myridas™ User Guide

Version 7.8 for Great Plains 7.5

Customer Templates

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 Customer Templates module:

- Customer Templates

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.

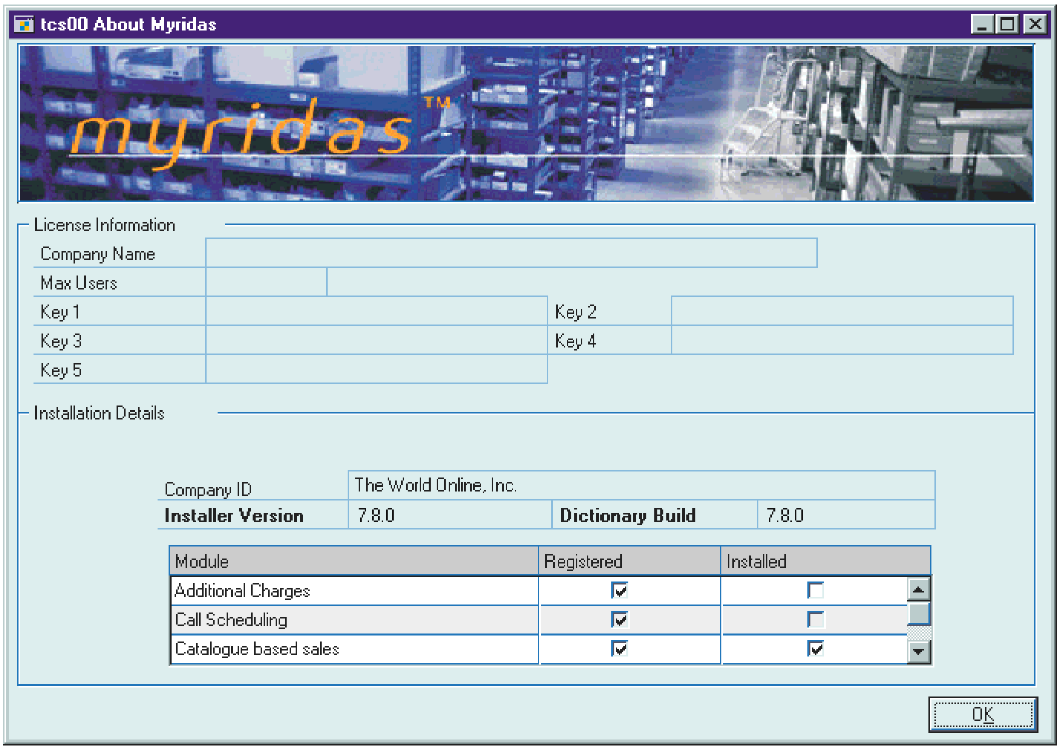
A full range of tutorials is also available on our website, http://www.trinitypartner.com.

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



Customer Templates

A customer order template is a list of products that a customer orders regularly, such as wine lists for restaurants, or spare-parts lists for customer machinery. Each template is created for a selected ship-to address, and an unlimited number of templates can be created for each address.

Once created, order templates can be can be used as lookups during sales transaction entry by accessing the Template Select window. The Template Select window also displays the history of orders placed for a selected item *i.e.* quantities, price, order numbers and dates etc.

The main features of the Myridas Customer Templates module are:

- The facility to set up customer order lists, where required, based on historical data
- The facility to update order templates automatically
- Template lookup in sales order entry enables rapid selection of items
- The facility to restrict debtors to purchasing items from a specified template
- The facility to purge templates of unrequired items
- The facility to copy template details
- The option to base template history on sales orders or invoices
- Generate template history option to generate templates from customers historical data
- The facility to create templates from Extended Pricing price sheets

A default template can be selected for individual customer ship-to addresses if required in the Default Template Extras window. One template per customer ship-to address can also be selected as the historical template in the Template Maintenance window. This template is automatically updated with any new items ordered by a customer during order entry. All other templates are fixed templates and can only have items added or removed in the Template Maintenance window.

Templates can be copied using the Template Copy window. Alternatively they can be generated from historical data using the Generate Template History window or from Great Plains Extended Pricing price sheets using the Price Sheet Template Creation window.

Historical information is updated for each customer regardless of whether order templates have been created, and can be displayed directly in the Order History window.

Template details for a selected customer range can be printed from the Template Report window.

Purge facilities allow the removal of historical records. Use the Template Purges window to delete template items from a historical template that have not been ordered since a specified date, and to delete order history that is older than a specified date.

Setup

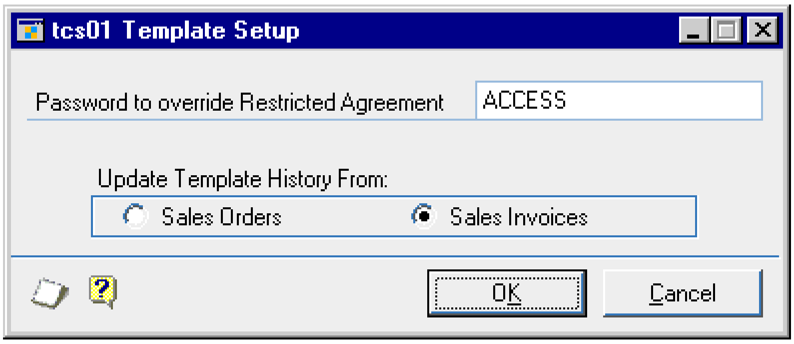
1. Template History Setup window

Cards >> Myridas Setup >> Template Selling >> Template Hist. Setup

Use the Template History Setup window to:

- Set up a password to override restricted agreements
- Set template history parameters from sales orders or invoices

The Template History Setup window



The update template history settings on this window will be especially useful if you enter sales documents directly as invoices rather than as orders.

Note that sales orders are the default parameter for the Customer Templates module. If you want historical templates to be based on sales orders, and have not already set the parameter to base them on sales invoices, then you do not need to adjust the setting in this window.

1.1 Setting a Password to Override Restricted Agreements

To setup a password to override restricted agreement templates in the Template History Setup window:

1. If you require the facility to override restricted agreement templates (see Setting Template Defaults for Debtors) then enter a password.

   If a debtor is on a restricted agreement template then items not on the template cannot be entered into sales transactions for the debtor. You can set up a password here so that if a non-template item is entered into a sales transaction for a debtor on a restricted agreement template then you will be given the option to enter the password. If the correct password is entered then the item will be accepted into the transaction.

   If no password is entered then restricted agreement templates cannot be overridden.

1.2 Setting Template History Parameters from Sales Orders or Invoices

To set parameters for updating historical templates from sales orders or invoices in the Template History Setup window:

1. Under Update Template History From click to select either Sales Orders or Sales Invoices.

   Your selection will set the parameters upon which historical templates are based. For example, if you select Sales Invoices then historical templates will be based on Sales Invoices rather than Sales Orders.

2. Click OK.

   Note that if you have templates on your system that are based on the parameter that you have NOT selected then you will receive a warning that template history data will be lost.

   Note that you can click Cancel at any point prior to clicking the OK button to close the Template History Setup window.

Cards

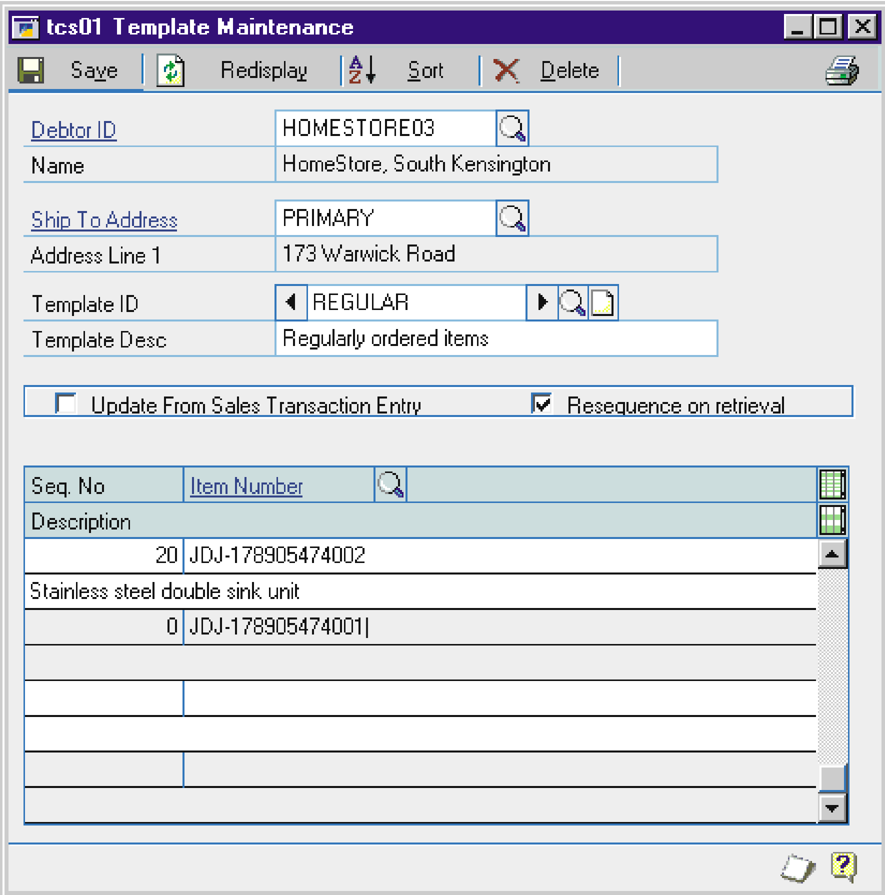
2. Template Maintenance Window

Cards >> Myridas Cards >> Template Selling >> Template Maintenance

Use the Template Maintenance window to:

- Create and edit templates

The Template Maintenance window



2.1 Creating and editing templates

To create or edit a template in the Template Maintenance window:

1. Enter a Debtor ID or click the Debtor ID lookup to select one from the Debtors and Prospects window.
2. Enter a Ship To Address or click the Ship-to lookup to select one from the Addresses window.
3. Enter a Template ID to identify your template, or click the lookup to select one from the Template Lookup window. If you select an existing template, its details will be displayed in the scrolling window. Click the Show button to display item descriptions.
4. Enter a Template Description to describe your template.
5. Select the Update From Sales Transaction Entry check box if you want this template to be the historical template.

6. Select the Resequence on retrieval check box if you want sequence numbers to be automatically regenerated each time the template is loaded into Template Maintenance.

Sequence numbers are required for each item on a template and can be entered by the user or automatically generated by the system. They provide an alternative method of sorting the template within order entry, such as sorting wine lists by bin number.

7. Enter an Item Number or click the lookup to select one from the Items window. Repeat for each item to be added to the template.
8. Enter a new Seq. No. for each item on the template or accept the system defaults.
9. Click Save to save your template.

Deleting templates

Click the Delete button to remove a template.

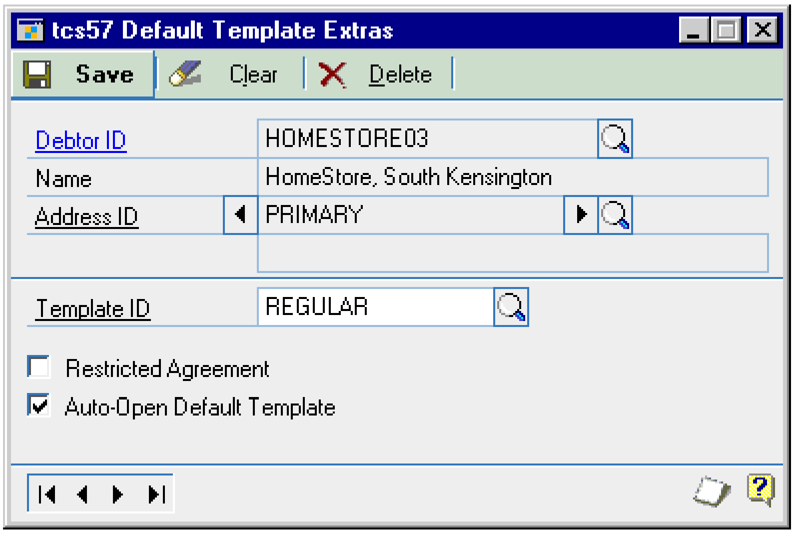
3. Default Template Extras window

Cards >> Myridas Cards >> Template Selling >> Def. Template Extras

Use the Default Template Extras window to:

- Restrict a debtor to purchasing items from a specified template
- Set a default template for a debtor/address combination

The Default Template Extras window



Note that the Default Template Extras window is also available as an Extras option from the Debtor Maintenance window.

3.1 Setting Template Defaults for Debtors

To set template defaults for debtors in the Default Template Extras window:

1. Enter a debtor ID or select one using the lookup.
2. Enter an address ID or select one using the lookup or browse buttons.
3. Enter a template ID or select one using the lookup. The selected template ID will be the default template for the displayed debtor/address combination.
4. Click the Restricted Agreement option to limit the selected debtor/address combination to purchasing items from the selected template only.
5. Click the Auto-Open Default Template option to set the selected template ID to automatically open when entering items into a sales transaction for the selected debtor/address combination.
6. Click Save to save the settings and close the window.

Deleting default template settings

Click Delete to delete default template settings.

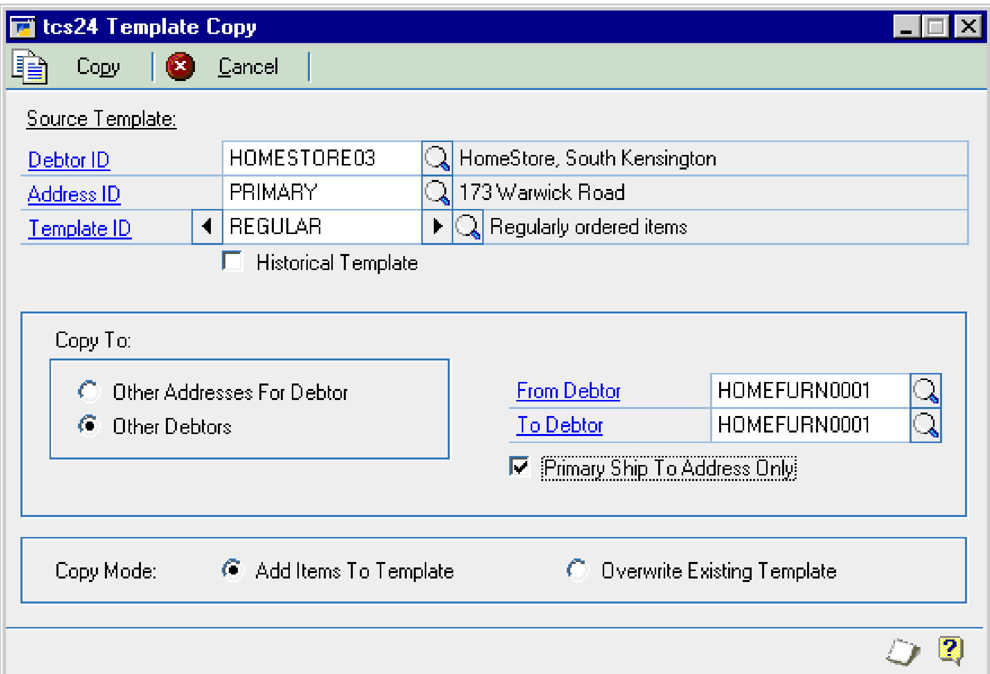
4. Template Copy window

Cards >> Myridas Cards >> Template Selling >> Template Copy

Use the Template Copy window to:

- Copy templates to other addresses or other debtors

The Template Copy window



4.1 Copying Templates

To copy a template report in the Template Copy window:

1. Enter a Debtor ID or click the lookup to select a Debtor ID from the Debtors and Prospects window.

2. Enter an Address ID or click the lookup to select an Address ID from the Addresses Lookup window for the selected Debtor.

3. Enter a Template ID or click the lookup to select a Template ID from the Template lookup window. You can also use the browse buttons to move between Template IDs.

Note that if you have set the Template to be a Historical Template then the Historical Template check box will be highlighted.

4. Click to select whether you want to copy the selected template to Other Addresses for Debtor or Other Debtors.

5. If you select Other Addresses for Debtor you should then enter From and To Addresses or click the lookups to select addresses from the Addresses Lookup window.

6. If you selected Other Debtors enter From and To Debtors or click the lookups to select Debtors from the Debtors and Prospects window.

Note that this will copy the selected template to all addresses held for the selected Debtor range. To apply the template copy to the Primary Ship To Address only, click the Primary Ship To Address Only check box. This field will only be displayed if you selected the Other Debtors option.

7. For Copy Mode click to select Add Items to Template or Overwrite Existing Template. If you select to Add Items to Template then only items new to the address or debtor will be added to template.

   If you select to Overwrite Existing Template then any templates already held for selected Debtor/address combinations will be overwritten in full, and the Debtor/address combination will be assigned the full template.

8. Click the Copy button to apply the template copy selections that you have made.

Note that you can click Cancel at any point prior to clicking the Copy button to close the Template Copy window.

Enquiries and Reports

5. Template Select Window

Enquiry >> Myridas Enquiries >> Template Selling >> Template Select

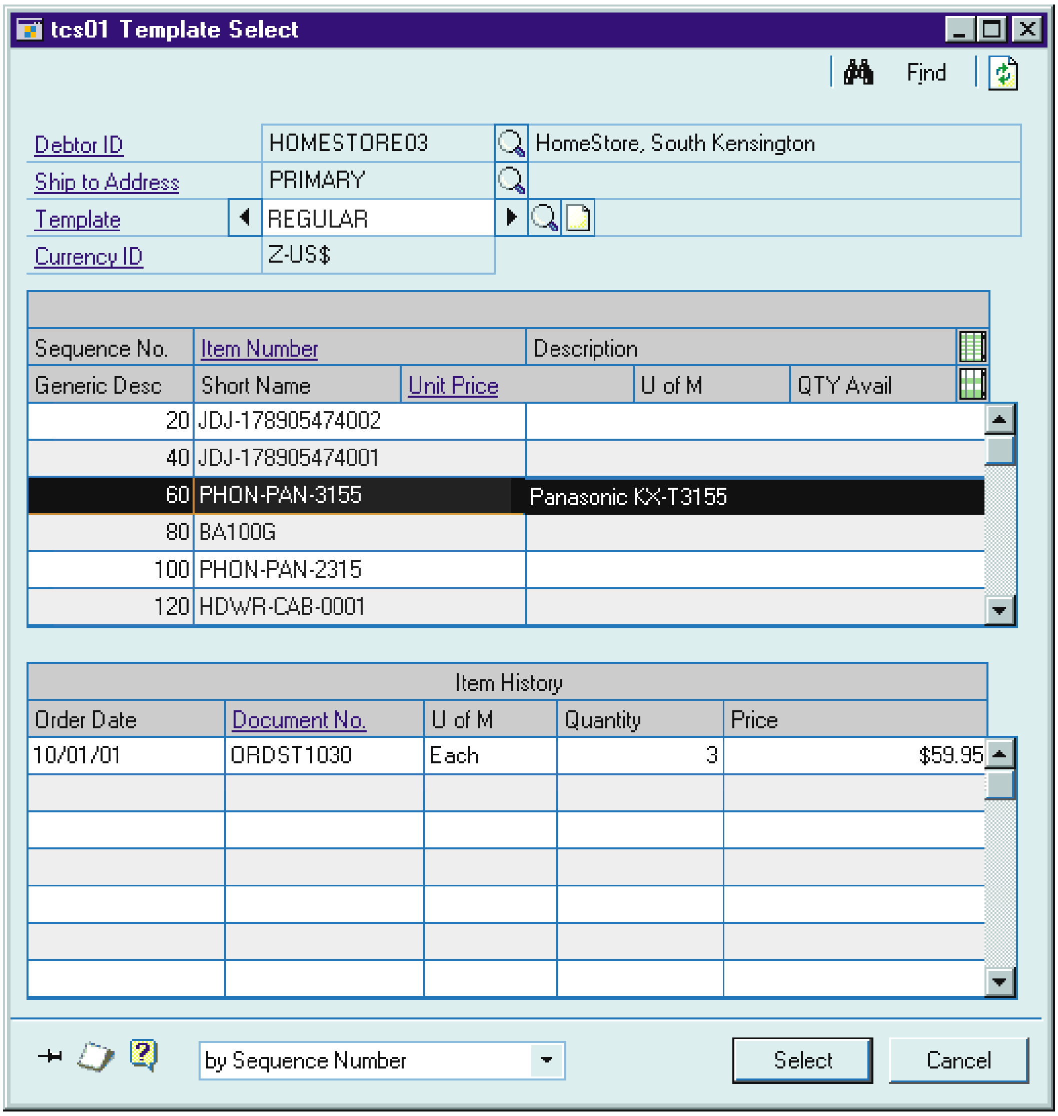
Use the Template Select window to:

- Select template items during sales transaction entry
- View order history

Note that the Template Select window can also be opened from the Sales Transaction Entry window – choose Template Select from the enabled Extras menu.

If you selected the Auto-Open Default Template option in the Default Template Extras window then the Template Select window will open displaying the selected default template for the debtor/address combination when entering items into sales transactions.

The Template Select window



5.1 Selecting template items during sales transaction entry

An order template can be used as a lookup during sales transaction entry.

To lookup a template during sales transaction entry in the Template Select window:

1. Start to enter your sales document details in the Sales Transaction Entry window. Once you have selected a Document No. and a Debtor ID, the Template Select window will become available to use.
2. Select Template Select from the Extras menu.
3. The Template Select window will open showing the current Debtor ID selection and default Ship to Address, Template ID entries and Currency ID. Accept these settings or make new selections.
4. Each template item will be displayed in the Items scrolling window. The Unit Price for each item is the price that is applied to the item in sales transaction entry, whether you are using standard pricing or Extended Pricing.
5. If you want to select multiple items from the template, click the Push Pin button to keep the Template Select window open after each selection. For each item to be selected:
   5.1. Highlight an item or click Find to locate one in the Find Item window.
   5.2. Click the Select button to return the selected item to the Sales Transaction Entry window.
6. Enter the remaining transaction details in the normal way.

If the customer/ship-to address has an historical template, it will be updated with any new items when you create and save an order. You will be given the option to create an historical template automatically when you first create an order for a new ship-to address.

5.2 Viewing order history

When selecting template items during sales transaction entry, the lower half of the Template Select window displays the order history for a selected template item.

To view the order history of an item in the Template Select window:

1. Highlight an item in the Items scrolling window.

The Item History scrolling window will display any historical orders associated with the selected item. For each order, the order date, order number, unit of measure, quantity and price will be shown. If you are also using the Myridas Catchweights module, the Catchweight Units of Measure and listed quantities will be also be displayed in the Item History scrolling window.

2. To view an order in more detail:
   2.1 Highlight an order in the Item History scrolling window or click the Find button to locate one in the Find History window.
   2.2 Click the Order Number zoom. The Order History window will open.

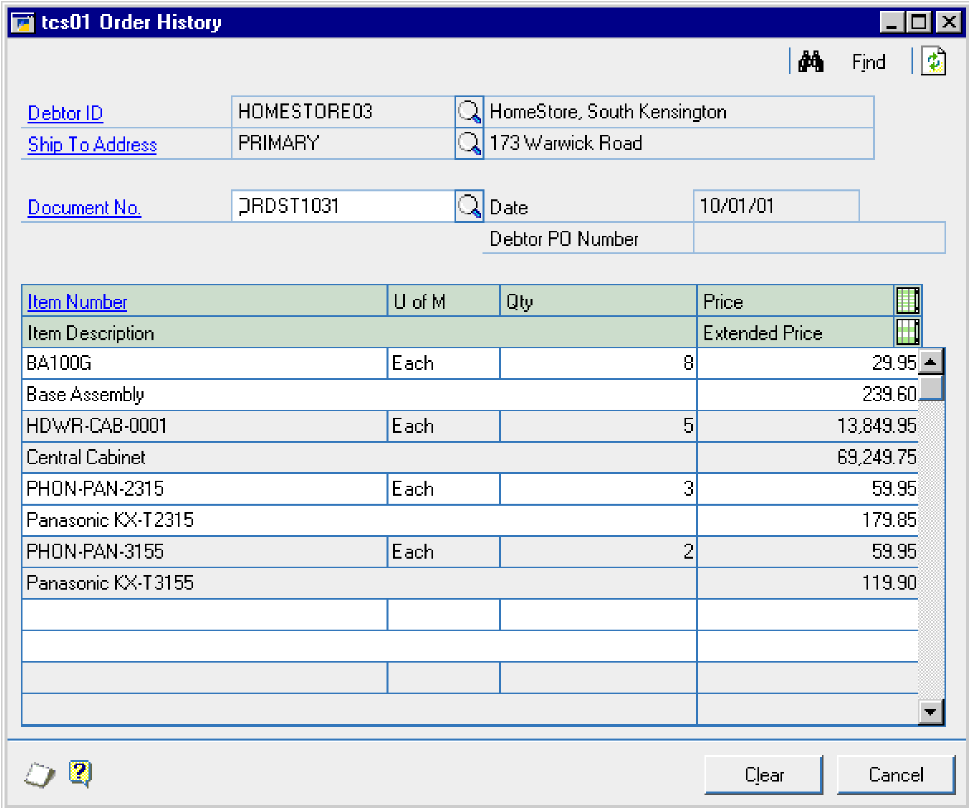
6. Order History Window

Enquiry >> Myridas Enquiries >> Template Selling >>Order History

Use the Order History window to:

- View historical orders

The Order History window



Note that the Order History window can also be opened by clicking the Order Number zoom in the Template Select window.

6.1 Viewing historical orders

To view historical orders in the Order History window:

1. When called from the Template Select window, the Order History window opens showing the current Debtor ID, Ship To Address and Document No. selection. Accept these settings or make a new selection.
2. Each item in the order will be displayed in the scrolling window. The item number, unit of measure, quantity and price will be listed for each item. Click the Show button to display the item description and extended price.
3. Click the Find button to locate a specific item in the Find Item window (optional).

Note that if you are using the Myridas Catchweights module then clicking the Show button will display Catchweight Units of Measure and quantities for the listed orders.

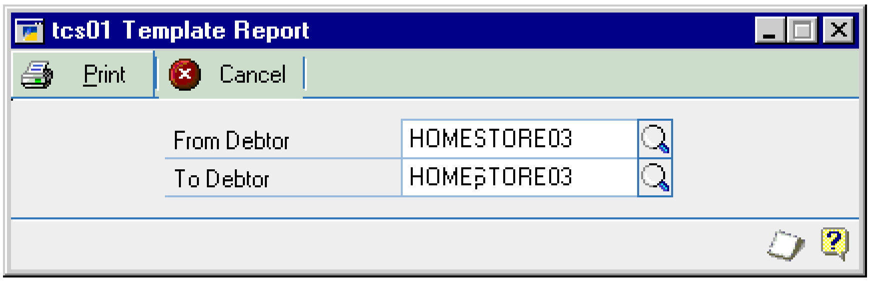
7. Template Report Window

Reports >> Myridas Reports >> Template Selling >> Template Report

Use the Template Report window to:

- Print template details for a range of customers

The Template Report window



7.1 Printing template details

To print a template report in the Template Report window:

1. Enter a From Debtor ID or click the lookup to select one from the Debtors and Prospects window.
2. Enter a To Debtor ID or click the lookup to select one from the Debtors and Prospects window.
3. Click the Print button.

Printing single templates

To print a single template, select Print from the File menu when the template is displayed in the Template Maintenance window.

Routines

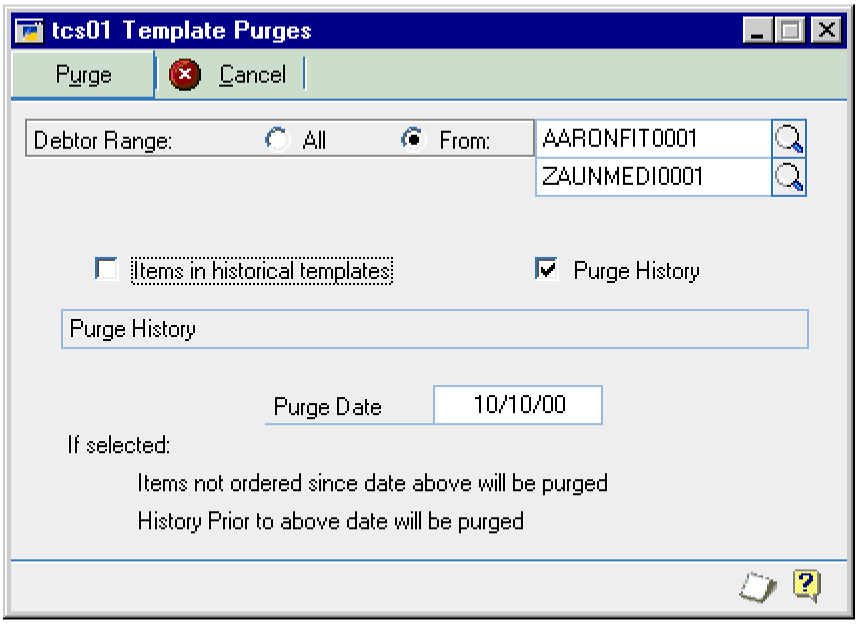
8. Template Purges Window

Routines >> Myridas Routines >> Template Selling >> Template Purge

Use the Template Purges window to:

- Remove items that have not been ordered since a specified date from a historical template
- Remove order history older than a specified date

The Template Purges window



8.1 Removing historical information

To remove historical items and order history in the Template Purges window:

1. Select All to purge all customer details, or select From to purge a range of customer details. If you select From, enter to and from Debtor IDs to specify a range, or use the lookups.
2. Select the Items in historical templates check box and/or the Purge History check box to remove items from historical templates or purge history, or do both.
3. Enter a Purge Date.
4. Click the Purge button.

History older than the entered date will be deleted.

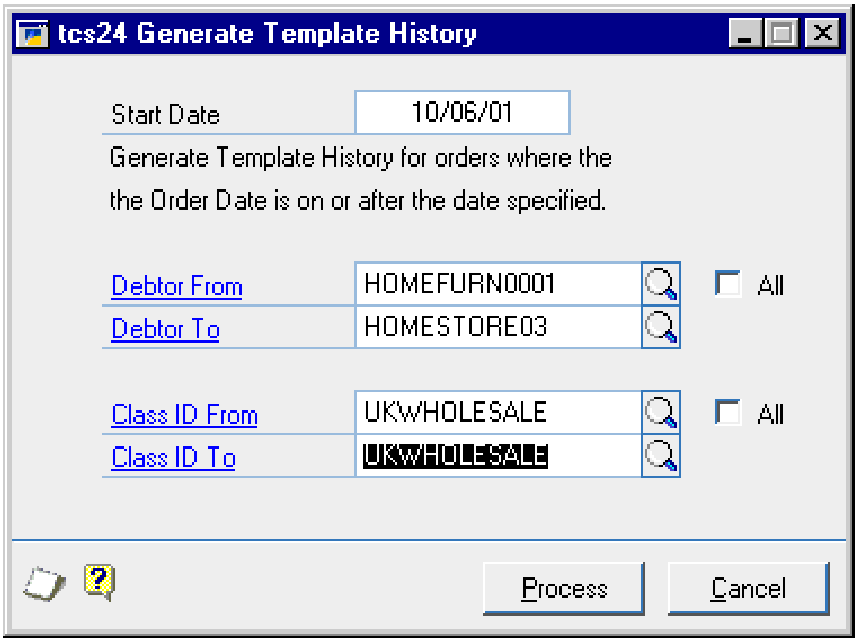
9. Generate Template History window

Routines >> Myridas Routines >> Template Selling >> Template Take-on

Use the Generate Template History window to:

- Generate historical templates for selected orders

The Generate Template History window



This will be particularly useful if you want to create historical templates for debtors whose sales orders were created before you set up the Customer Templates module.

9.1 Generating historical templates for selected orders

To generate historical templates for selected orders in the Generate Template History window:

1. Enter the Start Date from which you want a historical template to be generated. All **orders** (i.e.: not quotes, returns or invoices) placed from that date to present will be included on the historical templates for your selected range. These orders must have a Ship To Address specified or a template will not be created.

   Note that the Start Date default initially displayed in the window will be three months prior to the current date.

   Any Debtor/Address combination for which you have previously specified that a historical template isn't required will be omitted from processing. Enter a Debtor From and To range or use the lookups to select Debtors from the Debtors and Prospects window. You can click All to select all Debtors.

2. Enter a Class ID From and To range or use the lookups to select Class ID's from the Debtor Classes window. You can click All to select all Class ID's.

Note that if you include a Debtor in the range that has a Class ID not included in the range (or no Class ID) then this Debtor will not be included in the processing selection.

3. Click Process to create historical templates for your selection.

Note that you can click Cancel at any point prior to clicking the process button to close the Generate Template Histories window.

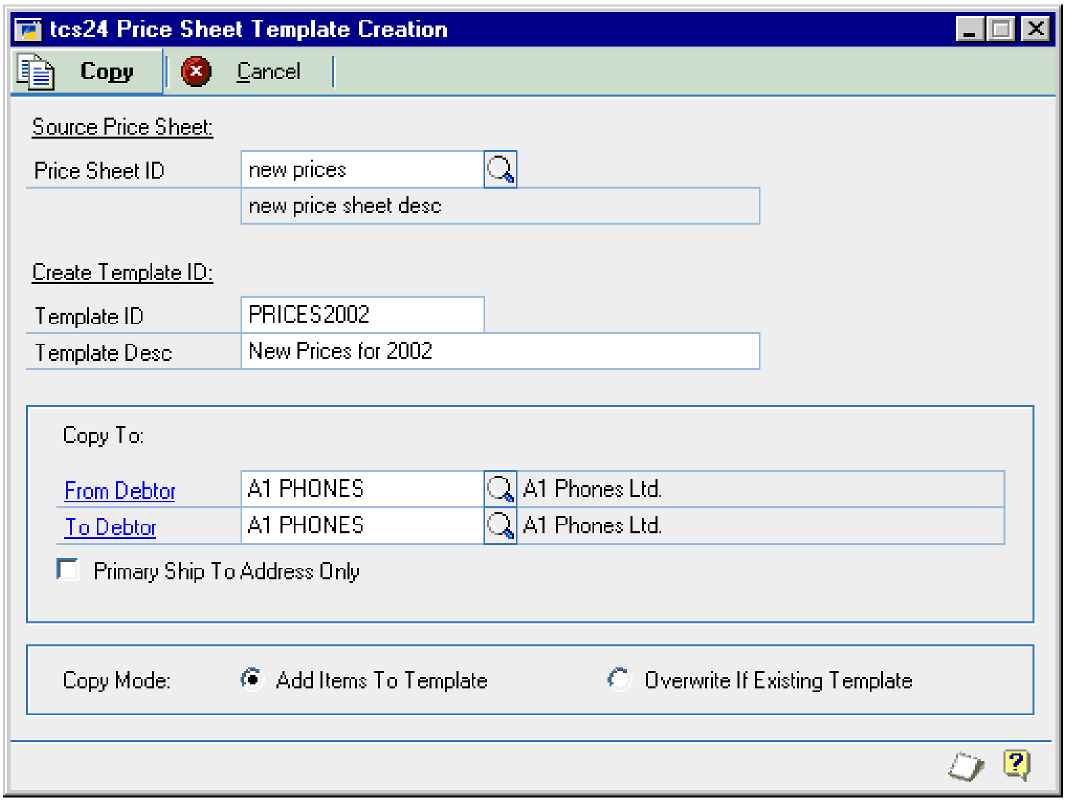
10. Price Sheet Template Creation window

Cards >> Myridas Routines >> Template Selling >> Prc. Sheet Template.

Use the Price Sheet Template Creation window to:

- Create templates from Extended Pricing Price Sheets

The Price Sheet Template Creation window



Note that this window will only be available if you are working with Extended Pricing in Great Plains. See the Great Plains User Manuals for further information on working with Extended Pricing.

10.1 Creating Templates from Extended Pricing Price Sheets

To create templates from Extended Pricing price sheets in the Price Sheet Template Creation window:

1. Enter the Price Sheet ID that you want to base a template on, or select one using the lookup.

2. Enter a Template ID and Template Description for the new template that you want to create.

   Note that you can enter a currently existing template - see the Copy Mode options for further details.

3. The Update from Sales Transaction Entry check box allows you to set templates created in this window as historical templates for the selected debtor range. Select this option to set the template as a historical template.

   Note that where any debtors in the selected range already have a historical template then the template created here will be assigned to them as a standard template. Details will be printed in the Template Creation from Price Sheet report which is printed automatically at the end of window processing.

4. Enter the debtor range that you want to assign the template to, or select a debtor range using the lookups.

5. Click the Primary Ship to Address Only option to assign the template to the Primary Ship Address only for the selected debtor range. Not selecting this option will result in the template being assigned to all addresses for the selected debtors.

6. Under Copy Mode you have two options. These options apply if you have selected an existing template as your Template ID.

Add Items To Template	Items from the price sheet not currently on the template will be added to the template
Overwrite If Existing Template	The template will be overwritten in its entirety with items on the price sheet

   Click to select the option you require.

7. Click Copy to copy details from the price sheet to the template for selected debtors.

Note that you can click Cancel at any point prior to clicking the Copy button to close the Price Sheet Template Creation window.

Appendix A

Access to Myridas Windows

Customer Templates

Window Name	Menu Access	Other Access
Default Template Extras	Cards >> Myridas Cards >> Template Selling >> Def. Template Extras	Cards >> Sales >> Debtors >> Extras >> Default Temp. Extras
Generate Template History	Routines >> Myridas Routines >> Template Selling >> Generate Template History	
Order History	Enquiries >> Myridas Enquiries >> Template Selling >> Order History	Sales Transaction Entry window >> Extras menu >> Order History Lookup
Price Sheet Template Creation window	Cards >> Myridas Routines >> Template Selling >> Prc. Sheet Template.	
Template Copy	Cards >> Myridas Cards >> Template Selling >> Template Copy	
Template History Setup window	Cards >> Myridas Setup >> Template Selling >> Template Hist. Setup	
Template Maintenance	Cards >> Myridas Cards >> Template Selling >> Template Maintenance	
Template Purges	Routines >> Myridas Routines >> Template Selling >> Template Purge	
Template Report	Reports >> Myridas Reports >> Template Selling >> Template Report	Template Maintenance window >> File >> Print (once a valid template has been selected)
Template Select	Enquiries >> Myridas Enquiries >> Template Selling >> Template Select	Sales Transaction Entry or Sales Item Details Entry windows >> Extras menu >> Template Select

Appendix B

Myridas Reports

Myridas provides multiple reports to increase information visibility.

Report Name	Module	Functionality
Sales Transaction Templates report	Template Selling	Select a range of templates in the Template Report window and print report Individual templates can be reported on through the Template Maintenance window
Template Copy Audit report	Template Selling	Prints details of processing performed through the Template Copy window
Template Creation from Price Sheet report	Template Selling	Prints details of processing performed through the Price Sheet Template Creation window

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