

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

Version 7.6 for Great Plains 7.5

## **Item Life Cycle**



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 Item Life Cycle module:

- Item Life Cycle



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>.

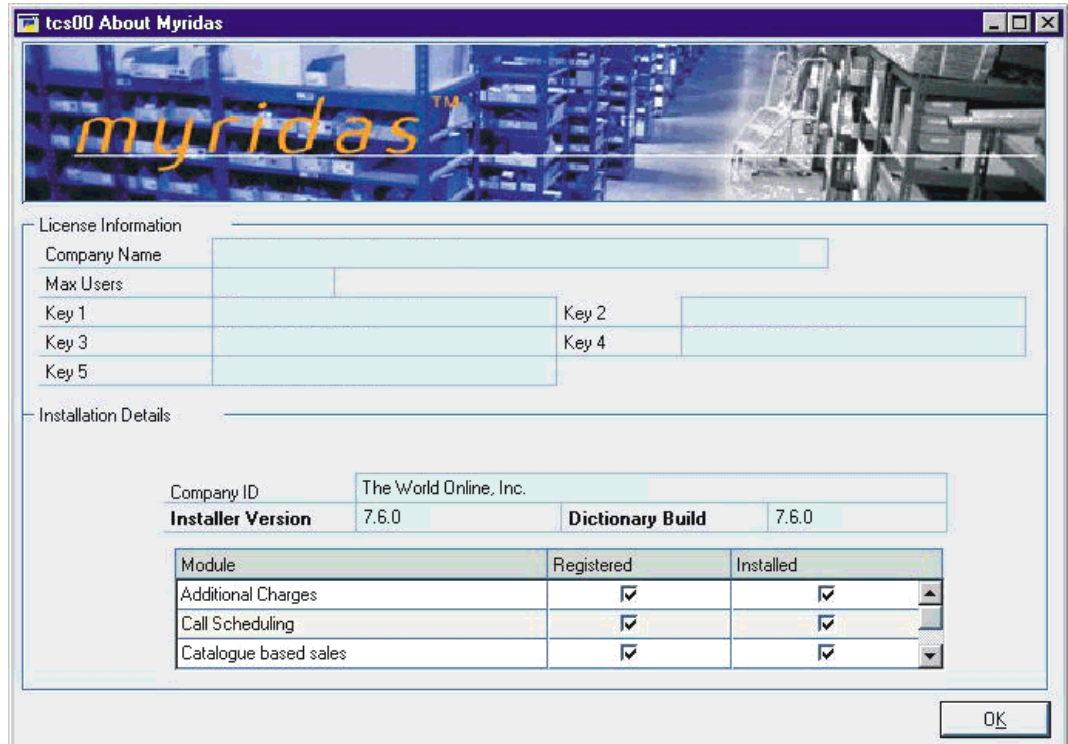
# About Myridas



*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*



## Item Life Cycle

The Myridas Item Life Cycle module allows for specific statuses to be set up and assigned to stock items. These statuses represent the stages in the Item Life Cycle, for example, an item may be assigned the status of “Under Development” or “Obsolete”.

The main features of the Item Life Cycle module are:

- The facility to maintain specific stock item statuses with descriptions and attributes
- The facility to assign a status to an item or range of items
- The prevention of selling items where there is insufficient stock or where items have been assigned “Do Not Sell” status
- The prevention of purchasing items where they have been assigned “Do Not Purchase” status

The Myridas Item Life Cycle module is fully integrated into Great Plains, giving additional functionality to standard Great Plains Item Maintenance, Sales and Purchasing applications. The user is given the option to assign statuses to an item at different stages in its life cycle, and so control which processes are allowed at each stage.

### *Status Codes*

Different statuses assigned to an item can have effects on several transaction types, for example Sales Orders, so that certain transactions will not be permitted dependant upon the attributes assigned to an item. Use the [Status Code Maintenance window](#) to create and maintain item Status Codes.

Status Attribute	Effects On
“Do Not Sell”	Sales Transaction Entry window
“Sell Only When In Stock”	Sales Transaction Entry window
“Do Not Purchase”	Purchase Transaction Entry window
"Do Not Include In Item Lookup"	Items window

Items that have not been assigned a status under the Item Life Cycle module will be subject to standard Great Plains behaviour.

## 1. Status Code Maintenance Window



*Cards >> Myridas Cards >> Item Life Cycle >> Status Code Maint.*

Use the Status Code Maintenance window to:

- Create or edit a Status Code
- Enquire about a specific Status Code

*The Status Code Maintenance window*

### 1.1 Creating and Editing Status Codes

An item Status Code has variable attributes and may be used to control the permitted activities for a specified item or items.

**To create or edit an item Status Code in the Status Code Maintenance window:**

1. Enter a Status Code ID or click the lookup to select one from the Status Code Lookup window. If you select an existing Status Code, its description and attributes will be displayed in the window.
2. For new Status Codes enter a Status Code description.
3. Confirm any attributes that shall be required by the Status Code by clicking on the relevant check boxes.

The “Do Not Sell” and “Sell Only When In Stock” attributes are mutually exclusive and may not be selected for the same item/items.

If you click the "Do Not Include In Item Lookup" option then the selected Item Number will not be visible when using the Items window.

4. Click the Save button.

*Deleting a Status Code*

Click the Delete button to delete a status code. You will not be able to delete a Status Code if there are current items assigned to that Status Code.

## 2. Item Status Code Allocation Window



*Cards >> Myridas Cards >> Item Life Cycle >> Assign Status Range*

Use the Item Status Code Allocation Window to:

- Assign Status Codes to multiple items

*The Item Status Code Allocation window*

### 2.1 Allocating Status Codes to Multiple Items

**To assign items to a Status Code in the Item Status Code Allocation window:**

1. Enter the required Status Code ID or click the lookup to select one from the Status Code Lookup window. The Status Code description and attributes will be displayed, and any items already assigned to this Status Code will be displayed in the scrolling window.
2. For each item to be assigned to the Status Code enter an Item Number in the scrolling window or click the lookup to select one from the Items window.

Items will be added to the Status Code in the order in which you select them. Click the Sort button to sort items by item number (optional).

3. Click the Save button to save the changes to your Status Code

Click the Ranges button to open the [Item Status Code Allocation Ranges window](#) where ranges of items can be assigned to a Status Code.

### Deleting Status Code allocations

Click the Delete button to de-allocate any items that have been assigned to a Status Code.

## 3. Item Status Code Allocation Ranges Window



*Cards >> Myridas Cards >> Item Life Cycle >> Assign Status Range >> Click the Ranges button*

Designated Status Codes may be allocated to a range of related items (item numbers, generic descriptions, Class ID's) simultaneously.

Use the Item Status Code Allocation Ranges window to:

- Assign ranges of items to a Status Code

### The Item Status Code Allocation Range window

**tcs13 Item Status Code Allocation Range**

Status Code: OBSOLETE  
Obsolete Stock

Item Number:  All  From:  To:

Generic Description:  All  From:  To:

Class ID:  All  From: RETAIL To:

Select Items whose Status Code is set to:  
 Unassigned  Any  Specified:

Item Number	Generic Desc	Class ID	Item Description	Status Code	Status Description
ACCS-CRD-12WH			Phone Cord - 12' White		
ACCS-CRD-25BK			Phone Cord - 25' Black		
ACCS-HDS-1EAR			Headset-Single Ear		
ACCS-HDS-2EAR			Headset - Dual Ear		
ACCS-RST-DXBK			Shoulder Rest-Deluxe Black		
ACCS-RST-DXWH			Shoulder Rest - Deluxe White		

Transfer OK Preview

### 3.1 Assigning Ranges of Items to a Status Code

#### **To assign a range of items to a Status Code in the Item Status Code Allocation Ranges window:**

The Item Status Code Allocation Ranges window will open with details of the current Status Code selection. Item ranges are assigned by item number, generic description and by Class ID.

1. Click All to assign all records or From to assign a selection of records for Item Number, Generic Description and Class ID. If you select From, enter To and From values to specify a range, or use the lookups.

2. To specify items to be added to the Status Code:

- 2.1. Select the Unassigned check box to add unassigned items only to the Status Code.

Note that items previously assigned to different Status Codes will not be reassigned to the new Status Code.

- 2.2. Select the Any check box to add items previously assigned to any Status Code, or unassigned items, to the new Status Code.

- 2.3. Select the Specified check box to add items previously assigned to a specified Status Code. Enter the required Status Code ID or click the lookup to select one from the Status Code Lookup window.

3. Click the Preview button to verify your selection in the scrolling window. The item number and item description of each item to be assigned will be listed. Click the Show button to display the generic description, class ID, current Status Code and Status Code description (where relevant).



4. Click the Transfer button to assign your item selection to the Status Code. Click OK to close the Transfer Completed Successfully dialog box.

5. Click OK to return to the Item Status Code Allocation window.

## 4. Assign Status Code to Item Number Window



*Cards >> Myridas Cards >> Item Life Cycle >> Assign Status Individ.*

Use the Assign Status Code to Item Number window to:

- Assign Status Codes to single items.

*The Assign Status Code to Item Number window*

### 4.1 Assigning a Status Code to an Individual Item

Status can also be assigned to an item via the Extras option in Item Maintenance.

**To assign Status Codes to single items in the Assign Status Code to Item Number window:**

1. Enter the required Item Number ID or click the lookup to select one from the Item Number Lookup window.
2. Where the item has already been assigned a Status Code this code will be displayed in the window, with any allocated attributes.
3. To add a Status Code to an item, or amend a current item Status Code, either enter the required Status Code ID or click the lookup to select one from the Item Number Lookup window.
4. Click the Save button.

*Deleting Status Code Allocations*

Click the Delete button to de-allocate an item that has been assigned to a Status Code

Note that a record cannot be saved without a valid status.

## 5. Sales Transactions – Item Life Cycle Version



*Transactions >> Sales >> Sales Trx Entry*

Use the Sales Transaction Entry window:

- To enter details of sales orders, invoices and quotations.

The Great Plains Sales Transaction Entry window has been enhanced for the Item Life Cycle module to account for item status upon entry of sales transactions.

*The Sales Transaction Entry window*

Myridas will look at the attributes of any Status Codes assigned to items, as the Item Number is selected in the Sales Transaction Entry window. The selection of items with certain Status Code attributes may lead to additional windows or warnings not featured in standard Great Plains.

## 5.1 “Do Not Sell” Items



If an item is selected in the Sales Transaction Entry window that has been allocated a Status Code incorporating the attribute “Do Not Sell”, then a warning will be displayed with the item’s status description and the message “Item not available for sale”.

*The Item not available for sale warning*



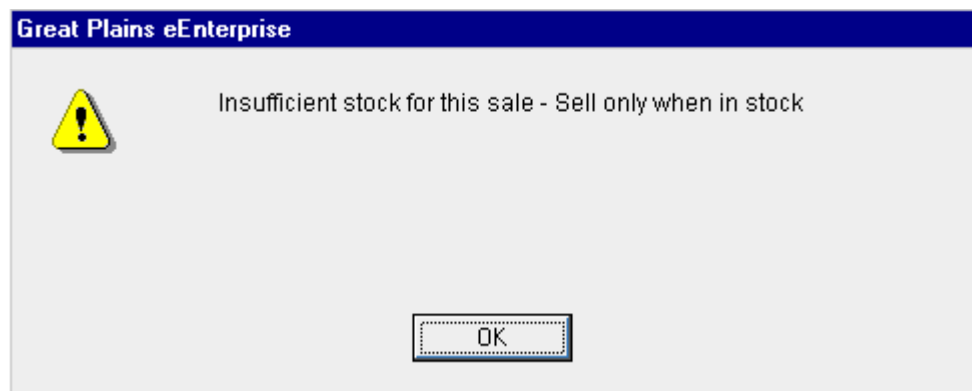
Note that you will not be allowed to continue with this transaction line in the Sales Transaction Entry window. This applies to all transaction types with the exception of returns.

## 5.2 “Sell Only When In Stock” Items – Sales Orders, Invoices and Back Orders



An item may be entered into the Sales Transaction Entry window where the quantity required is greater than the quantity available. If that item has been allocated a Status Code incorporating the attribute “Sell Only When In Stock”, then a warning will be displayed with the item’s status description and the message “Insufficient stock for this sale”.

*The Insufficient stock for this sale warning*



Note that you will not be allowed to continue with this transaction line in the Sales Transaction Entry window. This applies to sales orders and invoices where the document type ID is set to allocate by line item.

Where the document type ID for a sales order or invoice is **not** set to allocate by line item, then a similar warning will be given, but with the option to continue with the sales order/invoice, regardless of the stock balance.

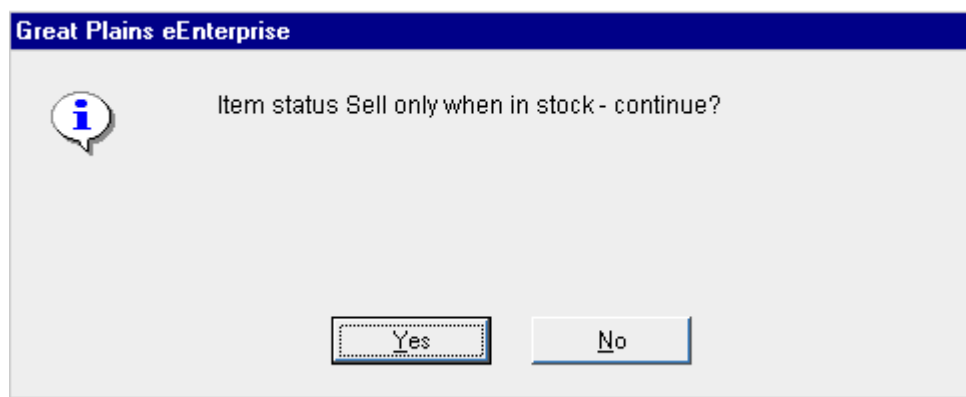
When a “back order” document is entered, then the “Item not available for sale” warning will be raised, regardless of the stock balance.

### 5.3 “Sell Only When In Stock” Items – Quotations



An item may be entered into the Sales Transaction Entry window that has been allocated a status with the attribute, “Sell Only When In Stock”. Should an item with this attribute be entered into a quotation, then a warning will be displayed with the item status description and the message “Item status”.

*The Item status warning*

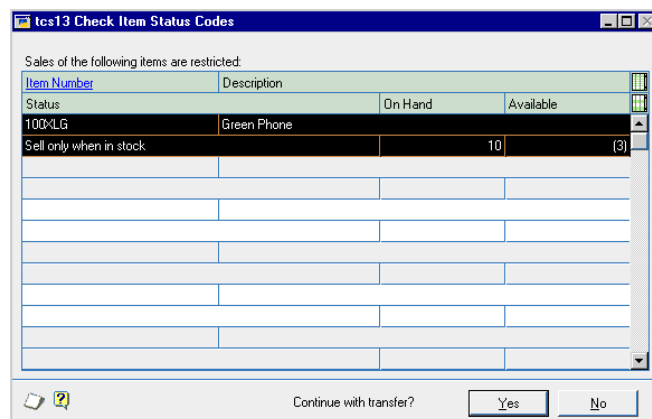


Note that the option will be given to continue with the quotation.

### 5.4 Transferring Quotations to Sales Orders/Invoices

A standard feature of Great Plains allows you to transfer a quotation document to a sales order or an invoice. If you are using the Item Life Cycle module, then should you select any items to which the status attributes “Do Not Sell” or “Sell Only When In Stock” have been allocated, a scrolling window will be displayed with the message “Check Item Status Codes”.

*The Check Item Status Codes window*



This window will contain the message “Sales of the following items are restricted”. All relevant item numbers will be listed in the scrolling window below, along with their item description, status description, on-hand quantity and available stock.

### To continue with the transfer:

1. Click the Yes button.

Note that if you select to continue with the transfer then all items on the transfer, including those with “Do Not Sell” and “Sell Only When In Stock attributes”, will be transferred.

Clicking the No button will stop the transfer.

## 6. Purchase Transactions – Item Life Cycle Version



*Transactions >> Purchasing >> Purchase Order Entry*

Use the Purchase Order Entry window:

- To enter details of purchase orders.

The Great Plains Purchase Transaction Entry window has been enhanced for the Item Life Cycle module to account for item Status Code upon entry of purchase transactions.

*The Purchase  
Order Entry  
window*

The screenshot shows the 'Purchase Order Entry' window with the following details:

- Type: Standard
- PO Number: PO2090
- Buyer ID: (empty)
- Date: 17/10/02
- Vendor ID: ACETRAVE0001
- Name: Ace Travel
- Currency ID: Z-US\$
- Allow Sales Documents Commitments:

Vendor Item	U of M	Quantity Ordered	Unit Cost
100XLG	Each	5	\$28.46
		0.00	\$0.00

Summary:

- Remaining PO Subtotal: \$142.30
- Subtotal: \$142.30
- Trade Discount: \$0.00
- Freight: \$0.00
- Miscellaneous: \$0.00
- Tax: \$0.00
- Total: \$142.30

Additional fields: Purch Addr Tax Sched: AUSNSWST+20, Comment ID: (empty)

Navigation: PO Number dropdown, PO Status: New, Revision: 0

## 6.1. "Purchase Not Allowed"



If an item is selected in the Purchase Order Entry that has been allocated a Status Code with the attribute "Do Not Purchase", then a warning will be displayed with the item status description and the message "Purchase not allowed".

*The Purchase  
not allowed  
warning*



You will not be allowed to continue with the purchase of this item.

## 6.2 Purchase Order Generation with the Item Life Cycle Module

Use the Purchase button in the Sales Transaction Entry window or Sales Document Range Enquiry window:

- To generate purchase orders automatically

The Great Plains auto-generation of purchase orders has been given added functionality by the Item Life Cycle module to check for items with a “Do Not Purchase” status attribute before the purchase order is generated.

### To check item status through this function:

1. Click the Generate button on the Purchase Order Preview window.

If any items with the status description “Do Not Purchase” are included in the order, then the Check Purchase Item Status Codes window will be displayed. Any items with the “Do Not Purchase” status attributed to them will be displayed in the scrolling window below.

2. Purchasing of these items is restricted. Clicking the Yes option will generate the purchase order for all items on that order, including those with the status attribute, “Do Not Purchase”.

Clicking the No button will return you to the Purchase Order Preview window. You may then edit the purchase order details and/or remove items from the purchase order.

*The Check  
Purchase Item  
Status Codes  
window*

Item Number	Description	On Hand	Available
100XLG	Green Phone	10.00	(3.00)
Obsolete Stock			

Proceed with the Purchase Order Generation ?

Yes No

## 7. Items Window – Item Life Cycle Version



*Cards >> Inventory >> Item Maintenance window >> Click the Item Number lookup button*

Use the Items window to:

- View, edit or select items

The Great Plains Items window has been enhanced for the Item Life Cycle module to include the field Status Code. This extra information may be useful during sales transaction entry, for example.

There is also the additional option to Only Show Items whose Status Code is set NOT to show in the Item Lookup. In the Status Code Maintenance window you had the option to set items to not show on the Items window. These items will not currently be displayed. If you click select the new option on the Items window then only items that you have set not to display will be displayed.

*The Great  
Plains Items  
window*

Item Number	Short Description	Status Code	Qty. On Hand	Qty. Avail.	PD Quantity
Description		Class ID	Generic		U Of M
100XLG	Phone		130	101	0
128 SDRAM	RAM		198,068	197,631	0
24X IDE	CD ROM		10	8	0
256 SDRAM	RAM		10	8	0
32 SDRAM	RAM		10	9	0
32X IDE	CD ROM		10	10	0
333PROC	Processor		10	7	0
4.5HD	Drive		10	10	0
400PROC	Processor		10	10	0
40X IDE	CD ROM		10	10	0

Only show Items whose Status Code is set NOT to show in the Item Lookup

by Item Number



Select Cancel

Note that additional functionality is available in the Item window through other Myridas modules.

## Appendix A

### Access to Myridas Windows

#### Item Life Cycle

<b>Window Name</b>	 <b>Menu Access</b>	 <b>Other Access</b>
Status Code Maintenance	Cards >> Myridas Cards >> Item Life Cycle >> Status Code Maint.	Cards >> Inventory >> Item >> Click Item Number Lookup >> Items window >> Click Status Code
Item Status Code Allocation	Cards >> Myridas Cards >> Item Life Cycle >> Assign Status Range	
Item Status Code Allocation Ranges	Item Status Code Allocation window >> Ranges button	
Assign Status Code to Item Number	Cards >> Myridas Cards >> Item Life Cycle >> Assign Status Individ.	Item Maintenance window >> Extras >> Assign Status Code
Check Purchase Item Status Codes	Transactions >> Sales >> Sales Trx Entry >> Purchase Order Preview >> Generate	

## Appendix B

### Alternate Great Plains Windows

Some Great Plains windows have been modified to incorporate Myridas behaviour:

<b>Great Plains Window Name</b>	<b>Series</b>	<b>Myridas Module</b>	<b>Modification</b>
Items	Inventory	Item Life Cycle	<p>New Status Code field</p> <p>This modification will only be available if the Great Plains Advanced Distribution module is also installed</p> <p>New Only show Items whose Status Code is set Not to show in the Item Lookup</p>

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