

*myridas*TM *User Guide*

Version 9.1 for Microsoft Dynamics™ GP 9.0

Sales Navigator

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 Sales Navigator module:

- Sales Navigator



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>.

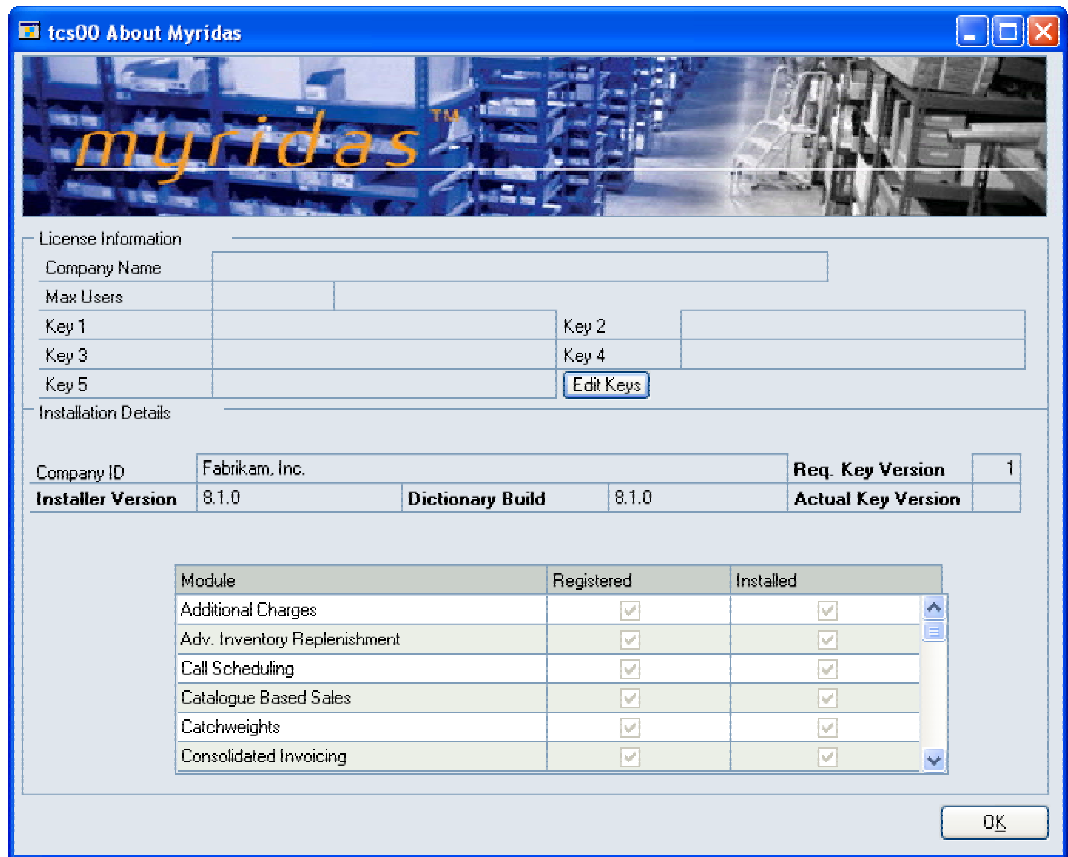
About Myridas



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



Sales Navigator

The Myridas Sales Navigator module provides functionality to give the user greater control when searching for sales documents. The core functionality of the module is implemented through the Sales Search window where you can search for sales documents based on debtor, delivery address or item prior to going into the Sales Transaction Entry window.

Additional windows enable more advanced searches and it is even possible to create a sales document direct from the Sales Search window, based on details that you have entered.

The main features of the Sales Navigator module are:

- Advanced searches for sales documents without having to go through the Sales Transaction Entry window
- Quickly locate a document then click a button to open it up in the Sales Transaction Entry window
- Assign sites to delivery addresses
- Create sales documents based on details entered in the Sales Search window
- Set a default site that sales searches will be based on
- Detail-rich enquiries about orders and debtors
- Facilities to zoom direct to documents, debtors and items

Setup

1. Sales Search Default Site window

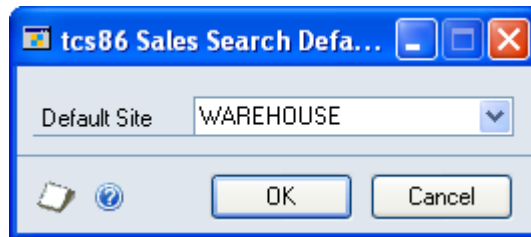


Tools >> Setup >> Myridas >> Sales Navigator >> Default Site

Use the Sales Search Default Site window to

- Set a sales search default site

The Sales Search Default Site window



You must select a default site before you can use sales search functionality. When using the [Delivery Address Search window](#) and the [Document Address Search window](#) the selected default site will be searched.

Note that if you have set up a user default site using the User Defaults Site Maintenance window (Tools >> Setup >> Myridas >> SOP Default Site) then searches will be based on the default site for the user.

1.1 Setting a Sales Search Default Site

To set a sales search default site using the Sales Search Default Site window:

1. Select a default site from the drop-down menu.

Note that you can select All Sites as the default site.

2. Click OK to close the window.

Note that you can click Cancel to close the window without making a selection.

Cards

2. Assign Sites to Addresses window



Card >> Myridas >> Sales Navigator >> Assign Sites to Addresses

Use the Assign Sites to Delivery Addresses window to:

- Assign sites to addresses

The Assign Sites To Delivery Addresses window

Details set up in the window are used when searching for addresses in the [Delivery Address Search window](#).

2.1 Assigning Sites to Addresses

To assign sites to addresses using the Assign Sites To Addresses window:

1. Enter a site ID or select one using the lookup or browse buttons.
2. Enter a debtor or select one using the lookup.
3. Enter a ship to address or select one using the lookup.

Repeat steps 2 and 3 to enter as many debtors as required or click the Ranges button to display the Assign Sites To Addresses By Range window where you can select a range of debtors / ship to addresses.

4. Click Save and close the window.

Unassigning sites from addresses

Note that you can click Delete to unassign sites from addresses.

3. Assign Sites To Address By Range window



Cards >> Myridas >> Sales Navigator >> Assign Sites to Addresses >> Ranges button

Use the Assign Site To Address By Range window to:

- Assign sites to ranges of addresses

The Assign Sites To Addresses By Range window

tcs86 Assign Sites To Del Addr Range

Site ID: WAREHOUSE Main Site

Debtor ID: All From: To:

Select Specific Ship To Address ID

Address: All From: To:

Select Debtor/Addresses whose Site ID is set to:

Unassigned Any Specified: Site ID

Debtor ID	Ship To Address ID
AARONFIT0001	PRIMARY
AARONFIT0001	WAREHOUSE
ADAMPARK0001	BILLING
ADAMPARK0001	PRIMARY
ADVANCED0001	PRIMARY
ADVANCED0002	PRIMARY
ADVANCED0002	WAREHOUSE
ALTONMAN0001	PRIMARY
ALTONMAN0001	SERVICE
AMERICAN0001	PRIMARY

Assign OK Preview

3.1 Assigning Sites to Ranges of Addresses

To assign sites to ranges of addresses using the Assign Sites To Address By Range window:

1. The site ID selected in the [Assign Sites To Addresses window](#) will be displayed by default.
2. All debtor IDs will be selected by default. Accept this selection or click the From button and enter range values or select them using the lookup buttons.
3. If you selected a single debtor range then you can click the Select Specific Ship To Address ID checkbox. You can now select all addresses or a range of addresses for the selected debtor.
4. Under Select Debtor / Addresses whose Site ID is set to: select Unassigned, Any or Specified.

Unassigned	Only debtors / addresses not currently assigned to a site will be included.
Any	All debtors / addresses will be included, regardless of whether they are already assigned to a site.
Specified	Enter a site or select one using the lookup. Only debtors / addresses assigned to this site will be displayed.

5. Click Preview. All debtors / addresses in the selected range will be displayed in the scrolling window.
6. Click Assign to assign displayed debtors / addresses to the selected site.
7. Click OK to close the window.

Transactions

4. Sales Search window



Transactions >> Myridas >> Sales Navigator >> Sales Search

Use the Sales Search window to:

- Search for sales documents
- Create sales documents
- Search for documents addresses
- Search for delivery addresses
- Search for items on documents
- Enquire about outstanding sales document lines
- Enquire about debtors

The Sales Search window

The screenshot shows the 'tcs86 Sales Search' window. At the top, there are navigation buttons: OK, Clear, Address Search, Document Search, Available to Promise, Outstanding Lines, and Debtor Enquiry. The main form contains the following fields:

- Debtor ID: ADAMPARK0001
- Name: Adam Park Resort
- Address ID: PRIMARY
- Show Documents for all Addresses:
- Order: STDORD
- Create Sales Document button
- Include: Unposted, History, New Orders
- Address: Suite 9876, 321 Chestnut Drive, Indianapolis, IN, 46206-1391, Tel No. 31755501020000, Contact: Roberta Masouras

The 'Sales Documents for Debtor Address' table is as follows:

Date	Document	Document Number	Debtor PO Number	Original Number	Document Status	Req Ship Date
07/04/2007	Order	ORDST2246	S		New	07/04/2007
12/04/2007	Order	ORDST2253	0900987		New	12/04/2007
12/04/2007	Order	ORDST2254	2		New	12/07/2007
12/07/2007	Order	ORDST2255	0923409		New	12/07/2007
12/07/2007	Order	ORDST2256	0909342		New	12/07/2007

Below the table, the 'Item Description' section shows:

Item Number	Item Description	U O I M	Quantity	Price	Extended Price
400PROC	400 Processor	Each	12	\$399.95	\$4,799.40

At the bottom, the 'Document Number' field is set to 'ORDST2253'.

Note that when documents are displayed you can click to select a document then click the Go To button to display it in the Sales Transaction Entry or Sales Document Enquiry window.

Also note that additional buttons will be displayed if you are working with other Myridas modules. If you are working with Customer Templates then you can click the Template button to display the Template Select window. If you are working with Catalogue Based Sales then you can click the Catalogue button to display the Item Catalogue and Search window.

4.1 Searching for Sales Documents

To search for sales documents using the Sales Search window:

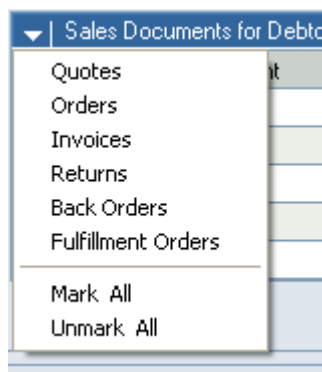
1. Enter a debtor ID or select one using the lookup.
2. The address ID field will automatically be filled with the default address ID for the selected debtor. This can be amended as required, or you can click the Show All Addresses checkbox to search for documents for all addresses. Address details for the address ID selected in the address ID field are also displayed.
3. From the Include options select one of the following:

Unposted	Displays documents that have not yet been posted.
History	Displays posted documents.
New Orders	Displays only orders that have a status of new.

Sales documents meeting the criteria will be displayed in the upper scrolling window.

If you selected Unposted or History then you can click the Sales Documents for Debtor Address menu to select which document types to view. Click on a document type to select / deselect it or use the Mark All / Unmark All option.

The Sales Documents for Debtor Address menu



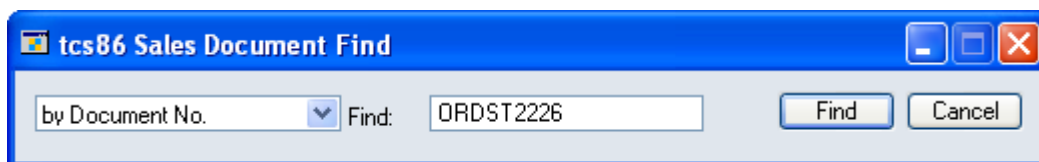
Note that if you have selected to view Unposted then any open orders displayed in the scrolling window will be denoted by the Open Orders icon.

The Document Status menu gives you the option to view documents based on their status.

When you click on a document in the scrolling window, item details from the document will be displayed in the lower scrolling window. The document number will be displayed at the bottom of the window.

4. You can further refine your document search by clicking the Find button below the upper scrolling window to display the Sales Document Find window.

*The Sales
Document Find
window*



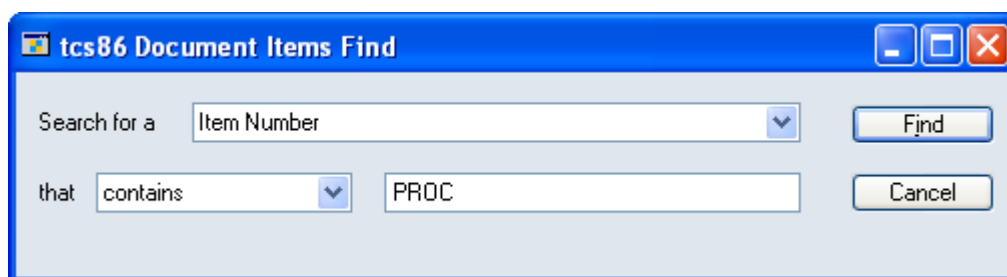
Select Document No., Debtor PO Number or Original Number as the find by option from the drop-down menu.

Enter the Find criteria. This can be any combination of letters or digits.

Click the Find button. If a valid match is found then the window will close and the match will be displayed as the first document in the Sales Search window scrolling window.

5. You can further refine your item search by clicking the Find button below the lower scrolling window to display the Document Items Find window.

*The Document
Items Find
window*



Select an option from the Search for a drop-down menu.

Select contains or begins with then enter any combination of letters or digits. The entered combination will form the basis of the search, for items beginning with or containing the combination, dependant upon selection.

Click the Find button. If a valid match is found then the window will close and the match will be displayed as the first item in the Sales Search window scrolling window.

6. If required you can click to select a document then click the Go To button to display it in the Sales Transaction Entry or Sales Document Enquiry window.

If you double click on an unposted document then the Sales Transactions Entry window will be displayed and if you double click on a historical document then the Sales Document Enquiry window will be displayed.

Note that you can also click to select an item then click the Available To Promise button to display the item in the Inventory Available To Promise window.

7. Click OK to close the window.

4.2 Creating Sales Documents

To create sales documents using the Sales Search window:

1. Enter a debtor and address as detailed in [Searching for Sales Documents](#).
2. From the Create Sales Document drop-down menu select the type of document that you want to create.
3. The default Type ID will be displayed by default. Accept this selection or enter a new type ID or select one using the lookup.
4. Click the Create Sales Document button. The Sales Transaction Entry window will open with document type and debtor and address details already entered.

4.3 Searching for Document Addresses

To search for documents addresses using the Document Address Search window:

1. Click the Document Search button to display the Document Address Search window.

*The Document
Address Search
window*

Debtor ID	Address ID	Site ID	Debtor Name	Contact	Postcode
AARONFIT0001	PRIMARY		Aaron Fitz Electrical	Bob Fitz	98052-6399
42555501010000	One Microsoft Way, Redmond, WA				
KENSINGT0001	PRIMARY		Kensington Gardens Resort	Judy Hopewell	53204-9900
41455501520000	12345 Redmond Rd, Milwaukee, WI				

2. If you selected a user default site in the User Defaults Site Maintenance window then that will be selected. If you don't have a user default site set up but have set up a default site in the [Sales Search Default Site window](#) then this site will be selected.

Select an alternate site from the drop-down menu as required.

3. Enter the Search For criteria. This can be any combination of letters or digits.

4. Select Document No., Debtor PO Number or Original Number as the search in option from the drop-down menu. Your selection will be searched for the entered Search For criteria, for example if you select Document No. then all sales document numbers will be searched for the entered criteria.
5. To search for documents containing a specific item only, enter an item number in the Containing Item Number field.
6. To search for documents on a specific load only, enter a load number in the On Load Number field.

Note that to use this field you must be working with the Myridas Vehicle Load Planning module.

7. Click the Refresh button. All documents meeting the selected criteria will be displayed in the scrolling window.

Click on a document to select it. Any documents sharing the same master number will be displayed in the Related Documents scrolling window. A master number is a single number assigned to a series of documents that is used to track related documents. For example, when you issue a quote, then transfer it to an order, and then an invoice, each document will be assigned the same master number. Each document also maintains its own document number.

Note that you can click the link buttons to view selected documents in the Sales Transaction Enquiry Zoom window.

8. Click the OK button to display the selected document in the Sales Search window.

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

4.4 Searching for Delivery Addresses

To search for delivery addresses using the Delivery Address Search window:

1. Click the Address Search button to display the Delivery Address Search window.

The Delivery Address Search window

Debtor ID	Address ID	Site ID	Debtor Name	Contact	Postcode
AARONFIT0001	PRIMARY		Aaron Fitz Electrical	Bob Fitz	98052-6399
42555501010000	One Microsoft Way, Redmond, WA				
KENSINGT0001	PRIMARY		Kensington Gardens Resort	Judy Hopewell	53204-9900
41455501520000	12345 Redmond Rd, Milwaukee, WI				

2. Enter the Search For criteria. This can be any combination of letters or digits.
3. Select Address, Post Code or Telephone Number as the search in option from the drop-down menu. Your selection will be searched for the entered Search For criteria, for example if you select Address then all addresses will be searched for the entered criteria.
4. If you selected a user default site in the User Defaults Site Maintenance window then that will be selected. If you don't have a user default site set up but have set up a default site in the [Sales Search Default Site window](#) then this site will be selected.

Select an alternate site from the drop-down menu as required.

5. All addresses meeting the selected criteria will be displayed in the scrolling window.
6. Click on an address to select it then click Select. The window will close and the details will be passed through to the Sales Search window.

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

4.5 Enquiring About Outstanding Sales Document Lines

To enquire about orders using the Outstanding Sales Document Lines window:

1. Click the Outstanding Lines button to display the Outstanding Sales Document Lines window.

Note that the window can also be displayed by selecting Enquiries >> Myridas >> Sales Navigator >> Order Lines Enquiry.

*The
Outstanding
Sales Document
Lines window*

Document No.	Item Number	Debtor ID	U of M	QTY Ordered	QTY Remain.	QTY To Inv.	QTY To B. Order	Item Description	Address ID	Req. Ship Date	PU Number	Required Date	Promised Date	Creditor ID
ORDST2229	128 SDRAM	ALTONMAN0001	Each	1	1	0	1							
ORDST2229	24X IDE	ALTONMAN0001	Each	1	1	0	1							
ORDST2229	ACCS-CRD-12WH	ALTONMAN0001	Each	1	1	0	1							
ORDST2229	ACCS-RST-DXBK	ALTONMAN0001	Each	1	1	0	1							
ORDST2229	ACCS-RST-DXWH	ALTONMAN0001	Each	2	2	0	2							

2. The current user will be selected by default. Accept this selection or enter alternate range values, or click the All button.
3. All debtors will be selected by default (unless you had a debtor entered in the Sales Search window). Accept this selection or click From and enter From and To range values or select them using the lookups.
4. All addresses will be selected by default (unless you had an address entered in the Sales Search window). Accept this selection or click From and enter From and To range values or select them using the lookups.
5. All orders / invoices will be selected by default. Accept this selection or click From and enter From and To range values or select them using the lookups.
6. There are six additional filters that can be further selected to restrict range criteria if required:

Remaining Quantity	Restrict to only lines with or without a remaining quantity
Purchase Order Commitment	Restrict to only lines with or without a purchase order commitment
Backorder Quantity	Restrict to only lines with or without a backorder quantity
Sales Requested Ship Date on or before	Enter a date - only lines with a requested ship date on or before the date will be displayed
Creditor Promised Date on or before	Enter a date - only lines with a creditor promised date on or before the date will be displayed
Include Kit Items	Select to include lines for kit header items Note that kit items are shown down to component level

These features are particularly useful for tracking backordered items which need to be purchased if using purchase order commitments.

7. Click Redisplay. All sales lines meeting the range criteria will be displayed in the scrolling window.

You can further restrict documents viewed in the scrolling window by selecting options from the View menu.

Note that you can click the Debtor Enquiry button to display the [Debtor Detailed Enquiry window](#).

8. Click OK to close the window.

4.6 Enquiring About Debtors

To enquire about debtors using the Debtor Detailed Enquiry window:

1. Click the Debtor Enquiry button to display the Debtor Detailed Enquiry window.

Note that if you have a debtor and address selected in the Sales Search window then by default details for that debtor and address will be displayed.

Note that the window can also be displayed by selecting Enquiries >> Myridas >> Sales Navigator >> Debtor Details Enquiry.

The Debtor Detailed Enquiry window

tcs86 Debtor Detailed Enquiry

OK Redisplay Clear Create Order Outstanding Lines

Debtor ID: ADAMPARK0001 [Look] [Hold] [Inactive]

Name: Adam Park Resort Class ID: USA-INMI-T2
 Short Name: Adam Park Resor Priority: None
 Statement Name: Adam Park Resort

Address ID: PRIMARY [Look]

Contact: Roberta Masouras
 Address: Suite 9876
 321 Chestnut Drive
 City: Indianapolis
 County: IN PostCode: 46206-1391 Country: USA

View: Period Balances

Period	Amount
Current	\$3,506.15
31 - 60 Days	\$0.00
61 - 90 Days	\$0.00
91 - 120 Days	\$0.00
121 - 150 Days	\$0.00
151 - 180 Days	\$0.00
Balance	\$20,676.51

View: Call History: By Call Date

Contact	Call Date	Time	Action Taken	SOP Type	Document Number
Bob Fitz	16/11/2004	11:50:47		Return	STDINV2281
Bob Fitz	03/11/2004	10:38:40	Create Order	Order	ORDST2243

Legend: Fwd Call Request Fwd Call Request Scheduled Call Action Incoming Call

Comments:

Processing: []

2. Enter a debtor or select one using the lookup.
3. The default address ID for the selected debtor will be displayed by default. Alternate addresses can be selected by using the browse buttons or lookup button.
4. Call history details for the debtor / address combination will be displayed in the main scrolling window.

Note that you must be using the Myridas Customer Call Scheduling module to access this functionality.

5. Period balance details for the debtor / address combination will be displayed in the secondary scrolling window.

Note that you can click the Outstanding Lines button to display the [Outstanding Sales Document Lines window](#).

6. Click OK to close the window.

Alternatively you can click the Create Order button. The Sales Transaction Entry window will open with document type and debtor and address details already entered.

5. Sales Document Search window



Enquiry >> Myridas >> Sales Navigator >> Sales Document Search

Use the Sales Document Search window to:

- Search for documents and print a summary

The Sales Document Search window

tcs97 Sales Document Search - Parameters

Display results by: ▾

Search 1:
 Debtor ID ▾ From:
 To:

Search 2:
 Document Type ▾ ▾

Search 3:
 Document Date ▾ From:
 To:

Search 4:
 None ▾ From:
 To:

Search 5:
 None ▾ From:
 To:

Search 6:
 None ▾ From:
 To:



Note that this window can also be displayed by clicking the Document Search button in the Sales Transaction Entry window.

5.1 Using the document search facility

To search for documents in the Sales Document Search window:

1. Select your search parameters from the drop-down lists and enter To and From values to specify ranges. You can choose up to 6 search criteria, from Batch Number, Debtor ID, Customer PO Number, Document Date, Document Number, Document Type, Document Type ID, Document Status, Requested Ship Date, Ship to Address and Load Number (see Vehicle Load Planning), Site ID and Coll. Note Status (see Returns Management).
2. Click OK.

The Sales Document Search window will be displayed, showing all the documents that match your search criteria.

The Sales Document Search window

Type	Type ID	Site ID	Document Number	Date	Ship Date	Amount	# Pm.
INV	STDINV	WAREHOUSE	STDINV2260	12/04/2007	12/04/2007	\$481.35	0
INV	STDINV	WAREHOUSE	STDINV2262	12/04/2007	12/04/2007	\$19.90	0
INV	STDINV	WAREHOUSE	STDINV2269	12/04/2007	12/04/2007	\$2,844.73	0

3. Select a document in the scrolling window and click the Go To button. From the drop-down list you can select Sales Trn Entry to display the document in the Sales Transaction Entry window or Sales Doc. Inquiry to display the document in the Sales Transaction Enquiry Zoom window.

Alternatively double click on a document in the scrolling window to display it in the Sales Transaction Entry window.

You can click the Print button to print the Document Search report detailing the documents located in the search.

Click the Search button to return to the Sales Document Search – Parameters window where you can edit or clear your selection.

4. Click OK to close the window.

Appendix A

Access to Myridas Windows

Sales Navigator

Window Name	 Menu Access	 Other Access
Debtor Detailed Enquiry	Enquiries >> Myridas >> Sales Navigator >> Debtor Details Enquiry	Transactions >> Myridas >> Sales Navigator >> Sales Search >> Debtor Enquiry button
Delivery Address Search		Transactions >> Myridas >> Sales Navigator >> Sales Search >> Address Search button
Document Address Search		Transactions >> Myridas >> Sales Navigator >> Sales Search >> Document Search button
Outstanding Sales Document Lines	Enquiries >> Myridas >> Sales Navigator >> Order Lines Enquiry	Transactions >> Myridas >> Sales Navigator >> Sales Search >> Outstanding Lines button
Sales Document Search	Enquiry >> Myridas >> Sales Navigator >> Sales Document Search	Transactions >> Sales >> Sales Transaction Entry >> Document Search button
Sales Search	Transactions >> Myridas >> Sales Navigator >> Sales Search	
Sales Search Default Site	Tools >> Setup >> Myridas >> Sales Navigator >> Default Site	

Appendix B

Myridas Reports

Myridas provides multiple reports to increase information visibility.

Report Name	Functionality
Document Search report	Print details of documents found in the document search.

Appendix C

Alternate Microsoft Dynamics™ GP Windows

Some Microsoft Dynamics™ GP windows have been modified to incorporate Myridas behaviour:

Window Name	Series	Myridas Module	Modification
Sales Transaction Entry	Sales	Sales Navigator	Shows the Document Search button

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