myridas™ User Guide

Version 7.7 for Great Plains 7.5

Linked Item Selling

Trinity Computer Services Limited

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Contents

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 Linked Item Selling module:

- Linked Item Selling

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.

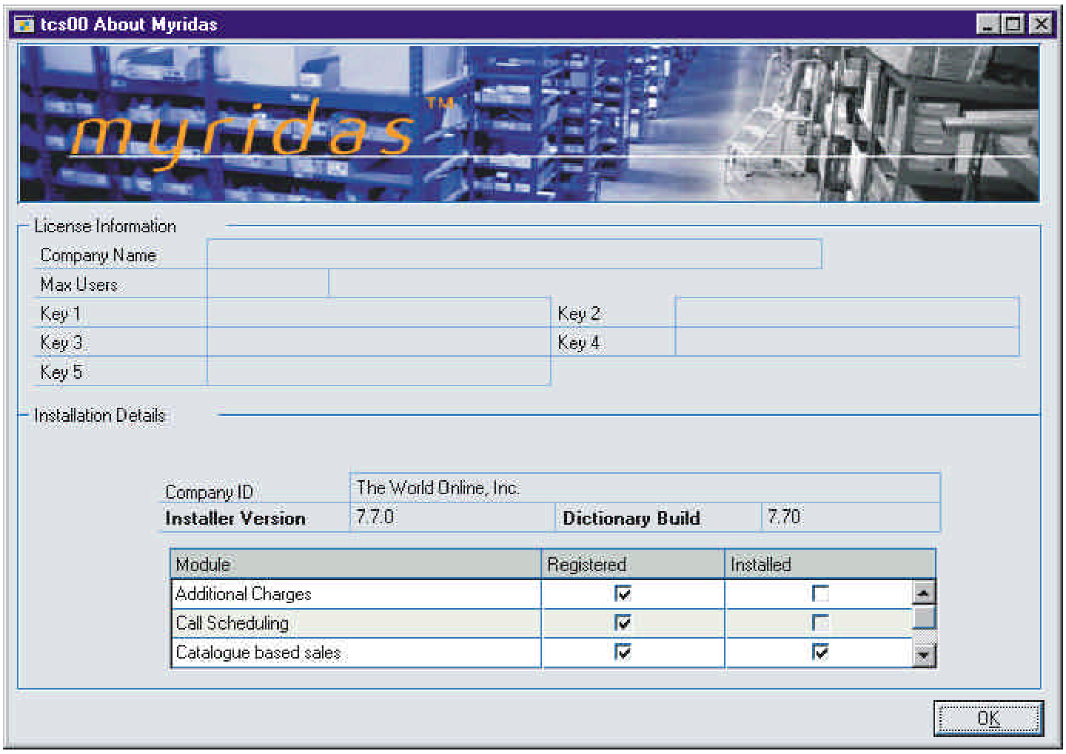
A full range of tutorials is also available on our website, http://www.trinitypartner.com.

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



Linked Item Selling

The Myridas Linked Item Selling module provides extended functionality for sales transactions. You can create Linked Item Groups so that when a trigger item is entered into a sales transaction, the user will be prompted as to whether they want to add further, specified linked items to the transaction. This would be useful for example, when selling printers, and you require that all customers are asked whether they also wish to purchase toner and paper.

The main features of Linked Item Selling are:

- The facility to set up linked item groups, with single or multiple trigger items
- The automatic prompting of users with linked items in sales transactions

Trigger Items

Trigger Items are Item Numbers that have been assigned to a Linked Item Group in the Linked Item Group Maintenance window, and specified as trigger items. When you enter a trigger item into a sales transaction the Linked Item Lookup window will be displayed with details of other items in the group.

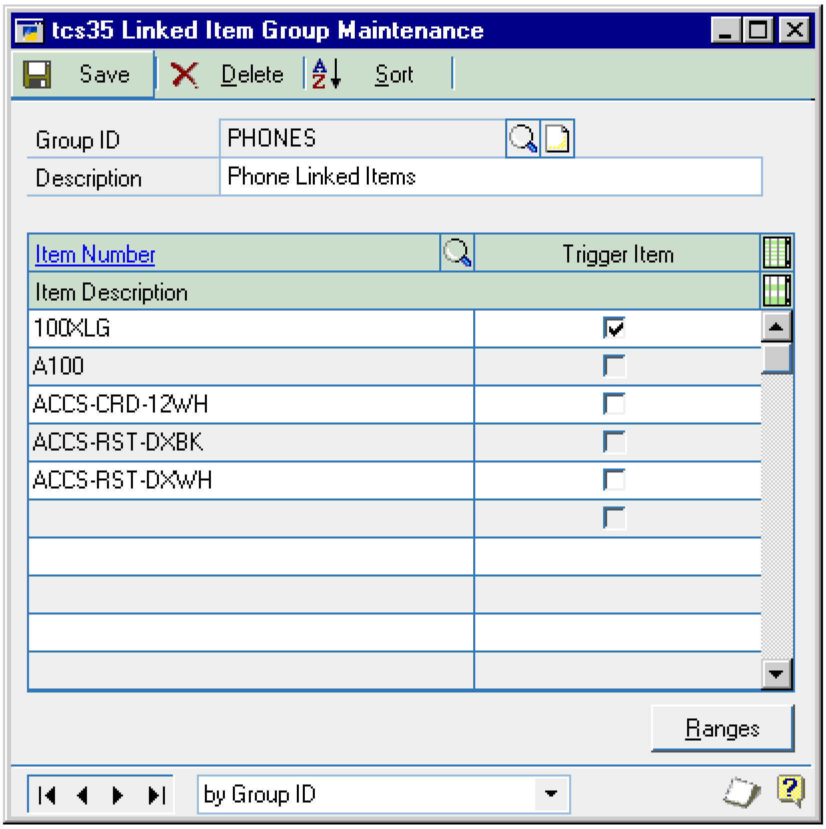
1. Linked Item Group Maintenance window

Cards >> Myridas Cards >> Linked Item Maintenance

Use the Linked Item Group Maintenance window to:

- Set up Linked Item Groups and trigger items

The Linked Item Group Maintenance window



1.1 Setting Up Linked Item Group ID's

To set up linked item groups in the Linked Item Group Maintenance window:

1. Enter the Group ID that you want your linked items to be associated with.

   Note that if you already have Group ID's set up you can click the lookup to select a Group ID to display from the Linked Item Group Lookup window.

2. Enter the Description for the Group ID.

3. Enter the Item Numbers that you want to assign to the Group ID, or select them using the lookup.

   Note that you can click the Ranges button to assign a range of items to a Group ID in the Linked Item Group Range Allocation window.

4. Click on the trigger item column to select which Item Numbers you want to be trigger items for the group.

A trigger item is the item that activates the Linked Item Lookup window in sales transaction processing, where you can view Linked Item Group information and add Linked Items to a transaction.

Any number of items in a Group can be marked as trigger items, but an item can only be a trigger item in one Group.

5. Click Save to save any changes you have made to a Group ID.

   Note that you can click Sort at any point to sort the Item Numbers into alphanumeric order.

Deleting Group ID's

To delete a Group ID click the Delete button.

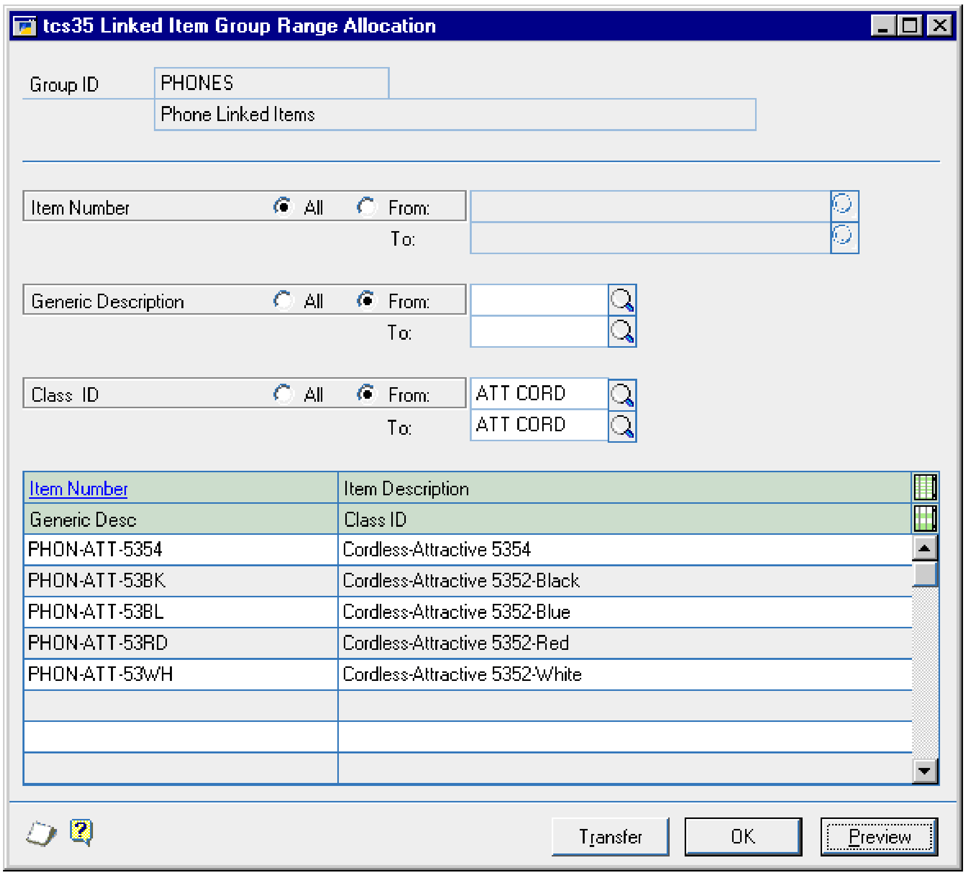
2. Linked Item Group Range Allocation window

Cards >> Myridas Cards >> Linked Item Maintenance >> Ranges button

Use the Linked Item Group Range Allocation window to:

- Allocate a range of items to a Group ID

The Linked Item Group Range Allocation window



The Linked Item Group Range Allocation window will open with details of the current Group ID. Item ranges are assigned by Item Number, Generic Description and Class ID.

2.1 Allocating a Range of Items to a Group ID

To allocate a range of items to a Group ID in the Linked Item Group Range Allocation window:

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. Click the Preview button to view your selection in the scrolling window. The Item Number and Item Description of each item to be assigned will be displayed. Click the Show button to display the Generic Description, Class ID and Item Short Name.
3. Click the Transfer button to assign the selected item range to the Group ID. Click OK to close the Transfer completed successfully dialog box.
4. Click the OK button to return to the Linked Item Group Maintenance window.

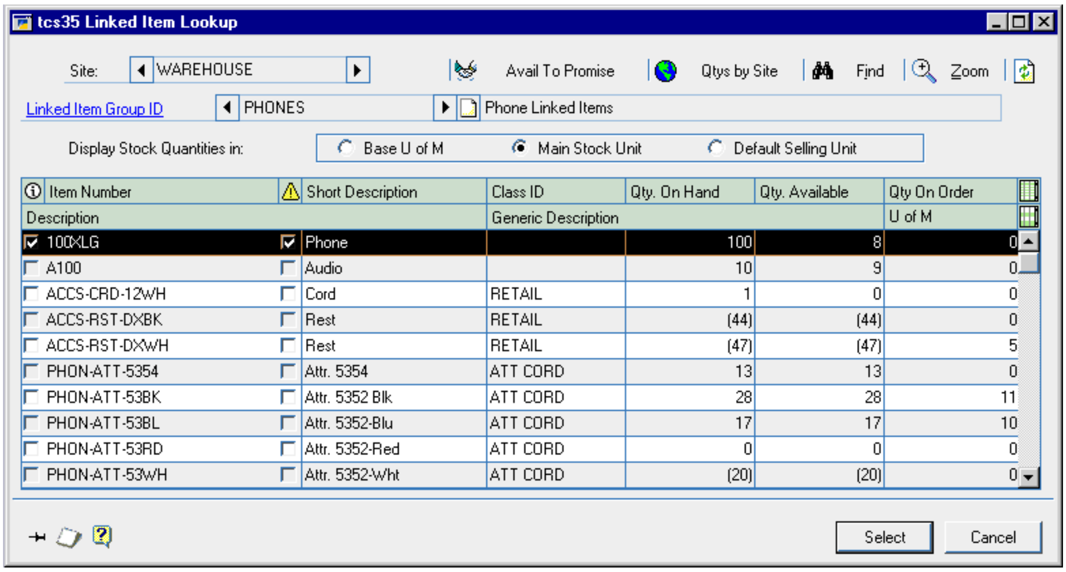
3. Linked Item Lookup window

Transactions >> Sales >> Sales Trx Entry >> Extras >> Linked Item Lookup

Use the Linked Item Lookup window to:

- Select linked items

The Linked Item Lookup window



Note that this window will be displayed automatically when you complete the entry of a Linked Item line in a sales transaction. Linked items are only available for quote, order and invoice documents.

The Linked Item Lookup window is also available through the Great Plains Sales Item Detail Entry window.

3.1 Adding Linked Items to Sales Transactions

To add linked items to sales transactions using the Linked Item Lookup window:

1. The Linked Item Lookup window will open details of the Group ID that the trigger item entered into the sales transaction belongs to.

   Note that if you have trigger items in the sales transaction for more than one Group ID, and select the Linked Item Lookup window as an Extras option, then the Group ID for the first trigger item in the transaction will be displayed.

2. All linked items within the Group will be displayed in the scrolling window with relevant details and quantities. Next to the Item Number field are two check boxes. If the first box is checked then the item has already been assigned to the current sales transaction document. If the second is checked then the associated item is a trigger item on the displayed Group.

3. You can select to scroll between sites by clicking the Site browse buttons. Click Redisplay to display the Linked Item details for each selected Site.

4. If more than one Linked Item Group is available for the transaction (where more than one trigger item has been entered into the transaction) then you can select to scroll between Groups by clicking the Group browse buttons. Click Redisplay to display the Linked Item details for each selected Group.

   There are also Avail To Promise, Qtys by Site, Find and Zoom buttons.

   If you have access to the Great Plains Advanced Distribution module then clicking the Qtys by Site button will display the currently selected Item Number in the Qty By Site Lookup window (see Great Plains Advanced Distribution).

   If you have access to the Great Plains Available To Promise module then clicking the Avail To Promise button will display the currently selected Item Number in the Available To Promise window (see Great Plains Available To Promise).

   Click the Find button to search for an Item Number using the Find window.

   Click the Zoom button to display the selected Item Number in the Great Plains Item Maintenance window

   The Display Stock Quantities in option allows you to select the units in which to display items. This is only available if you also have access to the Myridas Unit of Measure Management module.

5. To add a linked item to the sales transaction click on the Item Number then click Select. The Item will be added to the sales transaction.

Note that you can click Cancel at any point prior to clicking the Select button to close the Linked Item Lookup window.

Appendix A

Access to Myridas Windows

Linked Item Selling

Window Name	Menu Access	Other Access
Linked Item Group Maintenance	Cards >> Myridas Cards >> Linked Item Maintenance	
Linked Item Group Range Allocation	Cards >> Myridas Cards >> Linked Item Maintenance >> Ranges button	
Linked Item Lookup	Transactions >> Sales >> Sales Trx Entry >> Extras >> Linked Item Lookup	Transactions >> Sales >> Sales Trx Entry >> Enter full line containing a Trigger Item

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