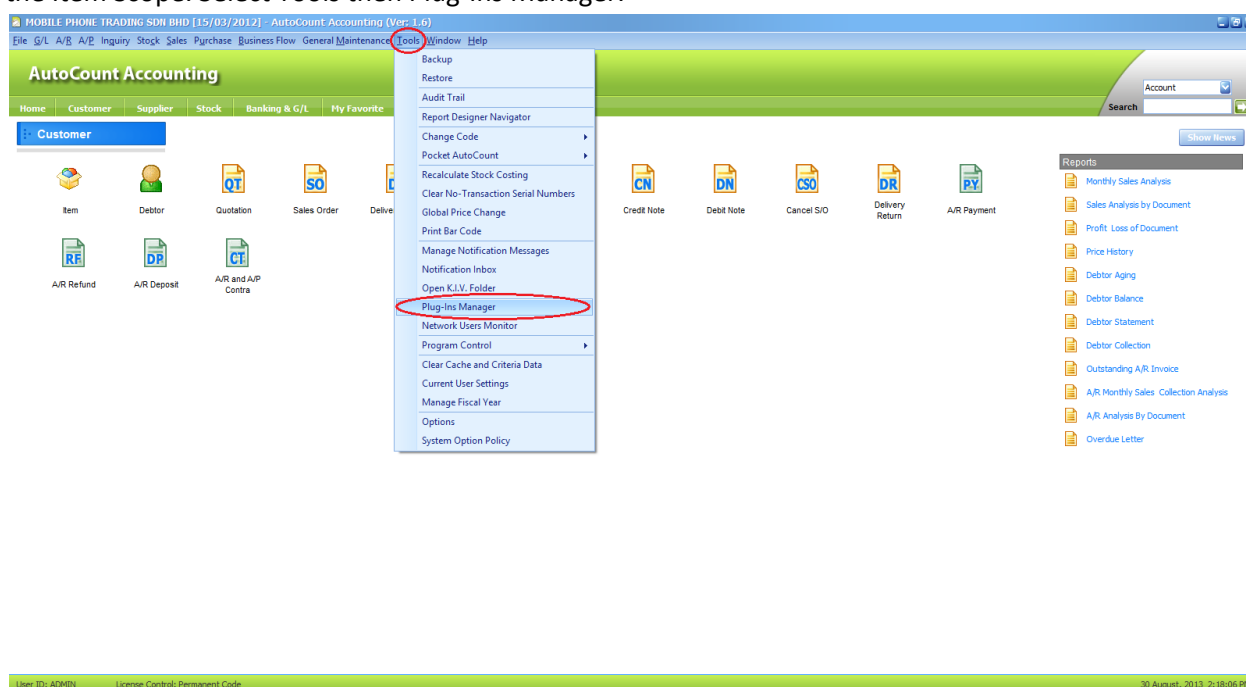
4. In the Confirm Installation screen, click Next.



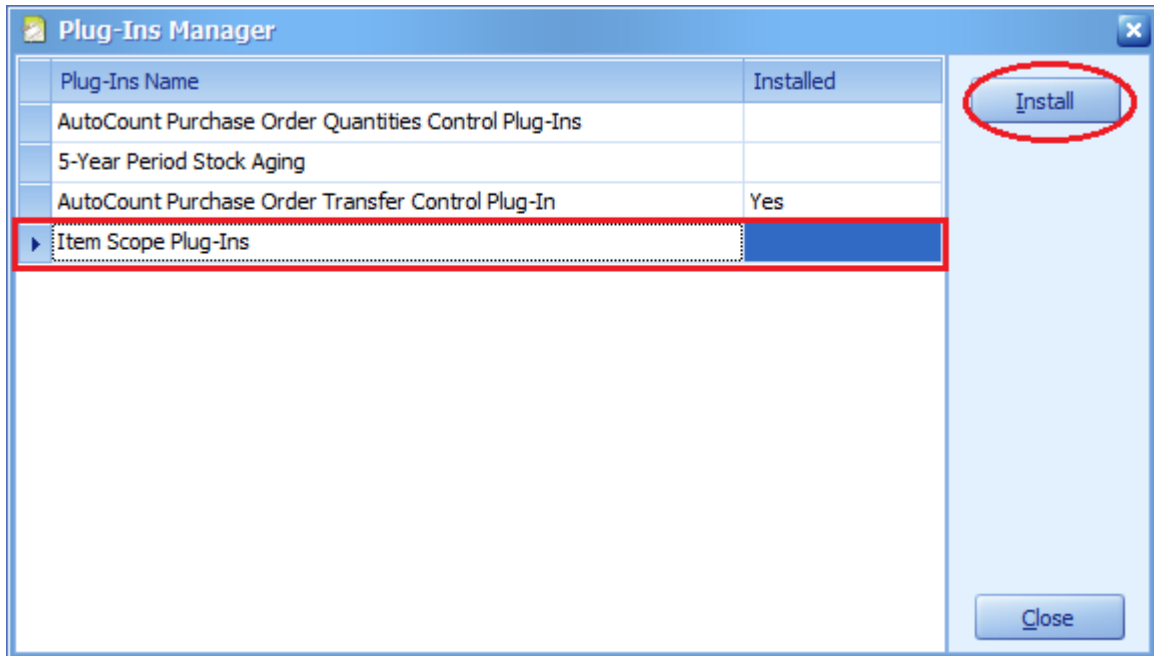
- After the installation is complete, click Close.



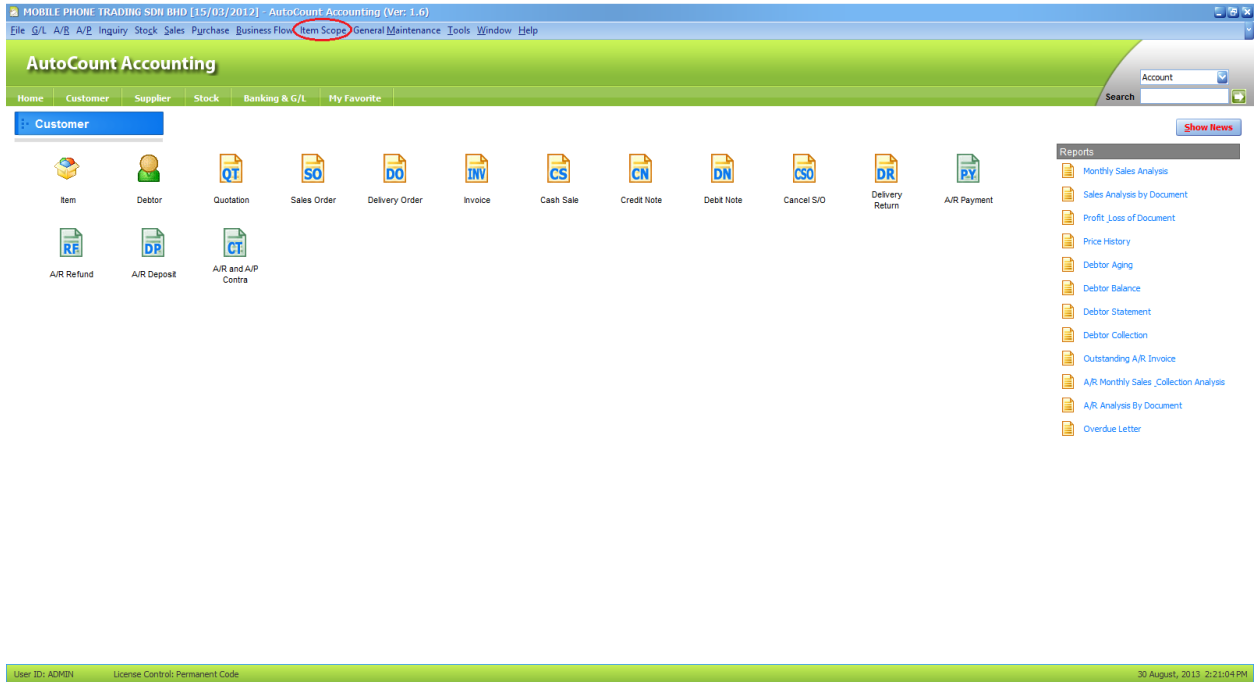
- Start the AutoCount Accounting program and log-in to the account book you wish to maintain the Item Scope. Select Tools then Plug-Ins Manager.



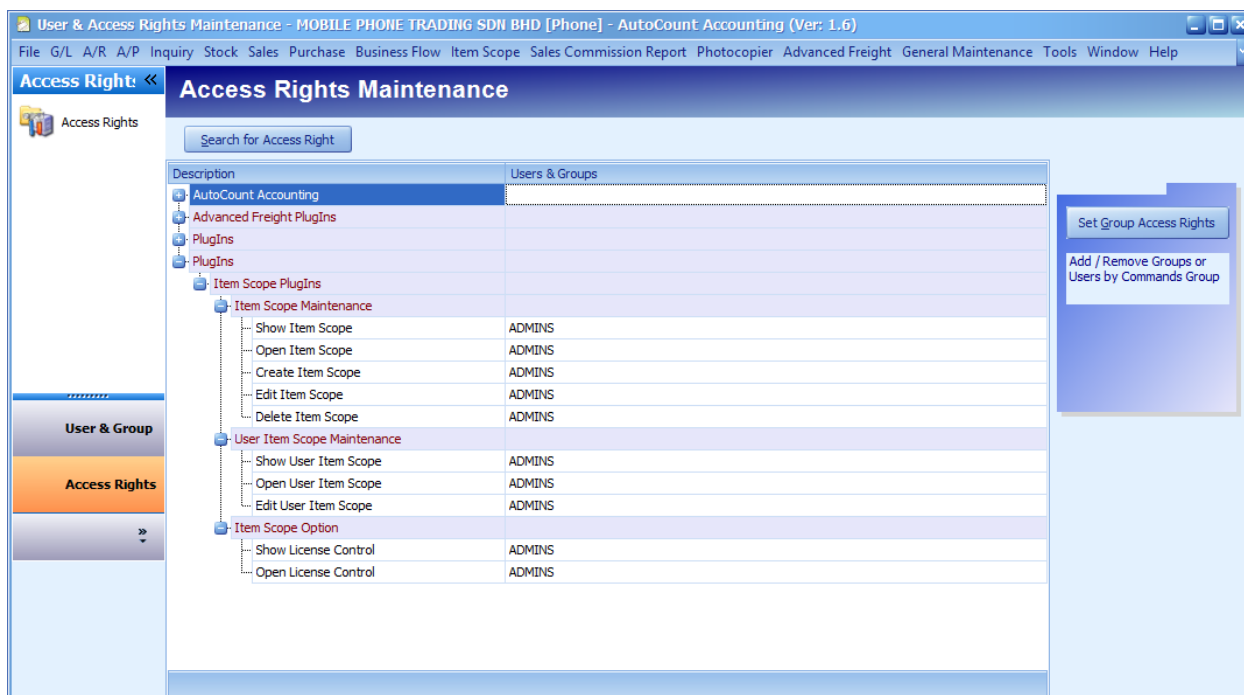
7. In the Plug-Ins Manager menu, select the Item Scope Plug-Ins entry and click the Install button.



8. After installation is complete, you will see the Item Scope menu on the AutoCount Accounting main menu bar.



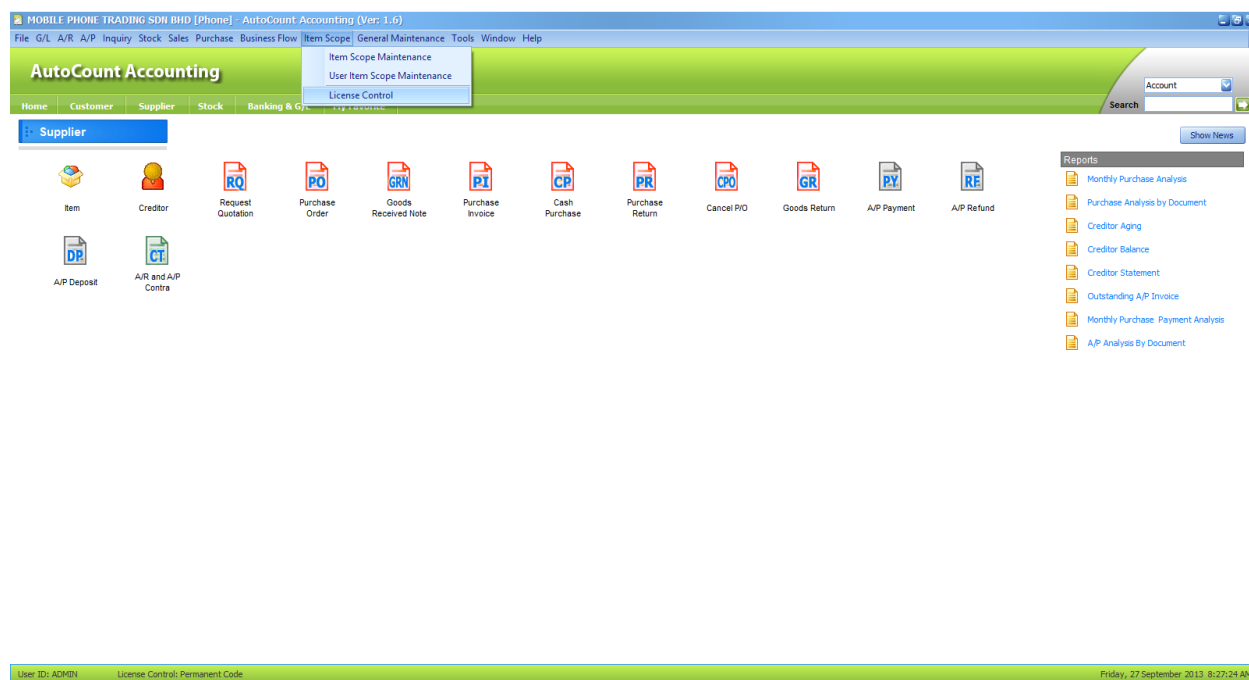
9. To setup the access rights for the Item Scope Maintenance, User Item Scope Maintenance and License Control, just access the Access Right option in User Maintenance menu accessible from the General Maintenance menu bar entry.



3. Item Scope Plug-in Usage

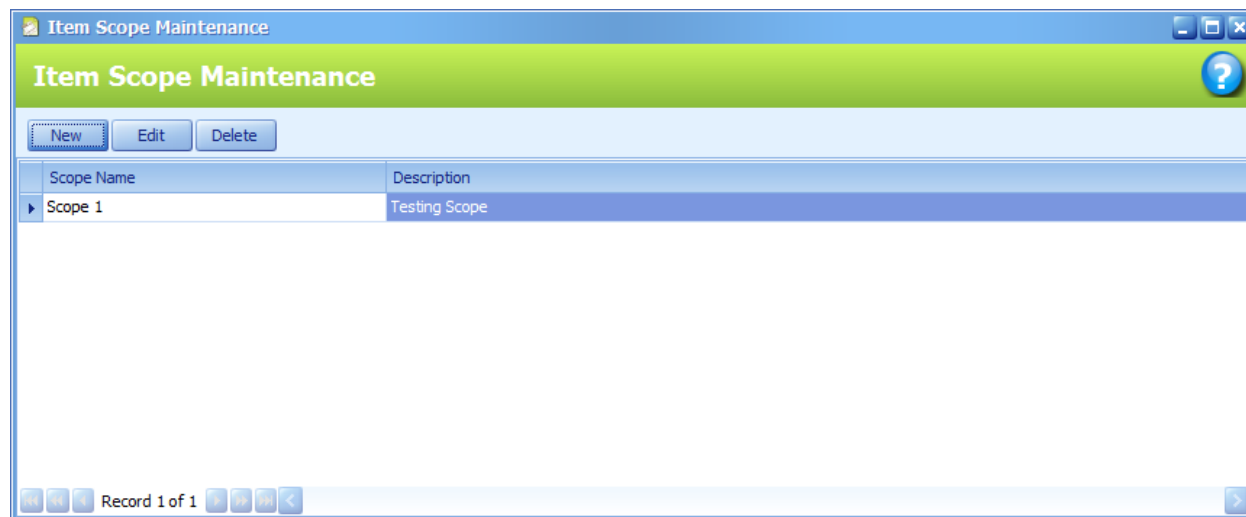
There are 3 menus associated to the Item Scope Plug-in. These are:

- 1) Item Scope Maintenance menu:
Maintain the Item Scope record(s) in the system.
- 2) User Item Scope Maintenance menu:
Maintain the users' Item Scope.
- 3) License Control menu:
Register item scope's license key



Maintaining Item Scope

Go to Item Scope -> Item Scope Maintenance.



This is the place to maintain and manage the Item Scope that is available in the account book. The created Item Scope is displayed here.

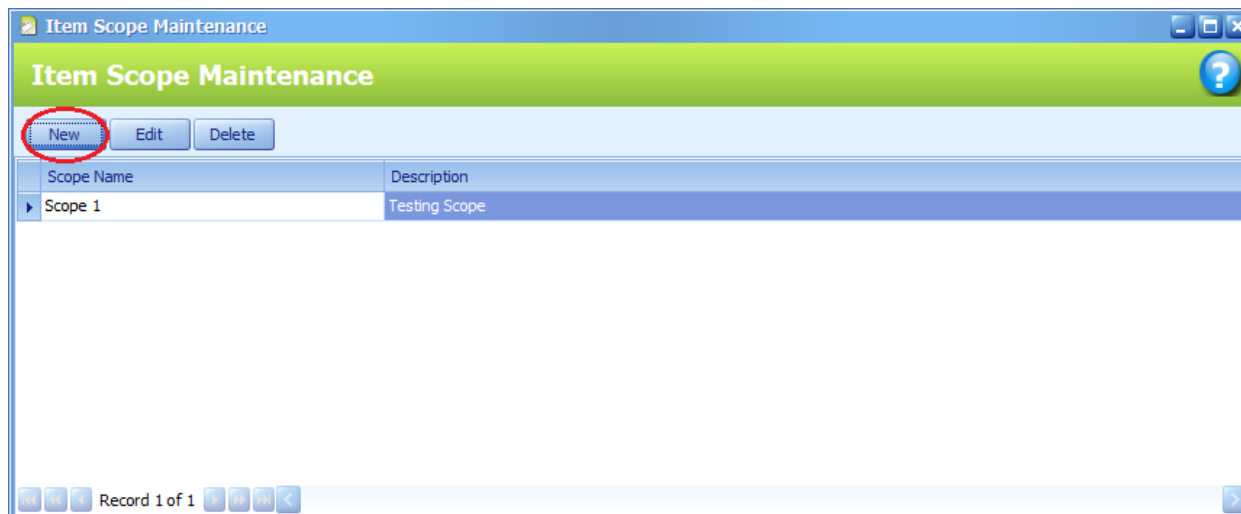
Scope Name: The name that is associated with the Item Scope maintained.

Description: The description of the Item Scope maintained.

Create an Item Scope

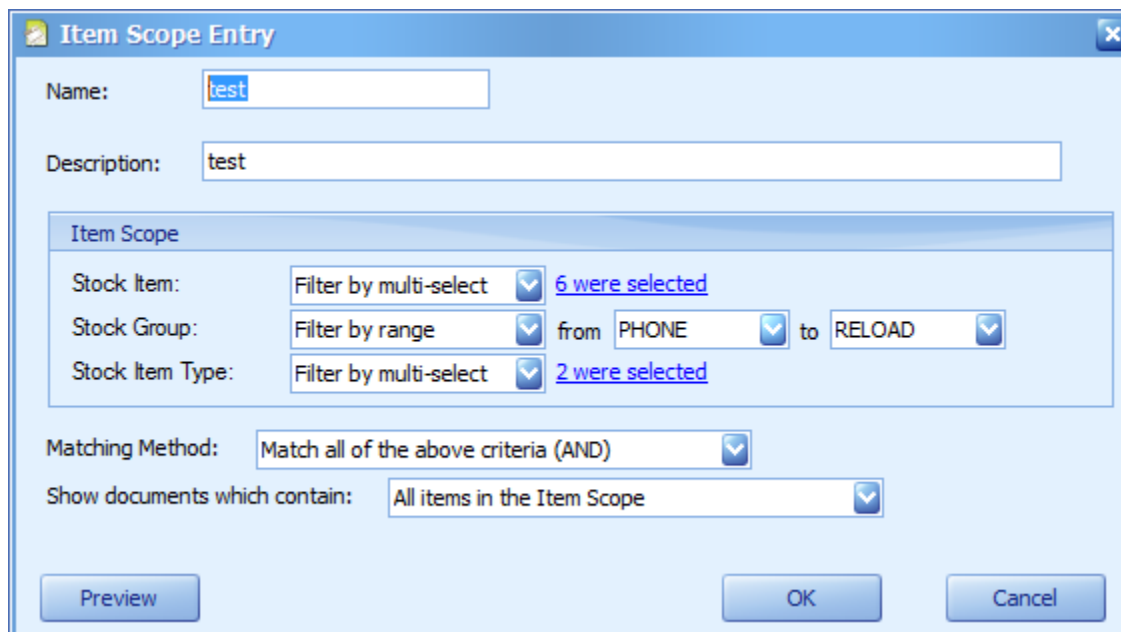
Creating an Item Scope allows you to specify which Item, Item Group and/or Item Type that you wish to be place under it. To create an Item Scope:

Go to Item Scope -> Item Scope Maintenance and click on New.



The screenshot shows the 'Item Scope Maintenance' window. It has a title bar 'Item Scope Maintenance' and a green header bar with the same text. Below the header, there are three buttons: 'New', 'Edit', and 'Delete'. The 'New' button is circled in red. Below the buttons is a table with two columns: 'Scope Name' and 'Description'. The table contains one row: 'Scope 1' and 'Testing Scope'. At the bottom of the window, there is a status bar that says 'Record 1 of 1'.

The Item Scope Entry dialogue will then be displayed.



The screenshot shows the 'Item Scope Entry' dialog box. It has a title bar 'Item Scope Entry'. The dialog contains the following fields and controls:

- Name:** A text box containing the word 'test'.
- Description:** A text box containing the word 'test'.
- Item Scope section:**
 - Stock Item:** A dropdown menu with 'Filter by multi-select' and a button that says '6 were selected'.
 - Stock Group:** A dropdown menu with 'Filter by range', followed by 'from' and a dropdown menu with 'PHONE', 'to' and a dropdown menu with 'RELOAD'.
 - Stock Item Type:** A dropdown menu with 'Filter by multi-select' and a button that says '2 were selected'.
- Matching Method:** A dropdown menu with 'Match all of the above criteria (AND)'.
- Show documents which contain:** A dropdown menu with 'All items in the Item Scope'.
- Buttons:** 'Preview', 'OK', and 'Cancel'.

Name: Key in the name for the Item Scope.

Description: Key in the description for the Item Scope

Item Scope

Stock Item: You may choose to filter the Stock Item that is applied with the Item Scope being maintained.

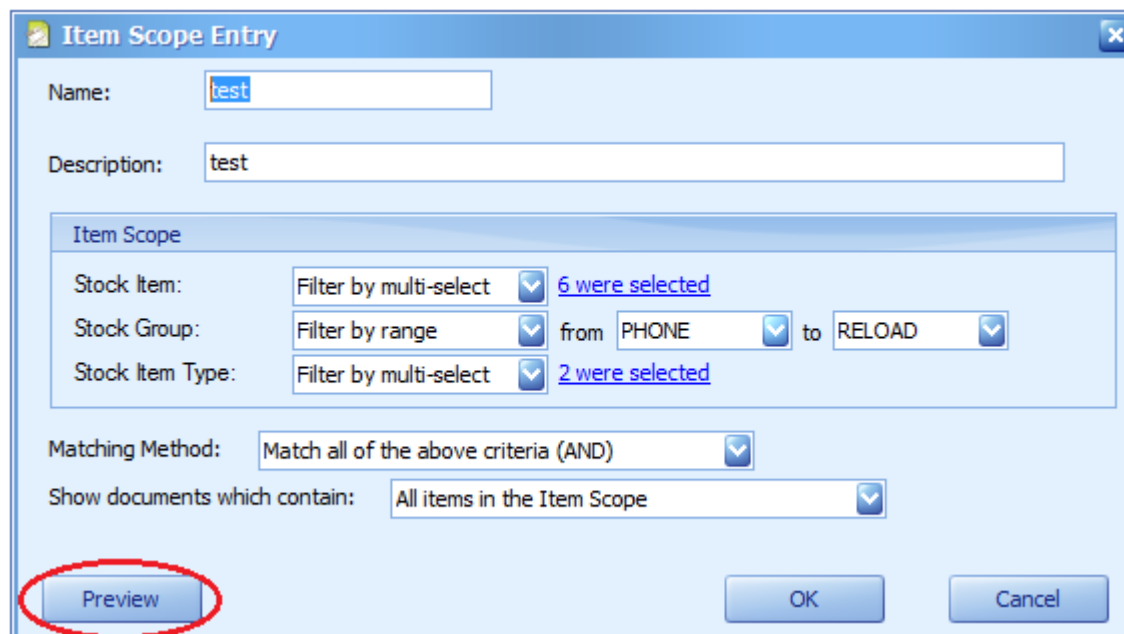
Stock Group: You can also choose to filter the Stock Group in which to be applied with the Item Scope being maintained.

Stock Item Type: You may choose to filter the Stock Item Type in which to be applied with the Item Scope being maintained

Matching Method: You can set the matching method to AND, which will apply all the filters together. You can also change the matching method to OR, which will apply either one of the filters.

Show documents which contain: select if you wish for the item scope to only show documents that contains all the items in the Item Scope or to show documents that contains at least one item in the Item Scope.

After filling the required information, you can click the Preview button to view the Items that a user is allowed to view in the Item Scope.



Item Scope Entry

Name:

Description:

Item Scope

Stock Item: [6 were selected](#)

Stock Group: from to

Stock Item Type: [2 were selected](#)

Matching Method:

Show documents which contain:

Item Scope Entry

Name:

test

Description:

test

Item Scope

Stock Item:

Filter by multi-select

6 were selected

Stock Group:

Filter by range

from PHONE to RELOAD

Stock Item Type:

Filter by multi-select

2 were selected

Matching Method:

Match all of the above criteria (AND)

Show documents which contain:

All items in the Item Scope

Item Code	Description
▶ CELCOM10	CELCOM RELOAD CARD RM10
CELCOM100	CELCOM RELOAD CARD RM100
N73	NOKIA N73
N80	NOKIA N80

Record 1 of 4

Preview

OK

Cancel

You can then click the OK button to save the Item Scope.

Item Scope Entry

Name:

test

Description:

test

Item Scope

Stock Item:

Filter by multi-select

6 were selected

Stock Group:

Filter by range

from PHONE to RELOAD

Stock Item Type:

Filter by multi-select

2 were selected

Matching Method:

Match all of the above criteria (AND)

Show documents which contain:

All items in the Item Scope

Item Code	Description
▶ CELCOM10	CELCOM RELOAD CARD RM10
CELCOM100	CELCOM RELOAD CARD RM100
N73	NOKIA N73
N80	NOKIA N80

Record 1 of 4

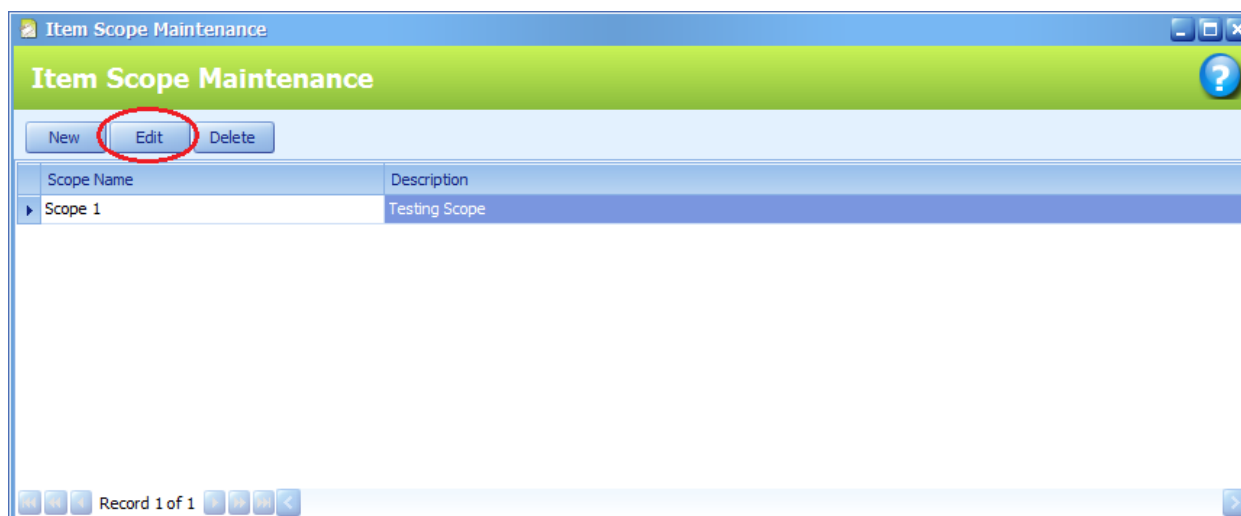
Preview

OK

Cancel

Edit Item Scope

Go to Item Scope -> Item Scope Maintenance and click on Edit.



Item Scope Maintenance

New Edit Delete

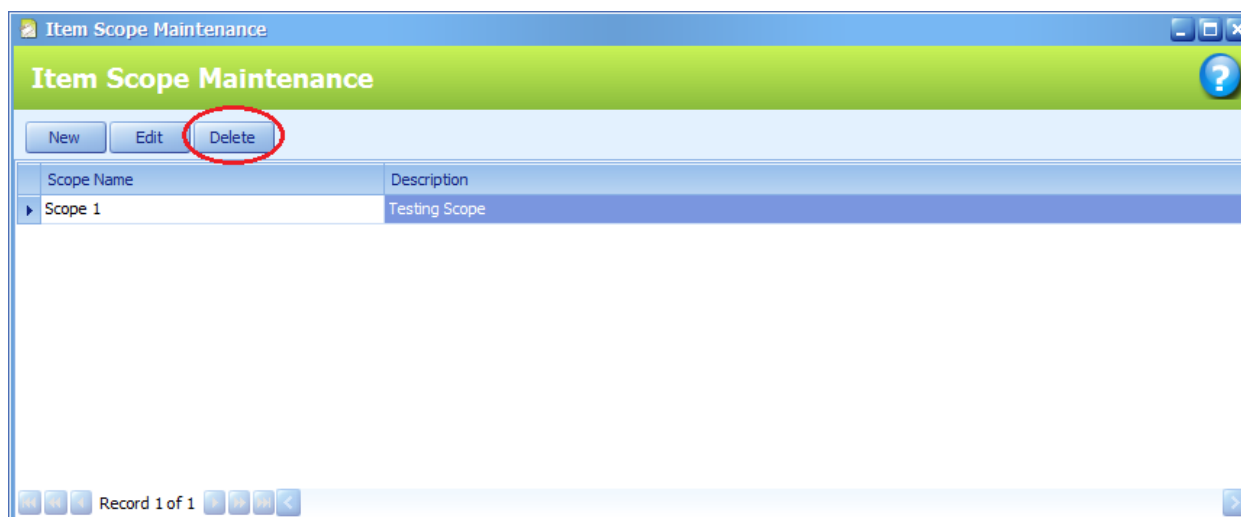
Scope Name	Description
Scope 1	Testing Scope

Record 1 of 1

In this window, you can edit the Item Scope that was maintained.

Delete Item Scope

Go to Item Scope -> Item Scope Maintenance and click on Delete.



Item Scope Maintenance

New Edit Delete

Scope Name	Description
Scope 1	Testing Scope

Record 1 of 1

Maintaining User Item Scope

Go to Item Scope -> User Item Scope Maintenance



The screenshot shows a software window titled "User Item Scope Maintenance". It features a table with three columns: "User ID", "User Name", and "Scope Name". The first row is highlighted in blue and shows "ADMIN" as the User ID, "Administrator" as the User Name, and "Scope 1" as the selected Scope Name. Below this, there are 14 other rows with various user names. At the bottom of the window, there is a status bar indicating "Record 1 of 15" and navigation buttons. The "OK" and "Cancel" buttons are located at the bottom right.

User ID	User Name	Scope Name
ADMIN	Administrator	Scope 1
soonseng	soonseng	
Interco	Interco	
NOTIFIER	NOTIFIER	
IVAN	IVAN	
RON	RON	
ANN	ANN	
ADMIN1		
CALLIE	CALLIE	
KELLY	KELLY	
SIEW LING	SIEW LING	
TAN	TAN	
test		
Approved		
APPROVAL		

In this menu, you can maintain which user will be using which Item Scope that you have maintained. You just select the User then click the Scope Name to open the drop down menu to select the Item Scope you wish to apply to the user.

User Item Scope Maintenance

User Item Scope Maintenance

User ID	User Name	Scope Name
ADMIN	Administrator	Scope 1
soonseng	soonseng	
Interco	Interco	
NOTIFIER	NOTIFIER	
IVAN	IVAN	
RON	RON	
ANN	ANN	
ADMIN1		
CALLIE	CALLIE	
KELLY	KELLY	
SIEW LING	SIEW LING	
TAN	TAN	
test		
Approved		
APPROVAL		

Scope N...

Description

Scope 1

Testing Scope

Record 1 of 15

OK

Cancel

After you have finish applying the item scope to the users, just click OK to save the maintenance.

User Item Scope Maintenance

User Item Scope Maintenance

User ID	User Name	Scope Name
ADMIN	Administrator	Scope 1
soonseng	soonseng	
Interco	Interco	
NOTIFIER	NOTIFIER	
IVAN	IVAN	
RON	RON	
ANN	ANN	
ADMIN1		
CALLIE	CALLIE	
KELLY	KELLY	
SIEW LING	SIEW LING	
TAN	TAN	
test		
Approved		
APPROVAL		

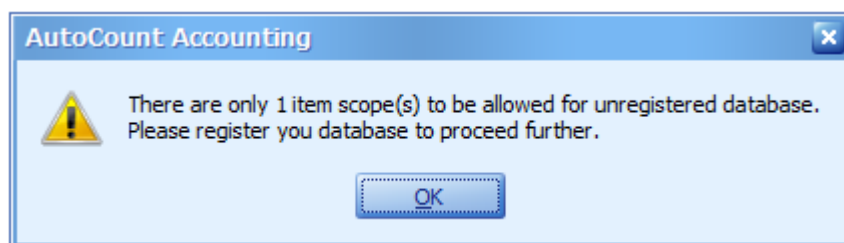
Record 1 of 15

OK Cancel

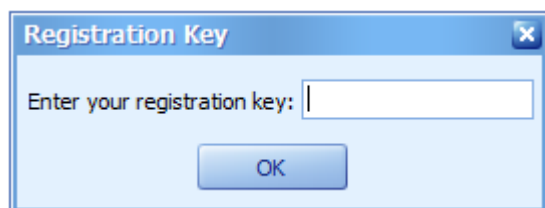
4. Item Scope License Control

You need to obtain the license key for full control of the Item Scope Plug-in. If you do not wish to register it, you can only create and maintain one item scope for the trial version. If you wish to register it, please enter the license key that you have obtained by creating another item scope.

A message will prompt requesting that you register your Item Scope installation and after pressing OK, the Registration Key dialog will be shown.



Enter the registration key and you may continue creating more Item Scope for your account book.



5. Item Scope Plug-in effect on AutoCount Accounting

The plug-in will filter the documents by using the document showing method in the Item Scope maintained. This in turn will affect the document main window, search window, transfer from window, data entry by past record window and print windows (listing, detail listing, outstanding listing and outstanding detail listing, where applicable).

Sales documents affected would be:

1. Quotation
2. Sales Order
3. Delivery Order
4. Invoice
5. Cash Sales
6. Cancel Sales Order
7. Delivery Return
8. Consignment and,
9. Bonus Point Redemption

Purchase documents affected would be:

1. Request Quotation
2. Purchase Order
3. Goods Return
4. Purchase Invoice
5. Cash Purchase
6. Purchase Return
7. Cancel Purchase Order
8. Good Received Note and,
9. Supplier Consignment

Stock documents affected would be:

1. Stock Transfer
2. Stock Adjustment
3. Stock Issue
4. Stock Receive
5. Stock Write-Off
6. Stock UOM Conversion and,
7. Stock Update Cost

Besides, the plug-in will filter the item, item group and item type maintenance form by using the item code, item type and item group in Item Scope maintained. This in turn will affect the main window, search window and print window.

The plug-in will also filter the reports based on the item code in the Item Scope maintained. As such it will affect the report windows.

Invoicing report affected:

1. Price History Report

Sales reports affected:

1. Multi-Dimensional Sales Analysis
2. Monthly Sales Analysis Report
The filter will be applied when Item Code, Item Group or Item Type is used in the group level 1 or 2 option
3. Sales Analysis By Document Report
The filter will be applied when Item Code, Item Group or Item Type is used in the group level 1 or 2 option
4. Top/Bottom Sales Ranking Report
The filter will be applied when the ranking type option is set to Item Code, Item Group or Item Type

5. Outstanding Consignment Report
The filter is applied to the Detail table
6. Customer Price List Report
7. Profit & Loss Document Report
The filter is applied to the Detail table
8. FOC Quantity Analysis By Document Report

Purchase reports affected:

1. Multi-Dimensional Purchase Analysis
2. Monthly Purchase Analysis Report
The filter will be applied when Item Code, Item Group or Item Type is used in the group level 1 or 2 option
3. Purchase Analysis By Document Report
The filter will be applied when Item Code, Item Group or Item Type is used in the group level 1 or 2 option
4. Top/Bottom Purchase Ranking Report
The filter will be applied when the ranking type option is set to Item Code, Item Group or Item Type
5. Outstanding Supplier Consignment Report
The filter is applied to the Detail table
6. Supplier Price List Report

Stock Reports affected:

1. Document Transaction Listing Report
2. Expired Item Batch Report
3. Inventory Physical Worksheet By Consignment Report
4. Inventory Physical Worksheet Report
5. Item Profit Margin Report
6. Reorder Advice Report
7. Stock Aging Report
8. Stock Balance By Location Report
9. Stock Balance Report
10. Stock Card Report
11. Stock Movement Report
12. Stock Status Report