

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

Version 9.0 for Microsoft Dynamics<sup>TM</sup> GP 9.0

## **Item Manager**

Trinity Computer Services Limited

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## Using this Guide

The graphics in this document are best viewed or printed with Adobe Acrobat Reader version 4.0 or above.

This guide provides user notes for the Myridas Item Manager module:

- Item Manager



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>.

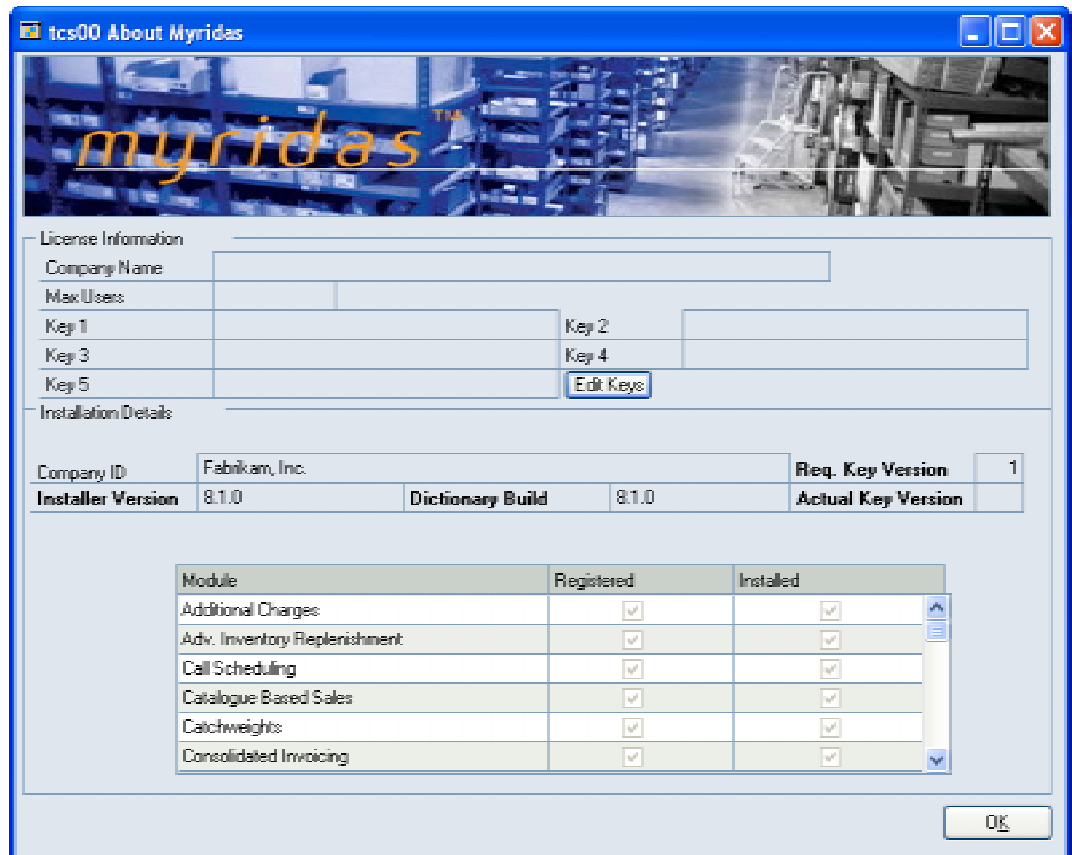
## About Myridas



*Help >> About Myridas*

Use the About Myridas window to check your license information and installation details. The window will tell you which Myridas modules you are registered to use and which have been installed on your system.

*The About Myridas window*



## Item Manager

The Myridas Item Manager module is designed to facilitate the creation of new items and the assigning of items to sites. Enhanced performance is given via two new features, the Myridas Copy Item Wizard and the Myridas Assign/Unassign Sites Wizard.

With standard Microsoft Dynamics™ GP the creation of new items, no matter how similar, must be performed individually. The Myridas Copy Item Wizard allows the user to choose one existing item as a template and then copy selected information from this item to generate unlimited item master records. For the new items the user can enter item codes and descriptions individually or merge these details automatically from an external source such as a spreadsheet.

The Myridas Assign/Unassign Sites Wizard allows the user to perform mass assigning of items to and from sites. Rather than removing obsolete stock from a site one item at a time, you can use the Assign/Unassign Sites Wizard to remove a whole range of items from a site.

The main features of the Myridas Item Manager module are:

- The facility to copy item details to create a new item
- The facility to select an item as a template then clone selected information to create unlimited new items
- The facility to perform mass allocation or removal of items to or from a selection of sites

## 1. Copy Item Wizard



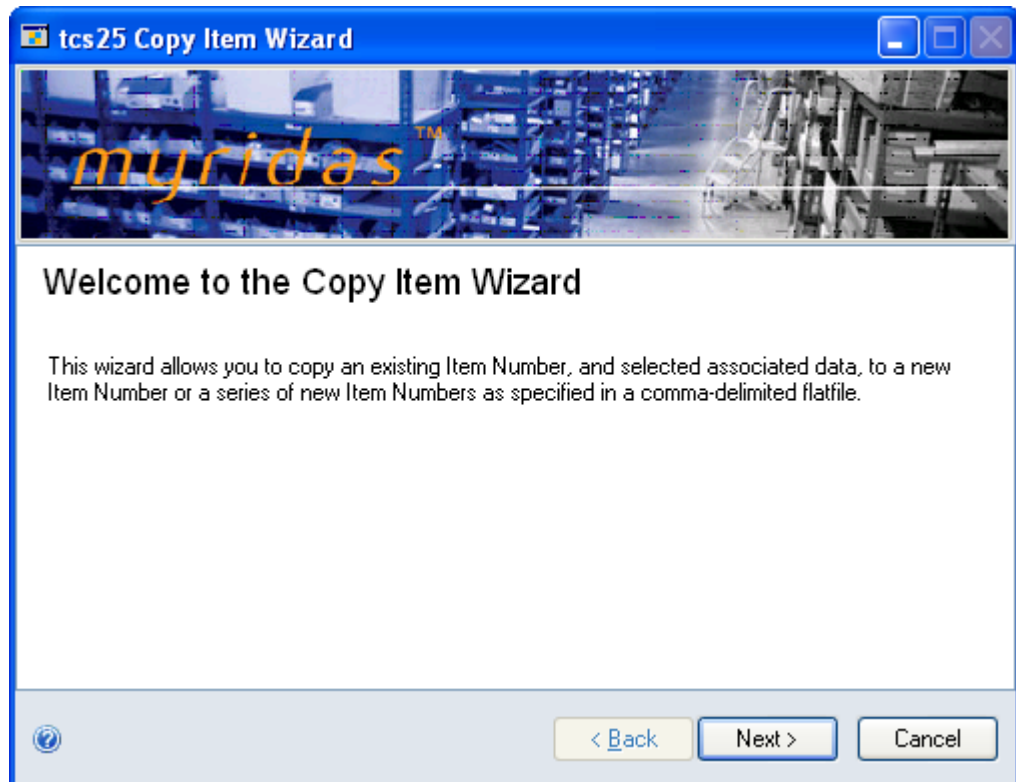
*Tools >> Routines >> Myridas >> Item Manager >> Copy Item Wizard*

The Myridas Copy Item Wizard allows the user to create single or multiple clones of a selected item.

Use the Copy Item Wizard to:

- Copy an existing Item Number and selected information to a new Item Number or range of Item Numbers

*The Copy  
Item Wizard*



### 1.1 Using the Copy Item Wizard

1. Click the Next button to display the next window

Note that you can click Cancel on this or any other Copy Item Wizard screen to close the Copy Item Wizard.

Note also that you can click the Back button on this or any other Copy Item Wizard screen to return to the previous screen.

## 2. Copy From screen



*Tools >> Routines >> Myridas >> Item Manager >> Copy Item Wizard*

*The Copy  
From screen*

Item Number	100XLG
Description	Green Phone
Short Name	Phone

### 2.1 Using the Copy From screen

1. Enter the Item Number that you want to copy, or click the lookup to select an Item Number from the Items window. The Item Description and Short Description will be displayed below.
2. Click the Next button to display the next screen.

### 3. Copy Options screen



*Tools >> Routines >> Myridas >> Item Manager >> Copy Item Wizard*

*The Copy Options screen*

#### 3.1 Using the Copy Options screen

1. Select the Item Number components that you want to copy. You can click on each component individually to select it, or click on the Mark All button to select all components. Click Unmark All to deselect all components.

#### Component Properties:

<b>Maintenance Options</b>	Copies information set up in the Item Maintenance window
<b>Item Note</b>	Copies any notes made against items using the Item Note facility
<b>Cost Details</b>	Copies cost details set up in the Item Maintenance window
<b>Accounts</b>	Copies information set up in the Item Account Maintenance window
<b>Site/Qtys</b>	Copies information set up in the Item Quantities Maintenance window
<b>Price Lists (including</b>	Copies information set up in the Item Price List

currency details)	Maintenance window
<b>Purchasing Options</b>	Copies information set up in the Item Purchasing Options Maintenance window
<b>Vendors</b>	Copies information set up in the Item Creditors Maintenance window
<b>Internet Information</b>	Copies information set up in the Internet Information window
<b>Minimum Shelf Life</b>	Copies information set up in the Set Minimum Shelf Life window
<b>Extended Pricing Price Details</b>	Copies pricing details set up with Extended Pricing
<b>Catchweight Details</b>	Copies catchweight information set up against items. <b>Required Modules:</b> Catchweights
<b>Split Pack Details</b>	Copies split pack details set up in the Split Pack/Maintain Stock Unit Maintenance window. <b>Required Modules:</b> Unit of Measure Management
<b>Picking Details</b>	Copies picking details set up using Microsoft Dynamics™ GP Advanced Picking
<b>Additional Charge Details</b>	Copies additional charge details set up using the Myridas Additional Charges module <b>Required Modules:</b> Additional Charges
<b>Item Load Details</b>	Copies item load details set up using the Myridas Load Planning module <b>Required Modules:</b> Load Planning
<b>Item Status Code Details</b>	Copies item status code details set up using the Myridas Item Life Cycle module <b>Required Modules:</b> Item Life Cycle
<b>Catalogue Attributes</b>	Copies catalogue attributes assigned to an Item Number using the Myridas Catalogue Based Sales module <b>Required Modules:</b> Catalogue Based Sales
<b>Catalogue Levels</b>	Copies catalogue levels to which an Item Number has been assigned using the Myridas Catalogue Based Sales module <b>Required Modules:</b> Catalogue Based Sales
<b>Reorder Level Management Details</b>	Copies reorder level management details assigned to an Item Number using the Myridas Reorder Level Management module <b>Required Modules:</b> Reorder Level Management

<b>Duty Processing Details</b>	Copies duty processing details assigned to an Item Number using the Myridas Duty Processing module <b>Required Modules:</b> Duty Processing
<b>Retrospective Discount Details</b>	Copies retrospective discount details assigned to an Item Number using the Myridas Retrospective Discounts module <b>Required Modules:</b> Retrospective Discounts
<b>Vendor Prices Details</b>	Copies vendor price details assigned to an Item Number using the Myridas Vendor Price Management module <b>Required Modules:</b> Vendor Price Management
<b>Site Default Bins</b>	Copies default bins details set for the item in the Item Site Default Bins window
<b>Item Resource Planning</b>	Copies item resource planning details set for the item in the Item Resource Planning Maintenance window
<b>Debtor Specific Product Details</b>	Copies details of any debtor specific settings assigned to items using the Myridas Distribution Enhancements module <b>Required Modules:</b> Distribution Enhancements
<b>Aggregate Pricing Details</b>	Copies any aggregate pricing details set up for the item using the Myridas Extended Pricing Enhancements module <b>Required Modules:</b> Extended Pricing Enhancements
<b>Alternate Item Code Details</b>	Copies any alternate item details set up using the Myridas Distribution Enhancements module <b>Required Modules:</b> Distribution Enhancements
<b>Forward and Scheduled Orders</b>	Copies forward order days. <b>Required Modules:</b> Forward and Scheduled Sales Orders
<b>Other</b>	This option allows you to customise the Item Copy to your own requirements. If you select "Other" then an SQL stored procedure (tcsINVSP00025_Customer_Specific) will be executed after all other details have been copied. Any required additional information can then be copied by adding the appropriate code to the stored procedure.

2. Click the Next button to display the next screen.

## 4. Copy To Source screen



Tools >> Routines >> Myridas >> Item Manager >> Copy Item Wizard

The Copy To Source screen

### 4.1 Using the Copy To Source screen

1. You can now select whether you want to enter a new Item Number manually (see 5.) or import multiple Item Numbers from an external flatfile (see 7.).

Note that a flatfile could be created from, for example, an Excel spreadsheet.

Sample Flatfile

100XLO	Orange Phone	Phone
100XLR	Red Phone	Phone
100XLP	Purple Phone	Phone

When creating a flatfile to import you should enter the three fields as shown in the example above. (The first column should contain the Item Number, the second column the Description and the third column the Short Description). Do not create a header field, as this will also be imported as a new item. The flatfile must be saved as a .csv or .txt file type.

2. Click on your selection then click the Next button. If you have selected to copy an Item Number manually then the Copy To screen will be displayed

(see below). If you have selected to copy form an external flatfile then the Select Flatfile screen will be displayed.

## 5. Copy To screen



*Tools >> Routines >> Myridas >> Item Manager >> Copy Item Wizard*

*The Copy To screen*

Item Number	100XLB
Description	Black Phone
Short Description	Phone

Copy Original Description
  Use Original Short Description

### 5.1 Using the Copy To screen

1. Enter the Item Number, Description and Short Description for your new item.

Note that you can copy the Description and Short Description from the original item. To do this leave the Description and Short Description fields empty and ensure that the Copy Item Description and Use Original Short Description boxes are checked.

2. Click the Next button to display the next screen.

## 6. Single Item Copy Update screen



*Tools >> Routines >> Myridas >> Item Manager >> Copy Item Wizard*

*The Single  
Item Copy  
Update  
screen*

**tcs25 Copy Item Wizard**


**Completing the Copy Item Wizard**

You have selected to copy the following Item Number:

100XLG	Green Phone
--------	-------------

To the following Item Number:

100XLB	Black Phone
--------	-------------

 When you choose Finish, the Item Number will be copied.

< Back   Finish   Cancel

### 6.1 Using the Single Item Copy Update screen

1. Click Finish to copy the selected Item Number. The Item Number will be copied and the Copy Completed screen will be displayed.

## 7. Select Flatfile screen



*Tools >> Routines >> Myridas >> Item Manager >> Copy Item Wizard*

*The Select  
Flatfile  
screen*

tcs25 Copy Item Wizard

Item Copy - Select the Flatfile *myridas*<sup>TM</sup>

Select the Text file that contains the new Item Numbers that are to be created

Flatfile Name

The comma delimited file should contain three fields;

Item Number,Item Description and Item Short Name

< Back Next > Cancel

### 7.1 Selecting a Flatfile

1. Enter the name and location of the flatfile you want to copy or click the browse button to select a file from your network.
2. Click next to display the next screen.

## 8. Flatfile Preview screen



Tools >> Routines >> Myridas >> Item Manager >> Copy Item Wizard

The Flatfile  
Preview  
screen

Include	Item Number	Item Description	Short Description	Error Description
<input checked="" type="checkbox"/>	100XLB	Black Phone		
<input checked="" type="checkbox"/>	100XLR	Red Phone		
<input checked="" type="checkbox"/>	100XLY	Yellow Phone		

Number of Items Selected to Copy: 3  
Number of Items with Errors: 0

Show All Item Numbers [v]    < Back    Next >    Cancel

### 8.1 Using the Flatfile Preview screen

1. All items to be copied from the selected flatfile will be displayed in the scrolling window.



Note that any errors will be displayed with a warning symbol. Items with errors will not be copied. If you require changes to be made to the flatfile you should do so in the relevant program, then re-import the flatfile into the Copy Item Wizard.

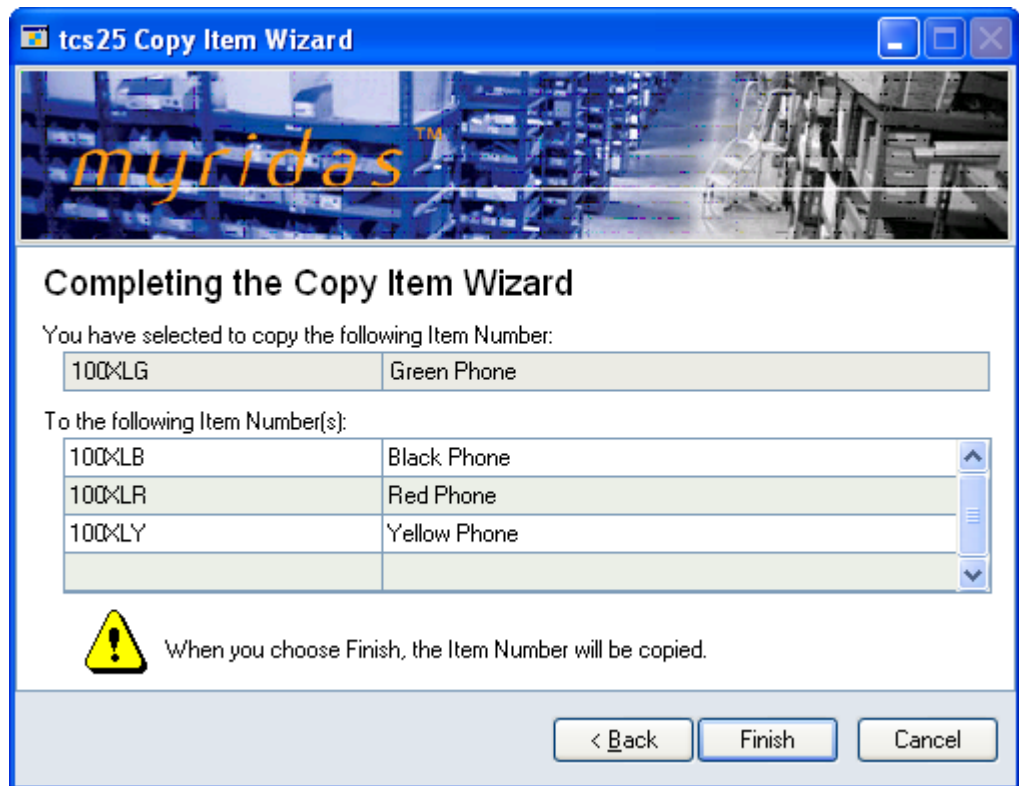
2. If you do not want a displayed Item Number to be included in the copy, click on the Include check box to unmark that item. The number of items selected to copy will be displayed below.
3. Click Next to display the next window.

## 9. Flatfile Update screen



*Tools >> Routines >> Myridas >> Item Manager >> Copy Item Wizard*

*The Flatfile  
Update  
screen*



### 9.1 Using the Flatfile Update screen

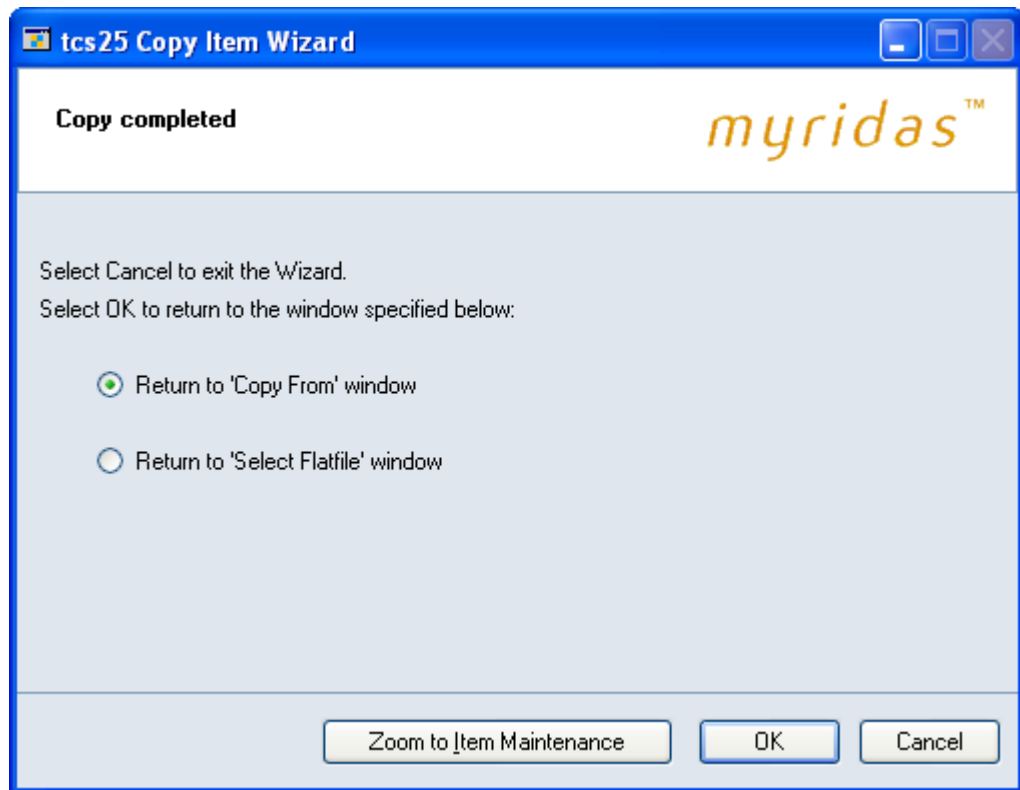
1. Click Finish to Copy the selected Item Number. The Item Numbers will be copied and the Copy Completed screen (see below) will be displayed.

## 10. Copy Completed screen



*Tools >> Routines >> Myridas >> Item Manager >> Copy Item Wizard*

*The Copy Completed screen*



### 10.1 Using the Copy Completed screen

1. To view the copied item/items click the Zoom to Item Maintenance button. The Microsoft Dynamics™ GP Item Maintenance window will be displayed. If a single item has been copied this will be displayed in the window.
2. You can now copy further Item Numbers. To copy from the same Item Number select the Return to 'Copy To' window option and click OK. To copy a different Item Number select the Return to 'Copy From' window option and click OK.
3. To close the Copy Item window click Cancel.

# Assign/Unassign Sites Wizard

## 11. Assign/Unassign Sites Wizard



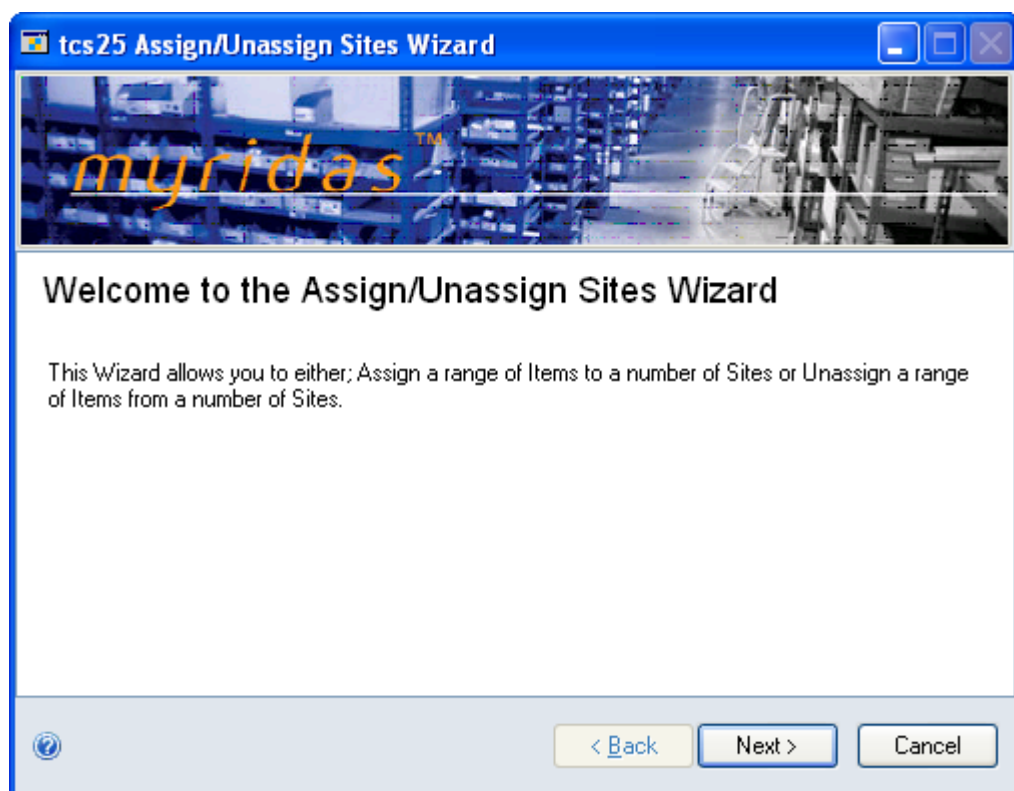
*Tools >> Routines >> Myridas >> Item Manager >> Assign/Unassign Sites Wizard*

The Myridas Assign/Unassign Sites Wizard allows the user to assign or unassign a range of items to or from a number of sites.

Use the Assign/Unassign Sites Wizard to:

- Assign a range of items to a site
- Unassign a range of items from a site

*The  
Assign/Unassign  
Sites Wizard*



### 11.1 Using the Assign/Unassign Sites Wizard

1. Click the Next button to display the next window

Note that you can click Cancel on this or any other Assign/Unassign Sites Wizard screen to close the Assign/Unassign Sites Wizard.

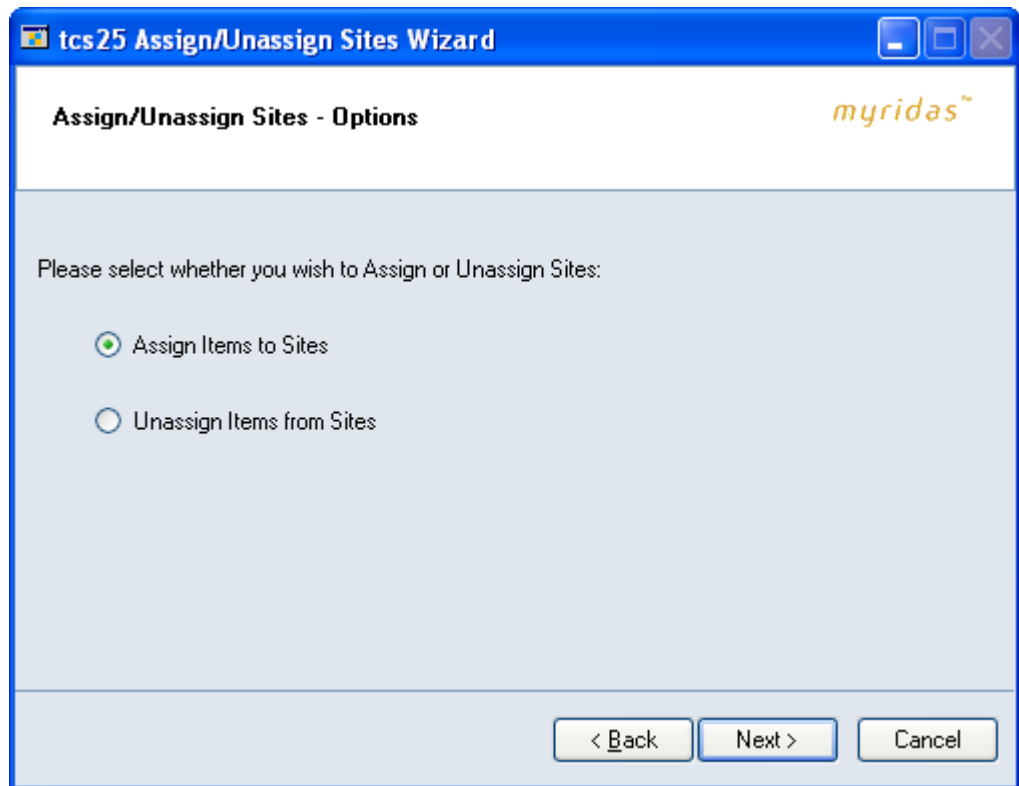
Note also that you can click the Back button whenever it is displayed to return to the previous screen.

## 12. Assign/Unassign Sites Wizard Options screen



*Tools >> Routines >> Myridas >> Item Manager >> Assign/Unassign Sites Wizard*

*The  
Assign/Unassign  
Wizard Options  
screen*



### 12.1 Using the Assign/Unassign Sites Wizard Options screen

1. Click to select whether you want to Assign Items to Sites or Unassign Items from Sites. If you select to assign items to sites then the Assigning Item Range screen will be displayed. If you select to unassign items from a site then the Unassign Item Range screen will be displayed.
2. Click Next to display the next screen.

## 13. Assigning Item Range screen



*Tools >> Routines >> Myridas >> Item Manager >> Assign/Unassign Sites Wizard*

*The Assigning  
Item Range  
screen*

**tcs25 Assign/Unassign Sites Wizard**

**Assign Items to Sites - Range Selection**

Choose an Item range that you want to Assign Sites to:

Item Number From: 100XLB

Item Number To: 100XLY

Choose the Site(s) that you want the Items to be Assigned to:

Sites		
<input checked="" type="checkbox"/>	NORTH	North store
<input type="checkbox"/>	SOUTH	South store
<input type="checkbox"/>	WAREHOUSE	Main Site
<input type="checkbox"/>	WC1	Work Center 1
<input type="checkbox"/>	WC2	Work Center 2
<input type="checkbox"/>	WC3	Work Center 3

Copy Primary Vendor from Default Site (if available)

< Back    Next >    Cancel

### 13.1 Assigning an Item Range to a Site

1. Enter From and To values for the range of Item Numbers that you want to assign to sites, or click the lookup to select Item Numbers from the Items window.
2. Click to select the Sites that you want to assign the range of items to.
3. To copy the Primary Vendor to the Sites that you are assigning the items to, click the Copy Primary Vendor from Default Site (if available) check box. Where you have Primary Vendor details set up for an item, they will be copied to the sites that you are assigning to the item.
4. Click Next to display the next screen.

## 14. Assigning Items to Sites Preview screen



*Tools >> Routines >> Myridas >> Item Manager >> Assign/Unassign Sites Wizard*

*The Assigning  
Items to Sites  
Preview screen*

Site	Item Number	Description
NORTH	100XLB	Black Phone
NORTH	100XLG	Green Phone
NORTH	100XLR	Red Phone
NORTH	100XLY	Yellow Phone

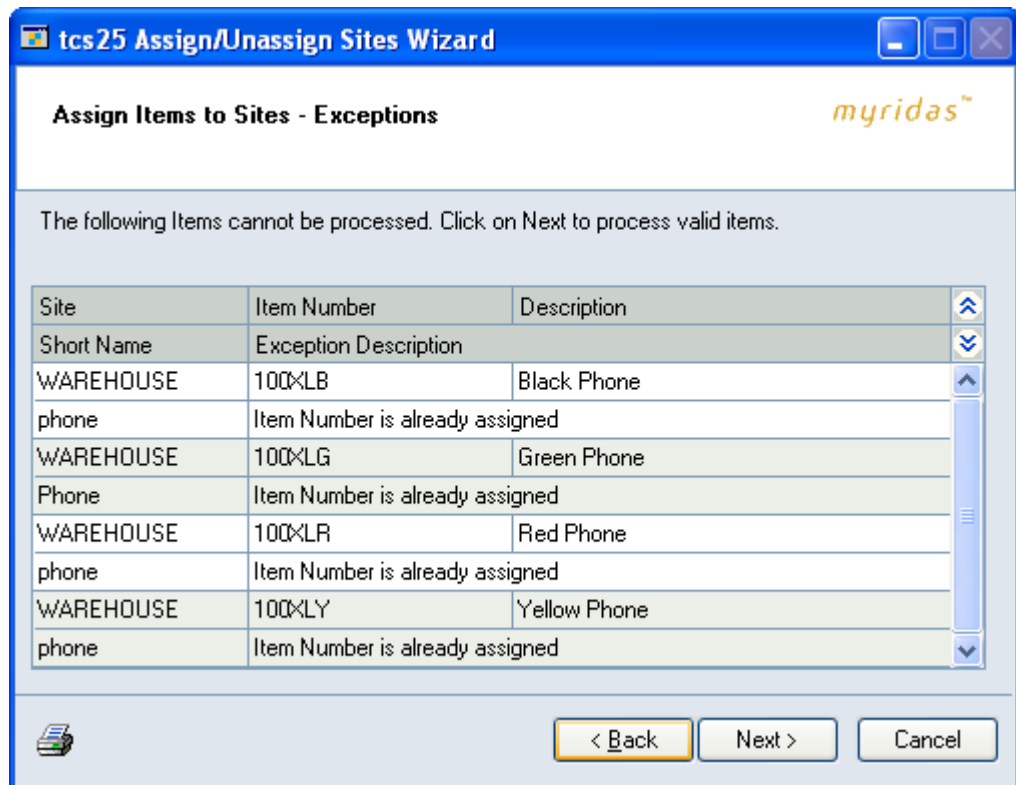
### 14.1 Previewing Items Assigned to Sites

1. The selected Sites and the range of Item Numbers that you have selected to be assigned to the Sites will be displayed in the scrolling window.
2. Click Next to display the next screen.



Note that if there are any exceptions, for example, where a selected Item Number is already assigned to a selected Site, then these will be displayed on the Exceptions screen. You can click Next to continue, Back to go back and amend your selection, or print out a list of the exceptions.

*The Exceptions  
screen*

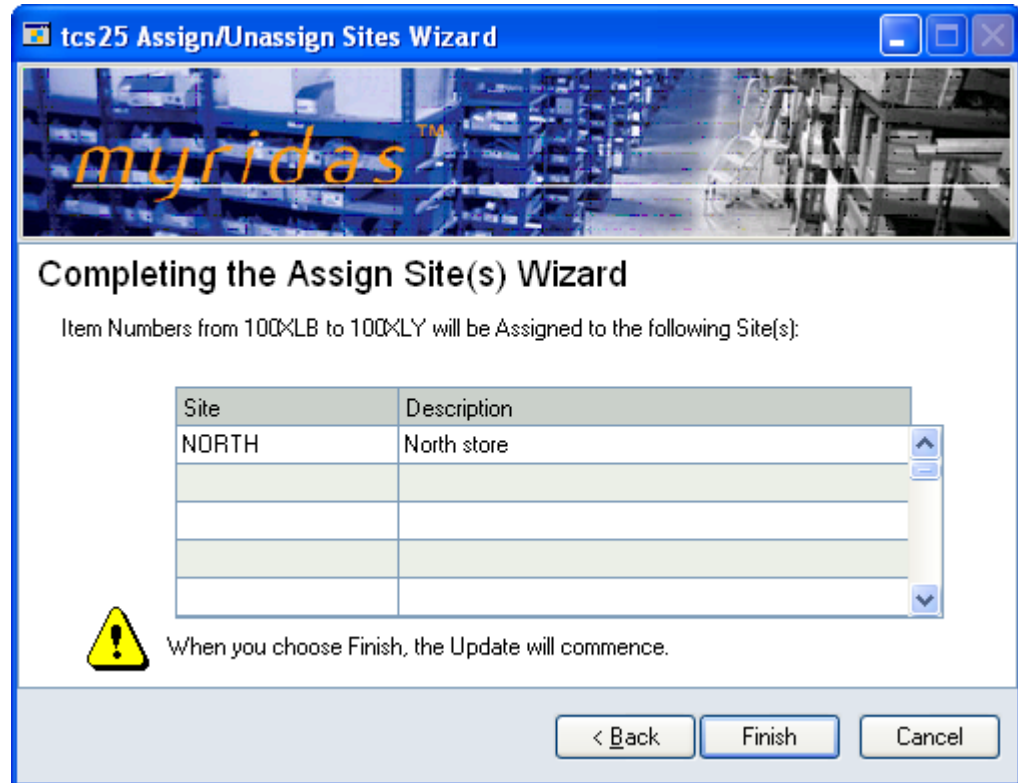


## 15. Assigning Items Update screen



*Tools >> Routines >> Myridas >> Item Manager >> Assign/Unassign Sites Wizard*

*The Assigning  
Items Updates  
screen*



### 15.1 Viewing Items to be Assigned

1. The range of Item Numbers that you have selected will be specified and the Sites to which they will be assigned will be displayed in the scrolling window.
2. Click Finish to assign the selected Item Numbers to the Sites you have selected. When the update is complete an Update Complete message will be displayed. You will be asked whether you want to assign Sites to more Item Numbers. Click Yes to display the Assigning Item Range screen, click No to close the Assign/Unassign Sites Wizard.

## 16. Unassign Item Range screen



*Tools >> Routines >> Myridas >> Item Manager >> Assign/Unassign Sites Wizard*

*The Unassign  
Item Range  
screen*

**Unassign Items to Sites - Range Selection**

Choose an Item range that you want to Unassign Sites from:

Item Number From: 100XLB

Item Number To: 100XLY

Choose the Site(s) that you want the Items to be Unassigned from:

Sites		
<input type="checkbox"/>	NORTH	North store
<input checked="" type="checkbox"/>	SOUTH	South store
<input type="checkbox"/>	WAREHOUSE	Main Site
<input type="checkbox"/>	WC1	Work Center 1
<input type="checkbox"/>	WC2	Work Center 2
<input type="checkbox"/>	WC3	Work Center 3

< Back    Next >    Cancel

### 16.1 Unassigning an Item Range

1. Enter From and To values for the range of Item Numbers that you want to unassign from sites, or click the lookup to select Item Numbers from the Items window.
2. Click to select the Sites that you want to unassign the range of items from.
3. Click Next to display the next screen.

## 17. Unassigning Items from Sites Preview screen



*Tools >> Routines >> Myridas >> Item Manager >> Assign/Unassign Sites Wizard*

*The Unassigning  
Items from Sites  
Preview screen*

**tcs25 Assign/Unassign Sites Wizard**

**Unassign Items to Sites - Preview** myridas™

The listed Items will be Unassigned from the selected Site(s). All Items within the range can be processed.

Site	Item Number	Description
SOUTH	100XLB	Black Phone
SOUTH	100XLG	Green Phone
SOUTH	100XLR	Red Phone
SOUTH	100XLY	Yellow Phone

### 17.1 Previewing Unassigned Items

1. The selected Sites and the range of Item Numbers that you have selected to be unassigned from the Sites will be displayed in the scrolling window.
2. Click Next to display the next screen.



Note that if there are any exceptions, for example, where a selected Item Number is not assigned to a selected Site, then these will be displayed on the Exceptions screen. You can click Next to continue, Back to go back and amend your selection, or print out a list of the exceptions.

## 18. Unassigning Items Update screen



*Tools >> Routines >> Myridas >> Item Manager >> Assign/Unassign Sites Wizard*

*The Unassigning  
Items Update  
screen*

Site	Description
SOUTH	South store

When you choose Finish, the Update will commence.

< Back   Finish   Cancel



### 18.1 Viewing Items to be Unassigned

1. The range of Item Numbers that you have selected will be specified and the Sites from which they will be unassigned will be displayed in the scrolling window.
2. Click Finish to unassign the selected Item Numbers from the Sites you have selected. When the update is complete an Update Complete message will be displayed. You will be asked whether you want to unassign Sites from more Item Numbers. Click Yes to display the Unassign Item Range screen, click No to close the Assign/Unassign Sites Wizard.

## Appendix A

### Access to Myridas Windows

#### Item Manager

<b>Window Name</b>	 <b>Menu Access</b>	 <b>Other Access</b>
Copy Item Wizard	Tools >> Routines >> Myridas >> Item Manager >> Copy Item Wizard	
Assign/Unassign Sites Wizard	Tools >> Routines >> Myridas >> Item Manager >> Assign/Unassign Sites Wizard	

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## Appendix B

### Myridas Reports

Myridas provides multiple reports to increase information visibility.

<b>Report Name</b>	<b>Module</b>	<b>Functionality</b>
Copy Errors report	Item Manager	Prints all errors encountered when preparing to copy items
Flatfile Preview report	Item Manager	Prints a preview of items selected to be copied from a flatfile

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