



Binary Stream Multi Entity Management MEM

Megan De Freitas - 2024-11-22 - System

Overview

Binary Stream is a third party GP add-on that allows a company to be divided into facilities (entities). GP can be assigned one or many facilities. Customers and vendors are also assigned one or more facilities. Sales documents and purchase orders are each assigned a single facility. The customers, vendors, and documents that a user can view in GP are filtered based on their User Assigned Facilities, and the facilities assigned to customers, vendors, and documents. SalesPad now allows this filtering to happen on many of our screens based on the facility definitions defined in Binary Stream MEM in GP.

The following objects will respect Binary Stream MEM:

- Customer
- Vendor
- Sales Document
- Purchase Order
- AR Transaction
- Receiving Screen
- Sales Document IDs

Setup

Existing SalesPad Binary Stream MEM functionality was moved out of BinaryStream.dll, and into a separate BinaryStreamMEM.dll. Existing users who use the BinaryStream.dll for MEM will need to get the BinaryStreamMEM.dll. For a user to be restricted to their Binary Stream MEM facility assignments, the SalesPad User Name must match exactly the User Name setup in GP.

Usage

Each GP user can have multiple facilities assigned to them. They can also have a default facility assigned to them. When a user searches for sales documents, purchase orders, vendors, customers, or AR transactions in SalesPad, only objects with a facility ID that they have access to will be returned in the search results. When opening a customer card, only document IDs that are configured for both the customer and the default facility ID that the user session is using will be shown. So, to create a sales document for a specific facility, the user must have their current session facility set to that facility. To set the facility ID, enable the Security Binary Stream MEM Session Facility. Then, select the session from the plugin.

The current user session is displayed in the bottom right corner of SalesPad.

Customer Search - MEM - SalesPad

Application BinaryStream CRM Distribution BOM Equipment Management Inventory Purchasing Reporting

MEM Session Facility

BinaryStream

Customer Search x

Close Search Clear New

Search By

Customer: Contact: Phone: Sales Rep: Starts With
City: State: Zip: Statement Name: Show Inactive

Max Results: 10000

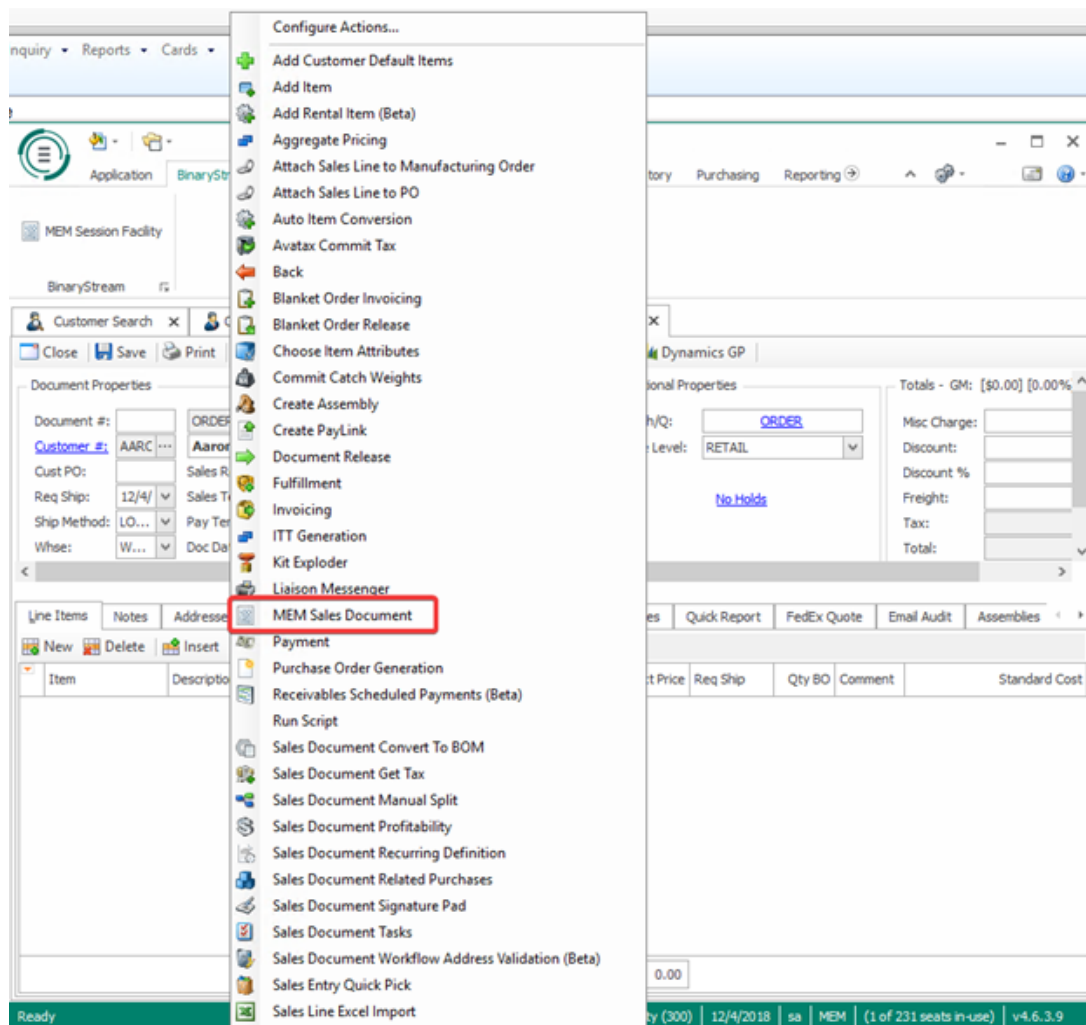
Search Results

Cust#	Cust Name	Sales Person ID	Addr Code	Contact Sales Rep	Contact Name	Email	Address 1	Phone 1	City	State
No data to display										

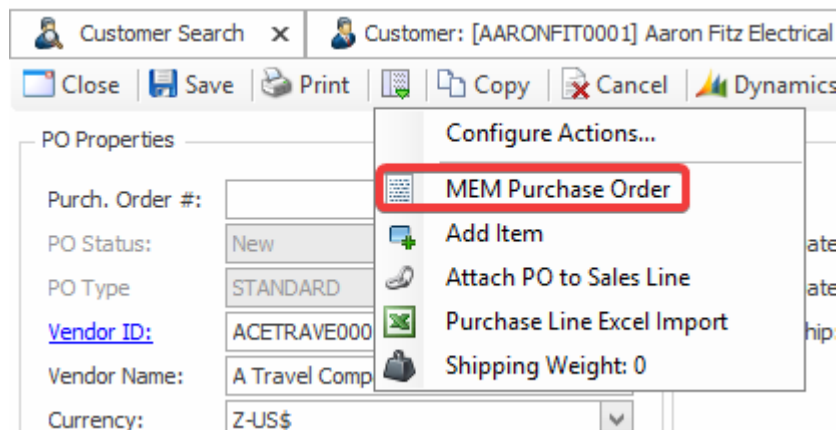
Ready MEM Facility (300) 12/4/2018 sa MEM (1 of 231 seats in-use) v4.6.3.9

There are MEM plugins on sales documents, purchase orders, and AR transactions to manually change MEM Field values. (AR transactions MEM Fields can only be modified if they are new).

Sales Document



Purchase Order



AR Transaction

Customer: [AARONFIT0001] Aaron Fitz Electrical

Close

Refresh

Save

Print

Dynamics GP

Quote

STD

Customer Properties

Customer:

AARONFIT0001

Customer Name:

Aaron Fitz Electrical

...

Short Name:

Aaron Fitz Elec

...

Cust Class:

USA-ILMO-T1

▼

✕

Price Level:

▼

✕

Pay Terms:

NET 30

▼

✕

Sales Rep:

West, Paul

...

Sales Terr:

TERRITORY 1

...

✕

Currency:

Z-US\$

Trade Discount:

0.00 %

Tax Reg Num:

Primary Address Information

Bob Fitz

One Microsoft Way

Redmond, WA 98052-63

P1: (425) 555-0101

FX: (312) 555-0101

Ship To Address Information

Bob Fitz

11403 45 St. South

Chicago, IL 60603-0776

P1: (312) 555-0102

Default Shipping Information

Method

LOCAL DELIVERY

Whse:

☐ Ship Complete

☐ On Hold

Contact Addresses

CRM

Note

A/R

Item History

Sales Documents

Credit Cards

PayFa

Overview

Notes

Transaction Entry

+

New

Save

Print

Clear

MEM AR

AR Transaction

AR Note

Transaction Info

Transaction Type

▼

Transaction Num

...

Batch Num

▼

Credit Card ID

▼

Checkbook ID

▼

Check Number

PO Number

Transaction Date

▼

Description

MEM AR

Properties

MEM Facility ID: 500

Facility Description: Consulting/Training

Department ID: 123

Allocation ID: GF83223D

Doc Num Address:

OK Cancel

Currently, MEM Facility ID is the only MEM field that is automatically populated on new sales documents and AR transactions.

For purchase orders, both MEM Facility ID and PO Type ID Field are populated based on the current session for the user, as well as Binary Stream Facility Document ID Setup (B3900110).

Customer

Customer: [AARONFIT0001] Aaron Fitz Electrical

Close Refresh Save Print Dynamics GP Quote

Customer Properties

Customer: AARONFIT0001

Customer Name: Aaron Fitz Electrical

Short Name: Aaron Fitz Elec

Cust Class: USA-ILMO-T1

Price Level:

Pay Terms: NET 30

Configure Actions...

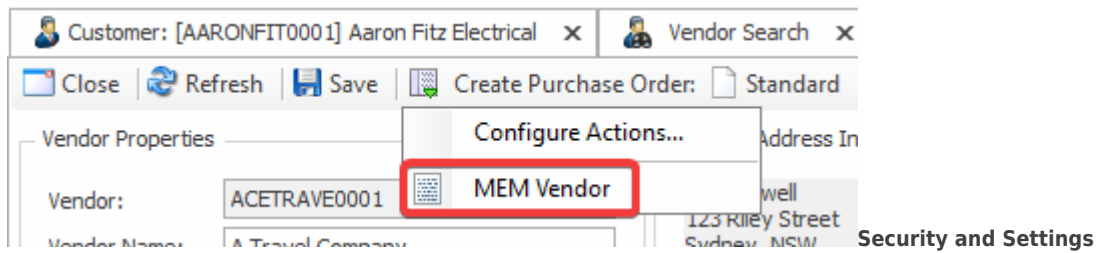
MEM Customer

Run Script

National Account: -N/A-

Ship To Address Information

Vendor



Security

Binary Stream MEM Purchase Order – Add a Purchase Order Plugin that allows a user to set the MEM Facility ID, Department ID, and PO Type ID on a Purchase Order.

*Binary Stream MEM Sales Document** – Add a Sales Document Plugin that allows a user to set the MEM Facility ID and Department ID on a Sales Document

Binary Stream MEM AR – The “Add an AR Entry” Plugin in AR Transaction Entry allows a user to set the MEM Facility ID, Department ID, Allocation ID, and Doc Num Address on a new AR Transaction.

Binary Stream Customer – Add a Customer Card Plugin that allows a user to set the MEM Facility ID(s) for a Customer.

Binary Stream New Customer – Add a Plugin that will run during New Customer Creation that allows a user to set the MEM Facility ID(s) for a Customer.

Binary Stream Vendor – Add a Vendor Card Plugin that allows a user to set the MEM Facility ID(s) for a Vendor.

Binary Stream New Vendor – Add a Plugin that will run during New Vendor Creation that allows a user to set the MEM Facility ID(s) for a Vendor.

Binary Stream MEM Session Facility – Set the Facility ID for the current user session.

Settings

Enable Binary Stream MEM – If true, will assign Binary Stream Facility to newly Created Sales Documents, Purchase Orders and AR Transactions. This is an overarching setting. Set to false to disable all MEM Document saving.

Enable Multi Entity AR Save – If true, will assign MEM fields to new AR Transactions.

Enable Multi Entity Line Facility By Warehouse – If true, the system will attempt to set the Facility ID on the Sales Line via the association from the Sales Line Warehouse Code.

Enable Multi Entity PO Save – If true, will assign MEM fields to Purchase Orders when saving.

Enable Multi Entity Sales Doc Save – If true, will assign MEM fields to Sales Documents when saving.

PO Enable Account Substitution – Purchase Order Binary Stream setting which dictates whether or not Account Substitution is enabled/disabled.

SD Enable Account Substitution – Sales Order Binary Stream setting which dictates whether

or not Account Substitution is enabled/disabled.