

*myridas*TM *User Guide*

Version 10.0 for Microsoft Dynamics™ GP 10.0

Unit of Measure Management

Trinity Computer Services Limited

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Using this Guide

The graphics in this document are best viewed or printed with Adobe Acrobat Reader version 4.0 or above.

This guide provides user notes for the Myridas Unit of Measure Management module:

- Unit of Measure Management



The mouse symbol has been used throughout the manual to help guide you to the location of windows in the software. See [Appendix A](#) for a list of Myridas windows and their location in the software.

A full range of tutorials is also available on our website, <http://www.trinitypartner.com>.

About Myridas

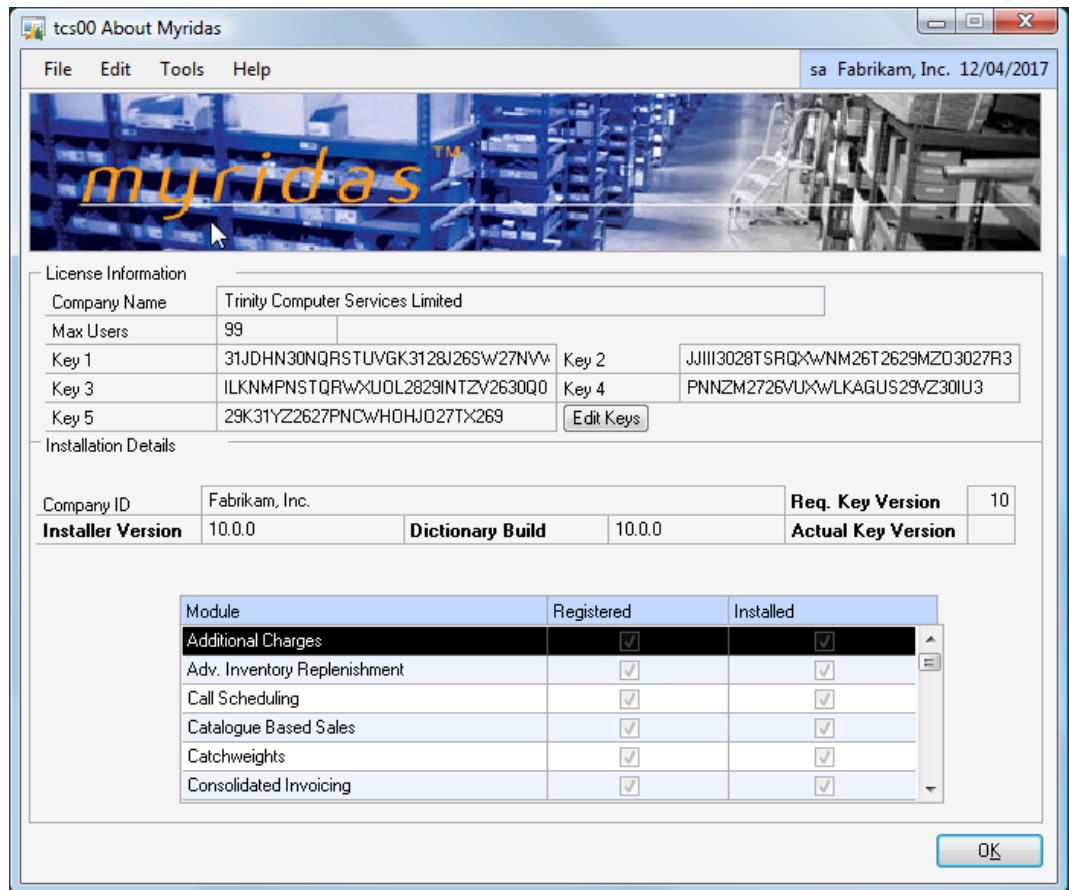


Tools >> Setup >> Myridas >> About Myridas

Help >> About Microsoft Dynamics GP >> Additional >> About Myridas

Use the About Myridas window to check your registration information and installation details. The window will tell you which Myridas modules you are registered to use and which have been installed on your system.

The About Myridas window



Unit of Measure Management

The Myridas Unit of Measure Management module provides the facility to specify items as “split pack” items. You may, for example, distribute bottles of wine by the bottle or by the case. The Myridas split pack format allows you to view the number of full cases and the number of additional bottles simultaneously.

In addition the Unit of Measure Management module allows you to view inventory balances in alternate units, not just the base unit, in a number of windows.

The main features of the Unit of Measure Management module are:

- The facility to specify items as split pack items
- The facility to specify a main stock unit for items
- The facility to specify different default selling units for an item when sold from different sites
- The facility to perform stock counts on items in the split pack format
- The facility to view items in main stock units or split pack format in a range of Microsoft Dynamics™ GP and Myridas windows
- Integration with Microsoft Dynamics™ GP Extended Pricing to generate base unit of measure prices from alternate unit of measure prices

*The Myridas
Split Pack
Format*



number of main units (e.g.: cases) number of split units (e.g.: bottles)

The Myridas Split Pack format allows the user to instantly evaluate item quantities, and provides greater controls over item quantity management.

With the Myridas Unit of Measure Management module, multiple windows are given the functionality to display item quantities in the split pack format, as shown below.

*Additional
Windows
with Split
Pack Format
Functionality*

Additional Windows with Split Pack Format Functionality
Item Lookup window
Item Stock Enquiry window
Available to Promise window
Myridas Item Quantities Locations window
Myridas Stock Count Unit of Measure Entry window

1. Unit of Measure Management Setup window



Tools >> Setup >> Myridas >> Unit of Measure Management >> Unit of Measure Management Setup

Use the Unit of Measure Management Setup window to:

- Specify the default units to be used in the named windows

*The Unit of
Measure
Management
Setup
window*

Window Name	Base U of M	Main Stock Unit	Default Selling Unit
Item Lookup	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Stock Card	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Available To Promise	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Item Qty's Locations	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Activity Reports	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Item Transaction Entry	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Item Transfer Entry	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>

1.1 Specifying Default Units

To specify default units in the Unit of Measure Management Setup window:

1. For each named enquiry and report window, select the Default Unit in which quantities should be displayed. For example, if you want quantities in the Item Lookup window to be displayed in the item's Default Selling Unit of Measure, click Default Selling Unit as the Default Unit for Item Lookup.
2. For Item Transaction Entry and Item Transfer Entry, select the default unit to be used when entering inventory transactions and transfers.
3. Click OK save.

Note that you can undo a selection and revert back to previously set parameters at any point by clicking the Cancel button.

With the exception of Item Transaction Entry and Item Transfer Entry, each of the windows specified in the Unit of Measurement Management Setup window has the facility to display quantities in split pack format. Whilst viewing items in these windows, the quantities will by default be displayed in the units specified in the Unit of Measure Management Setup window. You may however select to display quantities in different units by using the appropriate drop-down lists or lookups.

Note that if an item selected for display in one of the affected windows does not have, for example, a Main Stock Unit applied to it, quantities will by default be displayed or entered in the Base Unit of Measure.

2. Split Pack/Main Stock Unit Maintenance window



Cards >> Myridas >> Unit of Measure Management >> Split Pack/Main Stock Unit Maintenance

Use the Split Pack/Main Stock Unit Maintenance window to:

- Set up items and unit of measure schedules as split packs
- Specify the Main Stock Unit for items and unit of measure schedules

The Split Pack/Main Selling Unit Maintenance window

<u>Item Number</u>	128 SDRAM
Description	128 meg SDRAM
<u>U of M Schedule</u>	PHONE 1-10
Main Stock Unit	Case
Sales Consolidation Unit	Each
Purchasing Pack	Each
Selling Pack	Each

Split Pack Indicator

by Item Number

Note that this window is also available as an Additional option from the Microsoft Dynamics™ GP Item Maintenance window.

2.1 Setting Up Split Packs and Specifying Main Stock Units

To set up split packs and specify Main Stock Units in the Split Pack/Main Stock Unit Maintenance window:

1. Click on either Item or U of M Schedule. This will decide whether selections you make in the window apply to a specified item or to a Unit of Measure schedule.

Making the selections against a Unit of Measure schedule may be useful, for example, if you want to apply parameters to a range of items based on their shared Unit of Measure schedule.

2. Dependant on the selection made in step 1, enter either an Item Number or a Unit of Measure schedule, or use the lookup to select from the relevant lookup window.

The description of your selection will be displayed below. If you selected Item in step 1 then the U of M Schedule for the selected Item Number will also be displayed.

3. From the drop-down list select the Unit of Measure that you want to be the Main Stock Unit for the item or Unit of Measure schedule. The drop-down list is item specific and only contains units of measure held within the item Unit of Measure schedule.

The Main Stock Unit is the Unit of Measure that will be most commonly used for viewing stock balances and transactions.

4. From the drop-down list select the Unit of Measure you want to be the sales consolidation unit.
5. If required, from the drop-down list select the Unit of Measure you want as the purchasing pack. If selected then in the Purchase Order Entry and Purchase Item Details Entry windows the Quantity Ordered must be a multiple of this unit; for example if you select case as the purchasing pack where each case contains 12 items, then the Quantity Ordered must be a multiple of 12.
6. If required, from the drop-down list select the Unit of Measure you want as the selling pack. If selected then in the Sales Transaction Entry and Sales Item Details Entry windows the Quantity Ordered must be a multiple of this unit; for example if you select case as the selling pack where each case contains 12 items, then the Quantity Ordered must be a multiple of 12.
7. If you want to specify your selected item/items contained in the Unit of Measure schedule as split pack items click the split pack indicator box.
8. Click Save to apply your selection

*Deleting
selected
parameters*

You can delete parameters set in the Split Pack/Main Stock Unit Maintenance window by clicking the Delete button.

Note that you can clear a selection at any point by clicking the Clear button.

3. Item/Site Extras Maintenance window



Cards >> Myridas >> Unit of Measure Management >> Item/Site Extras Maintenance

Use the Item/Site Extras Maintenance window to:

- Specify different default selling units for one item when sold from different sites
- If a default selling unit is set up here for an item and site, this will override the overall Dynamics GP default selling unit for the item

*The Item/Site
Extras
Maintenance
window*

3.1 Setting Up Default Selling Units

To specify the default selling unit in the Item/Site Extras Maintenance window:

1. Enter an Item Number, or select one using the lookup.
2. Enter a Site ID, or select one using the lookup.
3. Enter a Default Selling U of M, or select one using the lookup.
4. Click Save.

*Deleting
item/site unit
of measure
details*

You can delete details set in the Item/Site Extras Maintenance window by clicking the Delete button.

Note that you can clear a selection at any point by clicking the Clear button.

If you specify a default selling unit for an item/site using this window, this unit will be used as the default in Sales Transaction Entry, overriding the overall Dynamics GP default selling unit for the item.

4. Myridas Stock Count Unit of Measure Entry window



Transactions >> Inventory >> Stock Count Entry >> In the Stock Count Entry window, enter a counted quantity for an item and choose the Counted Qty expansion button

Use the Myridas Stock Count Unit of Measure Entry window to:

- Enter stock count results in split pack format

The Myridas Stock Count Unit of Measure Entry is visually similar to the Microsoft Dynamics™ GP Stock Count Unit of Measure Entry window. However, added functionality allows you to enter stock counts for split pack items.

*The Myridas
Stock Count
U of M Entry
window*

U of M	Counted Qty	Ext Counted Qty
Case	20 / 5	205
	0 0	0

Note that you cannot enter stock counts for lot or serial numbered items. Stock counts for non-split pack items can be entered following standard procedure.

4.1 Entering Stock Counts for Split Pack items

To enter stock counts for split pack items in the Myridas Stock Count Unit of Measure Entry window:

1. Open the Stock Count Entry window.
(Transactions >> Inventory >> Stock Count Entry)
2. Enter or select the stock count ID.
3. In the scrolling window, select the item-site combination you want to enter results for.
4. Choose the Counted Qty. expansion button to open the Myridas Stock Count Unit of Measure Entry window.

Note that you must have clicked onto the Counted Qty. field to activate the expansion button.

5. Enter or select a unit of measure for the results, and then enter the counted quantity for that unit of measure.

The available fields for entering counted quantities will be dependent upon the unit of measure that you select. For example, units of measure for bottles of wine could be cases (main units) and bottles (split pack units). If you choose to enter the counted quantities in cases, then you can enter the number of cases and the number of bottles in the split pack format. For example, 3/2 would be three cases plus two bottles. If you choose to enter in bottles then the first numerical field of the split pack format (i.e.: the Split Pack field) will be disabled so that you may only enter bottles quantities.

Note that if you do not enter a unit of measure then it will default to the default unit of measure set for the Stock Card in the [Unit of Measure Management Setup window](#).

Also note that if a case holds ten bottles, then the highest figure that could be entered into the second field would be 9.

6. Repeat step 5 until you've entered all count results for the item-site combination. As you move off each line, the extended quantity—the equivalent in the base unit of measure, according to the assigned unit of measure schedule—is calculated and displayed.
7. Choose OK to close the Stock Count Unit of Measure Entry window.

The counted quantity and variance quantity are updated automatically in the Stock Count Entry scrolling window.

8. Repeat steps 3 to 7 until all necessary stock count results have been entered.
9. Process or Save the stock count.

5. Item Quantities Locations window



Enquiry >> Myridas >> Unit of Measure Management >> Item Quantity Locations

Use the Item Quantities Locations window to:

- View item location and quantity details

The Item Qty's Locations window

tcs21 Item Qty's Locations

Item Number: 128 SDRAM
 Description: 128 meg SDRAM
 U of M: Case

Sites: All Site ID: WAREHOUSE

Main Site		Quantities	
Description	RAM	On Hand	1 / 0
Default Site ID		Allocated	1 / 0
Short Desc	RAM	Available	0
Generic Desc	RAM	Sold	0
Valuation	FIFO Perpetual	Returned	0
Type	Sales Inventory	In Use	0
Substitute #1		In Service	0
Substitute #2		Damaged	0
Tax Schedule		Back Ordered	0 / 2
Track	None	Requisitioned	0
Primary Creditor ID		On Order	0
Creditor Name		Drop-Ship PO	0
Decimal Places: Quantity 2 Currency		Reorder Level	0
Current Cost	\$152.10	Variance	0
Standard Cost	\$0.00	Maximum Level	0
U of M Schedule ID	PHONE 1-10	History: <input checked="" type="checkbox"/> Calendar <input checked="" type="checkbox"/> Transaction	
Main Stock Unit	Case	<input checked="" type="checkbox"/> Fiscal <input checked="" type="checkbox"/> Distribution	
Sales Consolid Unit	Each		
Split Pack Indicator	<input checked="" type="checkbox"/>	Avail To Prom	

Navigation: by Item Number

Note that this window is also available as an Additional option from the Microsoft Dynamics™ GP Item Quantities Maintenance window.

5.1 Viewing Item Location and Quantities Details

To view item location and quantity details in the Item Quantities Locations window:

1. Enter an Item Number or select one using the lookup.
2. Select a Unit of Measure from the U of M drop-down list.
3. The Sites parameters are set by default to view All. To select a specific site ID click Site ID then use the Browse buttons or click the lookup to select a site.

Note that items will be displayed in the default unit set in the [Unit of Measure Management Setup window](#). Use the Unit of Measure drop-down list to view in an alternative unit of measure.

4. All relevant details for your selection will be displayed. When you have viewed the information click OK to close the window.

Note that if you have access to the Microsoft Dynamics™ GP Available to Promise module then you can view the selected item site combination in the Available to Promise window. Click the Avail To Prom button to display the window. If you do not have access to the Microsoft Dynamics™ GP Available to Promise module then the button will be disabled.

6. Extended Pricing with Unit of Measure Management

Microsoft Dynamics™ GP Extended Pricing provides functionality for setting up multi-layered pricing structures using price books and price sheets.

The Unit of Measure Management module provides additional functionality by enabling you to generate base unit of measure prices automatically. Prices can be generated automatically for multiple items or price groups using the [Generate Base Unit Prices window](#), for both split pack and non-split pack items.

6.1 How Base Unit Prices are Generated

Base unit prices can only be generated for items/groups that have prices set up for the non-base unit on price sheets. Generated base unit prices are directly drawn from the price set up for the main selling unit. For example you may have a price set up of £50 for a case of 10 item A's. The generated base unit price for an individual item A would be £5. The base unit price would then be added to the same price sheet (and price group where relevant) as the originating unit price.

Note that if you have prices set up for more than one unit of measure for an item then the unit price used to generate a base unit price from would be the unit set up as the default selling unit for the item.

You can use the Generate Base Unit Price Options window to apply additional markups to the base unit prices generated. For example, a case of 10 Item A's may have a net price of £50. When generating base prices for individual item A's you may want to have a markup of £1 on each individual item A sold. You would select the Net Price Markups Value option and enter a value of 1. All items/groups selected for base price generation, with non-base unit prices set up as net prices, would be subject to the same markup. See below for full details on how pricing markups are applied.

Net Price Markup	Added to the calculated base unit net price
Value Off Markup	Deducted from the calculated base unit value off amount, to result in less value off
Percentage Off Markup	Deducted from the calculated base unit percentage off amount, to result in less % off
Cost Uplift Value Markup	Added to the calculated base unit cost uplift value amount, to result in more uplift
Cost Uplift Percent Markup	Added to the calculated base unit cost uplift percentage amount, to result in more uplift

If a non-base unit price with quantity breaks is used to calculate a base unit price, the lowest level quantity break, for example 1 - 10, will be used in the calculation. Quantity break pricing is not generated; only one base unit price will be set up.

7. Generate Base Unit Prices window



Tools >> Routines >> Myridas >> Unit of Measure Management >> Generate Base Unit Prices

Use the Generate Base Unit Prices window to:

- Generate prices for items and price groups against their base unit of measure

The Generate Base Unit Prices window

Note that you can also display this window by selecting the Generate Base Prices Additional option from the Price Sheet Maintenance or Price Sheet Detail Maintenance windows. See below for further details of the default settings in the Generate Base Unit Prices window and the Generate Base Unit Price Options window if opened as an Additional option.

Price Sheet Maintenance window	Price Sheet Detail Maintenance window
Current price sheet selected	Current price sheet selected
Both Items & Groups selected	Items Only or Price Groups Only default dependent upon selection
All Markup options set to none	All Markup options set to none
Quantity Free Options set to Copy	Quantity Free Options set to Copy
Scrolling window populated with items/groups without base unit prices set up	Items to Update set to Split Packs Only
	Overwrite Mode set to New Prices Only
	Scrolling window populated with items/groups without base unit prices set up

7.1 Generating Base Unit of Measure Prices

To generate base unit of measure prices using the Generate Base Unit Prices window:

1. All price sheet IDs will be selected by default. To generate base unit prices for selected price sheets click From and enter a range of price sheets or select them using the lookup.
2. All class IDs will be selected by default. To generate base unit prices for selected class IDs click From and enter a range of class IDs or select them using the lookup.
3. For Item & Group Options select the option that you want to generate base unit prices for from: Items Only, Price Groups Only or Both Items & Groups.

If you select Price Groups Only then the option to select an item number range (step 4) will be disabled.

If you select Items only then the option to select a price group range (step 5) will still be accessible. Groups will not be displayed in the scrolling window; items assigned to groups in the selected range will be displayed.

4. All items will be selected by default. To generate base unit prices for selected items click From and enter a range of items or select them using the lookup.
5. All price groups will be selected by default. To generate base unit prices for selected price groups click From and enter a range of price groups or select them using the lookup.
6. Click the Price Type Options button to display the Generate Base Unit Price Options window where you can select further options to define an item/group range to generate base unit prices for.

The Generate Base Unit Price Options window

Items to Update	<input checked="" type="radio"/> Split Packs Only	<input type="radio"/> All	
Overwrite Mode	<input type="radio"/> New Prices Only	<input checked="" type="radio"/> Overwrite Existing Prices	
Options per Price Type			
Net Price Markups	<input type="radio"/> None	<input checked="" type="radio"/> Percentage	<input type="radio"/> Value
			<input type="text" value="5.00"/>
Value Off Markups	<input checked="" type="radio"/> None	<input type="radio"/> Percentage	<input type="radio"/> Value
			<input type="text" value="0.00"/>
Percent Off Markups	<input checked="" type="radio"/> None	<input type="radio"/> Percentage	<input type="text" value="0.00"/>
Cost Uplift Value Markups	<input checked="" type="radio"/> None	<input type="radio"/> Percentage	<input type="radio"/> Value
			<input type="text"/>
Cost Uplift Percent Markups	<input checked="" type="radio"/> None	<input type="radio"/> Percentage	<input type="text"/>
Quantity Free Options	<input type="radio"/> Copy	<input checked="" type="radio"/> Ignore	

7. For Items to Update click to select to generate base unit prices for Split Packs Only or for All items.
8. For Overwrite Mode click to select to generate New Prices Only or to Overwrite Existing Prices.

If you select New Prices Only then only items/groups without base unit prices set up will be displayed in the Generate Base Unit Prices window. If you select Overwrite Existing Prices then all items/groups within the selected criteria will be displayed and any current base unit prices will be overwritten.

9. Options per Price Type give you functionality enabling you to set markup values to the base prices that you generate. Click Percentage or Value and enter a percentage or value for each price type that you want to apply a markup to. See [How Base Unit Prices are Generated](#) for further details.

Note that the Cost Uplift options will be disabled unless you have the Cost Uplift Pricing option selected in the Extended Pricing Extras Setup window (see the Myridas Extended Pricing Enhancements User Guide for further details).

10. For Quantity Free Options click Copy to assign the same quantity free promotion as applies to the non-base unit price or Ignore to not incorporate quantity free items in the base unit price.
11. Click OK to close the window and return to the Generate Base Unit Prices window.
12. Click Preview to view your selected item/group range in the scrolling window.

All items/groups in the selected range will be displayed in the scrolling window in the base unit of measure. Items are denoted with an I symbol. Groups are denoted with a G symbol. Prices with decimal places rounded up to meet the item currency decimals will be denoted with an * symbol.

13. Click the Update checkbox to select/deselect items/groups for base unit price generation, or use the Mark All/Unmark All buttons to select/deselect all items/groups.
14. Click the Update button to generate base unit prices for all selected items/groups. The Report Destination window will be displayed giving you the option to print the Base Prices Generation Audit Report. Select your required option then close the window.

Note that if you opened the Generate Base Unit Prices window from the Price Sheet Maintenance window or the Price Sheet Detail Maintenance window then the Generate Base Unit Price window will close automatically when the report is printed and you will be returned to the originating window with the newly generated prices displayed.

8. Split Pack Reports



Many Microsoft Dynamics™ GP reports have been given additional functionality by the Myridas Unit of Measure Management module to display items in reports in the split pack format.

Split Pack Format Compatible Reports:
Inventory Stock Status Report
Inventory Stock Status by Site Report
Historical Stock Status Detail by Account
Historical Stock Status Detail by Item
Historical Stock Status Detail by Site
Historical Stock Status Summary by Account
Historical Stock Status Summary by Item
Historical Stock Status Summary by Site
Physical Inventory Checklist Report
Physical Inventory Checklist by Site Report
Physical Inventory Checklist by Site No Quantity Report
Physical Inventory Checklist No Quantity Report
Stock Count Forms by Item Report
Stock Count Forms by Item Break Report
Stock Count Forms by Site Report
Stock Count Forms by Site Break Report
Stock Count List Report
Vendor Activity Report
Vendor Activity by Vendor Report

Appendix A

Access to Myridas Windows

Unit of Measure Management

Window Name	 Menu Access	 Other Access
Generate Base Unit Price Options		Tools >> Routines >> Myridas >> Unit of Measure Management >> Generate Base Unit Prices >> Price Type Options button
Generate Base Unit Prices	Tools >> Routines >> Myridas >> Unit of Measure Management >> Generate Base Unit Prices	<p>Cards >> Inventory >> Extended Pricing >> Price Sheets >> Additional >> Generate Base Unit Prices</p> <p>Cards >> Inventory >> Extended Pricing >> Price Sheets >> Expansion button >> Additional >> Generate Base Unit Prices</p>
Item Quantities Locations	Enquiry >> Myridas >> Unit of Measure Management >> Item Quantity Locations	Cards >> Inventory >> Quantities/Sites >> Additional >> Item Qty Locs
Item/Site Extras Maintenance	Cards >> Myridas >> Unit of Measure Management >> Item/Site Extras Maintenance	
Split Pack/Main Stock Unit Maintenance	Cards >> Myridas >> Unit of Measure Management >> Split Pack/Main Stock Unit Maintenance	Cards >> Inventory >> Item >> Item Maintenance window >> Additional >> U of M Management Maintenance
Stock Count Unit of Measure Entry		Transactions >> Inventory >> Stock Count Entry >> In the Stock Count Entry window, enter a counted quantity for an item and choose the Counted Qty expansion button

Unit of Measure Management Setup	Tools >> Setup >> Myridas >> Unit of Measure Management >> Unit of Measure Management Setup	
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Appendix B

Modified Microsoft Dynamics™ GP Windows

Some Microsoft Dynamics™ GP windows have been modified to incorporate Myridas behaviour:

Window Name	Series	Myridas Module	Modification
Inventory Activity Reports	Inventory	Unit of Measure Management	Runs versions of reports which show split pack items in split pack format
Inventory Available To Promise	Inventory	Unit of Measure Management	Shows quantities in split pack format
Item Stock Enquiry	Inventory	Unit of Measure Management	Shows quantities in split pack format, and allows entry of start date for transactions.
Items	Inventory	Unit of Measure Management	Will display split pack items in the Split Pack format Unit Selection field allows you to select a display Unit of Measure
Quantities By Site	Inventory	Unit of Measure Management	Shows quantities in split pack format

Appendix C

Myridas Reports

Myridas provides multiple reports to increase information visibility.

Report Name	Module	Functionality
Base Prices Generation Audit Report	Unit of Measure Management	Prints details of base unit prices that have been generated

Multiple reports have been enhanced for the Unit of Measure Management module.

See [Split Pack Reports](#) for further details.

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