

# *myridas*<sup>TM</sup> *User Guide*

Version 11.0 for Microsoft Dynamics™ GP 2010

## **Customer Templates**

August 2010

Updated October 2011



# Contents

<b>CONTENTS.....</b>	<b>2</b>
<b>USING THIS GUIDE.....</b>	<b>3</b>
<b>ABOUT MYRIDAS.....</b>	<b>4</b>
<b>CUSTOMER TEMPLATES .....</b>	<b>5</b>
<b>SALES INFORMATION WINDOW .....</b>	<b>6</b>
<b>SETUP .....</b>	<b>7</b>
1. TEMPLATE SETUP WINDOW .....	7
1.1 <i>Setting up Template Parameters</i> .....	7
2. SALES INFORMATION DEFAULTS WINDOW .....	9
2.1 <i>Setting up Sales Information defaults</i> .....	10
<b>CARDS .....</b>	<b>12</b>
3. TEMPLATE MAINTENANCE WINDOW.....	12
3.1 <i>Creating and editing templates</i> .....	12
4. DEFAULT TEMPLATE EXTRAS WINDOW.....	13
4.1 <i>Setting Template Defaults for Debtors</i> .....	14
5. TEMPLATE COPY WINDOW .....	15
5.1 <i>Copying Templates</i> .....	15
<b>ENQUIRIES AND REPORTS.....</b>	<b>17</b>
6. SALES INFORMATION WINDOW.....	17
6.1 <i>Using the Sales Information window</i> .....	18
7. TEMPLATE SELECT WINDOW .....	21
7.1 <i>Selecting template items during sales transaction entry</i> .....	21
7.2 <i>Viewing order history</i> .....	23
8. ORDER HISTORY WINDOW.....	24
8.1 <i>Viewing historical orders</i> .....	24
9. TEMPLATE REPORT WINDOW.....	25
9.1 <i>Printing template details</i> .....	25
<b>ROUTINES.....</b>	<b>26</b>
10. TEMPLATE PURGES WINDOW .....	26
10.1 <i>Removing historical information</i> .....	26
11. GENERATE TEMPLATE HISTORY WINDOW .....	27
11.1 <i>Generating historical templates for selected orders</i> .....	27
12. PRICE SHEET TEMPLATE CREATION WINDOW.....	28
12.1 <i>Creating Templates from Extended Pricing Price Sheets</i> .....	29
<b>APPENDIX A .....</b>	<b>30</b>
ACCESS TO MYRIDAS WINDOWS .....	30
<i>Customer Templates</i> .....	30
<b>APPENDIX B .....</b>	<b>32</b>
MYRIDAS REPORTS .....	32
<b>INDEX .....</b>	<b>33</b>

## 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 Customer Templates module:

- Customer Templates



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.

# About Myridas

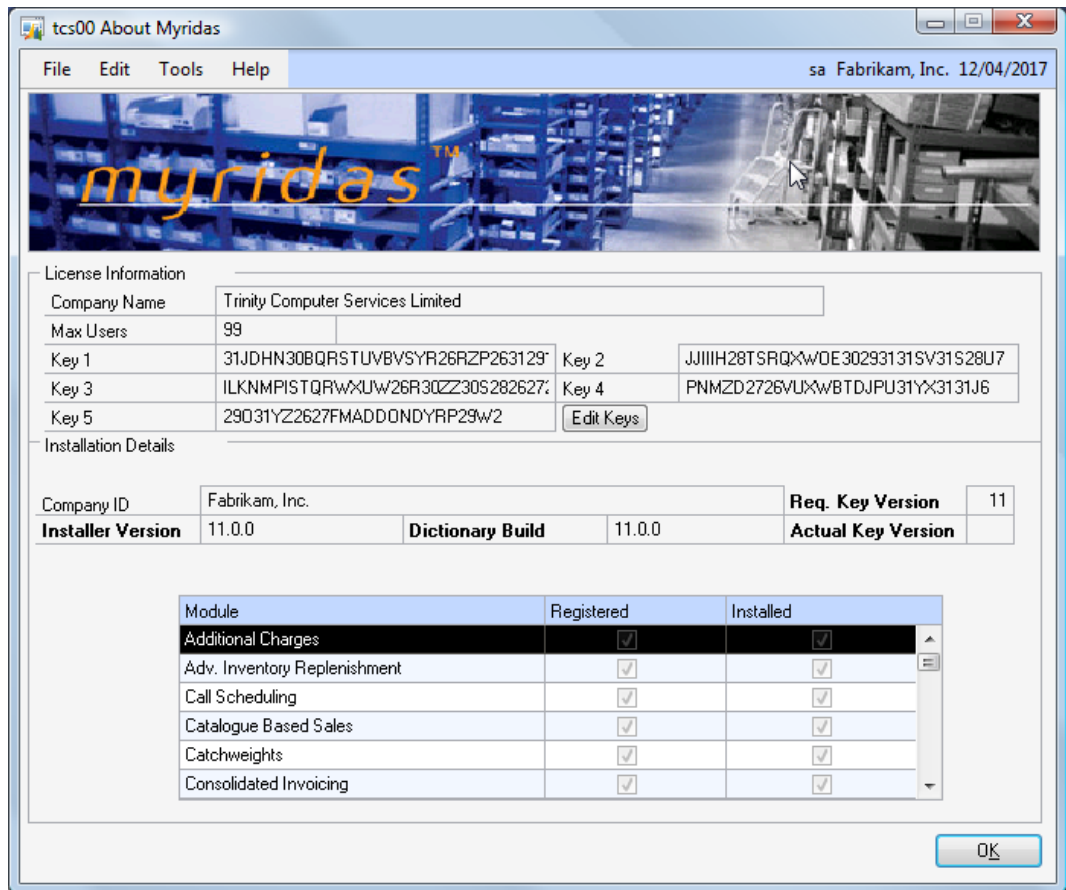


*Tools >> Setup >> Myridas >> About Myridas*

*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*



## Customer Templates

A customer order template is a list of products that a customer orders regularly, such as wine lists for restaurants, or spare-parts lists for customer machinery. Each template is created for a selected ship-to address, and an unlimited number of templates can be created for each address.

Once created, order templates can be used as lookups during sales transaction entry by accessing the [Template Select window](#). The Template Select window also displays the history of orders placed for a selected item *i.e.* quantities, price, order numbers and dates etc.

The main features of the Myridas Customer Templates module are:

- The facility to set up customer order lists, based on historical data if required
- The facility to update order templates automatically
- Template lookup in sales order entry enables rapid selection of items
- The facility to restrict customers to purchasing items from a specified template
- The facility to purge templates of unrequired items
- The facility to copy template details
- The option to base template history on sales orders or invoices
- Generate template history option to generate templates from customers historical data
- The facility to create templates from Extended Pricing price sheets

Note that this manual has been produced in conjunction with a Microsoft Dynamics™ GP UK dictionary. As such some customer fields have been replaced in screenshots and text with the term debtor.

A default template can be selected for individual customer ship-to addresses if required in the [Default Template Extras window](#). One template per customer ship-to address can also be selected as the historical template in the [Template Maintenance window](#). This template is automatically updated with any new items ordered by a customer during order entry. All other templates are fixed templates and can only have items added or removed in the [Template Maintenance window](#).

Templates can be copied using the [Template Copy window](#). Alternatively they can be generated from historical data using the [Generate Template History window](#) or from Microsoft Dynamics™ GP Extended Pricing price sheets using the [Price Sheet Template Creation window](#). Historical information is updated for each customer regardless of whether order templates have been created, and can be displayed directly in the [Order History window](#). Template details for a selected customer range can be printed from the [Template Report window](#).

Purge facilities allow the removal of historical records. Use the [Template Purges window](#) to delete template items from a historical template that have not been ordered since a specified date, and to delete order history that is older than a specified date.

## Sales Information window

The [Sales Information window](#) provides item search facilities when using Sales Transaction entry.

A search string can be entered in the Sales Transaction Entry item number field; matching items will then be displayed in the Sales Information window.

Fields that can be searched include Item number, Item Description, Generic Description and Class Id.

The [Sales Information window](#) can also be used to display customer templates.

An item can be selected from the list displayed in the [Sales Information window](#) and added to the current sales document.

After a sales document line has been entered, there is an option for the user to return automatically to the item list on the [Sales Information window](#), allowing rapid entry of a list of items into a sales document.

More information about an item is displayed in the detail section of [the Sales Information window](#). This includes available inventory, selling price, margin and sales pattern.

## Setup

### 1. Template Setup window

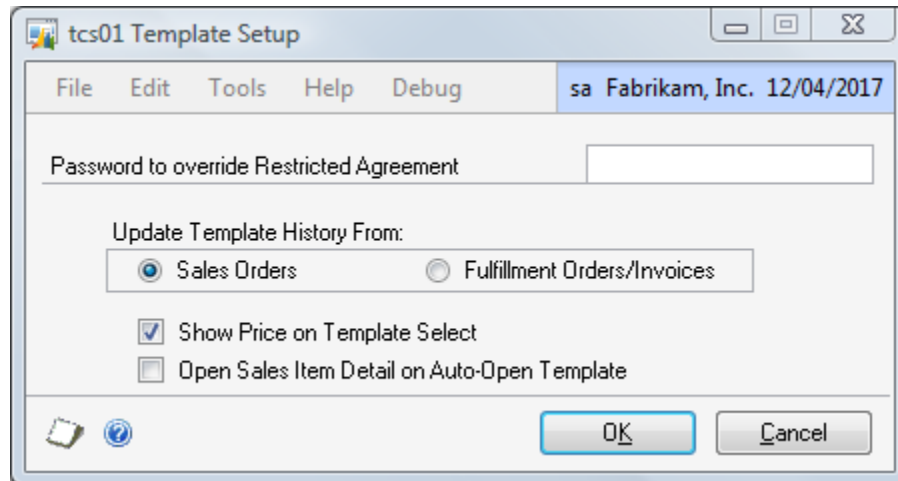


*Tools >> Setup >> Myridas >> Templates/TurboSOP >> Template Setup*

Use the Template Setup window to:

- Set up template parameters

*The Template Setup window*



The update template history settings on this window will be especially useful if you enter sales documents directly as fulfilment orders/invoices rather than as orders.

Note that sales orders are the default parameter for the Customer Templates module. If you want historical templates to be based on sales orders, and have not already set the parameter to base them on fulfilment orders/invoices, then you do not need to adjust the setting in this window.

#### 1.1 Setting up Template Parameters

##### To setup a Template parameters:

1. If you require the facility to override restricted agreement templates (see [Setting Template Defaults for Debtors](#)) then enter a password.

If a debtor is on a restricted agreement template then items not on the template cannot be entered into sales transactions for the debtor. You can set up a password here so that if a non-template item is entered into a sales transaction for a debtor on a restricted agreement template then you will be given the option to enter the password. If the correct password is entered then the item will be accepted into the transaction.

If no password is entered then restricted agreement templates cannot be overridden.

2. Under Update Template History From click to select either Sales Orders or Fulfilment Orders/Invoices.

Your selection will set the parameters upon which historical templates are based. For example, if you select Fulfilment Orders/Invoices then historical templates will be based on Sales Fulfilment Orders/Invoices rather than Sales Orders.

3. Click the Show Price in Template Select option to display the most recent price an item has been sold to the debtor at on the Template Select window.
4. Select the Open Sales Item Detail on Auto-Open Template option if you would like the Sales Item Detail Entry window to open automatically when the Template Select window is auto-opened (see [Setting Template Defaults for Debtors](#) ).
5. Click OK.

Note that you can click Cancel at any point prior to clicking the OK button to close the Template Setup window.

## 2. Sales Information Defaults window



*Tools >> Setup >> Myridas >> Templates/TurboSOP >> Sales Information Defaults*

Use the Sales Information Defaults window to:

- Specify options for using the [Sales Information window](#)

*The Sales Information Defaults window*

tcs103 Sales Information Defaults

File Edit Tools **Help** Debug sa Fabrikam, Inc. 12/04/2017

Save Clear Delete

Set Defaults for:

General

User User ID sa

Maintain Defaults

General Options

Activate Sales Information window

Automatically return to Sales Information window on entry of a line

Use Sales Information window as Template Selection window

View Item Options

Show Promotional Price flag in the scrolling window

Exclude if flagged as Do Not Sell

Quantity Filtering Only if Available + On Order Quantity > 0

Maximum Items 50

Item Enquiry Options

Select fields to show in the Item Enquiry:

Available

Price

Template Sequence

Margin

On This Trans. Order

Current Sales Period

Sales Period +1

Sales Period +2

Sales Period +3

Sales Period +4

Mark All

Unmark All

Move Up

Move Down

## 2.1 Setting up Sales Information defaults

### To setup Sales Information defaults:

1. Choose to set up General defaults for all users or to set up values for a specific user. The General options will be used for any user who does not have their own settings.
2. Click Maintain Defaults. Any existing values will be displayed.
3. Select the option to Activate Sales Information window in order to use the [Sales Information window](#) from within Sales Transaction Entry. If this option is selected, when CTRL-L is used in the item number field in Sales Transaction Entry, the Sales Information window will be used to search for items instead of the Item lookup window.

Note that the remaining options may be set up without marking the option to Activate the Sales Information window, but will only apply when the window is active.

4. Select the option to Automatically return to Sales Information window on entry of a line if, when entering document lines in Sales Transaction Entry, you would like to return to the Sales Information window after each line is completed.
5. The option to Use Sales Information window as Template Selection window works in conjunction with [Default Template functionality](#). If a customer has a default template id selected in the [Default Template Extras window](#), and the Auto-Open Default Template option has been chosen, the Default Template will be displayed in the [Sales Information window](#) instead of in the [Template Select window](#).
6. Select the option to Show Promotional Price flag in the scrolling window if you would like items on promotion to be indicated with an icon on the Sales Information window. Note that your item search will run more slowly if this option is chosen.
7. If you use the Myridas Item Lifecycle module, you can omit any items marked as Do Not Sell by selecting the Exclude if Flagged as Do Not Sell option.
8. Against Quantity Filtering select one of the following options:

All	Display all items regardless of stock balance
Only if Available Qty > 0	Only show items which have a quantity available
Only if Available + On Order Quantity > 0	Only show items for which the total of (available quantity +

	quantity on purchase order) > 0
--	---------------------------------

9. Against Maximum Items, show the default value for the maximum number of items to be selected in the Sales Information window.
10. Under Item Enquiry Options, choose the fields that you would like to see in the detail section of the [Sales Information window](#).

## Cards

### 3. Template Maintenance Window



*Cards >> Myridas >> Templates >> Maintenance*

Use the Template Maintenance window to:

- Create and edit templates

*The Template Maintenance window*

Seq. No	Item Number	Description
20	100XLG	
40	ACCS-HDS-1EAR	
60	ACCS-HDS-2EAR	
80	128 SDRAM	
100	HD-40	
120	HD-60	
140	3-A2998A	
160	3-E4471A	

#### 3.1 Creating and editing templates

**To create or edit a template in the Template Maintenance window:**

1. Enter a Debtor ID or click the Debtor ID lookup to select one from the Debtors and Prospects window.
2. Enter a Ship To Address or click the Ship-to lookup to select one from the Addresses window.
3. Enter a Template ID to identify your template, or click the lookup to select one from the Template Lookup window. If you select an existing template, its details will be displayed in the scrolling window. Click the Show button to display item descriptions.



4. Enter a Template Description to describe your template.
5. Select the Update From Sales Transaction Entry check box if you want this template to be the historical template.
6. Select the Resequence on retrieval check box if you want sequence numbers to be automatically regenerated each time the template is loaded into Template Maintenance.

Sequence numbers are required for each item on a template and can be entered by the user or automatically generated by the system. They provide an alternative method of sorting the template within order entry, such as sorting wine lists by bin number.

7. Enter an Item Number or click the lookup to select one from the Items window. Repeat for each item to be added to the template.
8. Enter a new Seq. No. for each item on the template or accept the system defaults.
9. Click Save to save your template.

### *Deleting templates*

Click the Delete button to remove a template.

## 4. Default Template Extras window



*Cards >> Myridas >> Templates >> Default Extras*

Use the Default Template Extras window to:

- Restrict a debtor to purchasing items from a specified template
- Set a default template for a debtor/address combination

### *The Default Template Extras window*

Note that the Default Template Extras window is also available as an Additional option from the Debtor Maintenance window.

## 4.1 Setting Template Defaults for Debtors

### **To set template defaults for debtors in the Default Template Extras window:**

1. Enter a debtor ID or select one using the lookup.
2. Enter an address ID or select one using the lookup or browse buttons.
3. Enter a template ID or select one using the lookup. The selected template ID will be the default template for the displayed debtor/address combination.
4. Click the Restricted Agreement option to limit the selected debtor/address combination to purchasing items from the selected template only.
5. Click the Auto-Open Default Template option to cause the Template Select window to open automatically displaying the selected template ID when entering items into a sales transaction for the selected debtor/address combination.

If the “Open Sales Item Detail on Auto-Open Template” option has been selected in the Template Setup window (see [Template Setup](#)), Sales Item Detail Entry will open at the same time as the Template Select window auto-opens.

6. Click Save to save the settings and close the window.

#### *Deleting default template settings*

Click Delete to delete default template settings.

## 5. Template Copy window



*Cards >> Myridas >> Templates >> Copy*

Use the Template Copy window to:

- Copy templates to other addresses or other debtors

*The Template Copy window*

### 5.1 Copying Templates

**To copy a template report in the Template Copy window:**

1. Enter a Debtor ID or click the lookup to select a Debtor ID from the Debtors and Prospects window.
2. Enter an Address ID or click the lookup to select an Address ID from the Addresses Lookup window for the selected Debtor.
3. Enter a Template ID or click the lookup to select a Template ID from the Template lookup window. You can also use the browse buttons to move between Template IDs.

Note that if you have set the Template to be a Historical Template then the Historical Template check box will be highlighted.

4. Click to select whether you want to copy the selected template to Other Addresses for Debtor or Other Debtors.

5. If you select Other Addresses for Debtor you should then enter From and To Addresses or click the lookups to select addresses from the Addresses Lookup window.
6. If you selected Other Debtors enter From and To Debtors or click the lookups to select Debtors from the Debtors and Prospects window.

Note that this will copy the selected template to all addresses held for the selected Debtor range. To apply the template copy to the Primary Ship To Address only, click the Primary Ship To Address Only check box. This field will only be displayed if you selected the Other Debtors option.

7. For Copy Mode click to select Add Items to Template or Overwrite Existing Template. If you select to Add Items to Template then any items new to the address or debtor will be added to their existing template.

If you select to Overwrite Existing Template then any templates already held for selected Debtor/address combinations will be overwritten in full, and the Debtor/address combination will be assigned the full template.

8. Click the Copy button to apply the template copy selections that you have made.

Note that you can click Cancel at any point prior to clicking the Copy button to close the Template Copy window.

## Enquiries and Reports

### 6. Sales Information window



*Sales Transaction Entry >> Item number field >> CTRL-L*

Use the Sales Information window to:

- Search for and select items during sales transaction entry
- View item details such as price, margin and available inventory during sales transaction entry

*The Sales Information window*







Item Number	Item Description
128 SDRAM	128 meg SDRAM
512 SDRAM	512 MEG RAM
CW123	cw123
<b>F.12456</b>	<b>f-12456</b>
PHON-ATT-0712	Attractive 712 wall phone

Available	0
Price	£1,350.00
Template Sequence	0
Margin	32.92%
On This Trans. Order	0
Current Sales Period	0
Sales Period +1	0

## 6.1 Using the Sales Information window

### To use the Sales Information window during sales transaction entry:

1. To use the Sales Information window in Sales Transaction Entry, the Activate Sales Information window option must be enabled in the [Sales Information Defaults window](#). Once this option has been enabled, using CTRL-L on the Item number field in Sales Transaction Entry will open the Sales Information window instead of the Item lookup.
2. If you enter CTRL-L on an empty item number field, your cursor will move to the Search field on the Sales Information window, and you can enter search parameters as required.
3. If you enter a search string and press CTRL-L, the system will perform an Item Search using your search string in conjunction with the search parameters already selected in the Sales Information window. If the search finds a single item number, this will be returned to the Sales Transaction Entry item number field. If multiple item numbers are identified in the search, these will be displayed in the Sales Information window, from where you can select the item that you require.
4. To return from the Sales Information window to Sales Transaction Entry, press ESC.
5. To disable the Sales Information window in order to use the Item lookup, use the Sales Information Window Active setting under the Options menu. If you wish to select items from the Item Catalogue (Catalogue Based Sales module), or the Template Select window, it is advisable to disable the Sales Information window.
6. The detail section of the Sales Information window shows further information about either the item currently highlighted in the Sales Information scrolling window or the item on the current Sales Transaction line. The fields displayed will be those specified in the [Sales Information Defaults window](#).
7. Use the buttons in the detail section to retrieve additional item information. Note that these options will only be available if the appropriate software module has been installed.

	Open item notes
	Open Inventory Available to Promise Enquiry
	Open Aggregate Promotion enquiry window
	Open Order History enquiry window
	Open Price Trace window
	Open Quantities by Site window

8. After entry of each line on the sales document, the user will be returned to the Sales Information window to select another item if the Automatically return to Sales Information window option is set in the Sales Information Defaults window.

### **Using the Search parameters in the Sales Information window:**

1. From the Search dropdown menu choose to Search on Item Number, Item Number & Description, Item Description, Generic Description, Short Description, Item Class or Class Description. Then choose whether to search whether your selected field contains or begins with your search string.
2. Enter a search string. Note that you can enter multiple strings separated by a + sign. For example, searching for "ch+ay" would search for items containing the strings "ch" and "ay".
3. When you tab off the search string field, the scrolling window will be populated with the search results.
4. Highlight an item in the scrolling window to show more information about the item in the detail section of the window. The fields displayed will be those specified in the [Sales Information Defaults window](#).
5. Click Select or press enter to choose an item from the scrolling window to be entered into your Sales Transaction.
6. Click Clear to clear your search string.
7. Note that the Site ID will take its value from the Default Site ID on the Sales document. The item search will be restricted to items which are linked to the selected site. Change the Site ID to All Sites to show items across all sites.
8. The default value for the maximum number of items to be selected in the search can be specified in the [Sales Information Defaults window](#). This value can be changed at runtime by changing the Maximum Items field.
9. Default values for the Item Quantity filter and Exclude if flagged as Do not Sell option can be specified in the [Sales Information Defaults window](#). These values can be changed at runtime by selecting options in the scrolling window View dropdown menu.

### **Using the Sales Information window as the Template Selection window:**

1. You can view a customer template in the Sales Information window by selecting a Template ID. If a Template ID is selected, the item search will be restricted to items on the selected template.
2. The customer's default template can be displayed automatically in the Sales Information window. In order to do this:

- set the Use Sales Information window as Template Selection window option in the [Sales Information Defaults window](#).

- set up a default template for the customer and ship-to address in the [Default Template Extras window](#), and mark to Auto-Open Default Template.

When entering a sales document for this customer and ship-to-address, the Sales Information window will open automatically with the customer's default template displayed.

## 7. Template Select Window



*Enquiry >> Myridas >> Templates >> Template Select*

Use the Template Select window to:

- Select template items during sales transaction entry
- View order history

Note that the Template Select window can also be opened from the Sales Transaction Entry window – choose Template Select from the Additional menu.

If you selected the Auto-Open Default Template option in the [Default Template Extras window](#) then the Template Select window will open displaying the selected default template for the debtor/address combination when entering items into sales transactions, unless the [Sales Information window](#) is used for this.

*The Template Select window*

The screenshot shows the 'tcs01 Template Select' window. The title bar indicates the user is 'sa Fabrikam, Inc. 12/04/2017'. The menu bar includes 'File', 'Edit', 'Tools', 'Help', and 'Debug'. There are buttons for 'Stop Auto Open', 'Find', and a refresh icon. The main area is divided into several sections:

- Fields:** Site ID (WAREHOUSE), Debtor ID (AMERICAN0002), Ship to Address (PRIMARY), Template (AMTEMPLATE1), and Currency ID (Z-US\$).
- Items (128 SDRAM) Table:**

Sequence No.	Item Number	Description	Generic Desc	Short Name	Unit Price	U of M	QTY Avail	QTY Ordered
20	100XLG	Green Phone						
40	ACCS-HDS-1EAR	Headset-Single Ear						
60	ACCS-HDS-2EAR	Headset - Dual Ear						
80	128 SDRAM	128 meg SDRAM						
100	HD-40	40 Gig hard drive						
120	HD-60	60 Gig hard drive						
- Item History Table:**

Order Date	Document No.	U of M	Quantity	Price	Debtor PO number
12/04/2017	ORDST2722	Case	1	\$100.00	
- Footer:** A dropdown menu set to 'by Sequence Number' and 'Select' and 'Cancel' buttons.

### 7.1 Selecting template items during sales transaction entry

An order template can be used as a lookup during sales transaction entry.

Note that you can click the Stop Auto Open button to close the Template Select window for the duration of the current transaction.

**To lookup a template during sales transaction entry in the Template Select window:**

1. Start to enter your sales document details in the Sales Transaction Entry window. Once you have selected a Document No. and a Debtor ID, the Template Select window will become available to use.
2. Select Template Select from the Additional menu.
3. The Template Select window will open showing the current Debtor ID selection and default Ship to Address, Template ID entries and Currency ID. Accept these settings or make new selections.
4. Each template item will be displayed in the Items scrolling window. The Unit Price for each item is the price that is applied to the item in sales transaction entry, whether you are using standard pricing or Extended Pricing. The Quantity Ordered is the quantity on the current sales transaction. Click the Refresh button to refresh this quantity.

You can also click the Only show Item not yet ordered option to only display items not yet added to the current sales transaction.

5. If you want to select multiple items from the template, click the Push Pin button to keep the Template Select window open after each selection. For each item to be selected:
  - a. Highlight an item or click Find to locate one in the Find Item window.
  - b. Click the Select button to return the selected item to the sales transaction.
6. Enter the remaining transaction details in the normal way.

If the debtor/ship-to address has an historical template, it will be updated with any new items when you create and save an order. You will be given the option to create an historical template automatically when you first create an order for a new ship-to address.

## 7.2 Viewing order history

When selecting template items during sales transaction entry, the lower half of the Template Select window displays the order history for a selected template item.

### **To view the order history of an item in the Template Select window:**

1. Highlight an item in the Items scrolling window.

The Item History scrolling window will display any historical orders associated with the selected item. For each order, the order date, order number, unit of measure, quantity and price will be shown. If you are also using the Myridas Catchweights module, the Catchweight Units of Measure and listed quantities will be also be displayed in the Item History scrolling window.

2. To view an order in more detail:
  - 2.1 Highlight an order in the Item History scrolling window or click the Find button to locate one in the Find History window.
  - 2.2 Click the Order Number zoom. The Order History window will open.

## 8. Order History Window



*Enquiry >> Myridas >> Templates >> Order History*

Use the Order History window to:

- View historical orders

*The Order History window*

Item Number	U of M	Qty	Price
Item Description	CW U Of M	CW Quantity	Extended Price
128 SDRAM	Case	1	\$100.00
ACCS-HDS-1EAR	Each	1	\$0.95

Note that the Order History window can also be opened by clicking the Order Number zoom in the Template Select window.

### 8.1 Viewing historical orders

#### To view historical orders in the Order History window:

1. When called from the Template Select window, the Order History window opens showing the current Debtor ID, Ship To Address and Document No. selection. Accept these settings or make a new selection.
2. Each item in the order will be displayed in the scrolling window. The item number, unit of measure, quantity and price will be listed for each item. Click the Show button to display the item description and extended price.





Note that if you are using the Myridas Catchweights module then clicking the Show button will display Catchweight Units of Measure and quantities for the listed orders.

## 9. Template Report Window

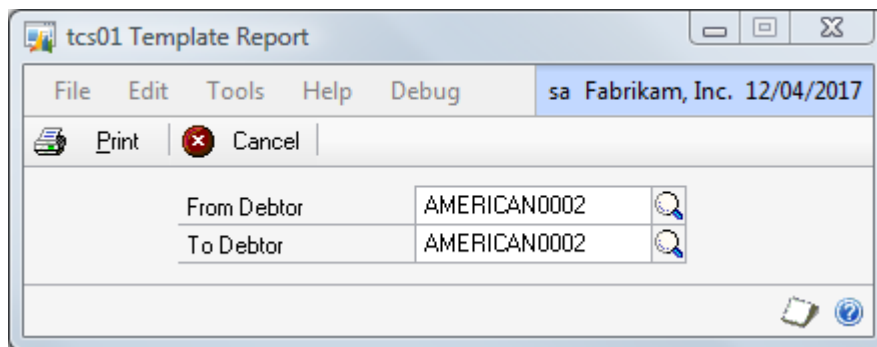


*Reports >> Myridas >> Templates >> Report*

Use the Template Report window to:

- Print template details for a range of debtors

*The Template Report window*



### 9.1 Printing template details

**To print a template report in the Template Report window:**

1. Enter a From Debtor ID or click the lookup to select one from the Debtors and Prospects window.
2. Enter a To Debtor ID or click the lookup to select one from the Debtors and Prospects window.
3. Click the Print button.

*Printing single templates*

To print a single template, select Print from the File menu when the template is displayed in the [Template Maintenance window](#).

## Routines

### 10. Template Purges Window

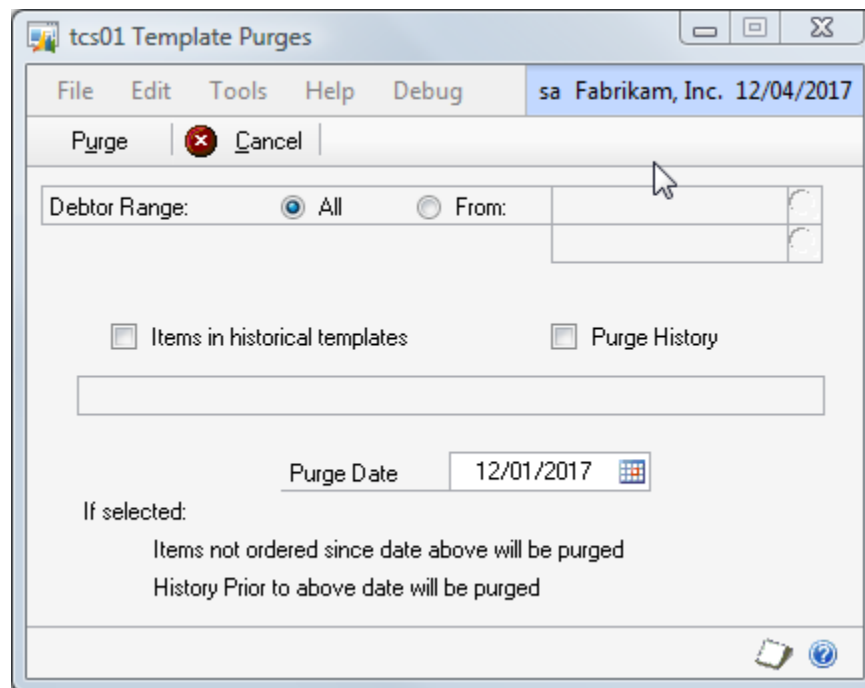


*Tools >> Routines >> Myridas >> Templates >> Purge*

Use the Template Purges window to:

- Remove items that have not been ordered since a specified date from a historical template
- Remove order history older than a specified date

*The Template Purges window*



#### 10.1 Removing historical information

**To remove historical items and order history in the Template Purges window:**

1. Select All to purge all debtor details, or select From to purge a range of debtor details. If you select From, enter to and from Debtor IDs to specify a range, or use the lookups.
2. Select the Items in historical templates check box and/or the Purge History check box to remove items from historical templates or purge history, or do both.
3. Enter a Purge Date.
4. Click the Purge button.

History older than the entered date will be deleted.

## 11. Generate Template History window



*Tools >> Routines >> Myridas >> Templates >> Take On*

Use the Generate Template History window to:

- Generate historical templates for selected orders

*The Generate  
Template  
History window*

This will be particularly useful if you want to create historical templates for debtors whose sales orders were created before you set up the Customer Templates module.

### 11.1 Generating historical templates for selected orders

**To generate historical templates for selected orders in the Generate Template History window:**

1. Enter the Start Date from which you want a historical template to be generated. All **orders** (i.e.: not quotes, returns or invoices) placed from that date to present will be included on the historical templates for your selected range. These orders must have a Ship To Address specified or a template will not be created.

Note that the Start Date default initially displayed in the window will be three months prior to the current date.

Any Debtor/Address combination for which you have previously specified that a historical template isn't required will be omitted from processing. Enter a Debtor From and To range or use the lookups to select Debtors from the Debtors and Prospects window. You can click All to select all Debtors.

2. Enter a Class ID From and To range or use the lookups to select Class ID's from the Debtor Classes window. You can click All to select all Class ID's.

Note that if you include a Debtor in the range that has a Class ID not included in the range (or no Class ID) then this Debtor will not be included in the processing selection.

3. Click Process to create historical templates for your selection.

Note that you can click Cancel at any point prior to clicking the process button to close the Generate Template History window.

## 12. Price Sheet Template Creation window



*Tools >> Routines >> Myridas >> Templates >> Price Sheet Template*

Use the Price Sheet Template Creation window to:

- Create templates from Extended Pricing Price Sheets

*The Price Sheet  
Template  
Creation  
window*

Note that this window will only be available if you are working with Extended Pricing in Microsoft Dynamics™ GP. See the Microsoft Dynamics™ GP User Manuals for further information on working with Extended Pricing.

## 12.1 Creating Templates from Extended Pricing Price Sheets

### To create templates from Extended Pricing price sheets in the Price Sheet Template Creation window:

1. Enter the Price Sheet ID that you want to base a template on, or select one using the lookup.
2. Enter a Template ID and Template Description for the new template that you want to create.

Note that you can enter a currently existing template - see the Copy Mode options for further details.

3. The Update from Sales Transaction Entry check box allows you to set templates created in this window as historical templates for the selected debtor range. Select this option to set the template as a historical template.

Note that where any debtors in the selected range already have a historical template then the template created here will be assigned to them as a standard template. Details will be printed in the Template Creation from Price Sheet report which is printed automatically at the end of window processing.

4. Enter the debtor range that you want to assign the template to, or select a debtor range using the lookups.
5. Alternatively, select a price book id. The template will then be assigned to all debtors that have been linked to the selected price book.
6. Click the Primary Ship to Address Only option to assign the template to the Primary Ship Address only for the selected debtor range. Not selecting this option will result in the template being assigned to all addresses for the selected debtors.
7. Under Copy Mode you have two options. These options apply if you have selected an existing template as your Template ID.

Add Items To Template	Items from the price sheet not currently on the template will be added to the template
Overwrite If Existing Template	The template will be overwritten in its entirety with items on the price sheet

Click to select the option you require.



8. Click Copy to copy details from the price sheet to the template for selected debtors.

Note that you can click Cancel at any point prior to clicking the Copy button to close the Price Sheet Template Creation window.

## Appendix A

### Access to Myridas Windows

#### Customer Templates

<b>Window Name</b>	 <b>Menu Access</b>	 <b>Other Access</b>
Default Template Extras	Cards >> Myridas >> Templates >> Default Extras	Cards >> Sales >> Debtors >> Additional >> Default Temp. Extras
Generate Template History	Tools >> Routines >> Myridas >> Templates >> Take On	
Order History	Enquiry >> Myridas >> Templates >> Order History	Sales Transaction Entry window >> Additional >> Order History Lookup
Price Sheet Template Creation	Tools >> Routines >> Myridas >> Templates >> Price Sheet Template	
Sales Information Defaults	Tools >> Setup >> Myridas >> Templates/TurboSOP >> Sales Information Defaults	
Sales Information		Sales Transaction Entry >> Item number field >> CTRL-L
Template Copy	Cards >> Myridas >> Templates >> Copy	
Template Setup	Tools >> Setup >> Myridas >> Templates/TurboSOP >> Template Setup	
Template Maintenance	Cards >> Myridas >> Templates >> Maintenance	
Template Purges	Tools >> Routines >> Myridas >> Templates >> Purge	
Template Report	Reports >> Myridas >> Templates >> Report	Template Maintenance window >> File >> Print (once a valid template has been selected)

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Template Select	Enquiry >> Myridas >> Templates >> Template Select	Sales Transaction Entry or Sales Item Details Entry windows >> Additional >> Template Select
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## Appendix B

### Myridas Reports

Myridas provides multiple reports to increase information visibility.

<b>Report Name</b>	<b>Module</b>	<b>Functionality</b>
Sales Transaction Templates report	Template Selling	Select a range of templates in the Template Report window and print report  Individual templates can be reported on through the Template Maintenance window
Template Copy Audit report	Template Selling	Prints details of processing performed through the Template Copy window
Template Creation from Price Sheet report	Template Selling	Prints details of processing performed through the Price Sheet Template Creation window

## Index

- C**
- Copying
    - templates ..... 15
  - Creating
    - templates from Extended Pricing
      - Price Sheets ..... 29
- D**
- Default Template Extras window ..... 13
  - Default Templates ..... 14
  - Deleting
    - templates ..... 13
- G**
- Generate Template History window ... 27
  - Generating
    - historical templates for selected
      - orders ..... 27
- H**
- Historical template ..... 5, 13, 22
  - Historical Templates
    - generating ..... 27
- O**
- Order History window ..... 5, 24
- P**
- Price Sheet Template Creation window
    - ..... 28
  - Printing
    - templates ..... 25
  - Purging
    - templates ..... 26
- R**
- Resequence on retrieval ..... 13
  - Restricted Agreement Templates ..... 14
    - password override ..... 7, 10
- S**
- Sequence numbers ..... 13
  - Setting
    - a password to override restricted
      - agreements ..... 7, 10
      - template defaults ..... 14
- T**
- Template Copy window ..... 15
  - Template Maintenance window ..... 5, 12
    - Resequence on retrieval ..... 13
    - Update From Sales Transaction Entry
      - ..... 13
  - Template Purges window ..... 5, 26
  - Template Report window ..... 5, 25
  - Template Select window ..... 5, 21
  - Template Setup window ..... 7, 9
  - Templates ..... 5
    - copying ..... 15
    - creating ..... 12
    - creating from Extended Pricing Price
      - Sheets ..... 29
    - defaults ..... 14
    - deleting ..... 13
    - printing ..... 25
    - removing historical information ..... 26
    - restricted agreement ..... 14
    - selecting template items ..... 21
    - viewing historical orders ..... 24
    - viewing order history ..... 23
- U**
- Update From Sales Transaction Entry .13