

*myridas*TM *User Guide*

Version 7.7 for Great Plains 7.5

Unit of Measure Management



Trinity Computer Services Limited

November 2003

Contents

| | |
|---|-----------|
| CONTENTS | 2 |
| USING THIS GUIDE | 3 |
| ABOUT MYRIDAS | 4 |
| UNIT OF MEASURE MANAGEMENT | 5 |
| 1. SPLIT PACK/MAIN STOCK UNIT MAINTENANCE WINDOW | 6 |
| 1.1 <i>Setting Up Split Packs and Specifying Main Stock Units</i> | 6 |
| 2. UNIT OF MEASURE MANAGEMENT SETUP WINDOW | 7 |
| 2.1 <i>Specifying Default Units for Windows</i> | 7 |
| 3. MYRIDAS STOCK COUNT UNIT OF MEASURE ENTRY WINDOW | 8 |
| 3.1 <i>Entering Stock Counts for Split Pack items</i> | 9 |
| 4. ITEM QUANTITIES LOCATIONS WINDOW | 10 |
| 4.1 <i>Viewing Item Location and Quantities Details</i> | 10 |
| 5. EXTENDED PRICING WITH UNIT OF MEASURE MANAGEMENT | 12 |
| 5.1 <i>How Base Unit Prices are Generated</i> | 12 |
| 6. GENERATE BASE UNIT PRICES WINDOW | 13 |
| 6.1 <i>Generating Base Unit of Measure Prices</i> | 14 |
| 7. SPLIT PACK REPORTS | 16 |
| APPENDIX A | 17 |
| ACCESS TO MYRIDAS WINDOWS..... | 17 |
| <i>Unit of Measure Management</i> | 17 |
| APPENDIX B | 18 |
| MODIFIED GREAT PLAINS WINDOWS..... | 18 |
| APPENDIX C | 19 |
| MYRIDAS REPORTS | 19 |
| INDEX | 20 |

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 Unit of Measure Management module:

- Unit of Measure Management



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

The screenshot shows a window titled "tcs00 About Myridas" with a header image of a warehouse and the Myridas logo. The window is divided into two main sections: "License Information" and "Installation Details".

License Information

| | | | |
|--------------|--|-------|--|
| Company Name | | | |
| Max Users | | | |
| Key 1 | | Key 2 | |
| Key 3 | | Key 4 | |
| Key 5 | | | |

Installation Details

| | | | |
|--------------------------|------------------------|-------------------------|------|
| Company ID | The World Online, Inc. | | |
| Installer Version | 7.7.0 | Dictionary Build | 7.70 |

| Module | Registered | Installed |
|-----------------------|-------------------------------------|-------------------------------------|
| Additional Charges | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Call Scheduling | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Catalogue based sales | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |

An "OK" button is located at the bottom right of the window.

Unit of Measure Management

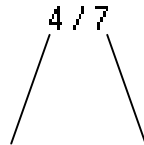
The Myridas Unit of Measure Management module provides the facility to specify items as “split pack” items. You may, for example, distribute bottles of wine by the bottle or by the case. The Myridas split pack format allows you to view the number of full cases and the number of additional bottles simultaneously.

In addition the Unit of Measure Management module allows you to view inventory balances in alternate units, not just the base unit, in a number of windows.

The main features of the Unit of Measure Management module are:

- The facility to specify items as split pack items
- The facility to specify a main stock unit for items
- The facility to perform stock counts on items in the split pack format
- The facility to view items in main stock units or split pack format in a range of Great Plains and Myridas windows
- Integration with Great Plains Extended Pricing to generate base unit of measure prices from alternate unit of measure prices

*The Myridas
Split Pack
Format*



number of main units (e.g.: cases) number of split units (e.g.: bottles)

The Myridas Split Pack format allows the user to instantly evaluate item quantities, and provides greater controls over item quantity management.

With the Myridas Unit of Measure Management module, multiple windows are given the functionality to display item quantities in the split pack format, as shown below.

*Additional
Windows
with Split
Pack Format
Functionality*

| Additional Windows with Split Pack Format Functionality |
|---|
| Great Plains Item Lookup window |
| Great Plains Stock Card window |
| Great Plains Available to Promise window |
| Myridas Item Quantities Locations window |
| Myridas Stock Count Entry window |

1. Split Pack/Main Stock Unit Maintenance window



Cards >> Myridas Cards >> U of M Management >> Split Pack MSU Maint.

Use the Split Pack/Main Stock Unit Maintenance window to:

- Set up items and unit of measure schedules as split packs
- Specify the Main Stock Unit for items and unit of measure schedules

The Split Pack/Main Selling Unit Maintenance window

Note that this window is also available as an Extras option from the Great Plains Item Maintenance window.

1.1 Setting Up Split Packs and Specifying Main Stock Units

To set up split packs and specify Main Stock Units in the Split Pack/Main Stock Unit Maintenance window:

1. Click on either Item or U of M Schedule. This will decide whether selections you make in the window apply to a specified item or to a Unit of Measure schedule.

Making the selections against a Unit of Measure schedule may be useful, for example, if you want to apply parameters to a range of items based on their shared Unit of Measure schedule.

2. Dependant on the selection made in step 1, enter either an Item Number or a Unit of Measure schedule, or use the lookup to select from the relevant lookup window.

The description of your selection will be displayed below. If you selected Item in step 1 then the U of M Schedule for the selected Item Number will also be displayed.

3. From the drop-down list select the Unit of Measure that you want to be the Main Stock Unit for the item or Unit of Measure schedule. The drop-down list

is item specific and only contains units of measure held within the item Unit of Measure schedule.

The Main Stock Unit is the Unit of Measure that will be most commonly used for viewing stock balances and transactions.

4. From the drop-down list select the Unit of Measure you want to be the sales consolidation unit.
5. If you want to specify your selected item, or items contained in the Unit of Measure schedule as split pack items, click the split pack indicator box.
6. Click Save to apply your selection

*Deleting
selected
parameters*

You can delete parameters set in the Split Pack/Main Stock Unit Maintenance window by clicking the Delete button.

Note that you can clear a selection at any point by clicking the Clear button.

2. Unit of Measure Management Setup window



Cards >> Myridas Setup >> Unit of Measure Management >> Unit of Measure Management Setup

Use the Unit of Measure Management Setup window to:

- Specify the default units in which items will be displayed in the named enquiry windows

*The Unit of
Measure
Management
Setup
window*

| Window | Base U of M | Main Stock Unit | Default Selling Unit |
|----------------------|----------------------------------|-----------------------|-----------------------|
| Item Lookup | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Stock Card | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Available To Promise | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Item Qty's Locations | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Stock Count | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> |

2.1 Specifying Default Units for Windows

To specify default units for windows in the Unit of Measure Management Setup window:

1. For each named enquiry window you are given the option to select the Default Units in which items will be initially displayed. For example, if you want to always view items in the Item Lookup window in their Default Selling Unit of Measure, then click Default Selling Unit in the Item Lookup row.

2. Click OK to invoke the parameters that you have set.

Note that you can undo a selection and revert back to previously set parameters at any point by clicking the Cancel button.

Each of the windows specified in the Unit of Measurement Management Setup window has been given the added functionality to display items in the split pack format. Whilst viewing items in these windows, the items will by default be displayed in the units specified in the Unit of Measurement Management Setup window. You may however select to display an item in different units when in the windows by using the appropriate drop-down lists or lookups.

Note that if an item selected for display in one of the affected windows does not have, for example, a Main Stock Unit applied to it, then it will by default be displayed in the Base Unit of Measure.

3. Myridas Stock Count Unit of Measure Entry window



Transactions >> Inventory >> Stock Count Entry >> In the Stock Count Entry window, enter a counted quantity for an item and choose the Counted Qty expansion button

Use the Myridas Stock Count Unit of Measure Entry window to:

- Enter stock count results in split pack format

The Myridas Stock Count Unit of Measure Entry is visually similar to the Great Plains Stock Count Unit of Measure Entry window. However, added functionality allows you to enter stock counts for split pack items.

*The Myridas
Stock Count
U of M Entry
window*

| U of M | Counted Qty | Ext Counted Qty |
|--------|-------------|-----------------|
| Case | 4 / 8 | 48 |
| I | 0 / 0 | 0 |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |

Total Extended Counted Qty: 48

Note that you cannot enter stock counts for lot or serial numbered items. Stock counts for non-split pack items can be entered in the standard manner.

3.1 Entering Stock Counts for Split Pack items

To enter stock counts for split pack items in the Myridas Stock Count Unit of Measure Entry window:

1. Open the Stock Count Entry window.
(Transactions >> Inventory >> Stock Count Entry)
2. Enter or select the stock count ID.
3. In the scrolling window, select the item-site combination you want to enter results for.
4. Choose the Counted Qty. expansion button to open the Myridas Stock Count Unit of Measure Entry window.

Note that you must have clicked onto the Counted Qty. scrolling window to activate the expansion button.

5. Enter or select a Unit of Measure for the results, and then enter the counted quantity for that Unit of Measure.

The available fields for entering counted quantities will be dependent upon the Unit of Measure that you select. For example, Units of Measure for bottles of wine could be Cases (Main units) and Bottles (Split Pack units). If you choose to enter the counted quantities in Cases, then you can enter the number of Cases and the number of Bottles in the split pack format. For example, 3/2 would be three Cases plus two Bottles. If you choose to enter in Bottles then the first numerical field of the split pack format (i.e.: the Split Pack field) will be disabled so that you may only enter Bottles quantities.

Note that if a case holds ten bottles, then the highest figure that could be entered into the second field would be 9.

6. Repeat step 5 until you've entered all count results for the item-site combination. As you move off each line, the extended quantity—the equivalent in the base unit of measure, according to the assigned unit of measure schedule—is calculated and displayed.
7. Choose OK to close the Stock Count Unit of Measure Entry window.

The counted quantity and variance quantity are updated automatically in the Stock Count Entry scrolling window.

8. Repeat steps 3 to 7 until all necessary stock count results have been entered.
9. Process or Save the stock count, following standard Great Plains behaviour.

4. Item Quantities Locations window



Enquiry >> Myridas Enquiries >> U of M Management >> Item Qty's Locations

Use the Item Quantities Locations window to:

- View item location and quantity details

The Item Qty's Locations window

Note that this window is also available as an Extras option from the Great Plains Item Quantities Maintenance window.

4.1 Viewing Item Location and Quantities Details

To view item location and quantity details in the Item Quantities Locations window:

1. Enter an Item Number or click the lookup to select an Item Number from the Items lookup window.
2. Select a Unit of Measure from the U of M drop-down list.
3. The Sites parameters are set by default to view All. To select a specific Site ID click Site ID then use the Browse buttons or click the lookup to select a site for the Item Quantities by Site lookup window.

Note that items will be displayed in the default unit set in the [Unit of Measure Management Setup window](#). Use the Unit of Measure drop-down list to view in an alternative unit of measure.

4. All relevant details for your selection will be displayed. When you have viewed the information click OK to close the window.

Note that if you have access to the Great Plains Available to Promise module then you can view the selected item site combination in the Available to Promise window. Click the Avail To Prom button to display the window. If you do not have access to the Great Plains Available to Promise module then the button will be disabled.

5. Extended Pricing with Unit of Measure Management

Great Plains Extended Pricing provides functionality for setting up multi-layered pricing structures using price books and price sheets.

The Unit of Measure Management module provides additional functionality by enabling you to generate base unit of measure prices automatically. Prices can be generated automatically for multiple items or price groups using the [Generate Base Unit Prices window](#), for both split pack and non-split pack items.

5.1 How Base Unit Prices are Generated

Base unit prices can only be generated for items/groups that have prices set up for the non-base unit on price sheets. Generated base unit prices are directly drawn from the price set up for the main selling unit. For example you may have a price set up of £50 for a case of 10 item A's. The generated base unit price for an individual item A would be £5. The base unit price would then be added to the same price sheet (and price group where relevant) as the originating unit price.

Note that if you have prices set up for more than one unit of measure for an item then the unit price used to generate a base unit price from would be the unit set up as the default selling unit for the item.

You can use the Generate Base Unit Price Options window to apply additional markups to the base unit prices generated. For example, a case of 10 Item A's may have a net price of £50. When generating base prices for individual item A's you may want to have a markup of £1 on each individual item A sold. You would select the Net Price Markups Value option and enter a value of 1. All items/groups selected for base price generation, with non-base unit prices set up as net prices, would be subject to the same markup. See below for full details on how pricing markups are applied.

| | |
|-----------------------------------|---|
| Net Price Markup | Added to the calculated base unit net price |
| Value Off Markup | Deducted from the calculated base unit value off amount, to result in less value off |
| Percentage Off Markup | Deducted from the calculated base unit percentage off amount, to result in less % off |
| Cost Uplift Value Markup | Added to the calculated base unit cost uplift value amount, to result in more uplift |
| Cost Uplift Percent Markup | Added to the calculated base unit cost uplift percentage amount, to result in more uplift |

If a non-base unit price with quantity breaks is used to calculate a base unit price, the lowest level quantity break, for example 1 - 10, will be used in the calculation. Quantity break pricing is not generated; only one base unit price will be set up.

6. Generate Base Unit Prices window



Routines >> Myridas Routines >> U of M Management >> Auto Base Price Gen

Use the Generate Base Unit Prices window to:

- Generate prices for items and price groups against their base unit of measure

The
Generate
Base Unit
Prices
window

| Price Sheet ID | Item Number | U of M | Existing Base Entry | Qty | New Base Entry | Based on | Price Type | Update |
|----------------|---------------|--------|---------------------|-----|----------------|----------|------------|-------------------------------------|
| I DRINKS | CAB SAUVIGNON | Bottle | * | | \$3.94 | U of M | | <input checked="" type="checkbox"/> |
| I DRINKS | CORBIERES | Bottle | * | | \$3.94 | U of M | | <input checked="" type="checkbox"/> |
| I DRINKS | MERLOT | Bottle | * | | \$3.94 | U of M | | <input checked="" type="checkbox"/> |

Note that you can also display this window by selecting the Generate Base Prices Extras option from the Price Sheet Maintenance or Price Sheet Detail Maintenance windows. See below for further details of the default settings in the Generate Base Unit Prices window and the Generate Base Unit Price Options window if opened as an Extras option.

| Price Sheet Maintenance window | Price Sheet Detail Maintenance window |
|--|--|
| Current price sheet selected | Current price sheet selected |
| Both Items & Groups selected | Items Only or Price Groups Only default dependent upon selection |
| All Markup options set to none | All Markup options set to none |
| Quantity Free Options set to Copy | Quantity Free Options set to Copy |
| Scrolling window populated with items/groups without base unit prices set up | Items to Update set to Split Packs Only |
| | Overwrite Mode set to New Prices Only |
| | Scrolling window populated with items/groups without base unit prices set up |

6.1 Generating Base Unit of Measure Prices

To generate base unit of measure prices using the Generate Base Unit Prices window:

1. All price sheet IDs will be selected by default. To generate base unit prices for selected price sheets click From and enter a range of price sheets or select them using the lookup.
2. All class IDs will be selected by default. To generate base unit prices for selected class IDs click From and enter a range of class IDs or select them using the lookup.
3. For Item & Group Options select the option that you want to generate base unit prices for from: Items Only, Price Groups Only or Both Items & Groups.

If you select Price Groups Only then the option to select an item number range (step 4) will be disabled.

If you select Items only then the option to select a price group range (step 5) will still be accessible. Groups will not be displayed in the scrolling window; items assigned to groups in the selected range will be displayed.

4. All items will be selected by default. To generate base unit prices for selected items click From and enter a range of items or select them using the lookup.
5. All price groups will be selected by default. To generate base unit prices for selected price groups click From and enter a range of price groups or select them using the lookup.
6. Click the Price Type Options button to display the Generate Base Unit Price Options window where you can select further options to define an item/group range to generate base unit prices for.

The Generate Base Unit Price Options window

| | | | |
|-----------------------------|---|---|------|
| Items to Update | <input checked="" type="radio"/> Split Packs Only | <input type="radio"/> All | |
| Overwrite Mode | <input type="radio"/> New Prices Only | <input checked="" type="radio"/> Overwrite Existing Price | |
| Options per Price Type | | | |
| Net Price Markups | <input type="radio"/> None | <input checked="" type="radio"/> Percentage <input type="radio"/> Value | 5.00 |
| Value Off Markups | <input checked="" type="radio"/> None | <input type="radio"/> Percentage <input type="radio"/> Value | 0.00 |
| Percent Off Markups | <input checked="" type="radio"/> None | <input type="radio"/> Percentage | 0.00 |
| Cost Uplift Value Markups | <input checked="" type="radio"/> None | <input type="radio"/> Percentage <input type="radio"/> Value | 0.00 |
| Cost Uplift Percent Markups | <input checked="" type="radio"/> None | <input type="radio"/> Percentage | 0.00 |
| Quantity Free Options | <input type="radio"/> Copy | <input checked="" type="radio"/> Ignore | |

7. For Items to Update click to select to generate base unit prices for Split Packs Only or for All items.
8. For Overwrite Mode click to select to generate New Prices Only or to Overwrite Existing Prices.

If you select New Prices Only then only items/groups without base unit prices set up will be displayed in the Generate Base Unit Prices window. If you select Overwrite Existing Prices then all items/groups within the selected criteria will be displayed and any current base unit prices will be overwritten.

9. Options per Price Type give you functionality enabling you to set markup values to the base prices that you generate. Click Percentage or Value and enter a percentage or value for each price type that you want to apply a markup to. See [How Base Unit Prices are Generated](#) for further details.

Note that the Cost Uplift options will be disabled unless you have the Cost Uplift Pricing option selected in the Extended Pricing Extras Setup window (see the Myridas Extended Pricing Enhancements User Guide for further details).

10. For Quantity Free Options click Copy to assign the same quantity free promotion as applies to the non-base unit price or Ignore to not incorporate quantity free items in the base unit price.
11. Click OK to close the window and return to the Generate Base Unit Prices window.
12. Click Preview to view your selected item/group range in the scrolling window.

All items/groups in the selected range will be displayed in the scrolling window in the base unit of measure. Items are denoted with an I symbol. Groups are denoted with a G symbol. Prices with decimal places rounded up to meet the item currency decimals will be denoted with an * symbol.

13. Click the Update checkbox to select/deselect items/groups for base unit price generation, or use the Mark All/Unmark All buttons to select/deselect all items/groups.
14. Click the Update button to generate base unit prices for all selected items/groups. The Report Destination window will be displayed giving you the option to print the Base Prices Generation Audit Report. Select your required option then close the window.

Note that if you opened the Generate Base Unit Prices window from the Price Sheet Maintenance window or the Price Sheet Detail Maintenance window then the Generate Base Unit Price window will close automatically when the report is printed and you will be returned to the originating window with the newly generated prices displayed.

7. Split Pack Reports



Many Great Plains reports have been given additional functionality by the Myridas Unit of Measure Management module to display items in reports in the split pack format.

| |
|---|
| Split Pack Format Compatible Reports: |
| Inventory Stock Status Report |
| Inventory Stock Status by Site Report |
| Historical Stock Status Detail by Account |
| Historical Stock Status Detail by Item |
| Historical Stock Status Detail by Site |
| Historical Stock Status Summary by Account |
| Historical Stock Status Summary by Item |
| Historical Stock Status Summary by Site |
| Physical Inventory Checklist Report |
| Physical Inventory Checklist by Site Report |
| Physical Inventory Checklist by Site No Quantity Report |
| Physical Inventory Checklist No Quantity Report |
| Stock Count Forms by Item Report |
| Stock Count Forms by Item Break Report |
| Stock Count Forms by Site Report |
| Stock Count Forms by Site Break Report |
| Stock Count List Report |
| Vendor Activity Report |
| Vendor Activity by Vendor Report |

Appendix A

Access to Myridas Windows

Unit of Measure Management

| Window Name |  Menu Access |  Other Access |
|--|---|---|
| Generate Base Unit Price Options | | Routines >> Myridas Routines >> U of M Management >> Auto Base Price Gen >> Price Type Options button |
| Generate Base Unit Prices | Routines >> Myridas Routines >> U of M Management >> Auto Base Price Gen | <p>Cards >> Inventory >> Extended Pricing >> Price Sheets >> Extras >> Generate Base Prices</p> <p>Cards >> Inventory >> Extended Pricing >> Price Sheets >> Expansion button >> Extras >> Generate Base Prices</p> |
| Item Quantities Locations | Enquiry >> Myridas Enquiries >> U of M Management >> Item Qtys Locations | Cards >> Inventory >>Quantities/Sites >> Extras >> Item Qty Locs |
| Split Pack/Main Stock Unit Maintenance | Cards >> Myridas Cards >> U of M Management >> Split Pack MSU Maint | Cards >> Inventory >> Item >> Item Maintenance window >> Extras >> U of M Management Maintenance |
| Stock Count Unit of Measure Entry | Transactions >> Inventory >> Stock Count Entry >> In the Stock Count Entry window, enter a counted quantity for an item and choose the Counted Qty Expansion button | |
| Unit of Measure Management Setup | Cards >> Myridas Setup >> U of M Management >> U of M Management Setup | |

Appendix B

Modified Great Plains Windows

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

| Great Plains Window Name | Series | Myridas Module | Modification |
|---------------------------------|---------------|----------------------------|---|
| Inventory Activity Reports | Inventory | Unit of Measure Management | Runs versions of reports which show split pack items in split pack format |
| Items | Inventory | Unit of Measure Management | <p>Will display split pack items in the Split Pack format</p> <p>Unit Selection field allows you to select a display Unit of Measure</p> <p>This modification will only be available if the Great Plains Advanced Distribution module is also installed</p> |

Appendix C

Myridas Reports

Myridas provides multiple reports to increase information visibility.

| Report Name | Module | Functionality |
|-------------------------------------|----------------------------|---|
| Base Prices Generation Audit Report | Unit of Measure Management | Prints details of base unit prices that have been generated |

Multiple reports have been enhanced for the Unit of Measure Management module.

See [Split Pack Reports](#) for further details.

Index

B

Base Unit Prices
generating 14

E

Entering
stock counts for split pack items 9
Extended Pricing 12

G

Generate Base Unit Price Options
window 14
Generate Base Unit Prices window 13
Generating Base Unit Prices 12, 14
calculations 12
quantity breaks 12

H

How Base Unit Prices are Generated . 12

I

Item Quantities Locations window 10

S

Setting Up Default Units for windows..7
Setting Up Main Stock Units6
Setting Up Split Packs.....6
Split Pack Format.....5
Split Pack Reports..... 16
Split Pack/Main Stock Unit
Maintenance window.....6
Stock Count Unit of Measure Entry
window8

U

Unit of Measure Management.....5
Unit of Measure Management Setup
window7

V

Viewing item locations and quantities 10