

*myridas*TM *User Guide*

Version 7.6 for Great Plains 7.5

Distribution Enhancements



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 Distribution Enhancements module:

- Distribution Enhancements



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>.

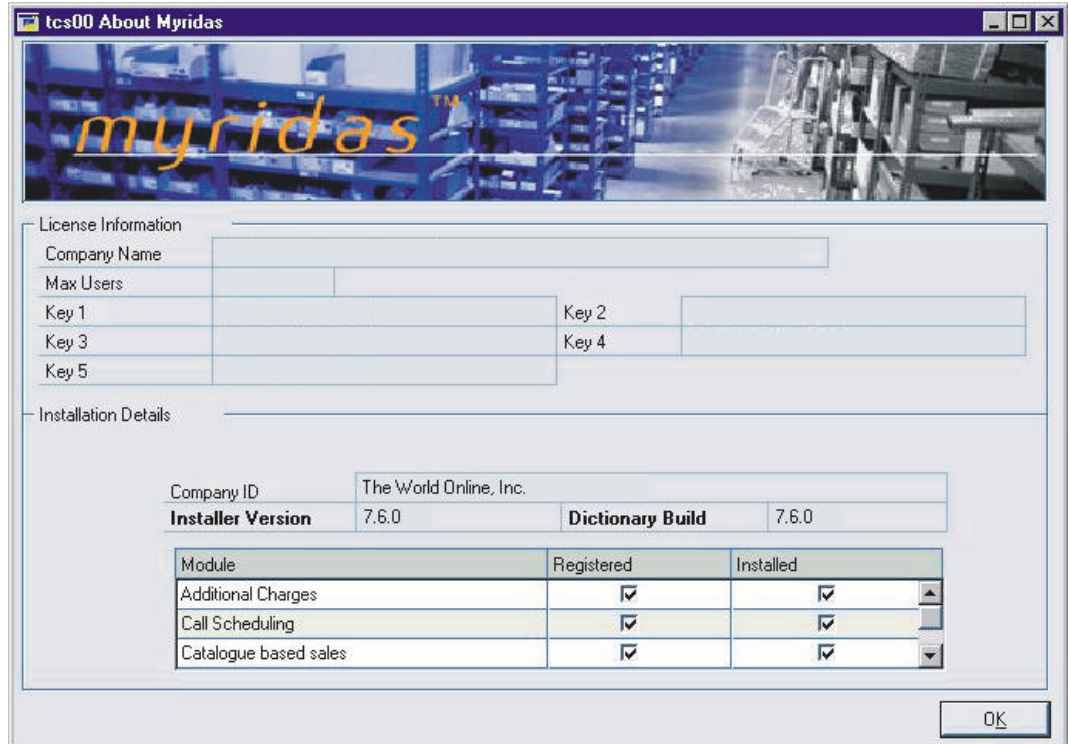
About Myridas



Cards >> Myridas Setup >> About Myridas

Use the About Myridas window to check your license 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



Distribution Enhancements

The Myridas Distribution Enhancements module provides three new areas of functionality to improve the effectiveness of your inventory control.

With [Transaction Reason Codes](#) you can set up and assign reason codes to inventory transactions, providing greater visibility of your inventory.

Barcode Management provides the functionality to set up barcodes and assign them to items. Barcodes can even be imported and exported on a mass scale using the [GTI Numbers Import/Export Wizard](#).

[Part Delivery Restrictions](#) enables you to set up process holds that will stop incomplete orders from being transferred to invoice.

The key features of the Distribution Enhancements module are:

- The facility to set up transaction reason codes and assign them to transactions
- The facility to set up barcodes and assign them to items
- Import/export wizard allowing you to import and export barcodes
- The facility to set up process holds to restrict partially complete orders from being transferred to invoice

Transaction Reason Codes

Transaction reason codes functionality allows you to assign reason codes to sales and inventory transactions. Using the [Transaction Reason Code Maintenance window](#) to set up an unlimited number of reason codes, you can then assign these reason codes to all types of sales and inventory transactions. Documents with reason codes assigned can be reported on using the [Great Plains SmartList](#).

1. Transaction Reason Code Maintenance window



Cards >> Myridas Setup >> Dist. Enhancements >> Reason Code Maint.

Use the Reason Code Maintenance window to:

- Set up transaction reason codes

*The
Transaction
Reason
Code
Maintenance
window*

1.1 Setting Up Transaction Reason Codes

To set up transaction reason codes in the Transaction Reason Code Maintenance window:

1. Enter a reason code, or if you are maintaining a code select one using the lookup.
2. Enter a description.
3. Click Save.

Note that you can click Clear at any point to clear the current selection.

*Deleting reason
codes*

Click Delete to delete the currently selected reason code.

2. Apply Transaction Reason Code window



Transactions >> Inventory >> Transaction Entry >> Extras >> Apply Reason Code

Use the Apply Transaction Reason Code window to:

- Assign reason codes to sales and inventory transactions

*The Apply
Transaction
Reason
Code
window*

Note that this window is also available through the Item Transfer Entry window.

Note also that you can open the sales transaction version of this window by clicking the Extras Apply Reason Code option in the Sales Transaction Entry window.

2.1 Assigning Reason Codes to Sales and Inventory Transactions

To assign reason codes to sales and inventory transactions in the Apply Transaction Reason Code window:

1. The current document type and document number will be displayed.
2. Enter a reason code or select one using the lookup.
3. Click OK to assign the reason code to the transaction and close the window.

Note that reason codes can be assigned to all inventory and sales document types.

3. Viewing and Reporting on Assigned Reason Codes

Sales and inventory documents with reason codes assigned to them can be reported on in the Great Plains SmartList. Click the SmartList icon then click on Inventory Transaction Reason Codes or Sales Transaction Reason Codes. All relevant documents will be displayed in the scrolling window with the reason code assigned to them. Click the Print button to print a report.

Barcode Management

Barcode management gives you the functionality to set up barcodes and suitable formats, assign them to item numbers, and to import/export them from/to Excel spreadsheets.

Whether using US Uniform Code Council (UCC's) or European Article Numbers (EAN's) , you can set up the appropriate format using the Barcode Format Maintenance window. Barcodes are also known as Global Trade Identification Numbers (GTI Numbers).

You can select whether to include check digits on barcodes. Check digits are the additional digit used to authenticate barcodes. If included they will be calculated automatically. All barcode formats are made up of 14 digits (including the check digit), however some formats only require a lesser number of digits with the additional digits being made up by prefixing 0's to the defined digits. If you select a number of digits less than 14 in the [Barcode Format Maintenance window](#), then when you create a barcode in the [GTI Number Maintenance window](#) the required 0's will be prefixed to the number you created in the underlying functionality of barcode maintenance.

4. Barcode Format Maintenance window

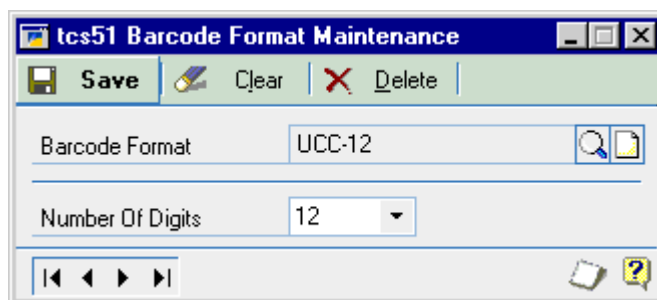


Cards >> Myridas Setup >> Dist. Enhancements >> Barcode Format Maint.

Use the Barcode Format Maintenance window to:

- Set up barcode formats

*The Barcode
Format
Maintenance
window*



4.1 Setting Up Barcode Formats

To set up barcode formats in the Barcode Format Maintenance window:

1. Enter a barcode format, or if you are maintaining a barcode format select one using the lookup.
2. From the Number of Digits drop-down menu select the number of digits that will be used for the barcode.

3. Click Save.

Note that you can clear entries in the window at any point by clicking the Clear button.

Deleting barcode formats

To delete a barcode format click the Delete button.

5. GTI Number Maintenance window



Cards >> Myridas Cards >> Dist. Enhancements >> GTI Number Maint.

Use the GTI Number Maintenance window to:

- Set up and assign GTI numbers

The GTI Number Maintenance window

5.1 Setting Up and Assigning GTI Numbers

To set up and assign GTI numbers in the GTI Number Maintenance window:

1. Enter a barcode format or select one using the lookup.
2. Enter a GTI number.

The number of digits that you can enter will be dependant on the number of digits you selected for the barcode format in the [Barcode Format Maintenance window](#). For example, if you selected 7 digits, then you will be able to enter 6 digits in the GTI Number field. The seventh digit will be made up by the check digit. The number in the Check Digit field will be calculated automatically.

3. Enter an item number or select one using the lookup.
4. Enter a unit of measure or select one using the lookup.

Note that different item units require different GTI numbers.

5. Click Save.

Note that you can click Clear at any point to clear the window.

Deleting GTI numbers

Click Delete to delete a GTI number and its assignment to an item number.

6. GTI Number Enquiry window

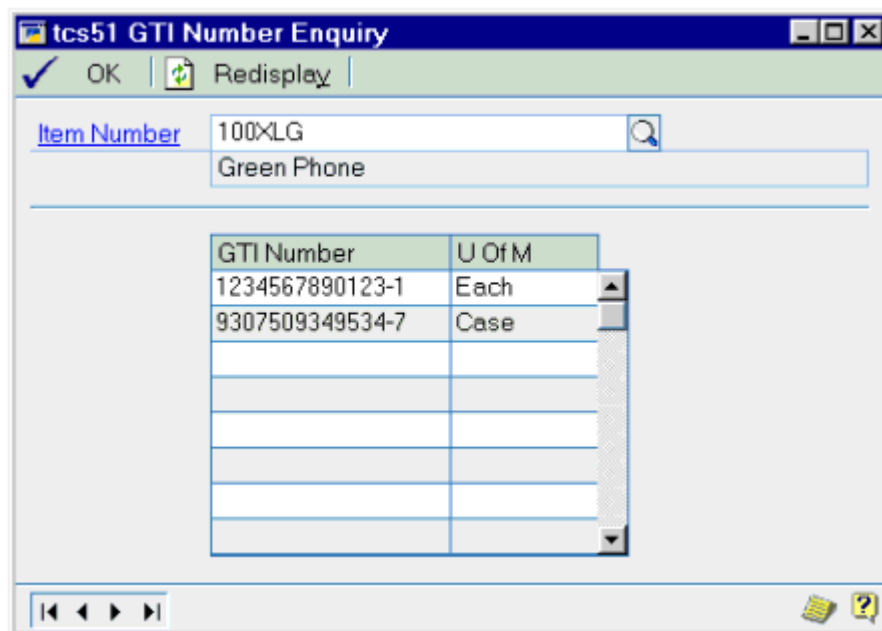


Enquiries >> Myridas Enquiries >> Dist. Enhancements >> GTI Number Enquiry

Use the GTI Number Enquiry window to:

- Search for item GTI numbers

The GTI Number Enquiry window



6.1 Searching for Item GTI Numbers

To search for item GTI numbers in the GTI Number Enquiry window:

1. Enter an item number or select one using the lookup.
2. All GTI numbers assigned to the item will be displayed in the scrolling window, along with associated units of measure.
3. Click OK to close the window.

Importing and Exporting Barcodes

7. Excel File Template Maintenance window



Cards >> Myridas Setup >> Dist. Enhancements >> Excel Template. Maint.

Use the Excel File Template Maintenance window to:

- Set up excel template ID's to enable importing/exporting of barcodes

*The Excel File
Template
Maintenance
window*

Excel Column	Maps To
A	GTI Number
B	Item Number
C	Creditor Item Number
D	U of M

Note that you must set up templates in this window prior to importing/exporting barcodes.

7.1 Setting Up Excel Template ID's

To set up excel template ID's in the Excel File Template Maintenance window:

1. Enter an excel template ID.

If you are maintaining a template ID then you can select one using the lookup.

2. Enter a description for the excel template ID.
3. Enter a creditor ID or select one using the lookup.

Note that each excel template ID can only be assigned to one creditor.

4. You can select to have the template not include header or footer rows on imported excel sheets. This would be useful, for example, where columns on the required spreadsheets have headings.

In the Number Of Header Rows To Skip and Number Of Footer Rows To Skip fields enter the number of rows that you do not want included in the import. If you do not require rows to be skipped then leave these fields set to 0.

Note that the contents of these fields have no effects when exporting vendor prices. If you are exporting vendor prices that you will be amending in Excel then re-importing, you should use an excel template ID with header and footer rows to skip set to 0.

5. In the scrolling window you should set how Excel columns will map to Myridas fields for the excel template ID. From the drop down menu's you can select the following options:

- GTI Number
- Item Number
- Creditor Item Number
- U of M

For each option you should enter an excel column, for example, A, B, or C. When you have entered a column, from the drop down menu select which Myridas field this column will be mapped to. When you import/export vendor prices the entered excel column will contain data relating to the selected Map To option.

Sample Excel column mapping

Excel Column	Maps To
A	GTI Number
B	Item Number
C	Creditor Item Number
D	U of M

Note that the Creditor Item Number and Item Number options do not both need to be mapped. However, both may be mapped if required. The GTI Number and U of M options must be mapped.

6. Click Save to save the excel template ID.

Deleting excel template ID's

Note that you can click Delete to delete an excel template ID.

7.2 Setting Up Excel Sheets for Importing and Exporting

When you are importing a spreadsheet you should set cells to text format. This will ensure that any leading 0's are carried through during import. During export cells will be set to this format by default. You should also be aware that the import/export process is case sensitive.

The import/export process functions with standard .xls Excel file types.

It is recommended that Excel is closed when you are using the GTI Numbers Import/Export Wizard.

8. GTI Numbers Import/Export Wizard



Routines >> Myridas Routines >> Dist. Enhancements >> GTI Number Wizard

The Myridas GTI Numbers Import/Export Wizard allows the user to import or export GTI Numbers for an unlimited number of items.

Use the GTI Numbers Import/Export Wizard to:

- Import or export vendor price details to/from an Excel spreadsheet

*The GTI
Numbers
Import/Export
Wizard*



8.1 Using the GTI Numbers Import/Export Wizard

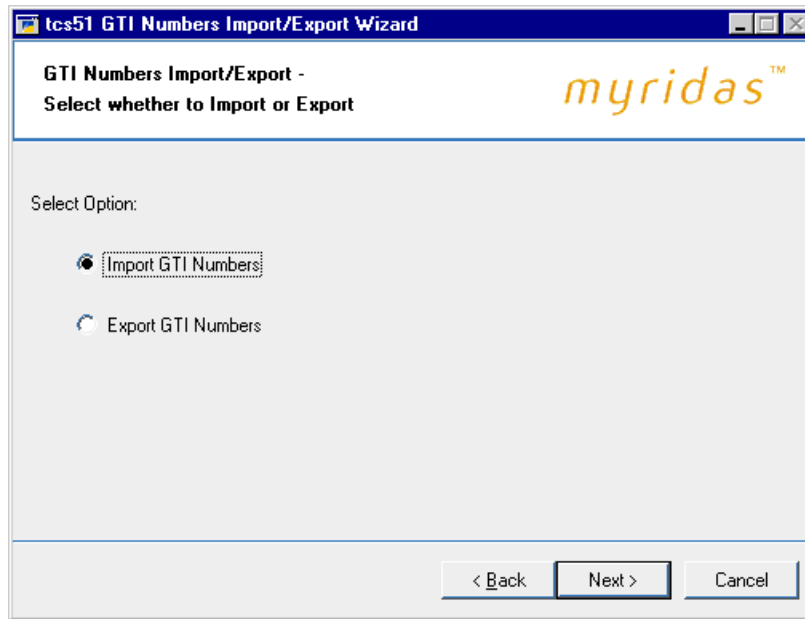
1. Click the Next button to display the next window

Note that you can click Cancel on this or any other GTI Numbers Import/Export Wizard screen to close the GTI Numbers Import/Export Wizard.

Note also that you can click the Back button on any other GTI Numbers Import/Export Wizard screen to return to the previous screen.

8.2 Import/Export screen

*The
Import/Export
screen*



8.2.1 Using the Import/Export Screen

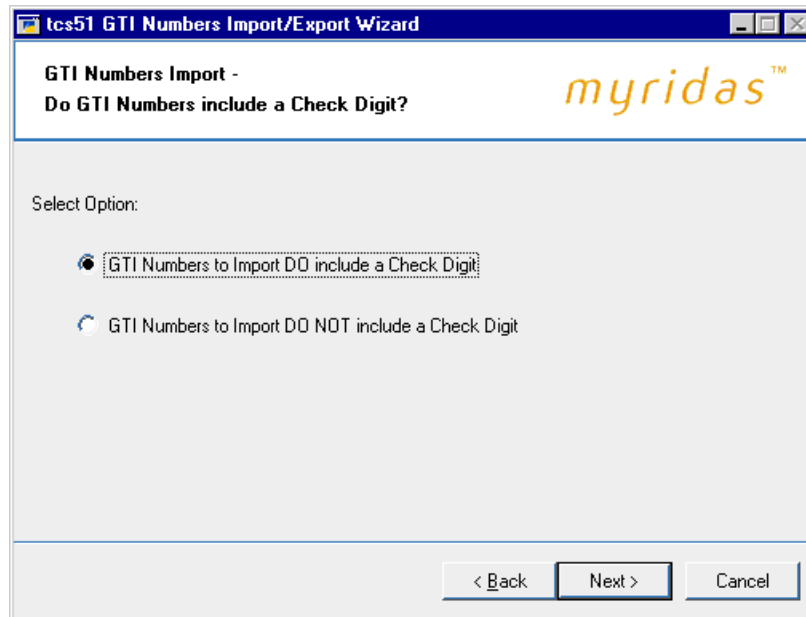
1. Click whether you want to import or export GTI numbers.
2. Click the Next button to display the next screen.

Note that details of exporting GTI numbers are to be found at [8.10](#). See below for details on importing GTI numbers.

Importing Barcodes

8.3 Check Digit screen

*The Check
Digit screen*



8.3.1 Using the Check Digit screen

1. Select whether to include check digits on the GTI numbers that are imported.
If they are not included then they will be created automatically during import.
2. Click Next.

Note that if a check digit is not included then the GTI numbers can be a maximum of 13 digits.

8.4 Select Excel File Template screen

The Select Excel File Template screen

GTI Numbers Import
Select Excel File Template

myridas™

Select Excel File Template to use:

Excel Template ID: GTITEMPLATE1

Creditor ID: ADVANCED0001

GTI Template 1

Advanced Office Systems

< Back Next > Cancel

8.4.1 Selecting an Excel File Template

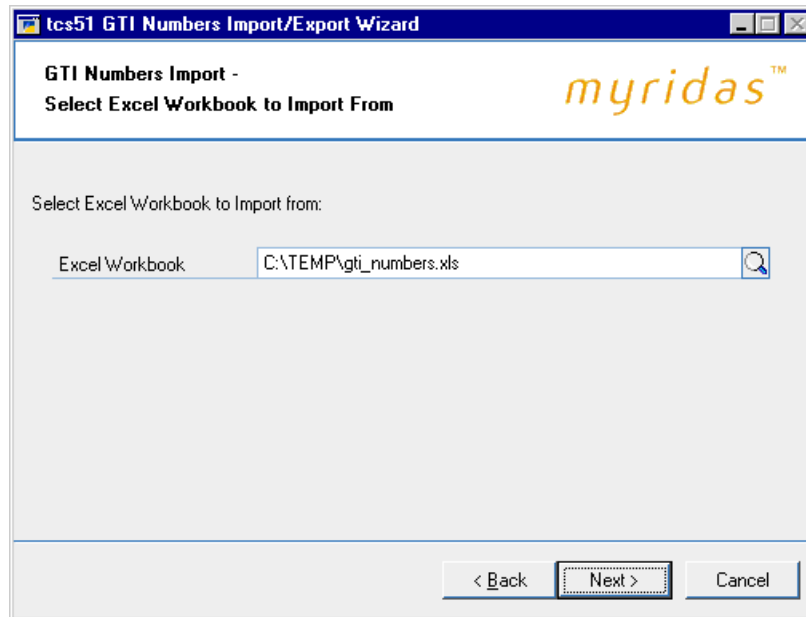
1. Enter the excel template ID (set up in the [Excel File Template Maintenance window](#)) that you want base the import on, or select one using the lookup.

Note that if you select a template where all the fields have not been mapped then an error message will be displayed.

2. The assigned creditor ID will be displayed by default. Click Next.

8.5 Select Excel Workbook screen

*The Select
Excel
Workbook
screen*



8.5.1 Selecting an Excel Workbook

1. Enter the Excel file that you want to import or select one using the lookup.

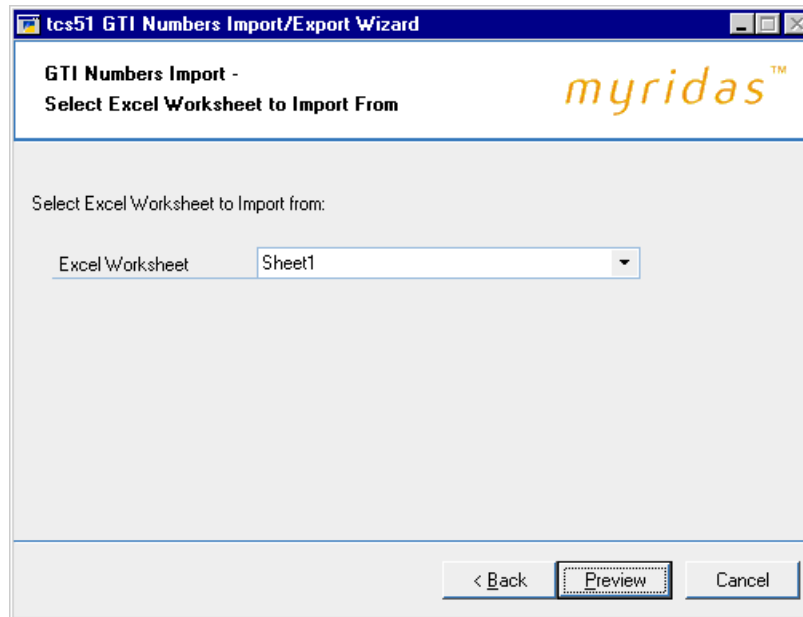
Note that you cannot just enter the name of the file; you must also enter the system path to the file, for example, C:\TEMP\gti_numbers.xls.

Also note that you can only import .xls file types. You cannot import files that are currently open in Excel.

2. Click Next.

8.6 Select Worksheet screen

The Select Worksheet screen



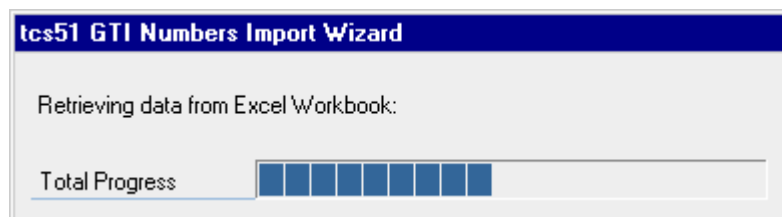
8.6.1 Selecting an Excel Worksheet

1. From the drop-down menu select the specific worksheet that you want to import.

Note that the worksheets are the individual spreadsheets held within a workbook, or Excel file. Worksheets will be displayed in the order that they are held in the selected workbook.

2. Click Preview. The details from the selected Excel worksheet will be imported into Great Plains and the progress will be displayed on the Import Wizard progress bar.

The Import Wizard progress bar

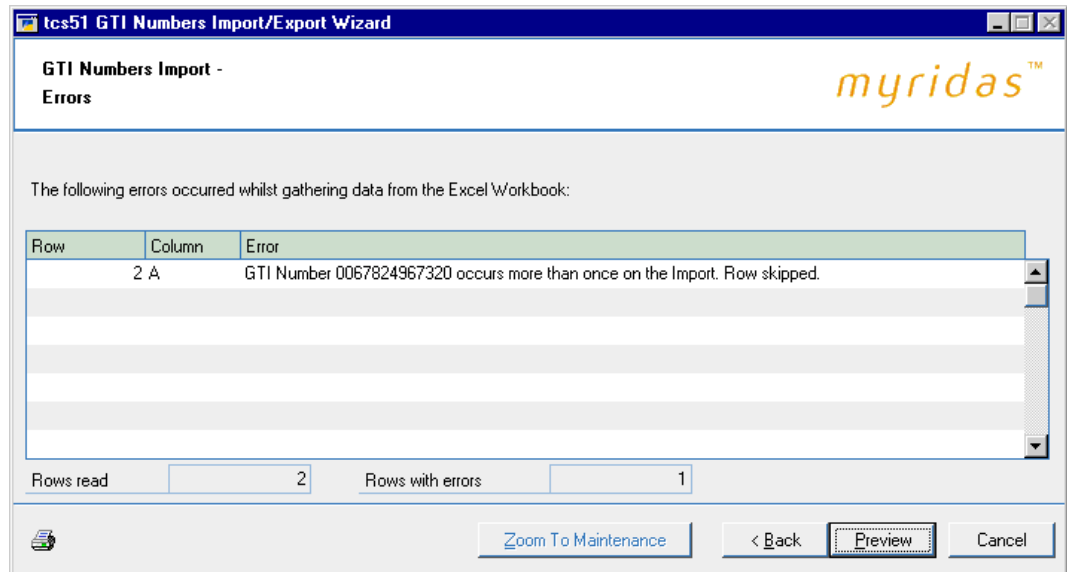


Note that if any errors are encountered during the import then the Import Errors screen will be displayed (see 8.6.2).

When the import is complete (if no errors were encountered) then the Import Preview screen will be displayed (8.7).

8.6.2 Using the Import Errors screen

The Import Errors screen



1. The Import Errors screen will be displayed where any errors are encountered during the import process. The location of the error in the spreadsheet will be displayed with details of the error.

Errors will be encountered when:

- There is an invalid excel cell format - for example you have entered text data into a field formatted for dates
- There is a duplicate record - when a row has been duplicated in the spreadsheet
- Some data "does not exist"

Click the Print icon to print the Import Errors Report detailing the import errors.

2. Where you have an error with data that "does not exist" it is possible to amend the details so that the import will be accepted.

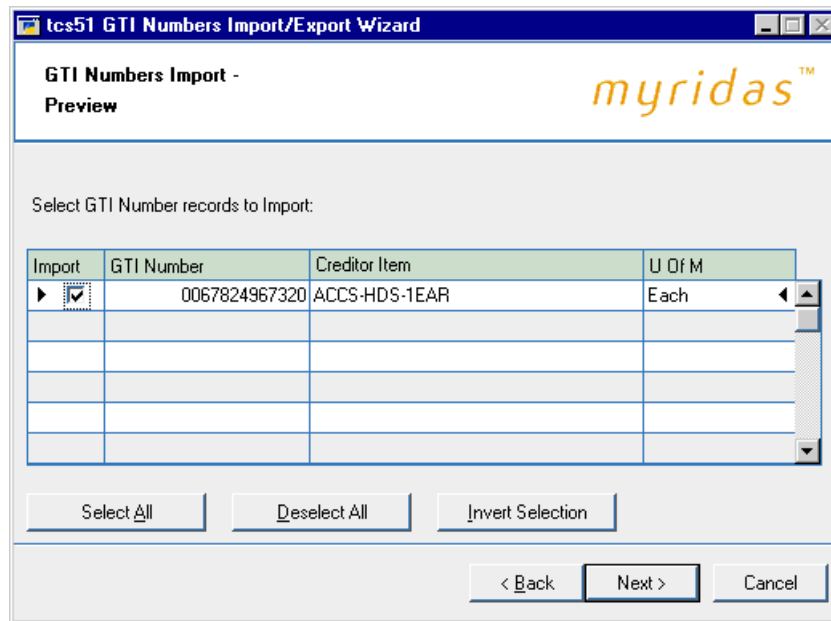
Click on the relevant line in the scrolling window and click the Zoom to Maintenance button. The relevant maintenance window will be displayed (for example, the Item Maintenance window will be displayed where the error concerns an Item Number that does not exist) with a new record created for the data that does not exist. Complete the data as required then return to the Import Errors window and click Back. The Select Worksheet screen will be displayed where you can re-import the spreadsheet.

3. Where a spreadsheet contains lines both with and without errors, the lines without errors will still be imported. Click Preview to preview these lines in the Import Preview window.

Note that if there are no valid rows then you will not be permitted to proceed.

8.7 Import Preview screen

The Import Preview screen



8.7.1 Using the Import Preview screen

1. The scrolling window will display all valid lines that you have imported, with all relevant information.
2. You need to select which lines in the upper scrolling window you want to import. When the check box for a line is marked that indicates that the line will be imported. You can check the lines manually or use the buttons detailed below.

Select All	Selects all lines for import
Deselect All	Deselects all lines so that they will not be imported
Invert Selection	Inverts the current selection - all lines selected for import will be deselected and vice versa

3. When you have completed your import selection click Next.

8.8 Completing Import screen

*The
Completing
Import screen*

8.8.1 Using the Completing Import screen

1. The excel template ID, excel workbook and worksheet that you have selected will be displayed.

Click Import to import the workbook and worksheet based on the details set in the excel template ID.

8.9 Import Completed screen

*The Import
Completed
screen*

8.9.1 Using the Import Completed Screen

1. The number of GTI Numbers imported will be displayed.

Note that this is different to the number of rows in excel. As multiple rows containing quantity break details will be incorporated into one import record.



2. The number of rows imported with errors will also be displayed, as will a warning that errors have occurred.

Errors will occur where another user is editing the record being imported. This record will not be imported.

3. Click the Print Audit button to print the Import Audit report displaying details of the import errors.
4. Click Restart Wizard if you want to import (or export) more vendor prices. Alternatively click Close Wizard to close the wizard.

Exporting Barcodes

8.10 Select GTI Numbers screen

*The Select
GTI Numbers
screen*

8.10.1 Selecting GTI Numbers

1. Click all to select to all GTI numbers or click from then enter a range of GTI numbers or select them using the lookups.
2. Click Next.

8.11 Export Check Digit screen

*The Export
Check Digit
screen*

tcs51 GTI Numbers Import/Export Wizard

GTI Numbers Export -
Export Check Digit with GTI Number?

myridas™

Select Option:

Include Check Digit on GTI Number

Exclude Check Digit from GTI Number

< Back Next > Cancel

8.11.1 Exporting Check Digits

1. Select whether to include check digits on the GTI numbers that are exported.
2. Click Next.

Note that if a check digit is not included then the GTI numbers can be a maximum of 13 digits.

8.12 Select Items screen

*The Select
Items screen*

tcs51 GTI Numbers Import/Export Wizard

GTI Numbers Export -
Select Items you wish to Export

myridas™

Select which Item Numbers you wish to export GTI Numbers for:

All

From: 100XLG

To: 128 SDRAM

< Back Next > Cancel

8.12.1 Selecting Items for Export

1. Click All to select to export GTI numbers for all items or click from then enter an item range or select a range using the lookups.

Note that only items with an assigned GTI number will be included in the export.

2. Click Next.

8.13 Select Excel File Template screen

The Select Excel File Template window

8.13.1 Selecting an Excel File Template

1. Enter the excel template ID (set up in the [Excel File Template Maintenance window](#)) that you want base the export on, or select one using the lookup.

Note that if you select a template where all the fields have not been mapped then an error message will be displayed.

2. The assigned creditor ID will be displayed by default. Click Next.

8.14 Select Excel Workbook screen

The Select Excel Workbook screen

8.14.1 Selecting a Workbook for Export

1. Enter the Excel file that you want to export to or select one using the lookup.

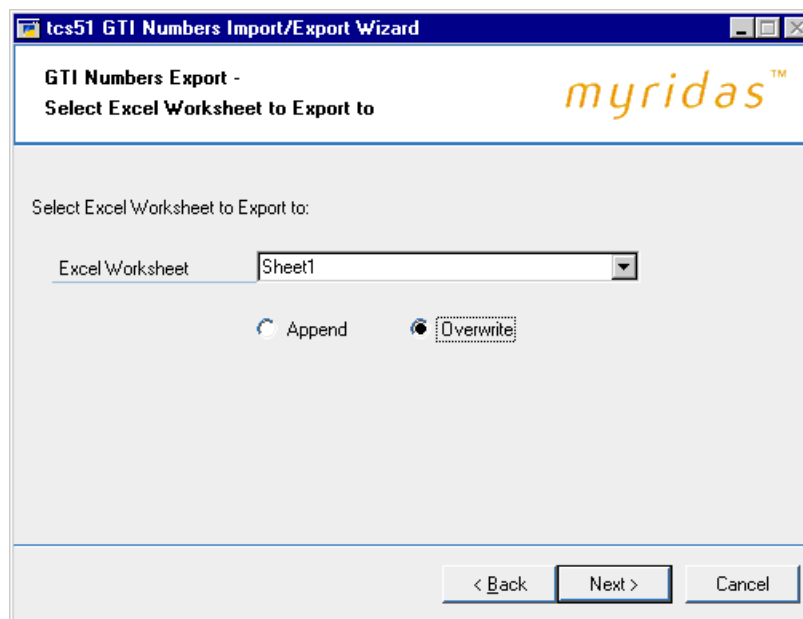
Note that you cannot just enter the name of the file; you must also enter the system path to the file, for example, C:\TEMP\gti_numbers.xls.

You cannot export to files that are currently open in Excel.

2. Click append or overwrite. Selecting append will add your exported barcodes to a current worksheet. Selecting overwrite will overwrite any current barcodes in the workbook.
3. Click Next.

8.15 Select Excel Worksheet screen

*The Select
Excel
Worksheet
screen*



8.15 1 Selecting an Excel Worksheet

1. If you selected append in the previous window select an excel worksheet from the drop-down menu.

If you selected overwrite enter an excel worksheet to export to. There will be no option to select from the drop-down menu. The excel worksheet that you entered will be created automatically on export. All other data in the workbook will be overwritten.

2. Select whether to append or overwrite the selected worksheet.

Note that if you selected to overwrite in the previous window then you will not have the option to append or overwrite.

3. Click Next.

8.16 Export Preview screen

*The Export
Preview
screen*



8.16.1 Previewing Exports

1. The GTI number range and item number range that you have selected will be displayed.
2. Click Next to complete the export.

8.17 Completing Export screen

*The
Completing
Export
screen*

8.17.1 Completing Barcode Export

1. The excel template ID, excel workbook and worksheet that you have selected will be displayed.
2. Click Export to export GTI numbers to the selected worksheet.

8.18 Export Completed screen

*The Export
Completed
screen*

8.18.1 Using the Export Completed screen

1. The number of GTI numbers exported will be displayed.
2. Click Restart Wizard if you want to export (or import) more vendor prices, or Zoom To Excel to view that exported barcodes in the Excel spreadsheet. Alternatively click Close Wizard to close the wizard.

Part Delivery Restrictions

Part Delivery Restrictions functionality enables you to set up process holds to restrict incomplete orders from being transferred to invoice. Set up and apply process hold IDs using the [Part Delivery Transfer Hold window](#).

When a no part delivery hold has been applied, sales orders with a quantity ordered that is greater than the quantity to invoice cannot be transferred to invoice. Any quantities cancelled will be taken into account. The order must be completed before transfer is permitted.

You can use the [Allow Part Delivery window](#) during sales transaction entry to set or remove part delivery restrictions for individual sales documents.

Note that part delivery transfer restrictions are only applicable to sales orders where the invoice ID used for transfer is a logistically controlled invoice set up using Great Plains Advanced Distribution.

9. Part Delivery Transfer Hold window



Cards >> Myridas Setup >> Dist. Enhancements >> Part Deliv. Xfer Hold

Use the Part Delivery Transfer Hold window to:

- Setup up process holds to restrict part deliveries

*The Part
Delivery
Transfer Hold
window*

9.1 Setting Up Restrictions on Part Deliveries

To set up restrictions on part deliveries using the Part Delivery Transfer Hold window:

1. Enter or select the process hold ID to be used for restricting part deliveries.

Note that the process hold ID must be set to apply holds to transferring documents in the Sales Process Holds Setup window.

2. Select one of the default options:

No Part Delivery	Part delivered documents will not be transferred to invoice unless otherwise specified
Allow Part Delivery	Part delivered documents will be transferred to invoice unless otherwise specified

Note that you can amend these settings for individual documents using the Allow Part Delivery window accessible from the Sales Transaction Entry window.

3. Click OK to confirm your settings and close the window.

10. Allow Part Delivery window



Transactions >> Sales >> Sales Trx Entry >> Extras >> Part Delivery

Use the Allow Part Delivery window to:

- Apply or remove part delivery restrictions for individual documents

The Allow Part Delivery window

10.1 Applying and Removing Part Delivery Restrictions for Individual Documents



To apply and remove part delivery restrictions for individual documents using the Allow Part Delivery window:

1. The default option set in the Part Delivery Transfer Hold window will be selected by default. Click an alternative option if required. This will be applied to the displayed document only.
2. Click OK to close the window.

Appendix A

Access to Myridas Windows

Distribution Enhancements

Window Name	 Menu Access	 Other Access
Allow Part Delivery		Transactions >> Sales >> Sales Trx Entry >> Extras >> Part Delivery
Apply Inventory Transaction Reason Code	Transactions >> Inventory >> Transaction Entry >> Extras >> Apply Reason Code	Transactions >> Inventory >> Transfer Entry >> Extras >> Apply Reason Code
Apply Sales Transaction Reason Code	Transactions >> Sales >> Sales Trx Entry >> Extras >> Apply Reason Code	
Barcode Format Maintenance	Cards >> Myridas Setup >> Dist. Enhancements >> Barcode Format Maint.	
Excel File Template Maintenance	Cards >> Myridas Setup >> Dist. Enhancements >> Excel Template Setup	
GTI Number Enquiry	Enquiries >> Myridas Enquiries >> Dist. Enhancements >> GTI Number Enquiry	
GTI Number Maintenance	Cards >> Myridas Cards >> Dist. Enhancements >> GTI Number Maint.	
GTI Numbers Import/Export Wizard	Routines >> Myridas Routines >> Dist. Enhancements >> GTI Number Wizard	
Part Delivery Transfer Hold	Cards >> Myridas Setup >> Dist. Enhancements >> Part Deliv. Xfer Hold	
Transaction Reason Code Maintenance window	Cards >> Myridas Setup >> Dist. Enhancements >> Reason Code Maint.	

Appendix B

Myridas Reports

Myridas provides multiple reports to increase information visibility.

Report Name	Functionality
Import Audit report	Prints details of GTI number import errors
Inventory Transaction Reason Code report	Prints details of all inventory documents with reason codes assigned.
Sales Transaction Reason Code report	Prints details of all sales documents with reason codes assigned.

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