# Product Restrictions

Is this feature disabled?

[🔧 Contact To Enable] *This feature needs to be switched on for your site by Commerce Vision.*
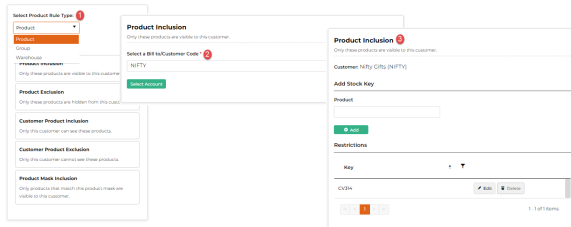
Settings: Product Maintenance must be in web mode

Overview

Use the Product Restrictions feature to create and apply product availability rules in the CMS instead of using ERP-integrated ones. A rule specifies **which user groups** can view/buy **which products** based on product, product group (or category), and/or stock warehouse. Rules can be created for a few products or cover a complete catalogue. When a product or product group is excluded from a customer account, customer users cannot view it.

Features

- Rule creation is designed for maximal flexibility. A rule has a combination of:
  - (1) a rule type - this defines whether a rule covers a product, category (or other product groups) or warehouse
  - (2) a rule - this specifies the specific rule, e.g., does it *include* or *exclude* products or customer account(s)?
  - (3) a product or group of products the rule applies to.

- Rules can be manually entered or bulk imported.
- Your staff can use the Product Restriction Enquiry tool in CMS to check whether a product is available for a customer account.

Step-by-step guide

1. Enable Product Restrictions

1. In the CMS, go to **Settings Settings Feature Management Products & Categories**.

2. Ensure **Product Restrictions** is enabled.
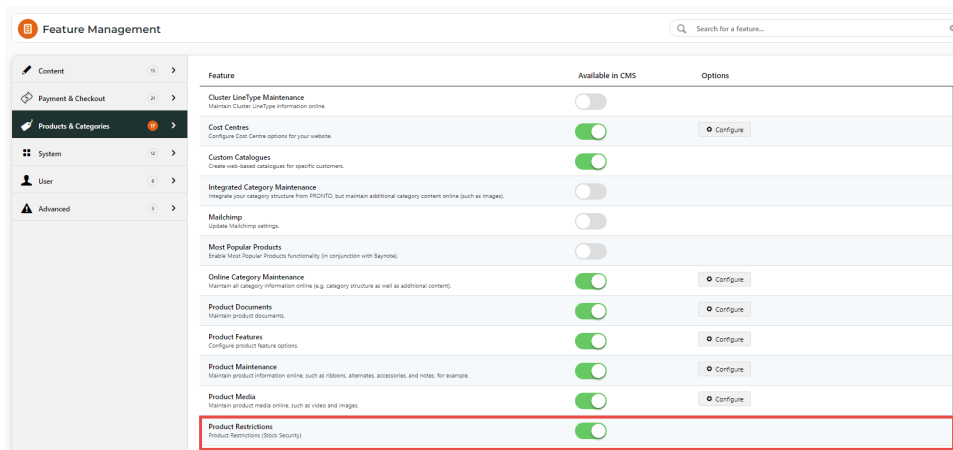
3. Click **Configure**.

4. In **Product Integration Mode**, select ERP for data integrated from the ERP or Web for online maintenance. **IMPORTANT -** ERP should only be selected if using Pronto or integration from your ERP has been implemented by Commerce Vision. **WARNING -** This will change the Maintenance mode in Product Maintenance settings and affect what fields are displayed on the Maintain Product page.

5. Toggle ON **Enable Category Group Restriction** if Web was selected in (4) or if ERP was selected and you want group restrictions for online categories as well as product groups defined in your ERP.

6. Click **Save**.

7. When enabled, check that **Product Restrictions** and **Product Enquiry** items appear on the **Products & Categories** menu.
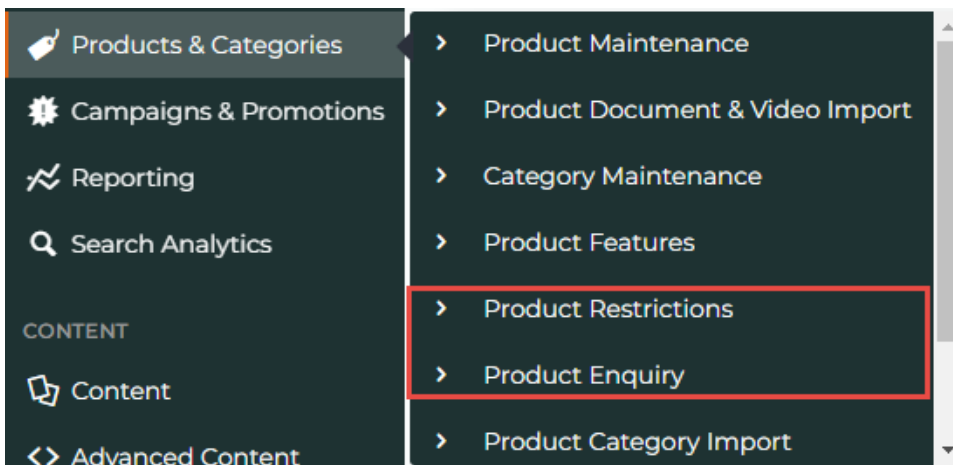
2. Add/Edit/Delete a product rule (manually)

ⓘ   The Product Cache must be cleared after editng or adding a restriction. See: Clear Cache

1. Go to **Products & Categories Product Restrictions**.

2. *Existing rules are listed by account code and restriction type. You can edit products in a rule or delete the whole rule.*

🔒 Product Restrictions			⊕ Options	⊕ Add New Restriction
Account Code	↑ ▼ Type Name	▼		
WAFFA	Product Exclusion		✿ Edit	🗑 Delete

1 - 1 of 1 items

3. *To add a new restriction, click* **Add New Restriction***.*

4. *In* **Select Product Rule Type***, select what the rule applies to:*

    a. **Product -** *one or more products or product masks*
    b. **Group -** *one or more categories or stock groups*
    c. **Warehouse** *- one or more warehouses (stock locations)*

Modify Product Restrictions

Select Product Rule Type:

Product ▼

Product
Group
Warehouse

Only these products are visible to this customer.

Product Exclusion

Only these products are hidden from this customer.

Customer Product Inclusion

Only this customer can see these products.

Customer Product Exclusion

Only this customer cannot see these products.

Product Mask Inclusion

Only products that match this product mask are visible to this customer.

5. *Select a rule. (See* Product Restriction Rules*.)*

6. *Add the bill-to/customer account, then the products, product groups or warehouses for the rule.*

7. *Refresh the product cache.*

Product Restriction Rules

NOTE - Exclusion rules have priority over inclusion rules. Example: If a product is added in both an inclusion and an exclusion rule, the exclusion rule will apply.

Rule Type	Rule	Guidelines

Product	Product Inclusion (SI)	What products can this customer see on your site? This rule restricts the selected customer to: • only products included in this rule To allow other products, create another inclusion rule (product or customer product type) for the customer and add those products. This rule **does not** affect other customers' access to the added product(s).	
	Customer Product Inclusion (SY)	Which customer can see this product on your site? This rule *allows only this* customer to access: • products included in this rule This rule **does** affect other customers' access to the product(s). To let another customer access these products, add an inclusion rule for that customer.	
	Product Exclusion (SE)	What products can't this customer see on your site? This rule *prevents only this* customer from: • products included in this rule This rule **does not** affect other customers' access to the product(s).	
	Customer Product Exclusion	Which customer can't see this product on your site? This rule prevents *only this* customer but allows other customers access to: • products included in this rule	
	Product Mask Inclusion (SM)	What group of products that match the product code mask can this customer see on your site? This rule allows the selected customer access to only: • products with product codes that fit the wildcard mask '?' - wildcard character. E.g., 'CV2?' includes only products that fit this string, e.g. CV21, CV22, etc	
Group	Group Inclusion (GI)	What product groups can this customer see on your site? Select Category or Stock Group. This rule allows the selected customer access to: • only product groups included in this rule To allow other product or product groups, create another inclusion rule (product or customer product type) for the customer and add them. This rule **does not** affect other customers' access to the added product group(s).	
	Group Exclusion (GE)	What product groups can't this customer see on your site? Select Category or Stock Group. This rule *prevents only this* customer from: • product groups included in this rule This rule **does not** affect other customers' access to these product(s).	
		Which customer can see these product groups on your site?	

	Group Inclusion, based on specific customer (GY)	This rule *allows only this* customer to access: • product groups included in this rule This rule **does** affect other customers' access to these product group(s). To let another customer access these product groupss, add an inclusion rule for that customer.
	Group Exclusion, based on specific customer (G?)	Which customer can't see this product group on your site? This rule prevents *only this* customer but allows other customers access to: • product groups included in this rule
	Group Mask Inclusion (GM)	What product groups (by masking) can this customer see on your site? This rule allows the selected customer access to only: • products under product group codes that fit the wildcard mask '?' - wildcard character. E.g., 'SX0302?' includes only products categorised in product groups with codes that match, e.g. SX03021, SX0302, etc
Warehouse	Warehouse Exclusion (WE)	Which stock warehouse(s) can't the selected customer buy from? This rule prevents the selected customer from accessing products: • from this warehouse. This rule does not affect other customers.

Additional Information

Minimum Version Requirements	4.37.00
Prerequisites	
Self Configurable	Yes
Business Function	Products & Categories
BPD Only?	Yes
B2B/B2C/Both	Both
Third Party Costs	n/a

Related Resources

• Product Restriction Enquiry

Related widgets

- Product Reviews Widget