



Horizons International

CFG/IPM Installation Manual

Latest code compatible with GP 18 (2018)

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Please keep this license agreement for your records.

Refer to the Installation Instructions for instructions on installing your accounting software. If you have any questions, please call Horizons International at 800-287-8014 ext 3.

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Installation Overview

Horizons Configurator and IPM is designed to be tightly integrated with Microsoft Dynamics GP, so before you can proceed to install CFG/IPM, Dynamics GP must be fully installed and the following modules implemented:

- General Ledger
- Inventory
- Sales Order Processing
- Purchase Order Processing

Checklist

- **Microsoft Dynamics GP 18 (2018) fully installed and required modules implemented**
- **System Pre-requisites met (see Before you Start)**
- **Preparation Complete (see Before you Start)**
- **Install 18 85 spRTM.1.xx code on server and create SQL tables (see Install Server)**
- **Registration (See Registration)**
- **Install 18 85 spRTM.1.xx code on each workstation**



Installation Before You Start

System Requirements

Horizons Configurator and IPM are designed to integrate with Microsoft Dynamics GP Accounting system. In addition to the system manager, the Sales Order Processing module is also required. For Configurator, the Purchase Order and Inventory modules are optional, but not using them will cause Configurator to have reduced functionality.

As with any system, it is recommended that you have appropriate backup and recovery measures in place before starting this installation.

Horizons system requirements for hardware and network considerations are the same as for Microsoft Business Solutions. Keep in mind that these requirements are minimums. In your production environment, your requirements may be substantially higher. Please refer to CustomerSource for the most recent system requirements:

MBS.Microsoft.com | [Sign in to CustomerSource](#) | [Support](#) | [Solution Center: Dynamics GP](#) | [Documentation](#) | [System Requirements](#)

Preparation

Following is a checklist to assist with preliminary steps that should be complete to ensure the smooth installation of Horizon's Manufacturing System.

- **Hardware requirements are met**
- **Networking requirements are met**
- **Dynamics GP 18 (2018) is installed**
- **18 85 spRTM.1.xx version of Horizons Configurator/IPM code downloaded (must match Horizons Manufacturing version if registered for both) Call Horizons @ 800/287-8014 Ext 1 for link and passwords**
- **Proper Horizons Configurator/IPM registration keys (Call Horizons to obtain them by email)**
- **Verified backup is done and available**
- **List of workstations**

Server Installation

Installation Steps

Special Instructions for Horizons Manufacturing Suite (HMS) customers:

If you have already installed and implemented HMS, before following the instructions below for Configurator/IPM, use GP SQL Maintenance to remove the 'Configurator SOP Header' and 'TV Item Master Non Inventory' tables. See Remove HMS Tables .

All users out of Dynamics GP

Make sure all users are completely out of Dynamics GP (not just the CFG/IPM users). This is important as the installation will not work properly otherwise.

Verify backup

It is highly recommended that you have a SQL backup on hand. While data issues are almost unheard of during a fresh installation of Horizons CFG/IPM, it is always best to be prepared.

Unzip the code

Unzip the code that was downloaded from the web to the workstation's Dynamics GP folder. In a typical workstation installation, the path will be c:\Program Files\Microsoft Dynamics GP) This will copy several files to the workstation:

- A Dynamics Chunk file—this is the New Installation chunk file, called Install.chunk, which is CFIPInst.cnk. It is not the full CFG/IPM code, but is used to update the Dynamics set file. It is important that the Chunk file is in the same location as the Dynamics.set and the Dynamics.exe.
- a. A HZCFG-IP.DIC file that is zipped up and named with the current version. It will be in the current format - CFG-IPM_1282spRTM.3.3.zip. The following are the meaning of the numbers from left to right:
 - Great Plains version - **12**
 - Horizons version - **82**
 - GP Service Pack compatibility - **sp**. If the code works for more than one continuous GP service pack version then it will appear like **RTM**, which means it works for Initial Release of a version of GP.
 - CSLS/Lot Holds compatibility number - **3** (Did not exist in earlier versions)
 - Build Number - **3**

- Various documents including the CFG/IPM Net Changes document that contains a summary list of recent changes to the code. To see a complete list of changes, please refer to the CFG Code Changes topic in the online help file.
- IPCFG_On-Line_Help.zip. This is a zip file that contains the online help chm along with a 'Readme'. Please be sure to read the 'Readme' before attempting to install the Online Help file.

Install the Code on the Server

1. Copy the Install chunk file (CFIPInst.cnk) to the root GP directory. Log in to Great Plains. A dialog box will appear. Click on 'Yes' to install the code. When the GP login window appears, choose Cancel. This process updates the Dynamics Set file. The chunk file has no code in it to run CFG/IPM. Next copy the HZCFG-IP.DIC that is in the CFG/IPM code download to the root GP directory and choose to overwrite.

Log into GP as 'sa'

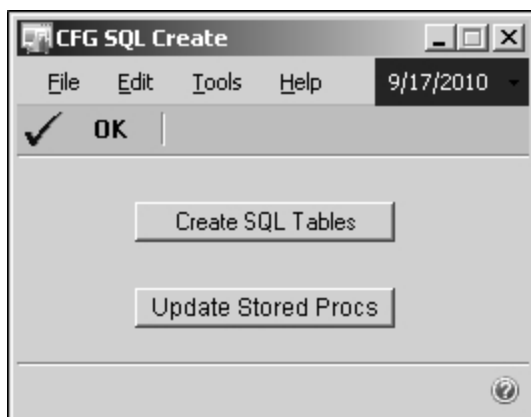
After the code is installed, proceed to log in to Dynamics GP as 'sa'.

Create the SQL tables

Each product (CFG and IPM) have separate sets of tables that must be created. If you have purchased one and not the other, you do *not* need to complete the installation procedures for both--only the one that you purchased. If you have purchased both, you will need to complete this process twice: once for IPM and once for CFG.

Configurator

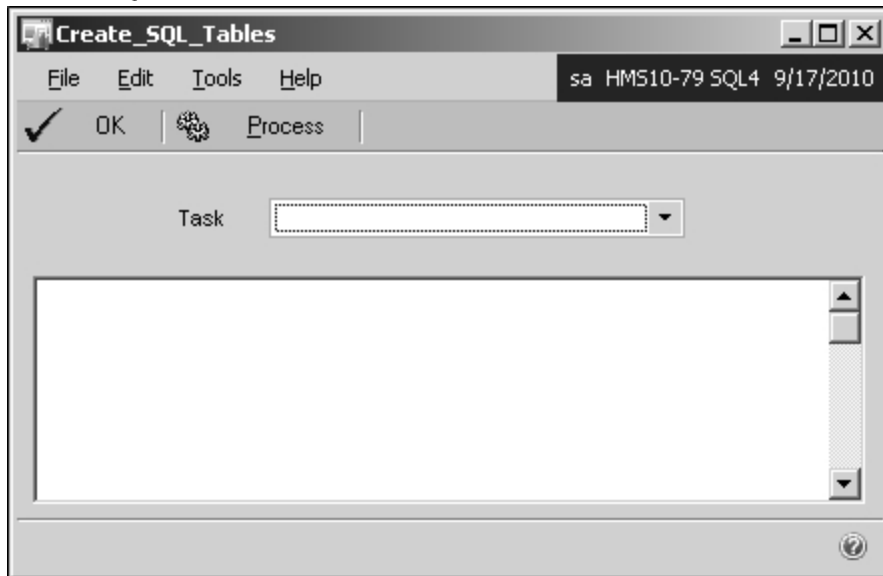
Open the *CFG SQL Create* window. CFG/IPM | Configurator | Setup and Utilities | Create SQL Tables



1. Click on the **Create SQL Tables** button.
2. After the process is complete, click OK to return to the window.
3. Close the *CFG SQL Create* window.

Item Pricing Matrix

Open the *Create_SQL_Tables* window. CFG/IPM | Item Pricing Matrix | Setup and Utilities | Create SQL Tables



1. Select 'Create SQL Tables' in the **Task** field. Click on **Process**.
2. After the process is complete, click OK to return to the window.
3. Select 'Add Stored Proc sp_IP_DeletePL' in the **Task** field. Click on **Process**. Click 'Continue'.

Alternate Dynamics GP windows

Both Configurator and IPM use the same alternate window for sales order processing. For Configurator, this alternate window is not required because all functions can be accessed from the Extras menu. For IPM, the buttons and other scripts on the alternate window must be available or the module will not calculate the prices appropriately.

Sales Transaction Entry sa HMS10-79 SQL4 9/17/2010

File Edit Tools View Options Additional Help

Save Actions

Type/Type ID: Order NO ALLOC Date: 9/17/2010

Document No. Batch ID

Customer ID Default Site ID FG

Customer Name Customer PO Number

Ship To Address Currency ID

Line Items by Order Entered

Item Number	D	U of M	Qty Ordered	Unit Price	Extended Price

Amount Received \$0.00

Terms Discount Taken \$0.00

On Account \$0.00

Comment ID

Subtotal \$0.00

Trade Discount R IPM \$0.00

Freight \$0.00

Miscellaneous \$0.00

Tax \$0.00

Total \$0.00

Holds User-Defined Distributions Commissions

by Document No. Document Status Price List Calculate Pricing

Use security in Dynamics GP to assign your users to the GP alternate Sales Transaction Entry windows.

Install Additional Companies

Even though some companies in your system may not need the functionality of CFG or IPM, you still must create the tables for each one that will be accessed by your users. If you don't create the tables, your users will receive 'file not found' errors as they attempt to log into the other company. Please perform all installation steps (with the exception of the Alternate Dynamics Windows) for each company in your system.

Optional Installation Procedures

There are a number of additional procedures that may be performed, depending on your individual circumstances. Please see the section [Option Installation Procedures](#).

Registration

Each product (CFG and IPM) have separate registration windows. If you have purchased one and not the other, you do *not* need to complete the registration procedures for both--only the one that you purchased. If you have purchased both, you will need to complete this process twice: once for IPM and once for CFG.

Special note for Horizons Manufacturing Suite (HMS) users:

Because of the tight integration between Configurator and Manufacturing, The registration keys for Configurator are *included* in the keys for Manufacturing, so you do NOT need to enter Configurator keys separately.

Configurator (stand-alone--not with HMS)

- Open the *Configurator Registration* window. CFG/IPM | Configurator | Setup and Utilities | Registration.
- Enter the Company name exactly as it appears on the email you received with your company keys in it. Note that the Company name must exactly match that in Dynamics GP registration.
- Click **OK** to close the window.

Item Pricing Matrix

- Open the *IPM Registration* window. CFG/IPM | Item Pricing Matrix | Setup and Utilities | Registration.
- Enter the Company name exactly as it appears on the email you received with your company keys in it. Note that the Company name must exactly match that in Dynamics GP registration.
- Click **OK** to close the window.

Workstation Install

All workstations in the system must be running the same version of CFG/IPM, even those workstations that will *not* be actively using the products.

To install each workstation, simply copy the same chunk file that was used for the server installation to the Dynamics GP directory (same location as the Dynamics.exe and Dynamics.set). After including the code, cancel logging into the company. Copy the full HZCFG-IP dictionary from the download into the root Dynamics directory. Overwrite the small dictionary created by the chunk file.



Optional Installation Procedures

Additional Company

Special Instructions for Horizons Manufacturing Suite (HMS) customers

When installing Horizons Configurator/IPM, you need to add the tables to any other companies in your system, even though those companies won't be using CFG or IPM. Simply log into the additional company as 'sa' and create the SQL tables using the Create SQL Tables window.

If you have already installed and implemented HMS, before following the instructions below for Configurator/IPM, do the following:

Use Dynamics GP SQL Maintenance (under Tools) to remove the 'Configurator SOP Header' and 'TV Item Master Non Inventory' tables. Log in as 'sa'. Select the Company database and the Product as Horizons Configurator/IPM. Find the 'Configurator SOP Header' table and highlight it. Mark 'Drop Table', 'Create Table', 'Drop Auto Procedure', 'Create Auto Procedure'. Click the Process button. Find the 'TV Item Master Non Inventory' table and mark the same checkboxes and click Process. Continue with the Configurator install.

Alternate Dynamics GP Windows

Sales Transaction Entry

**** Alternate Sales Trx Entry window is required for IPM**

Both Configurator and IPM have alternate windows for sales order processing. For Configurator, this alternate window is *not* required because all functions can be accessed from the Extras menu. For IPM, the buttons and other scripts on the alternate window *must* be available or the module will not calculate the prices appropriately. See Alternate Sales Trx Entry for technical reference.

Sales Transaction Entry sa HMS10-79 SQL4 9/17/2010

File Edit Tools View Options Additional Help

Save Actions

Type/Type ID: Order NO ALLOC Date: 9/17/2010
Document No. Batch ID
Customer ID Default Site ID: FG
Customer Name Customer PO Number
Ship To Address Currency ID

▼ Line Items by Order Entered CFG BoM PO R

Item Number	D	U of M	Qty Ordered	Unit Price	Extended Price

Amount Received	\$0.00	Subtotal	\$0.00
Terms Discount Taken	\$0.00	Trade Discount	R IPM \$0.00
On Account	\$0.00	Freight	\$0.00
Comment ID		Miscellaneous	\$0.00
<input type="button" value="Holds"/> <input type="button" value="User-Defined"/> <input type="button" value="Distributions"/> <input type="button" value="Commissions"/>		Tax	\$0.00
		Total	\$0.00

by Document No. Document Status Price List Calculate Pricing

Item Lookup

This window replaces the standard Dynamics GP item lookup window and has additional features that may be useful to customers that use Configurator and/or Horizons Manufacturing Suite. See Alternate Item Lookup for technical reference.

Items

File Edit Tools Help

sa HMS10-79 SQL4 9/17/2010

Site

Available to Promise

Qty's by Site

Clear

Start Item Class

End Item Class

Start Generic Description

End Generic Description

Start Short Description

End Short Description

Start Item Number

End Item Number

☒ None
 ☐ Kit Items
 ☐ Horizons BoM Parents

Item Category

Click Redisplay After Entering Selections

Item Number	Short Description	Class ID	Qty Available	Qty On Hand
Description		Generic Description		
20LB	20lb	FG	0	0
8OZ	8oz	FG	0	0
AVERAGE	FG AVERAGE	FG	0	0
CHOC	chocolate	RM	0.00000	0.00000
CULTURE	RM ACTUAL	RM	0.00000	0.00000
FF-F-N-0-1	Flat Fee	NOTE	0	0
FF-F-N-5-1	Flat Fee	NOTE	0.00000	0.00000
FG-A-L-0-1		FG	0	0
FG-A-L-0-2		FG	0	0
FG-A-N-0-1	FG AVERAGE	FG	0	0

by Item Number

Select Cancel

Item Price List Maintenance

For customers that also use HMS. This window is accessed by Cards | Inventory | Price List. Horizons Configurator has added a BoM button at the top allowing the lookup of “Standard BOM Items” and their quantity to be used in configurations and their List Prices. See Alternate Price List Maintenance for technical reference.

Item Price List Maintenance sa HMS10-79 SQL4 9/17/2010

File Edit Tools Help

Save **Delete** **Options** **Copy** **BoM**

Item Number

Description

Price Method: U of M Schedule

Base U of M

Quantity Decimals

Standard Cost

Current Cost

Price Group

Default Selling U of M

Default Price Level

Price Level	<input type="radio"/> U of M	<input type="radio"/> All	Percent	Price
Currency ID	<input type="radio"/> Start Quantity	End Quantity		

Remove

Item Price List Inquiry

For customers that also use HMS. This window is accessed by Inquiry | Inventory | Price List. Horizons Configurator has added a BoM button at the top allowing the lookup of “Standard BOM Items” and their quantity to be used in configurations and their List Prices. See Alternate Item Price List Inquiry for technical reference.

Item Price List Inquiry

File Edit Tools Help

sa HMS10-79 SQL4 9/17/2010

OK

Clear

Options

BoM

Item Number

Description

Price Method

Price Group

Default Selling U of M

Default Price Level

U of M Schedule

Base U of M

Quantity Decimals

Standard Cost

Current Cost

Price Level	U of M	All	Percent	Price
Start Quantity		End Quantity		

Currency Decimals

List Price

\$0.00

Item Number



Installation Troubleshooting

Automatic Table Creation/Binding Defaults Not Working

Q: I'm trying to install the new hZ Configurator code. Why aren't the tables getting created and the defaults bound?

A: Configurator doesn't automatically create the SQL tables like the Horizons Manufacturing product does. You need to create them using the 'CFG SQL Create' window.

Errors in other non-CFG/IPM windows

Q: We already own Horizons Manufacturing Suite (HMS) and are just now installing CFG/IPM. We have nothing set up yet, but my users are getting errors trying to access the SOP Auto-Create WO windows.

A: This is because HMS installs one CFG table (CFG50602) that is used to determine if you have CFG or not. When you installed CFG/IPM, that table needs to be manually recreated for CFG/IPM. Please follow the instructions in Server Installation to remove and re-create that table, or use the query in Installation Appendix I to remove them.

Errors that SQL cannot access the table

Q: I've just installed CFG/IPM and I'm getting errors that SQL cannot access various tables.

A: You need to manually create the tables in CFG/IPM. Please refer to those instructions in Server Installation.

Scripting Errors on Registration Tables

Q: I've just installed the code for IPM and created the IPM tables, but I'm getting a scripting error on a CFG table.

A: When you first install the CFG/IPM code and you log in as 'sa', the registration tables get created automatically for both the CFG and IPM products. Then, you manually create the rest of the tables for either or both products depending on your needs. To resolve this issue, there are two methods:

1. Create all of the CFG tables using the CFG SQL Create window
2. Use the SQL Maintenance window in Dynamics to create the 'Configurator Registration' table in the DYNAMICS database. If you choose this method, you will also need to use

Enterprise Manager to run the Grant.sql query against the DYNAMICS database to grant permissions.

Code not included

Q: I've unzipped the *.cnk file and verified that it is in the proper location on my workstation. Why isn't it 'including'? My Version window still shows the old version.

A: Sometimes the inclusion scripts that run as you launch Dynamics GP can't delete the old HZCFG-IP.dic. To get around this, simply delete or rename the HZCFG-IP.dic and then launch again. The 'cnk' file will now include properly.

Very Slow in Sales Transaction Entry

Q: We're just now implementing Configurator, and it seems to be extremely slow just moving from one line to another in Sales Transaction Entry, even without the Configurator Alternate Window.

A: Check that you have 'Track Master Numbers' marked in Sales Order Processing Setup for Dynamics GP. If Master number tracking is not turned on, not only will SOP be extremely slow, Configurator will not function properly.

Registration Issues

If you have having difficulty registering your software, here are some potential issues:

Opening TWO and trying to register

Don't register when in TWO - Fabrikam, use your live company instead.

Check for spaces at beginning or end of HZS registration keys

Sometimes when cutting and pasting spaces get put onto the end or beginning of the keys which will cause the keys to be incorrect.

Company Name is incorrect

Instead of trying to compare the two names (HZS company name and the GP company Name) simply highlight the company name in the HZS registration screen and paste it into the GP registration screen to make sure they are identical. Then try registering the product again. Sometimes Dynamics GP will accept the hZ Configurator name even if it is slightly different than the original Dynamics GP registered name.

Copying from a word document

It has been found that issues may arise from pasting from an e-mail or word document causes issues on the registration screen. Try pasting the keys into a notepad file. After pasting them into notepad, copy them again and paste them into the HZS registration screen.

'This registration is for eEnterprise only' error

The keys may have been generated incorrectly for you. If you are NOT on the eEnterprise version of Dynamics GP then please send a screen shot of the Dynamics GP About form to support@hzs.com with a message saying that you received the above message but you are not on eEnterprise and new keys will be generated for you. With Dynamics GP 9.0, this message will only appear if you are trying to register while logged into Fabrikam. Change to your live company and attempt to register again.

'This registration is for MS SQL only' error

The keys may have been generated incorrectly for you. If you are on SQL then try the other steps below. If you are NOT on the SQL version of Dynamics GP then please send a screen shot of the Dynamics GP About form to support@hzs.com with a message saying that you received the above message but you are not on MS SQL and new keys will be generated for you.

'These keys are for Dynamics/or eEnterprise Only'

The keys may have been generated incorrectly for you. Send an e-mail to support@hzs.com with 2 screen shots in it - The Horizons product you have installed (transactions/hms maintenance/about or cfg version) and the Dynamics GP About form. In the e-mail mention that you tried all of the above solutions and possibly need new keys generated.

Last case scenario:

Drop the HZS registration table and recreate it using GP's *SQL Maintenance* window.

1. Select your company database
2. Select 'Horizons Configurator/IPM as the 'product'
3. In the grid, select either 'Configurator Registration' or 'Horizons IPM Registration' or both
4. Click the boxes 'Drop Table' and 'Create Table'
5. Click Process
6. Click 'Yes' to the warning that you are about to delete data.
7. After the process is complete, close the window.

Now you may re-enter your registration keys.



Appendix I

Remove HMS Tables

Use Dynamics GP SQL Maintenance (under Tools) to remove the 'Configurator SOP Header' and 'TV Item Master Non Inventory' tables. Log in as 'sa'. Select the Company database and the Product as Horizons Configurator/IPM. Find the 'Configurator SOP Header' table and highlight it. Mark 'Drop Table', 'Create Table', 'Drop Auto Procedure', 'Create Auto Procedure'. Click the Process button. Find the 'TV Item Master Non Inventory' table and mark the same checkboxes and click Process. Continue with the Configurator install.