Trinity Installation and Upgrade User Guide

Version 18.3 for Dynamics GP 18.3

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Installing Dynavistics Trinity 18.3 for Microsoft Dynamics™ GP 18.3

These instructions describe:

- How to install a brand-new instance of ***Trinity 18.3*** on a Microsoft Dynamics™ GP system on which Trinity modules have not previously been installed.
- The upgrade process for an existing Trinity installation to ***Trinity 18.3*** from ***12.0, 14.0*** or ***Trinity 16.0***

These are each within their respective chapters below, as well as common instructions and explanation of the downloading and ***Trinity Module Installer*** process

IMPORTANT
Before attempting this installation, you should back up your Dynamics and Company databases, and back up your Microsoft Dynamics™ GP runtime software folder (e.g. C:\Program Files (x86)\Microsoft Dynamics\GP).

Trinity version Compatibility

Trinity 18.3.x is compatible with ***Dynamics™ GP 18.3***
Trinity 18.2.30+ is compatible with ***Dynamics™ GP 18.2***

Trinity 18.2.x is compatible with ***Dynamics™ GP 2018 R2***
Trinity 18.0 is compatible with ***Dynamics™ GP 2018 RTM***
Trinity 16.2 is compatible with ***Dynamics™ GP 2016 R2***
Trinity 16.0 is compatible with ***Dynamics™ GP 2016***
Trinity 14.0 is compatible with ***Dynamics™ GP 2015***

Trinity Upgrade Paths to latest Dynamics™ GP 18.3

Current Version	Step to	Final version
GP 18.2 with Myridas 18.2	None	GP 18.3 with Myridas 18.3.43
GP 2018 R2 with Myridas 18.2	None	GP 18.3 with Myridas 18.3.43
GP 2018 RTM with Myridas 18.0	None	GP 18.3 with Myridas 18.3.43
GP 2016 R2 with Myridas 16.2	None	GP 18.3 with Myridas 18.3.43
GP 2016 RTM with Myridas 16.0	None	GP 18.3 with Myridas 18.3.43
GP 2015 R2 with Myridas 14.0.5 or lower	GP 2016 RTM with Myridas 16.0 Or GP 2016 R2 with Myridas 16.2	GP 18.3 with Myridas 18.3.43 GP 18.3 with Myridas 18.3.43

1. Removing earlier versions of the Trinity Module Installer

If you are loading ***Trinity 18.3*** onto a system with an existing installation of Trinity, you must first remove the Trinity Module Installer from your system using *Add/Remove programs* or *Programs and Features* from the *Windows Control Panel*.
Once the uninstall has completed, ensure that the installation directory (default *C:\Program Files (x86)\Trinity setup*) and its contents have been deleted.

2. Obtaining the Trinity Distribution Downloads

The products are available on our website at https://www.dynavistics.com/downloads.
Just fill out the initial form and the page will refresh where you will see available downloads.

Select the version of Trinity that would be most appropriate for your version of Microsoft Dynamics™ GP
Usually this would be the latest version of Trinity for the version of Microsoft Dynamics™ GP you are on.

For example, in the below screenshot (*and the current results on this page may include newer versions):*

For ***GP 2018 R2***, the newest ***Trinity is 18.2.15***
For ***GP 2018 RTM***, the newest ***Trinity is 18.0.21***
For ***GP 2016 R2***, the newest ***Trinity is 16.2.26***

The .zip files contain the installer files and the Installation manuals.

**Note that .NET Framework 3.5 is needed for the Trinity installer to run.*

With the Download completed, unzip the files downloaded when ready to install the ***Trinity Module Installer***

**Note that the file naming will have the specific versioning number included.*

3. Installing the Trinity Module Installer

The ***Trinity Module Installer*** will need to be installed as the next step, setting up this program before being able to achieve the actual implementation of the Trinity Modules.

1. To install this, run the installation executable (***setup.exe***) and continue as below.

Note--The Trinity Module Installer requires the .Net Framework 2.0.

On 32-bit systems, during preparation for the setup process, the setup executable will check for .Net Framework 2.0 and will install it if it is not already present on your system. This may take several minutes.

On 64-bit systems, .Net Framework 2.0 must be pre-installed. The setup executable will not run if .Net Framework 2.0 is not installed. Click ***Next*** to reach the *License Agreement* screen.

In the License Agreement screen:

2. Please read the Dynavistics license agreement carefully. To continue select the "***I accept the terms***" in the license agreement.
3. Click ***Next*** to continue. The *Customer Information* screen will appear.

Note that if you do not agree to accept the Dynavistics license agreement, the installation will be cancelled.

In the Customer Information screen:

4. Enter the User Name and Organization name for the installation.
5. Click Next to continue. The Destination Folder screen will appear.

In the Destination Folder screen:

6. Click the ***Change…*** button to select a destination folder for your Trinity installation or accept the default installation setting as displayed.

7. Click ***Next*** to continue. The ***Ready to Install the Program*** screen will next appear.

In the *Ready to Install the Program* screen:

You are now ready to install Trinity.

8. Check that your Trinity installation options are correct.

9. Click ***Back*** to review or adjust any of your settings or select the ***Install*** button to begin the installation.

During the installation, a status bar will show you the progress made. When the installation is complete, the completion screen will open. Any problems encountered during the installation will be displayed in this screen.

10. When this completes, click ***Finish*** to complete the installation of the Trinity Installer.

If you have the ***Launch the Program*** checkbox selected, clicking ***Finish*** will begin you within the Trinity Module Installer as seen below

Trinity Module Installer - InstallShield Wizard
InstallShield Wizard Completed
The InstallShield Wizard has successfully installed Trinity Module Installer. Click Finish to exit the wizard.
Launch the program
dynavistics
< Back
Finish
Cancel

4. Using the Trinity Module Installer to Install Trinity and the Trinity modules into your company database

Running the *Trinity Module Installer* performs the following functions:

- Creates additional tables in your Dynamics database
- Creates additional tables in your company database (Fabrikam Inc if you are running an evaluation)
- Creates necessary SQL triggers and stored procedures in your company database
- Places the Trinity chunk file (file extension .cnk) and related files into your Microsoft Dynamics™ GP folder

To begin the installation process, please follow the following instructions:

4.1 Before running the *Trinity Module Installer*

IMPORTANT:

1. Backup the dynamics and company database(s) before doing any installation or update.

4.2 Running the Trinity Module Installer

**Note that these instructions are for a New Trinity Install only and not for a Trinity upgrade. For upgrading the software, please see Chapter 5 below*

With the Trinity Module Installed downloaded, Unzipped, and ready (see Section 2 and 3 above):

1. Run the "***TrinityInstaller.exe***" file (as an *Administrator* user) located in "C:\Programs Files (x86)\Trinity Setup" and update the company database(s).

2. Enter the SQL server's '*sa*' password and click Next

If it is not correctly defaulted, also ensure that the ***DynamicsGP Installation Folder*** selection is aligned to where the Microsoft Dynamics™ GP application is installed.

3. Select the System Database from the dropdown list and click Next

4. Enter your registration information (company name, number of licensed users and the Trinity Registration Keys and click ***Next***.

Note that you can copy the keys provided by Dynavistics and click **Paste Keys button to paste all fields into the screen.*

5. On the Module Installer Screen, select the Company you want to install Trinity from the dropdown list.

6. Then, place a check mark for each of the module(s) you want to install.

**Note that only the specifically purchased modules will be listed in your view of the screenshot below.*

7. Click on ***Install*** button to start the actual Installation process.

8. At this point, the system will start installing the Trinity module(s) selected and an *Overall Progress* bar will show up. <u>Do not exit or try to close this window.</u>
<u>Also note that during installation the window title may change to "Not Responding"—in these instances, please ignore that window title and allow this installation to complete in full</u>

9. Once the installation process is finished, you will get a message indicating so.

10. If you need to install Trinity on another company database, click ***Next*** and follow the same above process. Otherwise, click ***Exit*** to continue with the Deployment process.

4.3 First Time Entering GP after Exiting from the Installation Process

11. After Exiting from the Installation Process, you will need to go into the Microsoft Dynamics™ GP application Right-click on the GP icon and click on ***Run as administrator***

12. Click ***Yes*** to include the new code

13. Log in as ***sa*** user and click ***OK***.
Note that if you have multiple company databases, you must select one that you already installed Trinity on.

4.4 Initial Trinity Security Setup

Before you can use Trinity functionality, you need to set up Security Task Ids to include Trinity windows and reports.

Some of the Trinity modules require the use of alternate Microsoft Dynamics™ GP windows and reports. If you have installed one of these modules you will need to add the relevant Trinity alternate windows to your Alternate/Modified Forms and Reports Ids.

See the Microsoft Dynamics™ GP Documentation for full information on planning and setting up security on your Microsoft Dynamics™ GP system.

14. Click ***Yes*** to create and enable the Trinity security task

15. Click ***Yes*** to update Trinity security details

See Section 6 for additional options for setting up Trinity security.

See Section 7 for details of the alternate windows and reports required by the Trinity modules.

16. Do wait until all GP menus are loaded to access the Trinity menus. At the bottom left there is a Trinity icon to access the Trinity menus.
These can also be accessed from the GP menus on top of the window directly.

17. After completing the above process, it may be necessary to configure the individual Trinity Modules
*Please see the specific documentation for each Module's additional details and instructions.

4.5 Updating or amending your installation

Once you have installed the Trinity modules, you can re-run the installer (*Section 4.2*) to do any of the following:

- Enter new registration keys
- Set up Trinity for additional companies (if you have valid registration keys)
- Enable additional modules in an existing company
- Disable previously enabled modules for any company (this will prevent further use of Trinity functionality, but will not remove your data from the database)

4.6 Advanced Options

The Advanced button on the Installation options screen opens the Advanced Options window which allows you to do the following:

- Drop and create all stored procedures/ZDPs/triggers re-installs the Trinity SQL code in the selected company.
- Remove Trinity from above company removes all Trinity tables, triggers and stored procedures from the selected company.
- Remove Trinity from all companies removes all Trinity tables, triggers and stored procedures from all companies.
    - Having removed Trinity from your system, you may also want to delete the Trinity dictionary from your Microsoft Dynamics™ GP installation folder and edit your ***Dynamics.set*** file to delete the Trinity dictionary entry.

4.7 Installing Trinity on GP clients

If you have Microsoft Dynamics GP installed on additional client computers or terminal servers, you also need to install Trinity on the client installations. To do this, perform the following steps:

4.7.1. Run Trinityclient.exe on each additional client computer. This file can be found in your Trinity Setup folder.
4.7.2. Enter the location of the Microsoft Dynamics GP folder. Files will be copied to this folder.
4.7.3. Run Microsoft Dynamics GP as 'sa' user to load the Trinity files. (see section 4.3 above for details)

NOTE:

- If there are to be several additional Terminal or Local Machine Client users, you must go thru same process listed in section 4.7 above.
- Section 4.7 only applies to Trinity client installations and not to Trinity client upgrades. If you are upgrading a Trinity client, see section 5.5 further below. Also, prior to upgrade a Trinity client, you must first run the Trinity Installer to upgrade the company database(s).

5. Updating the Trinity Software

If you are installing ***Trinity 18.3.x*** into an existing installation, the Trinity module installer will recognize that an upgrade is required.

5.1 Before running the Trinity Module Installer

IMPORTANT:
1. Backup the Dynamics and company database(s) before doing any installation or update.

IMPORTANT:
It is necessary when upgrading a pre-existing system (from a version prior 18.0) with customizations the following additional step must be followed to retain those customizations:
2. Export all Trinity customizations that you might have to a package file
   Within GP 18.3, go to *Microsoft Dynamics GP>Tools>Customize>Customization Maintenance>Export* to export these customizations into a package file (that will be imported back at the end of this process, see *Section 5.5*)

IMPORTANT POINTS IF UPGRADING AN EXISTING PRE-VERSION 18 TRINITY INSTALLATION:

(1) The Trinity 18.2 chunk file will not load over an existing Trinity dictionary for an earlier ***pre-18.2 version*** (***Trinity 18.0*** or earlier). Therefore, before starting this upgrade, you should export all Trinity customization packages (*Modifier, Report Writer* and *VBA*), and then delete ***Myridas.dic***, ***F2387.dic***, ***R2387.dic*** and ***Myridas.vba*** from your GP software folder.

(2) If you are upgrading an existing pre-18.3 Trinity installation to ***Trinity 18.3***, please ensure that you have new Trinity registration keys before you start the upgrade. You must complete the upgrade to ***Microsoft Dynamics™ GP 18.3*** before starting your Trinity upgrade.

(3) Security for alternate windows will not be set automatically during installation. See Section 4.5 for further details on setting up access to Trinity windows.

(4) You can upgrade directly to ***Trinity 18.3*** from ***Trinity 16.0.7*** and above. If upgrading to ***Trinity 18*** from an earlier version of Trinity, you must first upgrade to ***Trinity 14.0.1*** or ***16.0.7***.
*Please see the *Trinity Upgrade Paths* section at the beginning of this document for further details on the Trinity upgrade path.

At this time, then the Microsoft Dynamics™ GP upgrade can occur (currently latest version is to GP 18.3).

3. Upgrade GP 2016 R2 to GP 18.3.

When completed with the Microsoft Dynamics™ GP upgrade, then you may continue with the Trinity upgrade to remain aligned.

DYNAVISTICS/TRINITY UPGRADES

You can download the installation/upgrade packages from our website at:

http://www.dynavistics.com/downloads

Just fill out the short form and the page will refresh to show available downloads.

5.2 Running the Trinity Module Installer

4. If there is a previous version, Uninstall the "***Trinity Module Installer***" program via *Control Panel> Programs and Features*.

5. Unzip the "***Trinity Download 18233.zip***" file and run the ***setup.exe*** file to install ***Trinity 18.3***

6. Run the " ***TrinityInstaller.exe***" file located in "*C:\Program Files (x86)\Trinity Setup*" and update the company database(s). You will need the version v18.3 keys provided within this step.

Within this screen, on the top right-hand corner you will see the current installed version (Installed) and the new version about to be installed (Installer).
The current keys will come up. If your GP version year will not change, you will not need new Trinity Registration keys. Otherwise, enter the new Trinity Registration keys provided by Dynavistics and click ***Next***.

7. The installer will detect that an Upgrade is necessary, on this screen click on the ***Update*** button to start the upgrade process

8. When advanced to the Module selection, select the Company database to be upgraded to new version of Trinity. Trinity Module(s) that need to be upgraded will be checked in. Click ***Next***.

9. If instead you receive the message below, the installer did not find major changes between versions. Please click OK to continue with the upgrade.

5.3 First Time Entering GP after Exiting from the Upgrade Installation Process

10. After Exiting from the Installation Process, you will need to go into the Microsoft Dynamics™ GP application Right-click on the GP icon and click on ***Run as administrator***

11. Click ***Yes*** to include the new code

12. Log in as ***sa*** user and click ***OK***.
Note that if you have multiple company databases, you must select one that you already installed Trinity on.

13. Also select ***Yes*** to create and enable the Trinity security task

14. Click ***Yes*** to update Trinity security details

5.4 Upgrading with Trinity Customized Forms

It is necessary when upgrading a pre-existing system (from a version prior 18.0) with customizations, when the upgrade is completed, then it is necessary to get these customizations back within the new version.

15. Import back all Trinity customizations that you might have from the package file (In GP 18.3, go to *Microsoft Dynamics GP>Tools>Customize>Customization Maintenance>Import*)

Highlight the desired Trinity content, and select to Import it back in

5.5 Upgrading Trinity on GP clients

If you have Microsoft Dynamics GP installed on additional client computers or terminal servers, you also need to upgrade Trinity on the client installations. To do this, perform the following steps:

4.7.1. Export all Trinity customizations that you might have to a package file:
Within GP 18.3, go to *Microsoft Dynamics GP>Tools>Customize>Customization Maintenance>Export* to export these customizations into a package file (that will be imported back at the end of this process)
4.7.2. Run Trinityclient.exe on each additional client computer. This file can be found in your Trinity Setup folder.
4.7.3. Enter the location of the Microsoft Dynamics GP installation. Files will be copied to this folder.
4.7.4. Run Microsoft Dynamics GP as 'sa' user to load the Trinity files.
4.7.5. Import back all Trinity customizations that you might have from the package file. (In GP 18.3, go to *Microsoft Dynamics GP>Tools>Customize>Customization Maintenance>Import*)

NOTE: If there are to be several additional Terminal or Local Machine Client users, you must go thru same process listed in section 4.7 above.

6. Setting up Trinity security

6.1 Creating a task for all Trinity windows

A facility to create a task incorporating all Trinity windows and reports is available. This option is provided to help you get started with Trinity functionality.

There are two ways to access this facility--either:

(i) (*As described in section 4.5 above*) After installing Trinity, log in to the system as "*sa*". You will be prompted with the option to create the task "***TRINITYSECURITY-ALL-OPS***". If the option is accepted, all Trinity windows and reports will be added to this task.

Or:

(ii) In the Security Task Setup window, select ***Additional >> Create/Update Trinity*** task.

You can then add the ***TRINITY-SECURITY-ALL-OPS*** to any security roles as required.

6.2 Applying security to Trinity alternate forms and reports

You can use the Microsoft Dynamics™ GP *Alternate/Modified Forms and Reports* window to add the required Trinity alternate forms to your alternate/modified forms and reports Ids.

See section 7 for details of the alternate forms and reports associated with each Trinity module. These are also documented in the individual module User Guides.

Within the Microsoft Dynamics™ GP *Alternate/Modified Forms and Reports* window, Additional options are provided to assist you with addition of the correct Trinity alternate forms.

(i) ***Additional >> Show Trinity Required***: select this option to display only the windows and reports which are required for the Trinity modules that you have installed in the current company.

(ii) ***Additional >> Show Trinity Incorrect:*** select this option to display any windows where the Trinity alternate has been
selected but is not required for the Trinity modules that you have installed in the current company.

(iii) ***Additional >> Show All*** to turn off either of the above restrictions.

These options are applied when either Trinity or All Products is selected from the Product dropdown list.

Please not that any changes you make will only be reflected in the restricted lists after you Save the alternate/modified forms and reports
Id.

7. Trinity alternate forms and reports

7.1 Alternative Forms/Modules

Window Name	Description	Modules
Apply Sales Documents	"Apply by aging period" option	Financials Enhancements
Bin Quantity Inquiry	Shows Quantities in split pack format if using the Unit of Measure Management module	Unit of Measure Management
Bin Quantity Entry	Allows entry of bin catchweight details	Catchweights
Bin Quantity Transfer Entry	Allows entry of bin catchweight details	Catchweights
Bulk Picking Print	Includes options for Bulk Picking by Load	Load Planning
Generate Suggested Purchase Orders	In the vendor pricing module there is an additional option in this window to allow generation of zero quantity P.O.s and selection of vendor groups, also additional information on the Preview window. This alternate window MUST be used when using a system that includes the Vendor Pricing module	Vendor Pricing
Inventory Activity Reports	Used in Unit of Measure Management to print reports in split pack format	Unit of Measure Management
Inventory Available to Promise Inquiry	Shows Quantities in split pack format if using the Unit of Measure Management module	Unit of Measure Management, Reserved Stock

Item Bin Transfer Entry	Allows entry of bin catchweight details	Catchweights
Item Price List Inquiry	Allows entry of Price Method per line, discount group and Based on U of M	Distribution Extensions
Item Price List Maintenance	Displays Price Method per line and discount group	Distribution Extensions
Item Stock Inquiry	Shows Quantities in split pack format if using the Unit of Measure Management module. Shows Catchweight quantities if using the Catchweight module.	Unit of Measure Management, Catchweights
Items	Alternate item number lookup which includes status code information, unit of measure management options, duty processing consolidated stock view and new Find button to search item Catalog	Item Lifecycle, Unit of Measure Management, Duty Processing, Catalog Based Sales
PO Assignment for Sales Document	Optional alternate window showing Qty Committed and Qty Available on PO.	Distribution Enhancements
Print Sales Documents	Includes reprint options for Collection Notes (Returns Management module). This alternate window MUST be used when using a system that includes the Trinity Returns Management module.	Returns Management
Purchasing Lot Number Entry	Displays dual quantity catchweight balances. This alternate window MUST be used when using a system that includes the Trinity Catchweights module.	Catchweights
Purchasing Returns Lot Number Entry	Displays dual quantity catchweight balances. This alternate window MUST be used when using a system that includes the Trinity Catchweights module.	Catchweights
Quantities by Site	Shows Quantities in split pack format if using the Unit of Measure Management module	Unit of Measure Management
Sales Automatic Order Allocation	Includes option to select by Route range if using the Trinity Load Planning module	Load Planning
Sales Bulk Confirmation	Option to open Sales Transaction Entry window. Catchweight confirmation warning indicator on documents where a Catchweight actual weight needs to be entered.	General, Catchweights
Sales Document Print Options	Includes reprint options for Collection Notes (Returns Management module) and additional functionality for the Load Planning module. This alternate window MUST be used when using a system that includes the Trinity Returns Management or Load Planning module.	Returns Management, Load Planning, Consolidated Invoicing

Sales Item Detail	Not required for any Trinity module	
Sales Lot Number Entry	Displays dual quantity catchweight balances. This alternate window MUST be used when using a system that includes Catchweights, Duty Processing or En Primeur/Paid Reserves.	Catchweights, Duty Processing En Primeur, & Paid Reserves
Sales Multiple Orders to	Includes option to select by Route range if using the Trinity Load Planning module	Load Planning
Invoices Transfer		
Sales Quantity Shortage Options	Expansion window to view Duty Processing consolidated stock balance. This alternate window MUST be used when using a system that includes the Trinity Duty Processing module. Take from Reserved Stock button to display Reserved Stock Allocation window.	Duty Processing, Reserved Stock
Sales Transaction Inquiry Zoom	Provides a facility to filter individual dispatch lines from consolidated invoices. In the Returns Management module, the original invoice number is displayed for Returns based on invoice. This alternate window MUST be used when using a system that includes Trinity Consolidated Invoicing or Returns Management.	Consolidated Invoicing, Returns Management
Sales Transaction Entry	Incorporates Returns Management options and additional requirements for Catchweights, Load Planning, Reserved Stock and Duty Processing modules. This alternate window MUST be used when using a system that includes Trinity Returns Management, Catchweights, Load Planning, Reserved Stock, Sales Navigator or Duty Processing	Returns Management, Catchweights, Load Planning, Reserved Stock, Duty Processing, Sales Navigator
Stock Count Lot Number Entry	Displays Mark All and Unmark All buttons	Distribution Enhancements
Stock Count Serial Number Entry	Displays Mark All and Unmark All buttons	Distribution Enhancements

7.2 Alternative Reports

Report Name	Description	Modules
IV Item Price List	Shows Price Method per line	Distribution Extensions
IV Item Price List MC	Shows Price Method per line	Distribution Extensions
SOP Other Invoice Form	Invoice in graphical format incorporating additional features for Consolidated Invoices	Consolidated Invoicing

SOP Other History Invoice Form	Invoice in graphical format incorporating additional features for Consolidated Invoices	Consolidated Invoicing
SOP Blank Invoice Form	There are no changes to this report in standard Trinity; it is included to allow easier customization of invoices with Trinity tables.	
SOP Blank History Invoice Form	There are no changes to this report in standard Trinity; it is included to allow easier customization of invoices with Trinity tables.	
SOP Blank Packing Slip Form	There are no changes to this report in standard Trinity; it is included to allow easier customization of packing slips with Trinity tables.	
SOP Blank Order Form	There are no changes to this report in standard Trinity; it is included to allow easier customization of orders with Trinity tables.	
Sales Bulk Picking Ticket	There are no changes to this report in standard Trinity; it is included to allow easier customization of picking tickets with Trinity tables.	
SOP Blank Picking Ticket Bin Sequenced	There are no changes to this report in standard Trinity; it is included to allow easier customization of picking tickets with Trinity tables.	
SOP Blank Picking Ticket Order Entered	There are no changes to this report in standard Trinity; it is included to allow easier customization of picking tickets with Trinity tables.	

8. Installing Trinity .net Extensions

In order to use eConnect to create Inter-Site Sales Orders in the *InterSite Transfer* module or to import Purchase Orders and Price Lists in the Distribution Extensions module, an additional application must be installed.

This is the ***Trinity Extensions*** application.

To install, run the ***ExtensionsSetup.msi*** installation package which you will find in *C:\Program Files (x86)\Trinity Setup\Additional Components\Trinity Extensions* or similar, depending on the location of your Trinity installer.

This should be installed on each machine running a GP client. In addition, Microsoft Dynamics™ GP eConnect must be installed and the eConnect integration service must be started. See Microsoft Dynamics™ GP documentation for further details of eConnect.

9. Distribution Extensions module

Additional installation steps must be followed in order to use the import/export functionality in the Distribution Extensions module.
Once this module is installed, please go to the ***Installing Trinity.net Extensions*** within the
C:\Program Files (x86)\Trinity Setup\Additional Components\Trinity Extensions
to see the *Distribution Extensions* User Guide for more details.

10. Inter-Site Transfers module

Additional installation steps must be followed in order to use the eConnect option in the Inter-Site Transfers module.
Once this module is installed, please go to the ***Installing Trinity.net Extensions*** within the
C:\Program Files (x86)\Trinity Setup\Additional Components\Trinity Extensions
to see the *Inter-Site Transfers* User Guide for more details.

11. Trinity Integration with SmartList

The Smartlist Integration module is one of the modules available for installation. This module enables integration between several other Trinity modules and Microsoft Dynamics™ GP SmartList. If you require SmartList integration with any of the following modules, then ensure that you install this Smartlist Integration.

Module	Functionality
Load Scheduling	Vehicle Table
Item Status	Item Status Table and status code as column on items
Reorder Level Management *	Calendar Usage Table and Fiscal Usage Table
Distribution Enhancements	Sales Transaction Reason Code Table and Inventory Transaction Reason Code as separate views and as columns on transactions

- The installation of Smartlist Integration is essential for the *Reorder Level Management* module.

12. Trinity and the GP web client

Trinity modules may be used within the Microsoft Dynamics™ GP web client but there are some functionality restrictions.

- Addition of lines using base return on invoice functionality in Returns Management is not available
- Creation of scheduled orders in the Forward and Scheduled Orders module is not available
- Processing of Additional Charges is not available.

Some other windows may not function correctly due to limitations of the Microsoft Dynamics™ GP web client.