

*myridas*TM *User Guide*

Version 7.7 for Great Plains 7.5

Distribution Enhancements



Trinity Computer Services Limited

November 2003

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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>.

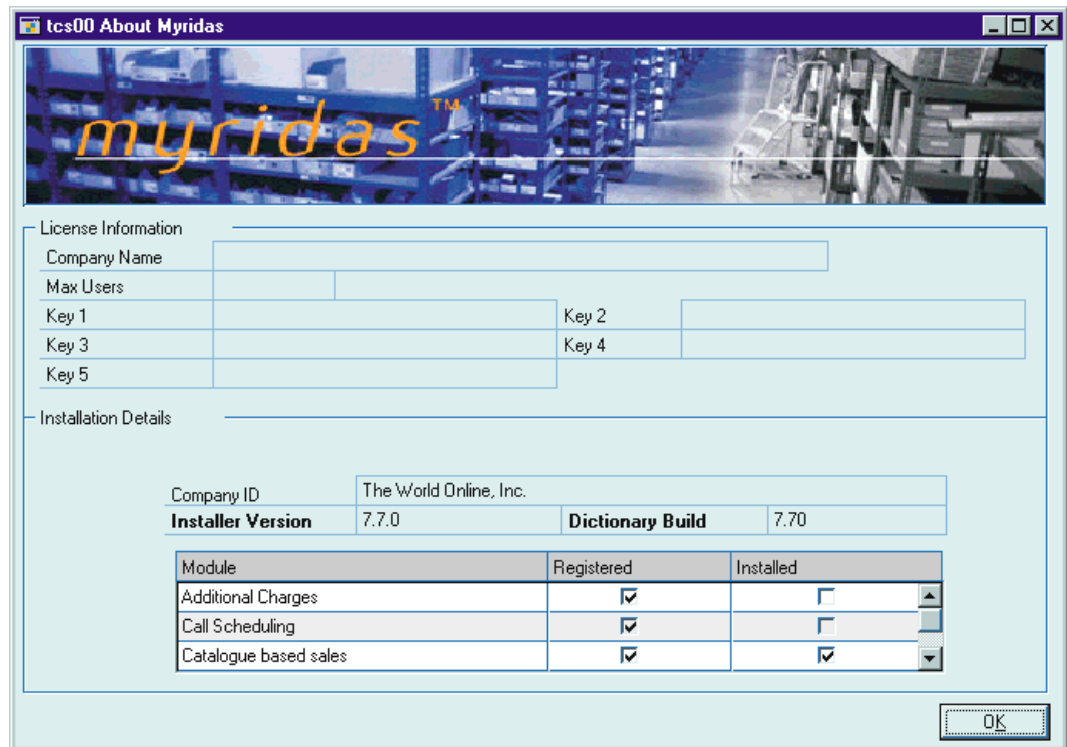
About Myridas



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 multiple 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.

[Debtor Specific Items](#) enables you to assign debtors to a specific item number. Once the relationship is created, only debtors assigned to the item number will be permitted to purchase it in sales transaction entry.

[Alternate Items](#) gives you functionality to assign alternate item codes to inventory items. The alternate codes can be keyed in to several windows and are automatically replaced with the actual inventory item number. Alternate item numbers can be imported and exported on a mass scale using the [Alternate Item Numbers Import/Export Wizard](#).

[Sales Batch Purge](#) gives you the functionality to remove sales batches that no longer contain any transactions.

[Document Margins](#) lets you view margins on sales transactions during transaction entry, and automatically updates the [Document Margins window](#) with new details entered into a transaction. Select margin percentage calculation types in the [Distribution Enhancements Setup window](#).

[Required Debtor Reference](#) functionality lets you denote debtors and transaction types as requiring entry of a debtor purchase order number during sales transaction entry.

[User Default Sites](#) functionality enables you to set default site IDs for users in sales transaction entry. If required users can be restricted to operating with only the default site ID assigned to them.

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
- The facility to restrict the sale of any item to specified debtors
- The facility to assign alternate item numbers to inventory items

- Import/export wizard allowing you to import and export alternate items
- Purge empty sales batches
- View accurate sales margins during transaction entry
- Set debtors and transaction types as requiring entry of a debtor purchase order number during sales transaction entry
- Set default sites for users

1. Distribution Enhancements Setup window

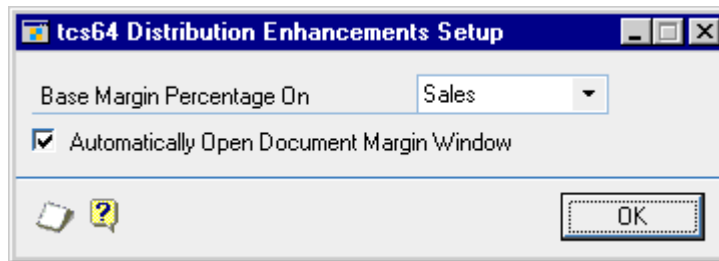


Cards >> Myridas Setup >> Dist. Enhancements >> Dist. Enhancem Setup

Use the Distribution Enhancements Setup window:

- Setup document margin calculation details

*The
Distribution
Enhancements
Setup window*



The settings you make in this window will define how document margins displayed in the [Document Margins window](#) are calculated. See below for further details.

1.2 Setting Up Document Margin Calculation Details

To setup document margin calculations in the Distribution Enhancements Setup window:

1. From the Base Margin Percentage On drop-down menu select Costs or Sales.

The margin is the sum of all transaction extended prices minus the sum of all unit cost prices for items on a transaction. The margin percentage is calculated dependant on your selection:

Sales	Margin / Total sales value for document lines
Costs	Margin / Total cost value for document lines

2. Select the Automatically Open Document Margin Window option to have the Document Margin window open automatically during sales transaction entry. If you do not select this option the Document Margin window is still available as an Extras option from the Sales Transaction Entry window and the Sales Item Detail Entry window.
3. Click OK to save your settings and close the window.

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](#).

2. 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*

2.1 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.

3. 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.

3.1 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.

4. 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](#) or the [Scanned GTI Number Maintenance window](#) the required 0's will be prefixed to the number you created in the underlying functionality of barcode maintenance.

5. Barcode Format Maintenance window

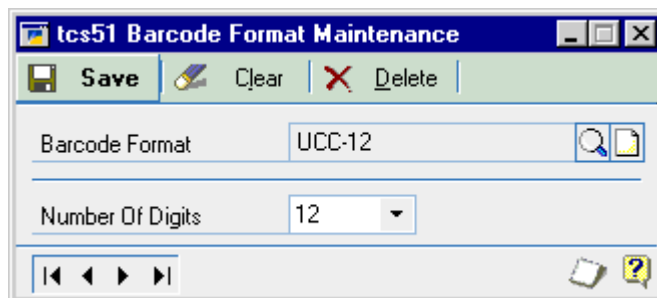


Cards >> Myridas Setup >> Dist. Enhancements >> Barcode Format Maint.

Use the Barcode Format Maintenance window to:

- Set up barcode formats

*The Barcode
Format
Maintenance
window*



5.1 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.

6. 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

Note that you can also assign GTI numbers in the [Scanned GTI Number Maintenance window](#).

6.1 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.

7. Scanned GTI Number Maintenance window



Cards >> Myridas Cards >> Dist. Enhancements >> Scan. GTI Num Maint

Use the Scanned GTI Number Maintenance window to:

- Set up and assign GTI numbers with a barcode scanner

The Scanned GTI Number Maintenance window

7.1 Setting Up and Assigning GTI Numbers

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

1. Scan in a GTI number using a barcode scanner.
2. Click Options and select or deselect the Scanned Barcode includes Check Digit option. This should be set to reflect the settings of your barcode scanner and carried out before you scan in barcodes.

The number in the Check Digit field will be calculated automatically regardless of the option selected.

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.

8. 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

GTI Number	U Of M
1234567890123-1	Each
9307509349534-7	Case

8.1 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

9. Excel File Template Maintenance window



Routines >> Myridas Routines >> Dist. Enhancements >> GTI Number Excel Tmpl

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.

9.1 Setting Up Excel Template IDs

To set up excel template IDs 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 barcodes. If you are exporting barcodes 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 barcodes 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.

9.2 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.

10. 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 barcodes details to/from an Excel spreadsheet

*The GTI
Numbers
Import/Export
Wizard*



10.1 Using the GTI Numbers Import/Export Wizard

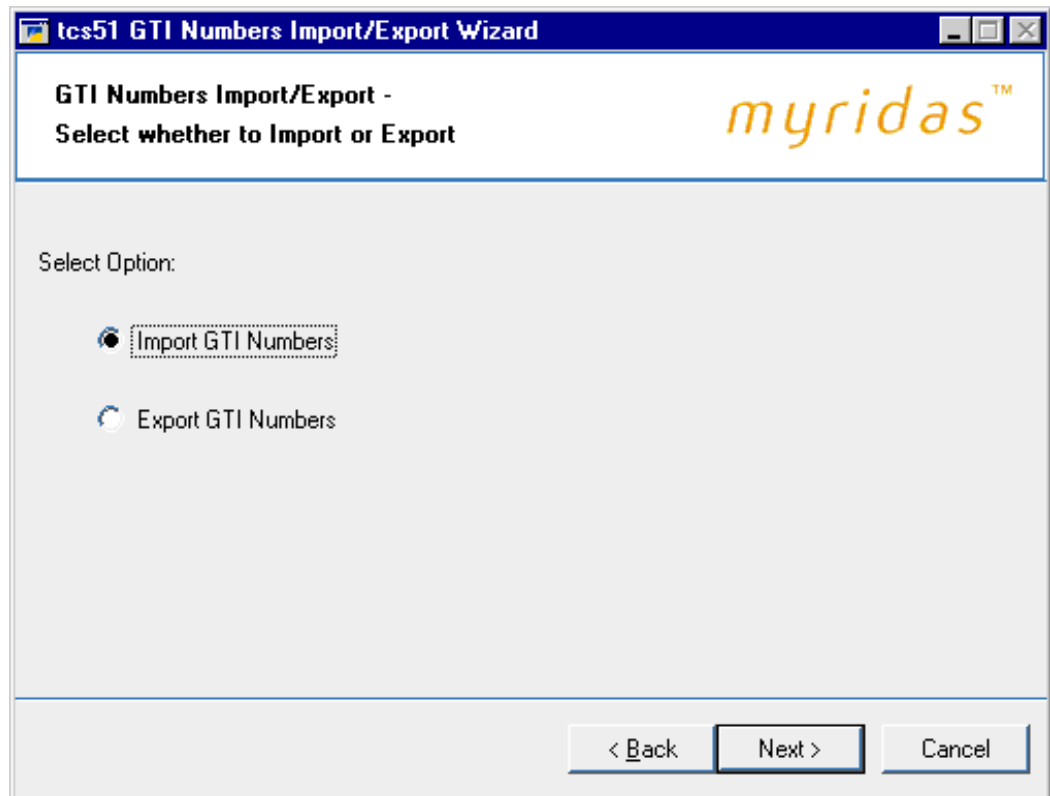
1. Click the Next button to display the next window

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.

10.2 Import/Export screen

*The
Import/Export
screen*



10.2.1 Using the Import/Export Screen

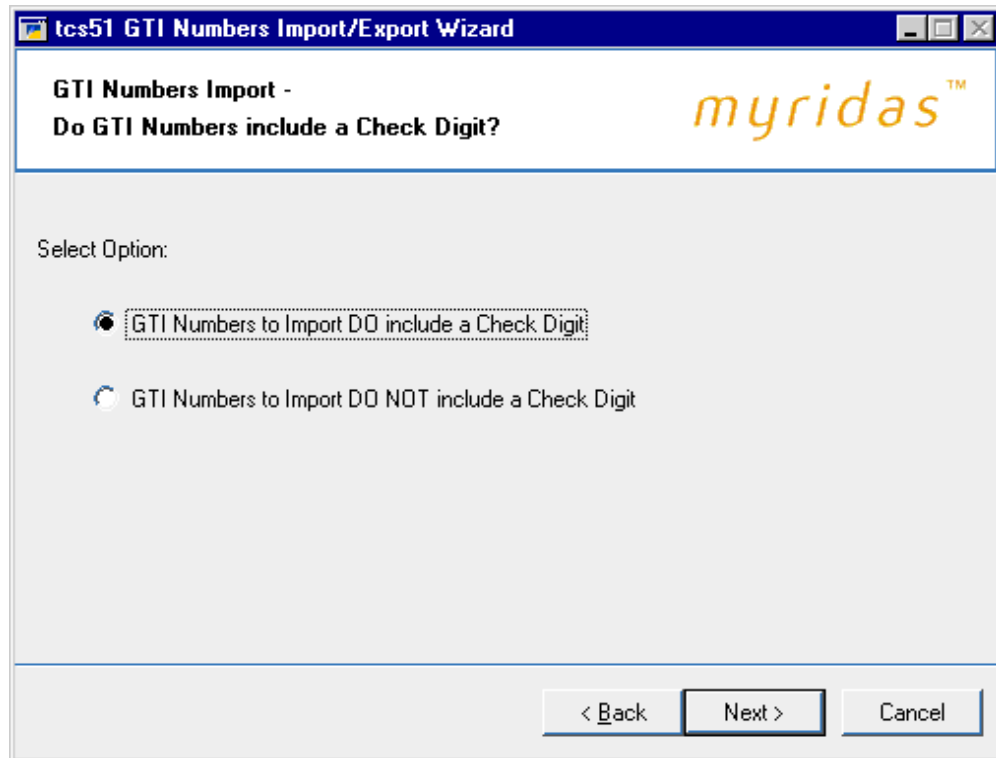
1. Click whether you want to import or export GTI numbers.
2. Click the Next button to display the next screen.

Note that details of exporting GTI numbers are to be found at [10.10](#). See below for details on importing GTI numbers.

Importing Barcodes

10.3 Check Digit screen

The Check Digit screen



10.3.1 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.

10.4 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

10.4.1 Selecting an Excel File Template

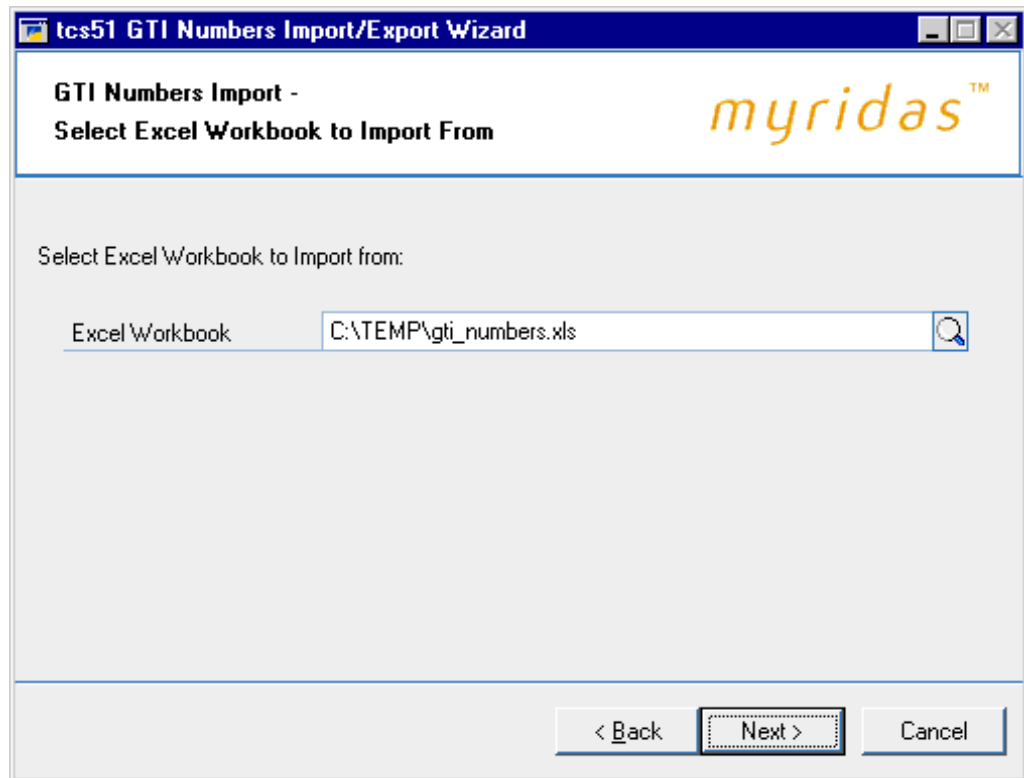
1. Enter the excel template ID (set up in the [Excel File Template Maintenance window](#)) that you want base the import on, or select one using the lookup.

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.

10.5 Select Excel Workbook screen

*The Select
Excel
Workbook
screen*



10.5.1 Selecting an Excel Workbook

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

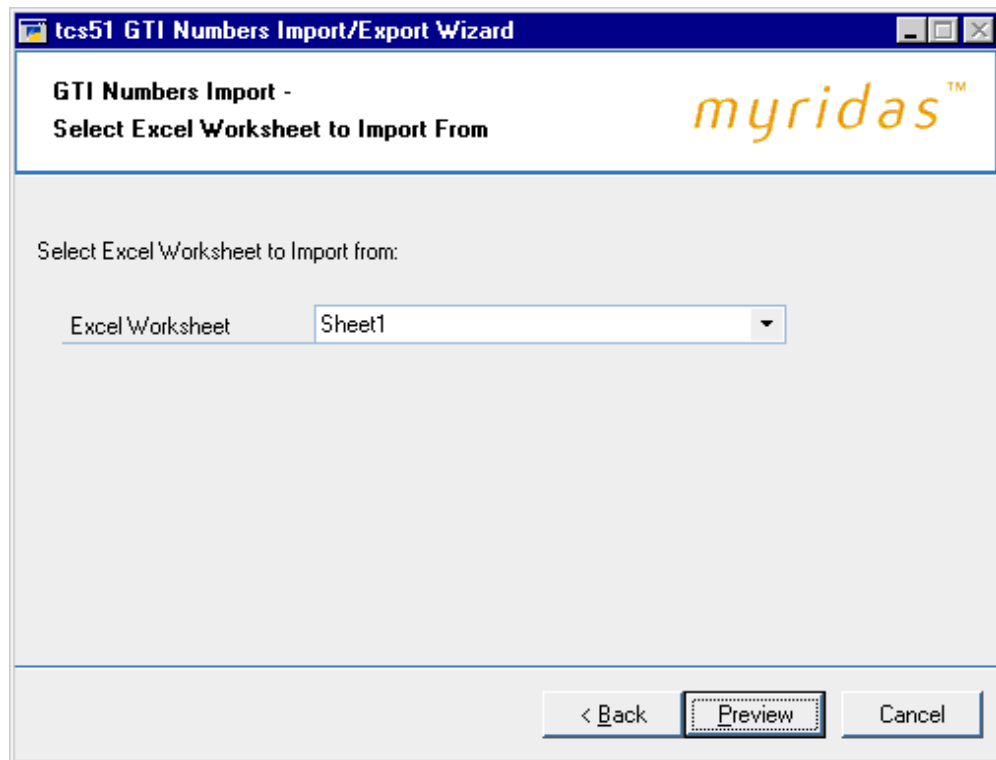
Note that you cannot just enter the name of the file; you must also enter the system path to the file, for example, C:\TEMP\gti_numbers.xls.

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

2. Click Next.

10.6 Select Worksheet screen

The Select Worksheet screen



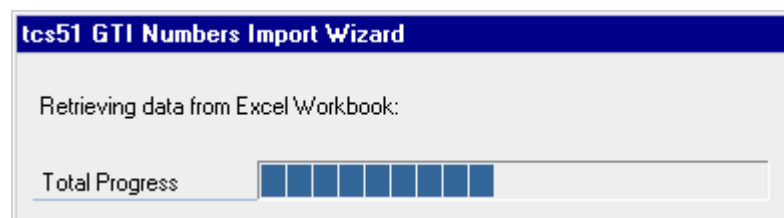
10.6.1 Selecting an Excel Worksheet

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

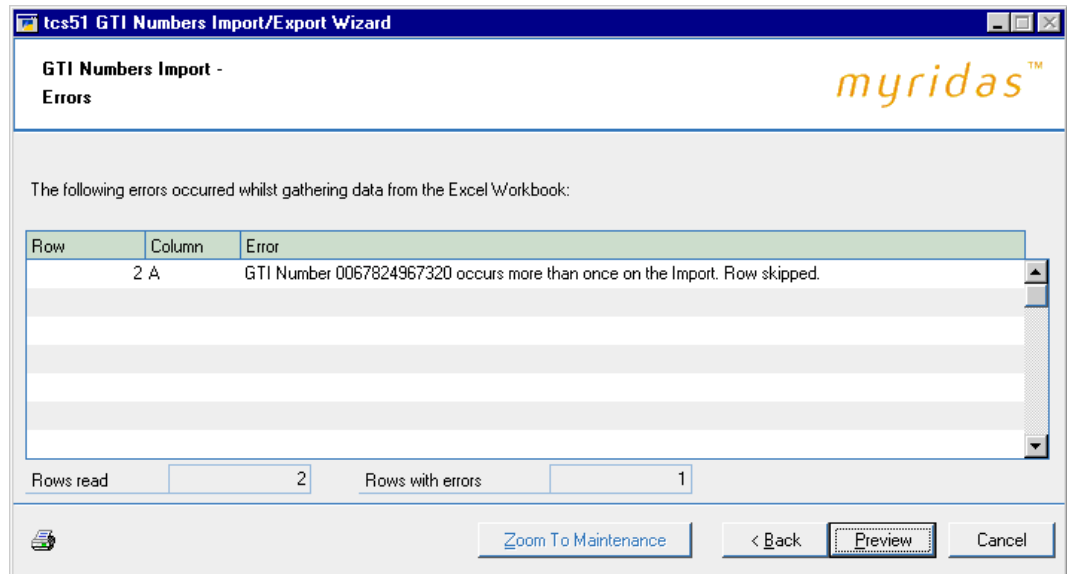


Note that if any errors are encountered during the import then the Import Errors screen will be displayed (see 10.6.2).

When the import is complete (if no errors were encountered) then the Import Preview screen will be displayed (10.7).

10.6.2 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.

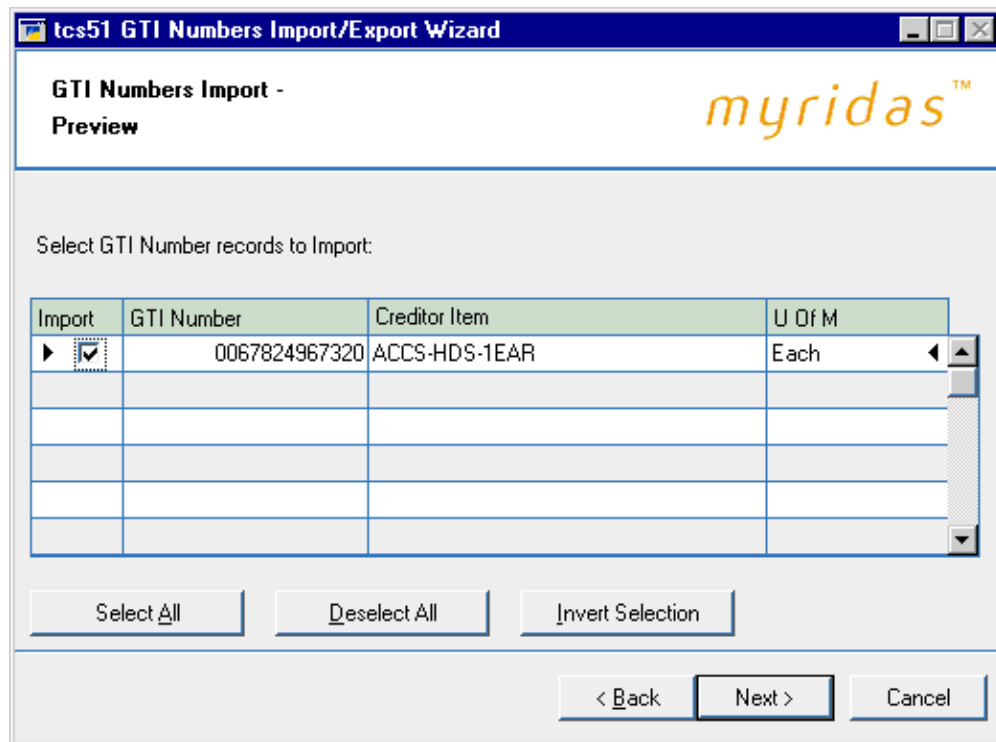
Click on the relevant line in the scrolling window and click the Zoom to Maintenance button. The relevant maintenance window will be displayed (for example, the Item Maintenance window will be displayed where the error concerns an Item Number that does not exist) with a new record created for the data 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.

10.7 Import Preview screen

*The Import
Preview
screen*



10.7.1 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.

10.8 Completing Import screen

*The
Completing
Import screen*

tcs51 GTI Numbers Import/Export Wizard


Completing the GTI Numbers Import Wizard

You have selected to Import GTI Numbers using the following Excel parameters:

Excel Template ID: GTITEMPLATE1

Excel Workbook: C:\TEMP\gti_numbers.xls

Excel Worksheet: Sheet1

 When you select Import, all records selected on the Preview window will be processed.

< Back Import Cancel

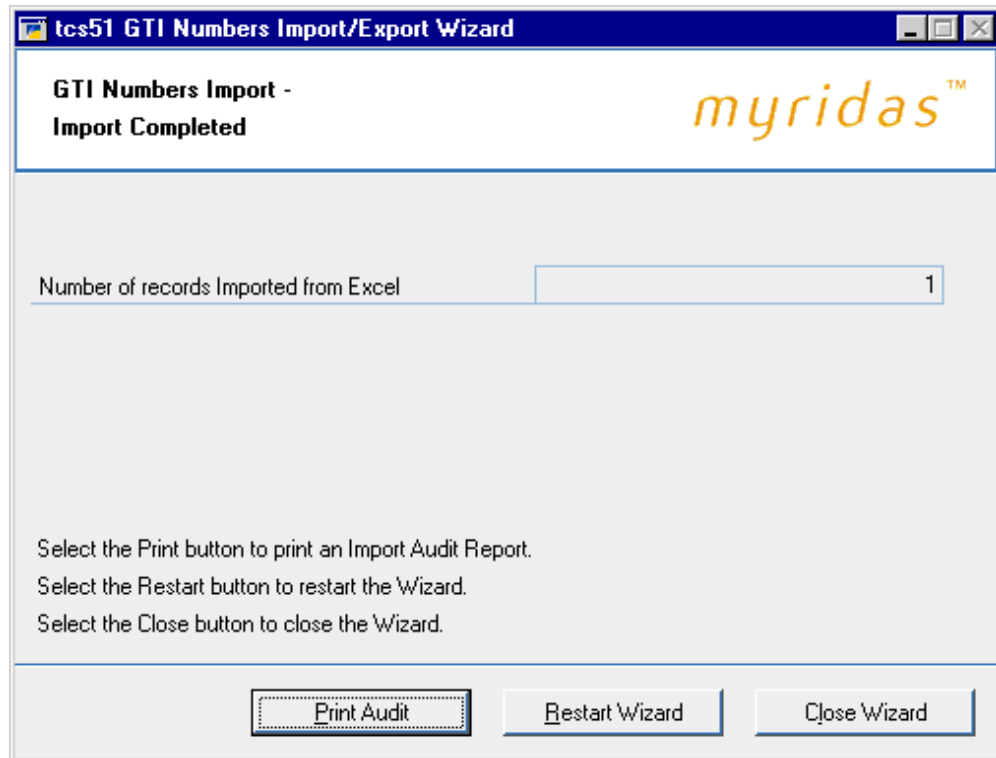
10.8.1 Using the Completing Import screen

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.

10.9 Import Completed screen

The Import Completed screen



10.9.1 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 barcodes. Alternatively click Close Wizard to close the wizard.

Exporting Barcodes

10.10 Select GTI Numbers screen

*The Select
GTI Numbers
screen*

tcs51 GTI Numbers Import/Export Wizard

GTI Numbers Export -
Select GTI Numbers you wish to Export

myridas™

Select which GTI Numbers you wish to export:

All

From:

To:

< Back Next > Cancel

10.10.1 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.

10.11 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

10.11.1 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.

10.12 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:

To:

< Back Next > Cancel

10.12.1 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.

10.13 Select Excel File Template screen

The Select Excel File Template window

GTI Numbers Export -
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

10.13.1 Selecting an Excel File Template

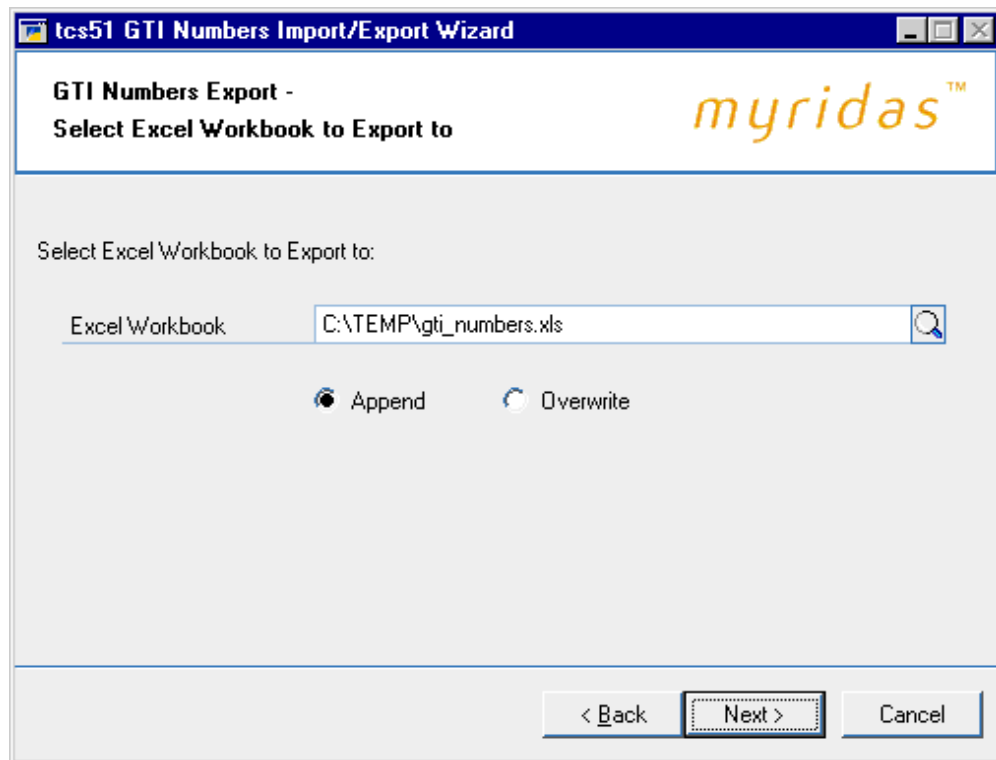
1. Enter the excel template ID (set up in the [Excel File Template Maintenance window](#)) that you want base the export on, or select one using the lookup.

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.

10.14 Select Excel Workbook screen

*The Select
Excel
Workbook
screen*



10.14.1 Selecting a Workbook for Export

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

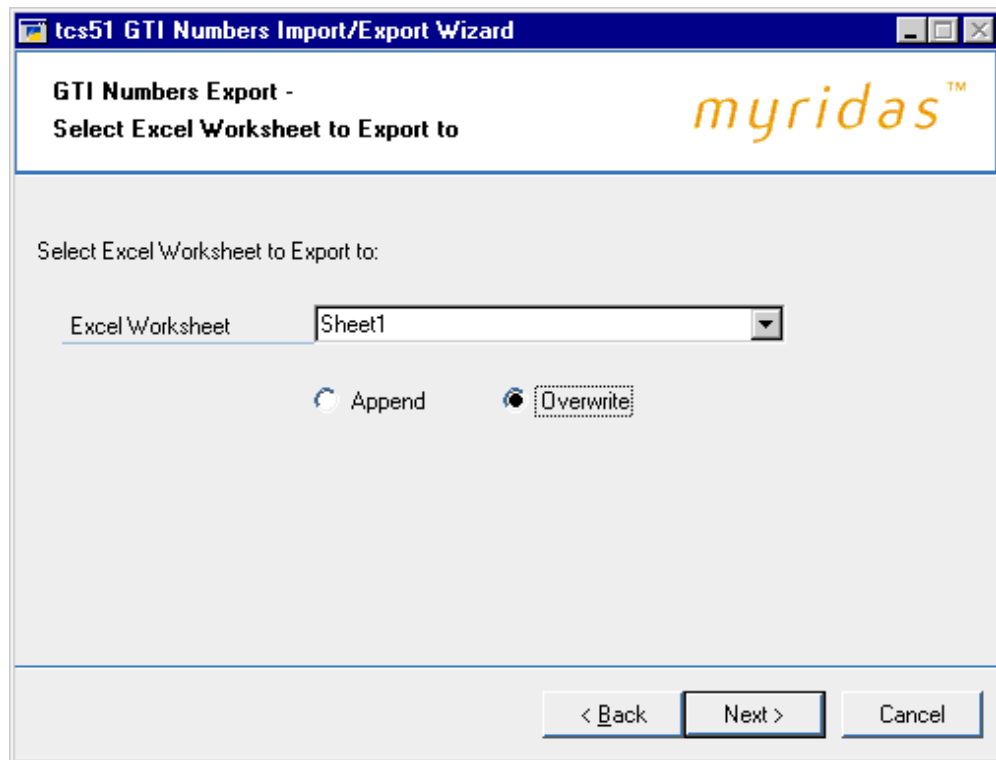
Note that you cannot just enter the name of the file; you must also enter the system path to the file, for example, C:\TEMP\gti_numbers.xls.

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.

10.15 Select Excel Worksheet screen

*The Select
Excel
Worksheet
screen*



10.15 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.

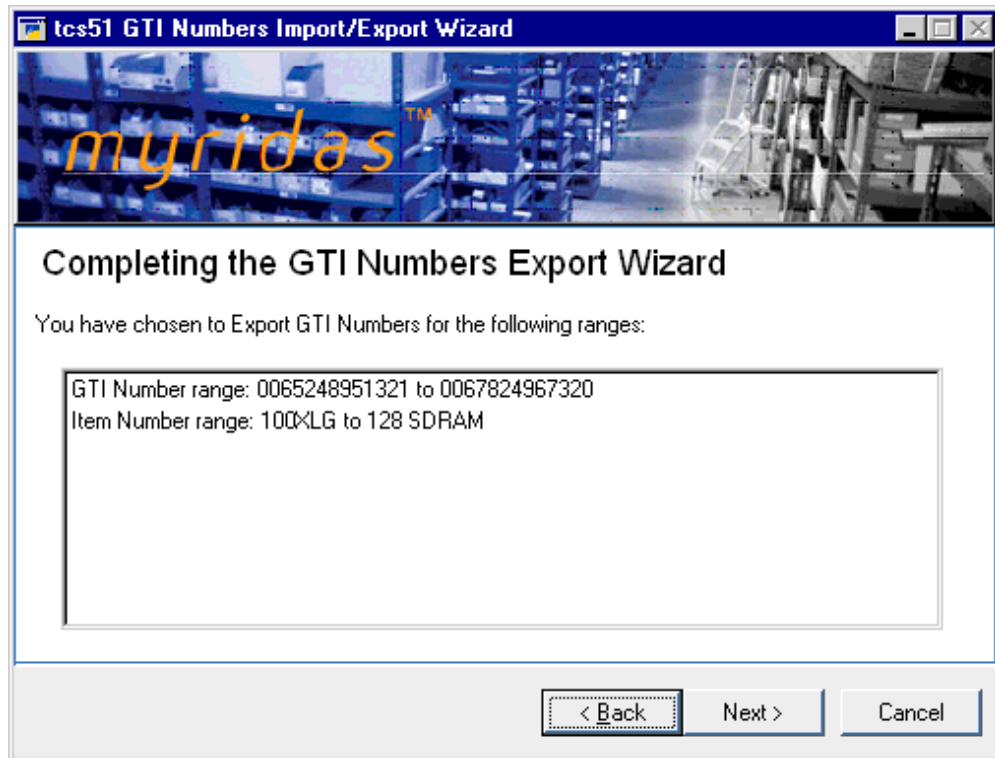
2. Select whether to append or overwrite the selected worksheet.

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.

10.16 Export Preview screen

*The Export
Preview
screen*



10.16.1 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.

10.17 Completing Export screen

*The
Completing
Export
screen*

tcs51 GTI Numbers Import/Export Wizard


Completing the GTI Numbers Export Wizard

You have selected to Export GTI Numbers using the following Excel parameters:

Excel Template ID: GTITEMPLATE1

Excel Workbook: C:\TEMP\gti_numbers.xls

Excel Worksheet: Sheet1

 When you choose Export, all GTI Numbers in range will be Exported.

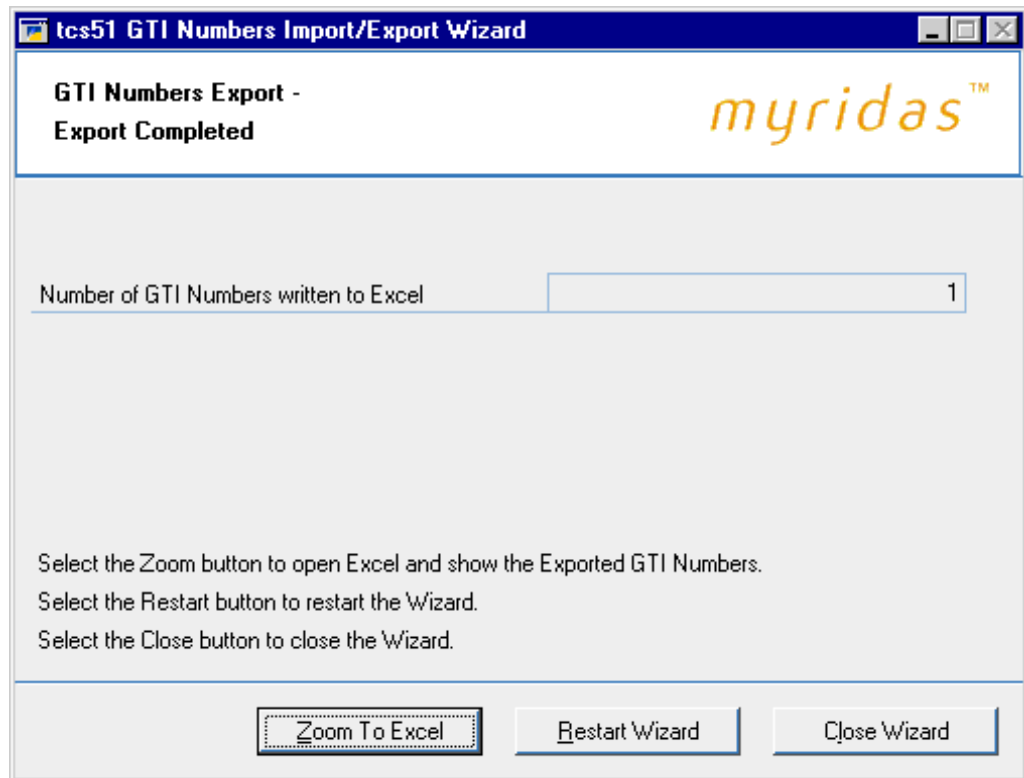
< Back Export Cancel

10.17.1 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.

10.18 Export Completed screen

The Export Completed screen



10.18.1 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 barcodes, 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.

11. 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

11.1 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.

12. Allow Part Delivery window



Transactions >> Sales >> Sales Trn 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

12.1 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.

Debtor Specific Items

Debtor Specific Items functionality enables you to assign debtors to a specific item number. When one or more debtors have been assigned to an item number using the [Assign Debtors To Item window](#) or the [Assign Debtor Range to Item window](#), then the item number will then only be available for sale to debtors assigned to the item number.



If you attempt to include an item number in a sales transaction where the debtor has not been assigned to the item, then you will receive a warning that the debtor has not been assigned to the item number for ordering. You will be unable to select the item unless you first assign the debtor to it.

13. Assign Debtors to Item window



Cards >> Myridas Cards >> Dist. Enhancements >> Assign Debt. to Item

Use the Assign Debtors to Item window to:

- Assign debtors to specific a item number

The Assign Debtors to Item window

Debtor ID	Debtor Name
BLUEYOND0001	Blue Yonder Airlines

13.1 Assigning Debtors to a Specific Item

To assign debtors to a specific item in the Assign Debtors to Item window:

1. Enter an item number or select one using the lookup.
2. Enter a Debtor ID or select one using the lookup. As many debtors as required can be assigned to a single item number. Only debtors displayed in the scrolling window can purchase the displayed item number through the Sales Transaction Entry window.
3. Click Save.

You can click the Ranges button to assign a range of debtors to the item in the Assign Debtor Range to Item window.

Note that you can click Delete to remove debtors assigned to the item number. If you select to delete the assignment then all debtors will be able to purchase the item.

14. Assign Debtor Range to Item window

Cards >> Myridas Cards >> Dist. Enhancements >> Assign Debt. to Item >> Ranges button

Use the Assign Debtor Range to Item window to:

- Assign debtor ranges to specific a item

The Assign Debtor Range to Item window

Debtor ID	Debtor Name	Assign
AARONFIT0001	Aaron Fitz Electrical	<input checked="" type="checkbox"/>
ADAMPARK0001	Adam Park Resort	<input checked="" type="checkbox"/>
ADVANCED0001	Advanced Paper Co.	<input checked="" type="checkbox"/>
ADVANCED0002	Advanced Tech Satellite System	<input checked="" type="checkbox"/>
ALTONMAN0001	Alton Manufacturing	<input checked="" type="checkbox"/>
ASSOCIAT0001	Associated Insurance Company	<input checked="" type="checkbox"/>

14.1 Assigning Debtor Ranges to an Item

To assign debtor ranges to an item in the Assign Debtor Range to Item window:

1. The currently selected item number will be displayed.
2. All debtor IDs will be selected by default. To select a range of debtors click From and enter from and to debtor IDs or select them using the lookups.
3. The List Debtors assigned to a specific Item Number option enables you to view debtors already assigned to an item number. If required then selected this option and enter an item number or select one using the lookup.
4. Click Preview to display your selected range in the scrolling window.
5. All displayed debtors will be selected by default.
6. Debtors can be selected/deselected by clicking on the Assign checkbox, or by using the Mark All/Unmark All buttons.
7. Click Assign to assign the selected debtors to the displayed item number.
8. Click OK to close the window.

Alternate Items

Great Plains gives you functionality to set up debtor, creditor and substitute items and assign them directly to inventory item numbers. With the Myridas Distribution Enhancements module you can set up a further alternate item that is assigned directly to the item number only, and is not debtor/creditor specific. Set up alternate item numbers using the [Alternate Item Number Maintenance window](#).

Alternate item numbers can be entered into the Sales Transaction Entry window, the Sales Transaction Detail Entry window, the Available To Promise window and the Item Enquiry window. If an alternate item number is entered that has been assigned to more than one inventory item then you can select an item using the [Select Item Number window](#).

15. Alternate Item Codes Setup window

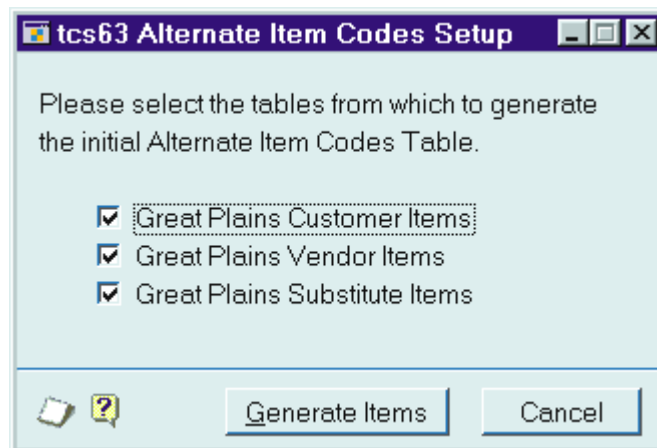


Cards >> Myridas Setup >> Dist. Enhancements >> Alt. Item Setup

Use the Alternate Item Codes Setup window to:

- Setup alternate items functionality

*The
Alternate
Item Codes
Setup
window*



15.1 Setting Up Alternate Items Functionality

To set up alternate items functionality using the Alternate Item Codes Setup window:

1. Click to select the options that you use on your system.

Note that if you use any of the displayed item types on your system then you must select the option to ensure successful table generation.

2. Click Generate Items to set up alternate item functionality. A dialogue box will warn you that any existing alternate items will be removed then recreated to enable alternate items functionality. Click Yes to continue. Alternate item

functionality will be set up and the Alternate Item Codes Setup window will close automatically.

Note that you can click Cancel at any point to close the window.

16. Alternate Item Number Maintenance window

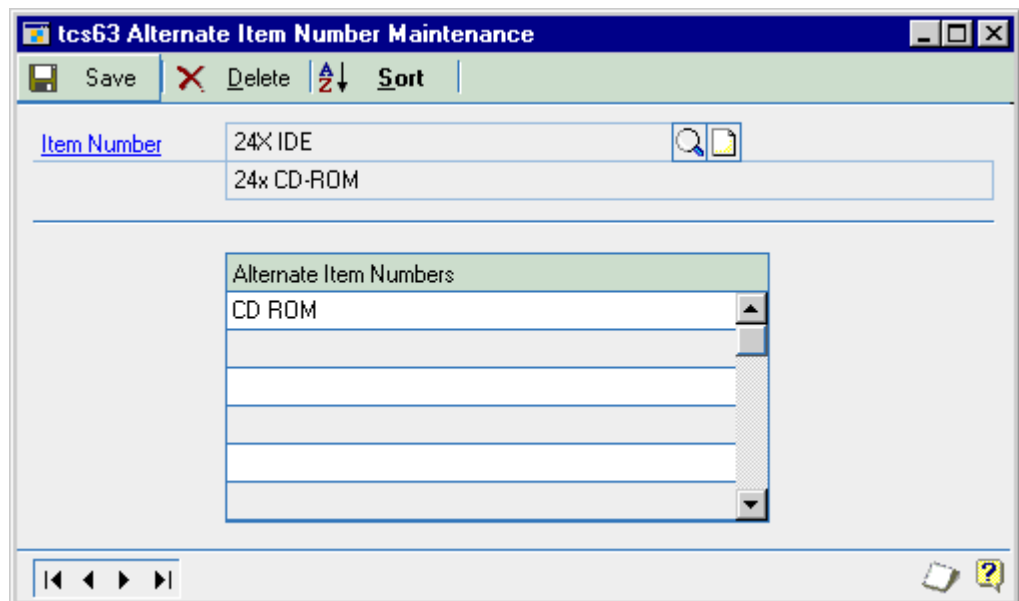


Cards >> Myridas Cards >> Dist. Enhancements >> Alt. Item Maintenance

Use the Alternate Item Number Maintenance window to:

- Assign alternate item numbers to items

*The
Alternate
Item
Number
Maintenance
window*



16.1 Assigning alternate item numbers to items

To assign alternate item numbers to items in the Alternate Item Number Maintenance window:

1. Enter an item number or select one using the lookup.
2. In the scrolling window enter as many alternate item numbers for the item as are required.

Note that an alternate item number may be assigned to as many different item numbers as required.

3. Click Save to save any changes made and close the window.

*Deleting alternate
items numbers*

Click Delete to delete all alternate item numbers assigned to the selected item number.

17. Select Item Number window



Transactions >> Sales >> Sales Trn Entry >> Enter an alternate item number that is assigned to more than one item

Use the Select Item Number window to:

- Select an item when an alternate item number is assigned to multiple items

*The Select
Item Number
window*

Alternate Item Number	Item Number	Class ID	Qty. On Hand	Qty. Avail.	PO Quantity
CD ROM	24x IDE	Generic	5	(48)	U of M
24x CD-ROM		CD ROM			Each
CD ROM	32x IDE		10	(30)	0
32x CD-ROM		CD ROM			Each

The Select Item Number window can be displayed from the Sales Transaction Entry window, the Sales Transaction Detail Entry window, the Available To Promise window and the Item Enquiry window.

Note that the Select Item Number window will only be displayed when you enter into one of the enabled windows an alternate item number that is assigned to multiple items, or when you enter an incomplete alternate item number that partially matches multiple alternate item numbers. For example, if you enter CD, which does not exist as an alternate item number, but the alternate item numbers CD ROM and CD DRIVE do exist, then all item numbers linked with these two alternate item numbers would be displayed in the Select Item Number window.

17.1 Selecting an item when an alternate item number is assigned to multiple items:

To select an item from the Select Item Number window:

1. All item numbers that the selected alternate item number is assigned to will be displayed in the scrolling window.

Use the Site browse buttons to scroll between site quantities if required.

If you are using the Myridas Unit of Measure Management module you can select which unit of measure to view quantities in. If you do not have access to this module then quantities will be displayed in the Great Plains default unit of measure.

- Click on the required item line then click select. The item number will be entered into the originating window and the Select Item Number window will close.

Note that you can click Cancel at any point to close the Select Item Number window.

18. Alternate Item Number Enquiry window



Enquiries >> Myridas Enquiries >> Dist. Enhancements >> Alt. Item Enquiry

Use the Alternate Item Number Enquiry window to:

- Enquire about alternate item numbers

*The
Alternate
Item
Number
Enquiry
window*

Item Number	Alternate Type	Creditor/Debtor Name	Item Description	Creditor/Debtor Description
24X IDE	User Alternate Item			
24X IDE	Creditor Item	ADVANCED0001		
32X IDE	User Alternate Item			

The Alternate Item Number Enquiry window will display details of alternate item numbers, creditor/debtor items and Advanced Distribution substitute items.

18.1 Enquiring About Alternate Item Numbers

To enquire about alternate item numbers in the Alternate Item Number Enquiry window:

1. From the Enquire On options click to select Alternate Item Numbers or Item Numbers.

Alternate Item Number	Item numbers and creditor/vendor item numbers linked with the selected item number are displayed
Item Number	Alternate item numbers assigned to the selected item number are displayed

2. Enter an item number/alternate item number, dependant on the Enquire On selection made, or select one using the lookup. All alternate item numbers/item number assigned to the selection will be displayed.
3. Click OK to close the window.

Importing and Exporting Alternate Item Numbers

The features detailed in this section enable you to import and export alternate item numbers between Great Plains and Excel. To enable the import/export functionality you need to set up Excel Template ID's in the Excel File Template Maintenance window (see below).

Note that you will be unable to use this functionality unless you have Excel installed on your system.

When you have set up Excel Template ID's you can then import and export alternate item numbers using the [Alternate Item Numbers Import/Export Wizard](#).

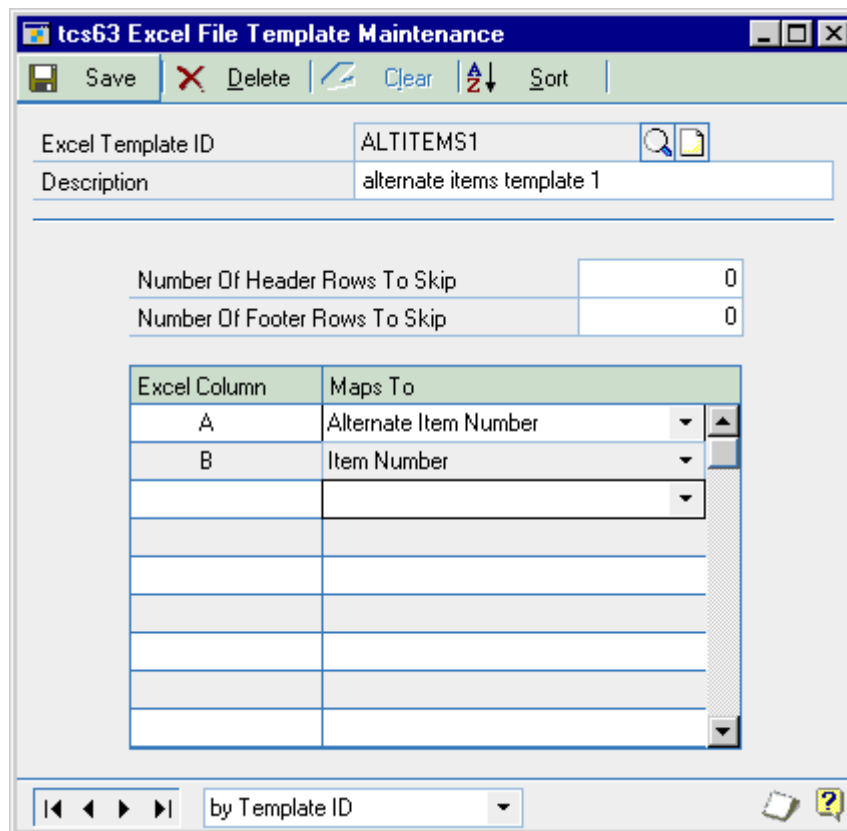
19. Excel File Template Maintenance window

Routines >> Myridas Routines >> Dist. Enhancements >> Alt. Item Excel Tmpl

Use the Excel File Template Maintenance window to:

- Set up Excel Template ID's to enable importing/exporting of alternate item numbers

*The Excel File
Template
Maintenance
window*



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

19.1 Setting Up Excel Template IDs

To set up Excel Template IDs 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. 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.

Under Number Of Header Rows To Skip and Number Of Footer Rows To Skip 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 alternate item numbers. If you are exporting alternate item numbers 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.

4. 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:
 - Alternate Item Number
 - Item Number

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 alternate item numbers the entered Excel Column will contain data relating to the selected Map To option.

*Sample Excel
column
mapping*

Excel Column	Maps To
A	Alternate Item Number ▼
B	Item Number ▼

Note that all map to options must be selected.

5. 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.

19.2 Setting Up Excel Sheets for Importing and Exporting

You do not need to set the cells in the spreadsheets to a specific format. You should however 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 Alternate Item Numbers Import/Export Wizard.

20. Alternate Item Numbers Import/Export Wizard



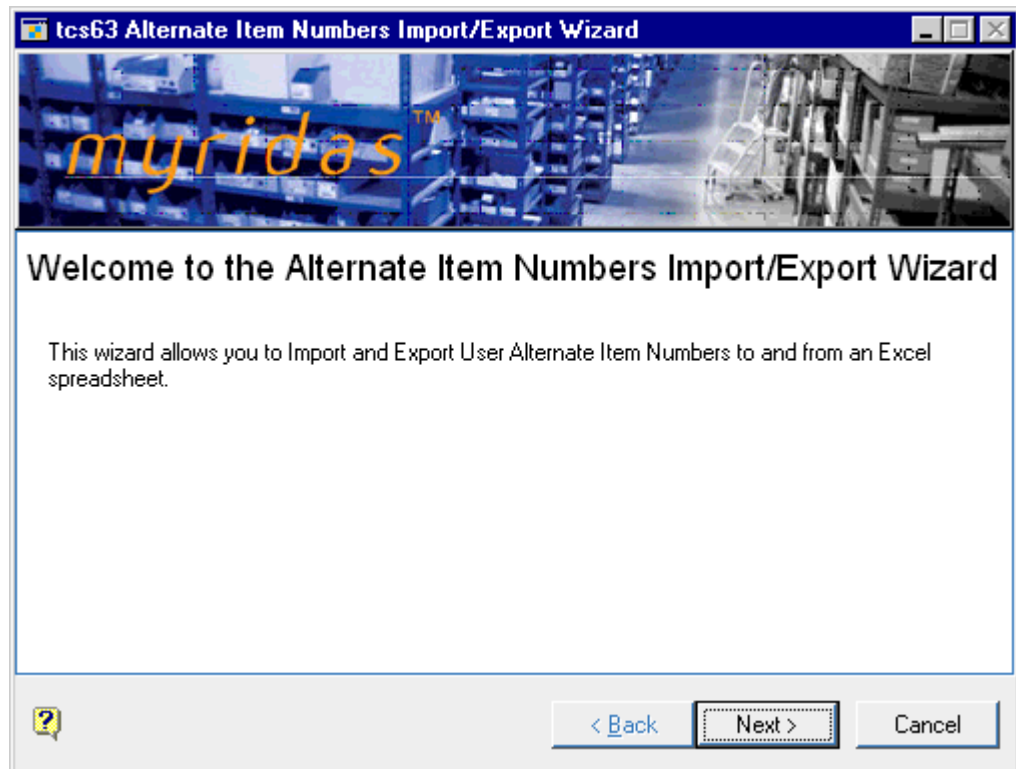
Routines >> Myridas Routines >> Dist. Enhancements >> Alt. Item Wizard

The Myridas Alternate Item Numbers Import/Export Wizard allows the user to import or export alternate item numbers.

Use the Alternate Item Numbers Import/Export Wizard to:

- Import or export alternate item numbers to/from an Excel spreadsheet

*The Alternate
Item Numbers
Import/Export
Wizard*



20.1 Using the Alternate Item Numbers Import/Export Wizard

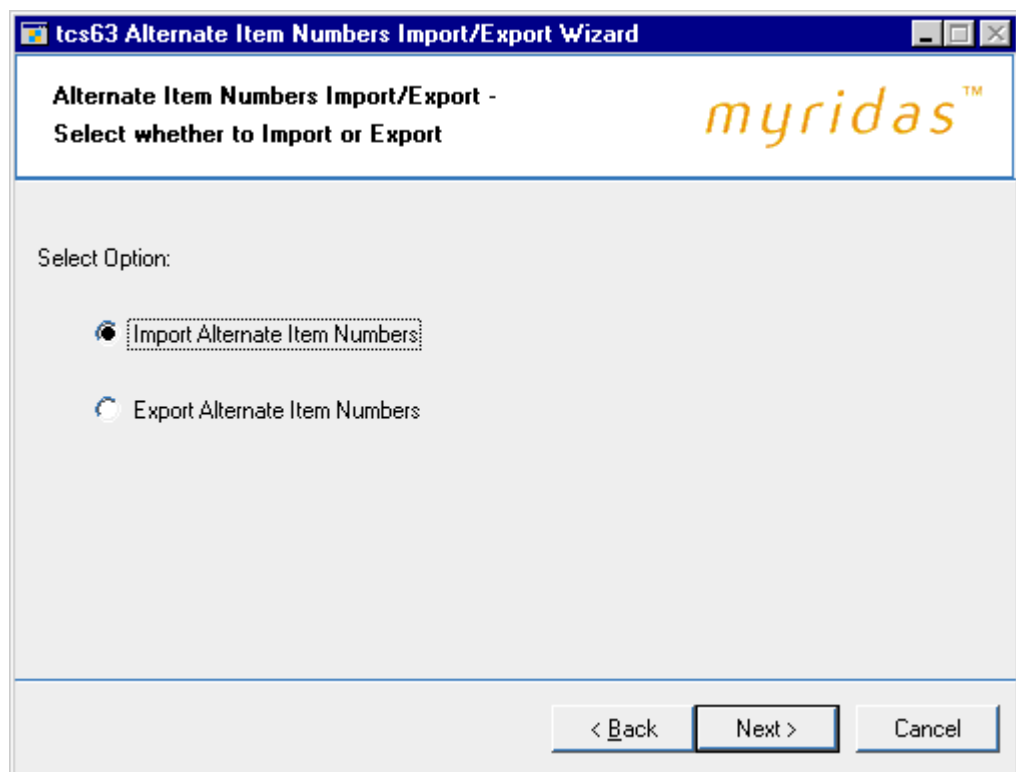
1. Click the Next button to display the next window

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

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

20.2 Import/Export Screen

*The
Import/Export
screen*



20.2.1 Using the Import/Export Screen

1. Click whether you want to Import Alternate Item Numbers or Export Alternate Item Numbers.
2. Click the Next button to display the next screen.

Note that details of exporting alternate item numbers are to be found at 19.9. See below for details on importing alternate item numbers.

Importing Alternate Item Numbers

20.3 Select Import File Screen

*The Select
Import File
screen*

tcs63 Alternate Item Numbers Import/Export Wizard

Alternate Item Numbers Import
Select Excel File Template

myridas™

Select Excel File Template to use:

Excel Template ID ALTITEMS1

alternate items template 1

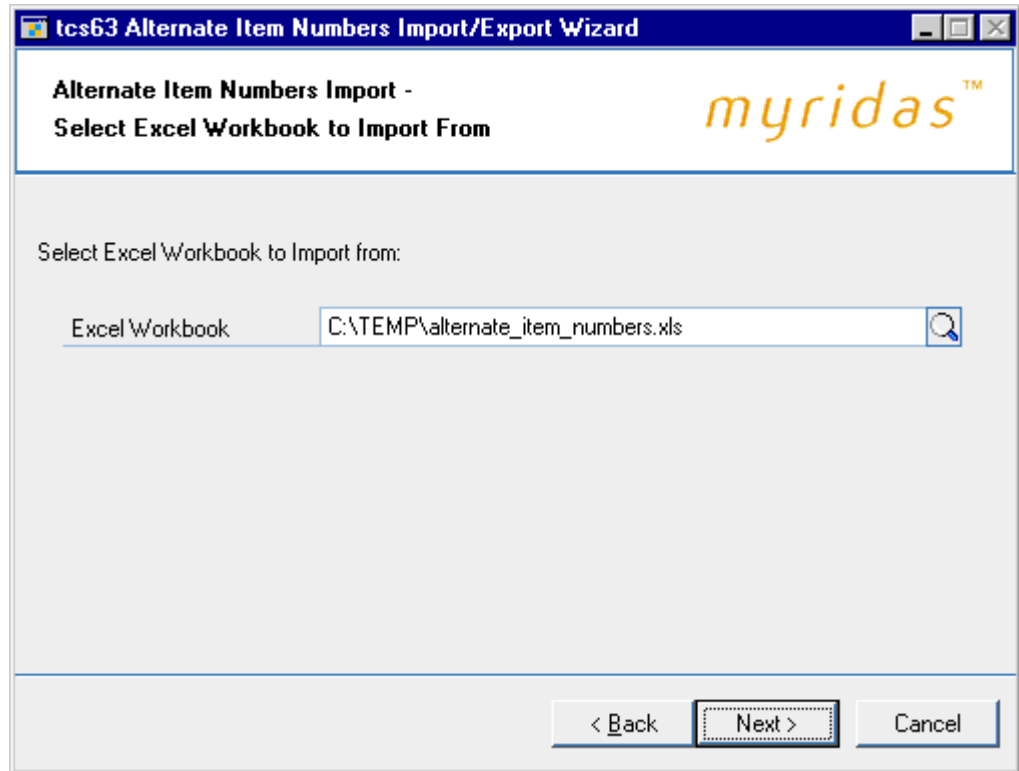
< Back Next > Cancel

20.3.1 Using the Select Import File screen

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.
2. Click Next.

20.4 Select Workbook Screen

*The Select
Workbook
screen*



20.4.1 Using the Select Workbook Screen

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

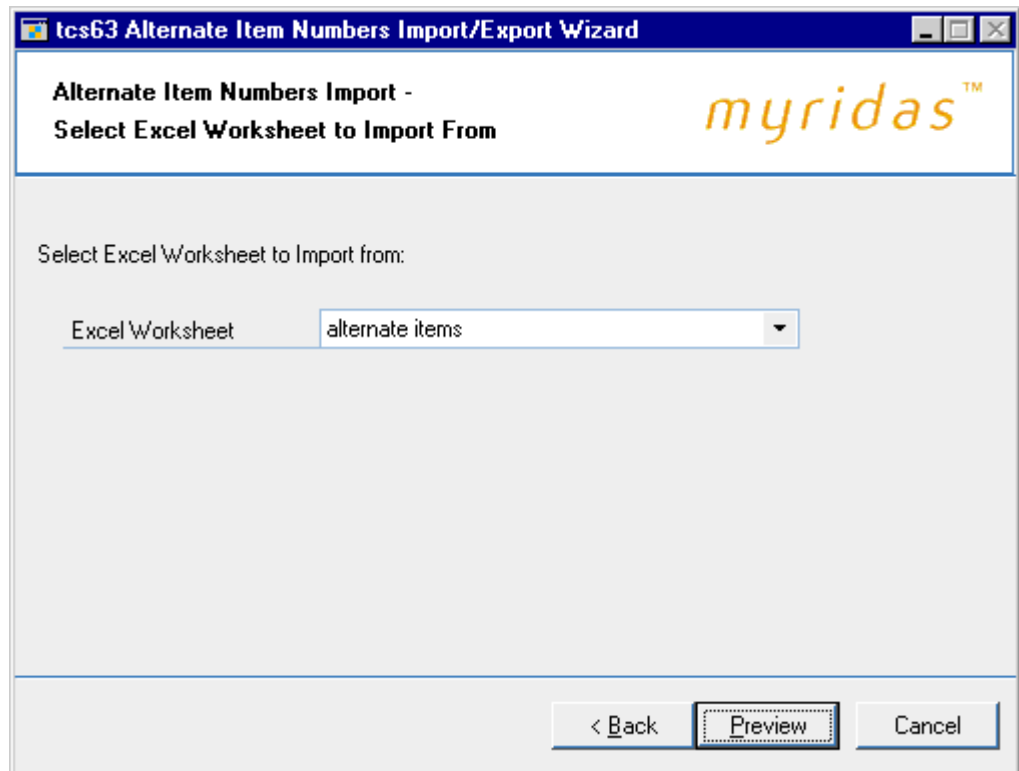
Note that you cannot just enter the name of the file, you must also enter the system path to the file, for example, C:\TEMP\alternate_item_numbers.xls.

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

2. Click Next.

20.5 Select Worksheet Screen

*The Select
Worksheet
screen*



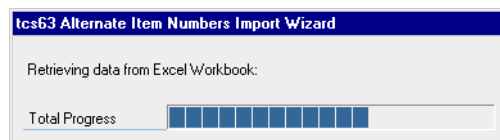
20.5.1 Using the Select Worksheet Screen

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*

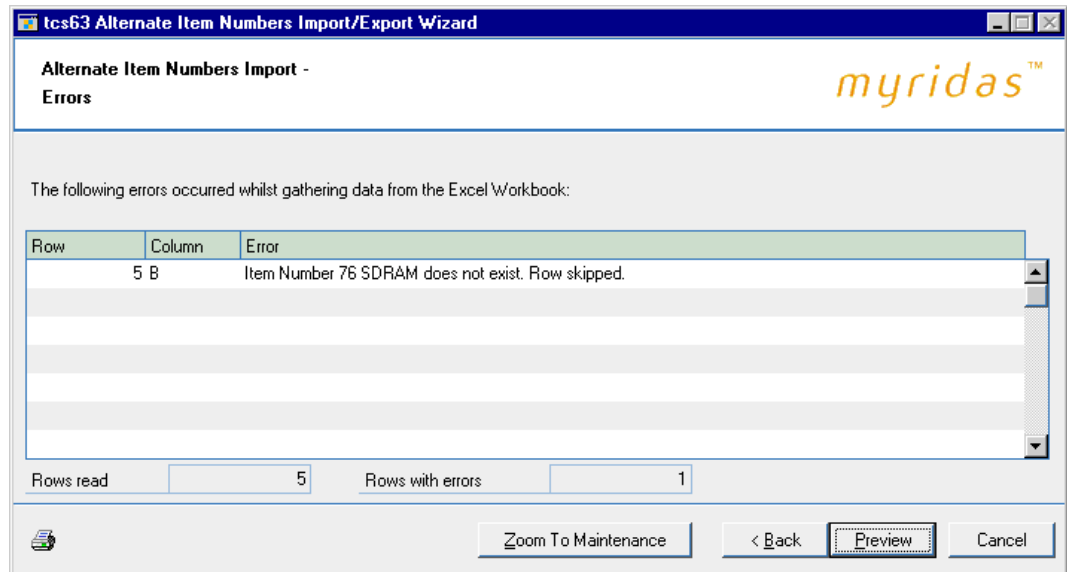


Note that if any errors are encountered during the import then the Import Errors screen will be displayed (see 20.5.2).

3. When the import is complete (if no errors were encountered) then the Import Preview screen will be displayed (20.6).

20.5.2 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 where a date is required
- 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.

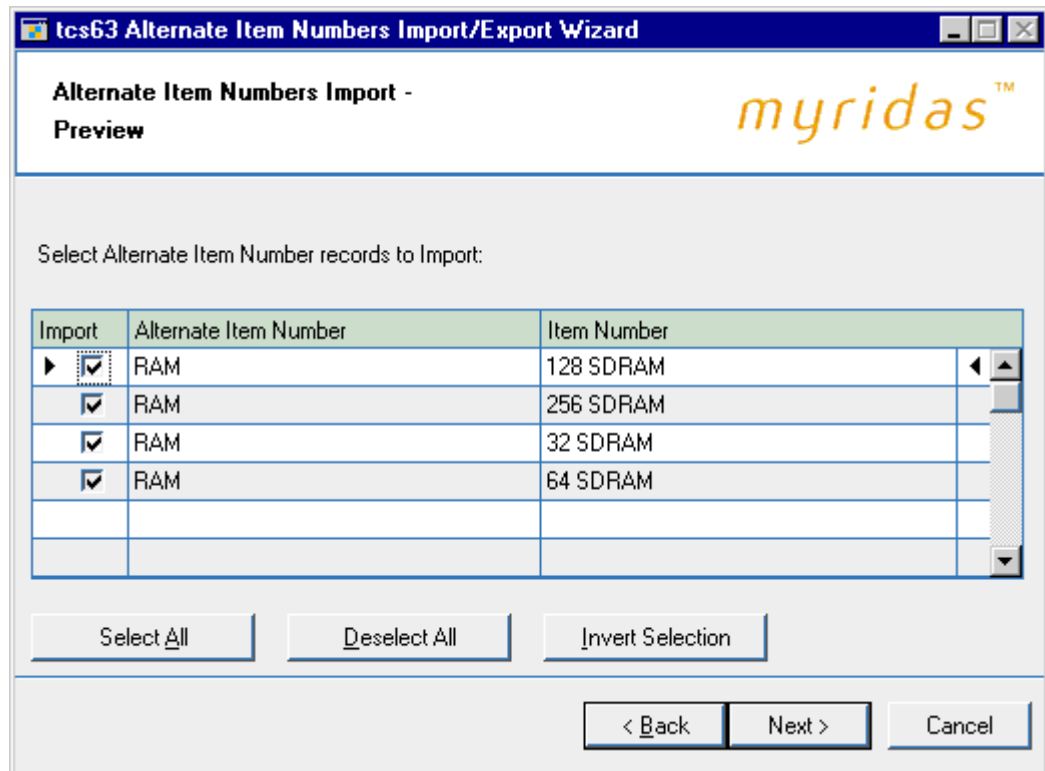
Click on the relevant line in the scrolling window and click the Zoom to Maintenance button. The relevant maintenance window will be displayed (for example, the Item Maintenance window will be displayed where the error concerns an Item Number that does not exist) with a new record created for the data 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.

20.6 Import Preview Screen

*The Import
Preview screen*



20.6.1 Using the Import Preview Screen

1. The scrolling window will display all valid lines that you have selected for import, with all relevant information.
2. You need to select which lines in the 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.

20.7 Completing Import Screen

*The Completing
Import screen*

tcs63 Alternate Item Numbers Import/Export Wizard

myridas™


Completing the Alternate Item Numbers Import Wizard

You have selected to Import Item Numbers using the following Excel parameters:

Excel Template ID: ALTITEMS1

Excel Workbook: C:\TEMP\alternate_item_numbers.xls

Excel Worksheet: alternate items

 When you select Import, all records selected on the Preview window will be processed.

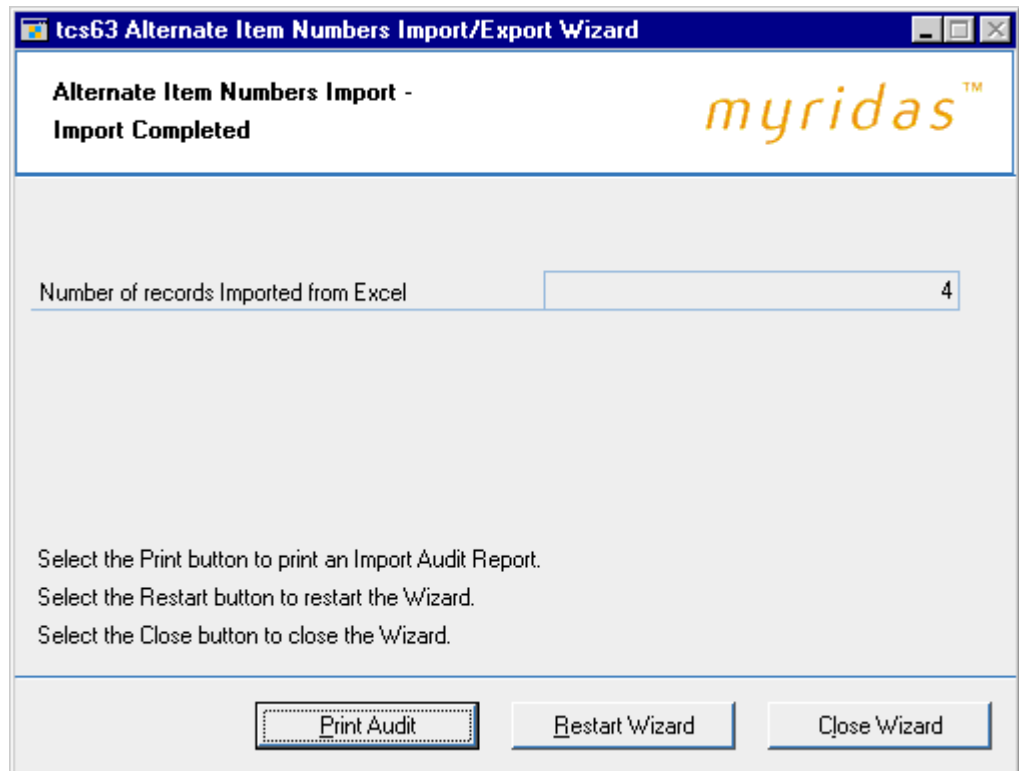
< Back Import Cancel

20.7.1 Using the Completing Import screen

1. The Excel Template ID, Excel Workbook and Worksheet that you have selected will be displayed.
2. Click Import to Import the workbook and worksheet based on the details set in the Excel Template ID.

20.8 Import Completed Screen

The Import Completed screen



20.8.1 Using the Import Completed Screen



1. The number of alternate item numbers imported will be displayed.
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 alternate item numbers. Alternatively click Close Wizard to close the wizard.

Exporting Alternate Item Numbers Prices

20.9 Alternate Item Numbers Selection Screen

The Alternate Item Numbers Selection screen

tcs63 Alternate Item Numbers Import/Export Wizard

Alternate Item Numbers Export -
Select Alternate Items you wish to Export

myridas™

Select which Alternate Item Numbers you wish to export:

All

From:

To:

< Back Next > Cancel

20.9.1 Using the Alternate Item Numbers Selection Screen

1. Click All to select to export all alternate item numbers or click From then enter a alternate item number range or select them using the lookups.
2. Click Next.

20.10 Select Excel File Template Screen

*The Select
Excel File
Template screen*

tcs63 Alternate Item Numbers Import/Export Wizard

Alternate Item Numbers Export -
Select Excel File Template

myridas™

Select Excel File Template to use:

Excel Template ID: ALTITEMS1

alternate items template 1

< Back Next > Cancel

20.10.1 Using the Select Excel File Template Screen

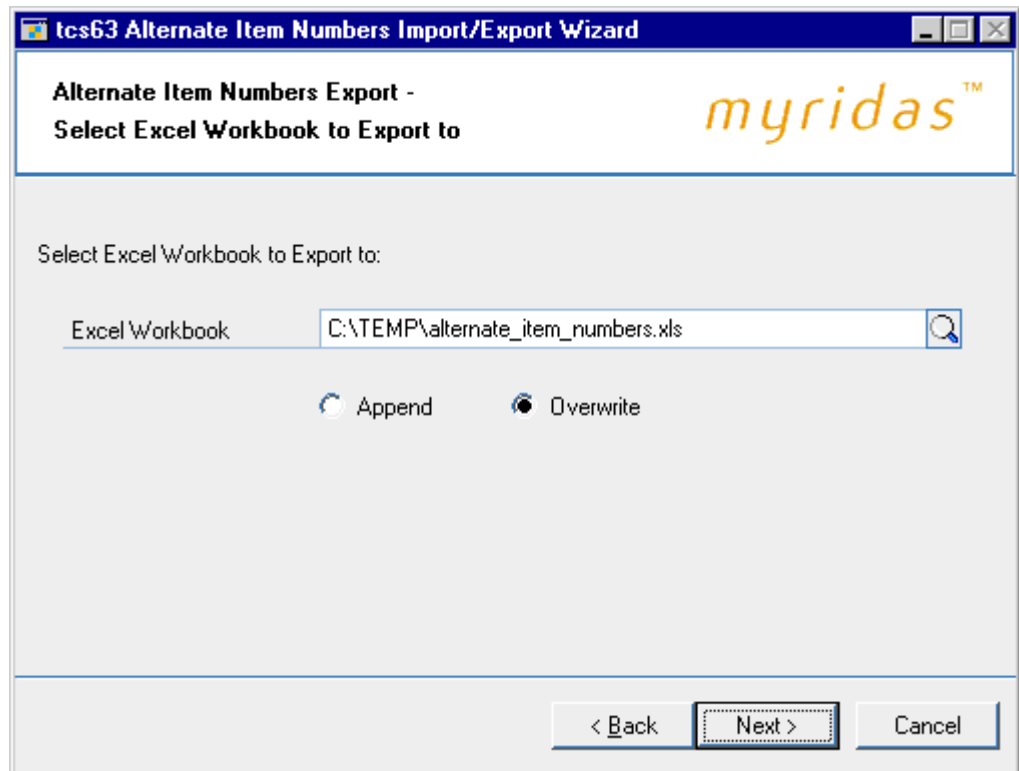
1. Enter the Excel Template ID (set up in the Excel File Template Maintenance window) that you want base the import on, or select one using the lookup.

Note that any Number Of Header/Footer Rows To Skip settings applied in the Excel File Maintenance window are not applicable when exporting alternate item numbers.

2. Click Next.

20.11 Select Workbook Screen

The Select Workbook screen



20.11.1 Using the Select Workbook Screen

1. Enter the Excel file that you want to export alternate item numbers 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\alternate_item_numbers.xls. You can choose to select a workbook that has not yet been created - the workbook will be created automatically during the export.

Also note that you cannot export to files that are currently open in Excel.

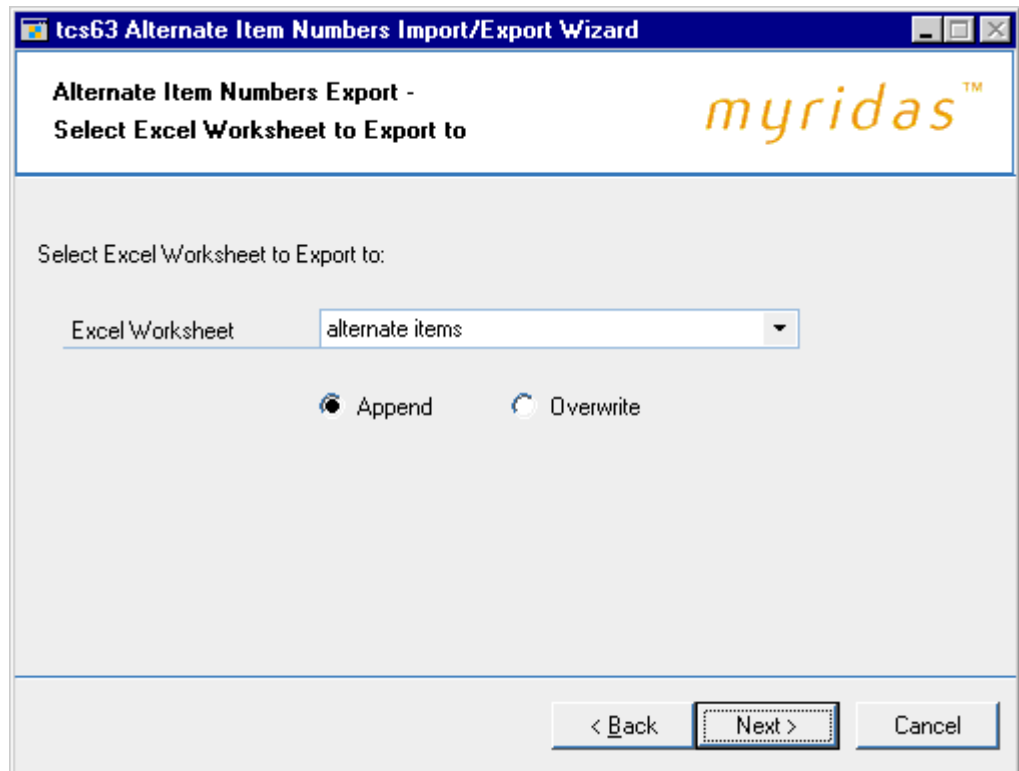
2. If you select a workbook that has already been created then you should also select whether to Append or Overwrite.

Append	Append exported details to the selected workbook
Overwrite	Overwrite the selected workbook with exported details

3. Click Next.

20.12 Select Worksheet Screen

The Select Worksheet screen



20.12.1 Using the Select Worksheet Screen

1. Enter a worksheet or select one from the drop-down menu. You can choose to enter a new worksheet - if you do so then the worksheet will be automatically created during the export process.

Note that if you selected to overwrite an existing workbook in the previous window, then you will not have the option to select a current worksheet from the drop-down menu.

Also note that you cannot export to files that are currently open in Excel.

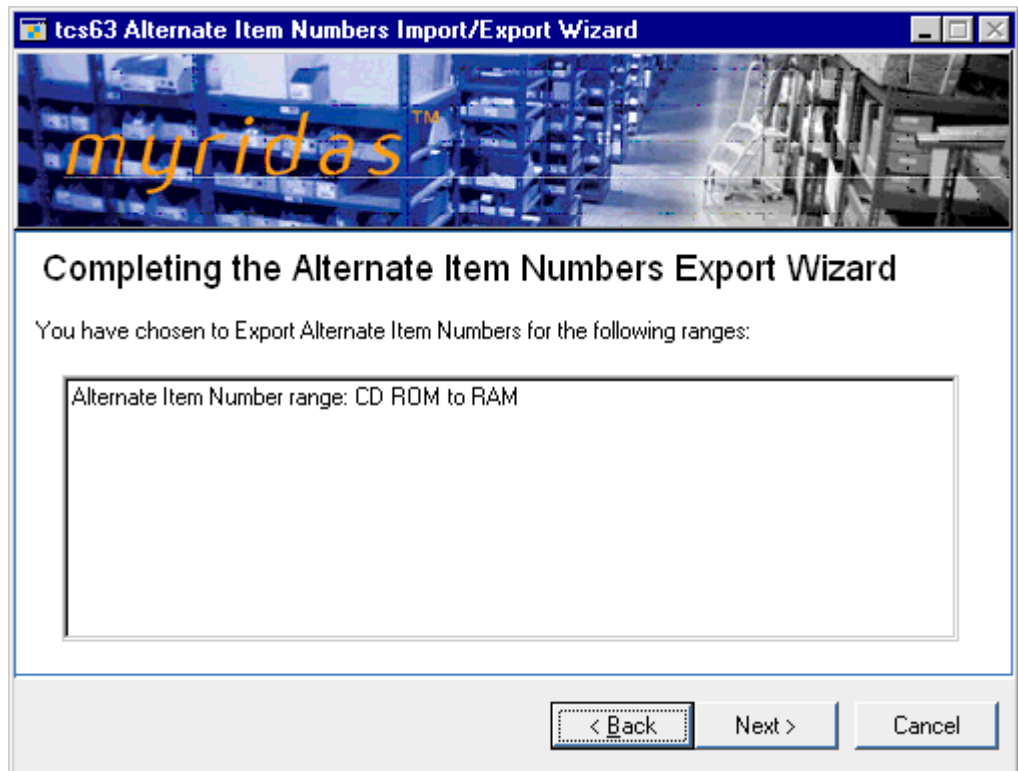
2. If you select a worksheet that has already been created then you should also select whether to Append or Overwrite.

Append	Append exported details to the selected worksheet
Overwrite	Overwrite the selected worksheet with exported details

3. Click Next.

20.13 Completing Export Screen

*The Completing
Export screen*

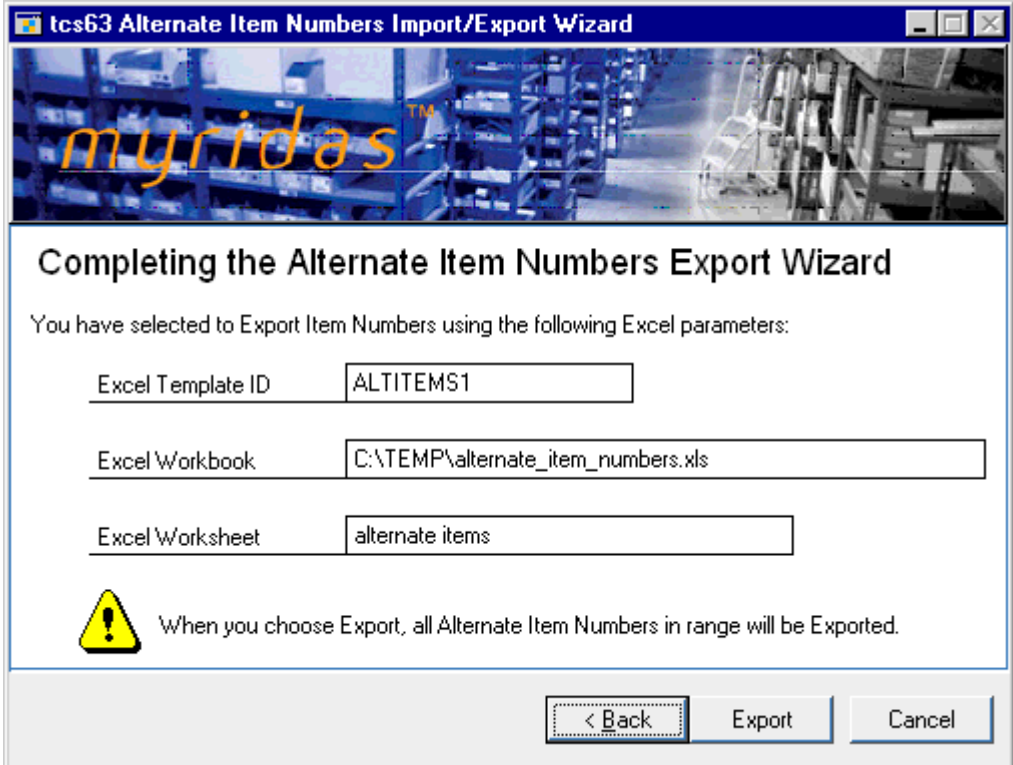


20.13.1 Using the Completing Export screen

1. The range that you have selected to export will be displayed.
2. Click Next.

20.14 Completing Export Screen 2

*The Completing
Export screen 2*



tcs63 Alternate Item Numbers Import/Export Wizard


Completing the Alternate Item Numbers Export Wizard

You have selected to Export Item Numbers using the following Excel parameters:

Excel Template ID: ALTITEMS1

Excel Workbook: C:\TEMP\alternate_item_numbers.xls

Excel Worksheet: alternate items

 When you choose Export, all Alternate Item Numbers in range will be Exported.

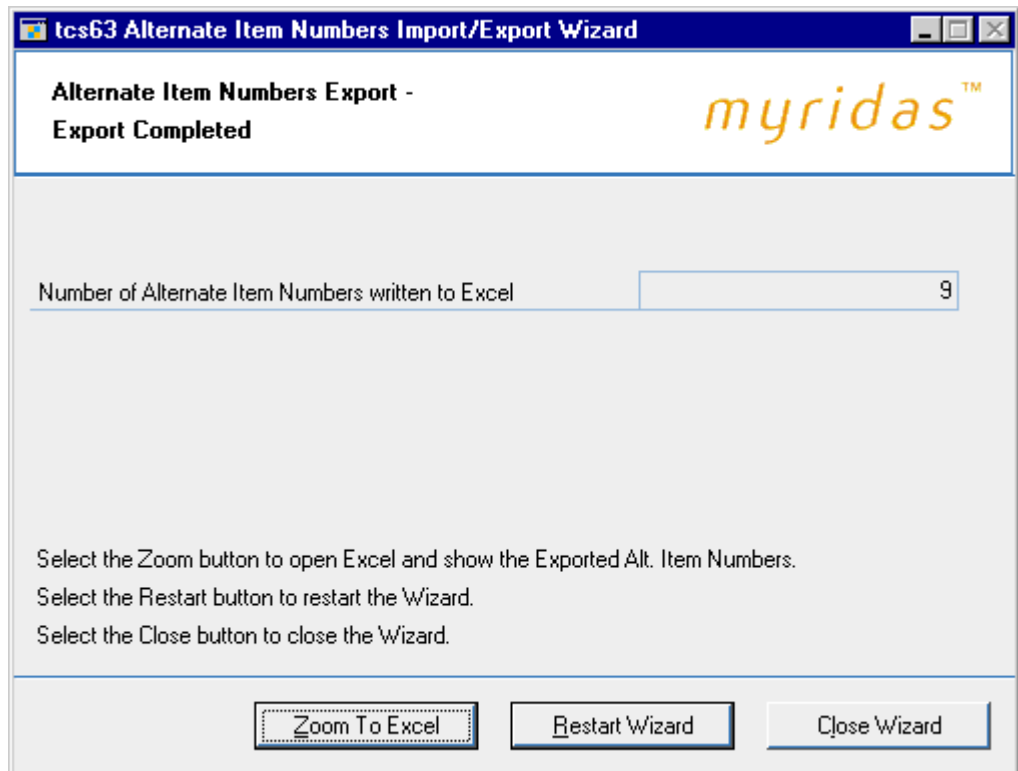
< Back Export Cancel

20.14.1 Using the Completing Export screen 2

1. All Excel details that you have selected to export will be displayed.
2. Click Export.

20.15 Export Completed Screen

The Export Completed screen



20.15.1 Using the Export Completed Screen

1. The number of alternate item numbers exported will be displayed.
2. Click Zoom To Excel to display the worksheet that has been exported.
3. Click Restart Wizard if you want to export (or import) more alternate item numbers. Alternatively click Close Wizard to close the wizard.

Sales Batch Purge

Sales Batch Purge gives you the functionality to remove sales batches that no longer contain any transactions.

21. Sales Transaction Batch Purge window

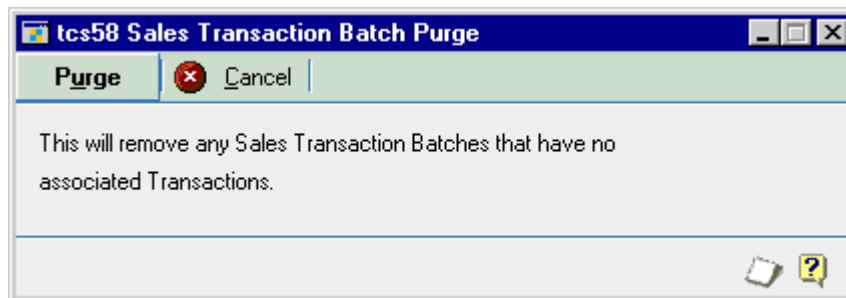


Routines >> Myridas Routines >> Sales Trx Batch Purge

Use the Sales Transaction Batch Purge window:

- Purge empty sales batches

The Sales Transaction Batch Purge window



21.1 Purging Empty Sales Batches

To purge empty sales batches using the Sales Transaction Batch Purge window:

1. Click Purge.

A purge in progress dialogue box will be displayed while the system purges empty sales batches. All sales batches with no transactions will be purged except in the following circumstances:

- Another user has already marked the batch for deletion
- The batch is marked to post or is in use
- The batch header record states the there are no assigned documents, but documents do exist

When the purge is complete the Report Destination dialogue box will be displayed. Select the destination to print the Sales Transaction Purge Errors report to. Details of purged batches and batches that could not be purged will be displayed.

2. Click Cancel to close the window.

Document Margins

Document Margins gives you functionality to view margins on sales transactions as you enter the transaction. The [Document Margins window](#) will open automatically (dependant on settings; see below) during sales transaction entry. The total cost of the transaction and the margin and margin percentage will be displayed and recalculated during the transaction as new items are entered.

Use the [Distribution Enhancements Setup window](#) to select whether to base margin percentages on the unit cost or the sales price of items on a transaction. The margin is the sum of all transaction extended prices minus the sum of all unit cost prices for items on a transaction. The margin percentage is calculated dependant on your selection:

Sales	Margin / Total sales value for document lines
Costs	Margin / Total cost value for document lines

Select the Automatically Open Document Margin window option in the Distribution Enhancements Setup window to have the Document Margin window open automatically during sales transaction entry. If you do not select this option the Document Margin window is still available as an Extras option from the Sales Transaction Entry window and the Sales Item Detail Entry window.

22. Document Margins window



Transactions >> Sales >> Sales Trn Entry >> Extras >> Document Margins

Use the Document Margins window to:

- View sales margin details for current transactions

*The
Document
Margins
window*

tcs64 Document Margins	
Total Cost	\$388.50
Margin	\$31.15
Margin Percentage	7.42%

OK

Note that if you selected the Automatically Open Document Margin window option in the [Distribution Enhancements Setup window](#) then the Document Margins window will be displayed by default when you enter details in the Sales Transaction Entry window or the Sales Item Detail Entry window. If you did not select this option then the window is available from both these windows as an Extras option.

22.1 Viewing Sales Margin Details for Current Transactions

To view sales margin details for current transactions in the Document Margins window:

1. Details of the transaction total cost (unit cost of items on the transaction), margin and margin percentage will be displayed and updated as you enter new details into the transaction. See [Document Margins](#) for more details.
2. Click OK to close the window.

Required Debtor Reference

Required Debtor Reference functionality enables you to define debtors that require a debtor purchase order number (or a customer reference) to be entered in sales transactions.

Use the [Required PO Number Setup window](#) or the [Assign Required PO Number window](#) to set sales transaction types for debtors that require a debtor PO number to be entered. All types of sales transactions or a selection of transaction types can be set for each debtor to require entry of a debtor PO number during transaction entry.

When you enter a sales transaction type for a debtor that has been set to require a debtor PO number, you will be unable to save, post or transfer the transaction until you have entered a debtor PO number.

23. Required PO Number Setup window



Cards >> Sales >> Debtor >> Extras >> Debtor PO Number

Use the Required PO Number Setup window to:

- Set individual debtors to require a debtor PO number in sales transaction entry

*The
Required
PO Number
Setup
window*

23.1 Setting Up Individual Debtors to Require a Debtor Purchase Order Number in Sales Transaction Entry

To set up individual debtors to require a debtor purchase order number during sales transaction entry using the Required PO Number Setup window:

1. Enter a debtor ID or select one using the lookup.
2. All sales order types will be selected by default. Click to select the types where you require a debtor purchase order number to be entered in the transaction.
3. Click Save and close the window.

Deleting required PO number settings

Click Delete to remove required purchase order number settings from the displayed debtor.

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

24. Assign Required PO Number window

Cards >> Myridas Cards >> Dist. Enhancements >> Required Debt PO

Use the Assign Required PO Number window to:

- Set multiple debtors to require a debtor PO number in sales transaction entry

*The Assign
Required PO
Number
window*

Required; Quote Order Invoice Return Back Order

Existing Debtors with these settings:

Debtor ID	Debtor Name
AARONFIT0001	Aaron Fitz Electrical
ADAMPARK0001	Adam Park Resort
ADVANCED0001	Advanced Paper Co.
BLUEYOND0001	Blue Yonder Airlines
CELLULAR0001	Cellular Express
HEARTLAN0001	Heartland Tower Systems

Ranges

24.1 Setting Up Multiple Debtors to Require a Debtor Purchase Order Number in Sales Transaction Entry

To set up multiple debtors to require a debtor purchase order number during sales transaction entry using the Assign Required PO Number window:

1. Click to select the types where you require a debtor purchase order to be entered in the transaction.

All debtors set up for the selected types will be displayed in the scrolling window.

Note that if you select/deselect further types then the debtors assigned to the originally selected types will no longer be displayed.

2. Enter debtor ID's as required or select them using the lookup.

Note that you can click the Ranges button to display the [Assign Required PO Number Range window](#) where you can set a range of debtors to require purchase order number entry in sales transactions.

3. Click OK to save any changes and close the window.

Deleting required PO number settings

To delete an assigned debtor ID select the debtor in the scrolling window then select edit and delete row.

25. Assign Required PO Number Range window

Cards >> Myridas Cards >> Dist. Enhancements >> Required Debt PO >> Ranges button

Use the Assign Required PO Number Range window to:

- Set ranges of debtors to require a debtor PO number in sales transaction entry

*The Assign
Required
PO Number
Range
window*

Debtor ID	Debtor Name	Assign
ADVANCED0002	Advanced Tech Satellite System	<input checked="" type="checkbox"/>
ALTONMAN0001	Alton Manufacturing	<input checked="" type="checkbox"/>
AMERICAN0001	American Science Museum	<input checked="" type="checkbox"/>
AMERICAN0002	American Electrical Contractor	<input checked="" type="checkbox"/>
ASSOCIAT0001	Associated Insurance Company	<input checked="" type="checkbox"/>
ASTORSUI0001	Astor Suites	<input checked="" type="checkbox"/>
ATMORERE0001	Atmore Retirement Center	<input checked="" type="checkbox"/>
BAKERSEM0001	Baker's Emporium Inc.	<input checked="" type="checkbox"/>
BERRYMED0001	Berry Medical Center	<input checked="" type="checkbox"/>
BOYLESCO0001	Boyle's Country Inn's	<input checked="" type="checkbox"/>
BREAKTHR0001	Breakthrough Telemarketing	<input checked="" type="checkbox"/>

25.1 Setting Up Ranges of Debtors to Require a Debtor Purchase Order Number in Sales Transaction Entry

To set up ranges of debtors to require a debtor purchase order number during sales transaction entry using the Assign Required PO Number Range window:

1. The required transaction types selected in the [Assign Required PO Number window](#) will be displayed by default.
2. All debtor IDs will be selected by default. To select a range of debtors click From and enter from and to debtor IDs or select them using the lookups.
3. Click the Only Unassigned Debtors checkbox to select only debtors that have not already been set up to require debtor purchase order number entry.
4. Click Preview to view your selected range in the scrolling window.

5. All displayed debtors will be selected by default. Debtors can be selected/deselected by clicking on the Assign checkbox, or by using the Mark All/Unmark All buttons.
6. Click Assign to assign the selected debtors to require entry of a debtor purchase order number in transaction entry for the displayed transaction types.
7. Click OK to close the window.

User Default Sites

User Default Sites functionality enables you to assign a default site to a user ID for use in the Sales Transaction Entry window.

Use the User Default Site Maintenance window to assign a default site to a user ID. When the user opens the Sales Transaction Entry window the site ID will automatically default to that set in the User Default Site Maintenance window. You can select to restrict the user to the default site, so that alternate sites cannot be selected during sales transaction entry.

Note that restricting the user to a default site ID does not restrict the site ID at item line level in sales transaction entry.

26. User Default Site Maintenance window



Cards >> Myridas Setup >> Dist. Enhancements >> SOP Default Site

Use the User Default Site Maintenance window to:

- Set default sites for users

*The User
Default Site
Maintenance
window*

26.1 Setting Default Sites for Users

To set default sites for users in the User Default Site Maintenance window:

1. Enter a user ID or select one using the lookup.
2. Enter a default site ID or select one using the lookup.
3. Click the Restrict to default site option to restrict the selected user to using the default site ID only.

If this option is selected then the user will be unable to select alternate sites during sales transaction entry. Note that restricting the user to a default site ID does not restrict the site ID at item line level in sales transaction entry.

4. Click Save to save changes made and close the window.

*Deleting user
default sites*



Click Delete to delete default site settings for the selected user.

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

Appendix A

Access to Myridas Windows

Distribution Enhancements

Window Name	 Menu Access	 Other Access
Allow Part Delivery		Transactions >> Sales >> Sales Trn Entry >> Extras >> Part Delivery
Alternate Item Codes Setup	Cards >> Myridas Setup >> Dist. Enhancements >> Alt. Item Setup	
Alternate Item Number Enquiry	Enquiries >> Myridas Enquiries >> Dist. Enhancements >> Alt. Item Enquiry	
Alternate Item Number Maintenance	Cards >> Myridas Cards >> Dist. Enhancements >> Alt. Item Maintenance	
Alternate Item Numbers Import/Export Wizard	Routines >> Myridas Routines >> Dist. Enhancements >> Alt. Item Wizard	
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 Trn Entry >> Extras >> Apply Reason Code	
Assign Debtor Range to Item		Cards >> Myridas Cards >> Dist. Enhancements >> Assign Debt. to Item >> Ranges button
Assign Debtors to Item	Cards >> Myridas Cards >> Dist. Enhancements >> Assign Debt. to Item	

Assign Required PO Number	Cards >> Myridas Cards >> Dist. Enhancements >> Required Debt PO	
Assign Required PO Number Range		Cards >> Myridas Cards >> Dist. Enhancements >> Required Debt PO >> Ranges button
Barcode Format Maintenance	Cards >> Myridas Setup >> Dist. Enhancements >> Barcode Format Maint.	
Distribution Enhancements Setup	Cards >> Myridas Setup >> Dist. Enhancements >> Dist. Enhancem Setup	
Document Margins	Transactions >> Sales >> Sales Trn Entry >> Extras >> Document Margins	Transactions >> Sales >> Sales Trn Entry >> Item Expansion button>> Extras >> Document Margins Will be displayed by default from both windows if option selected in Distribution Enhancements Setup window
Excel File Template Maintenance	Routines >> Myridas Routines >> Dist. Enhancements >> Alt. Item Excel Tmpl	
Excel File Template Maintenance	Routines >> Myridas Routines >> Dist. Enhancements >> GTI Number Excel Tmpl	
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	
Required PO Number Setup		Cards >> Sales >> Debtor>> Extras >> Debtor PO Number
Sales Transaction Batch Purge	Routines >> Myridas Routines >> Sales Trx Batch Purge	
Scanned GTI Number Maintenance	Cards >> Myridas Cards >> Dist. Enhancements >> Scan. GTI Num Maint	
Select Item Number		Transactions >> Sales >> Sales Trn Entry >> Enter an alternate item number that is assigned to more than one item Also available from the Sales Transaction Detail Entry window, the Available To Promise window and the Item Enquiry window
Transaction Reason Code Maintenance window	Cards >> Myridas Setup >> Dist. Enhancements >> Reason Code Maint.	
User Default Site Maintenance	Cards >> Myridas Setup >> Dist. Enhancements >> SOP Default Site	

Appendix B

Myridas Reports

Myridas provides multiple reports to increase information visibility.

Report Name	Functionality
Import Audit report	Prints details of alternate item number import errors.
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 Purge Errors report	Print details of purged batches and batches that could not be purged.
Sales Transaction Reason Code report	Prints details of all sales documents with reason codes assigned.

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