Catalog Based Sales
User Guide

Version 18.2 for Dynamics GP 18.2

Document version: 18

Date: April 6th 2020

Contents

Catalog Based Sales

The Trinity Catalog Based Sales module provides extended functionality for item maintenance and sales transactions. The core functionality of the module is implemented in the Item Catalog and Search window where the user can identify items by specified attributes, or by browsing the Item Catalog.

The visual display of the Catalog and advanced search parameters allow the user to fulfill requirements for an order immediately, find alternative items, or even email an item specification to a customer.

The main features of Catalog Based Sales are:

- The facility to create attributes and assign them to items
- The facility to create an item Catalog up to five levels deep
- The facility to perform searches for suitable items based on attributes, Catalog location or spelling, all from within one user-friendly window
- The option to automatically link item attributes and Catalogs to user-definable categories
- Integration with Sales Transaction Entry allowing rapid order completion
- Integration with Item Maintenance allowing rapid item location

Item Attributes

Item attributes allow the user to perform specified searches in the Item Catalog and Search window so that the required item may be located with greater speed and accuracy in Sales Transaction Entry. An unlimited number of attributes may be stored in one Attribute Group. Use the Maintain Item Attributes window to create and edit Attribute Groups and attributes.

Items may be assigned one or multiple attributes (unlimited) using the Assign Items To Attributes window, and the Assign Attributes To Items window. Unlimited numbers of items can all be assigned the same attribute.

Note that you can also import and export item attributes using the Item Attribute Import / Export Wizard.

Catalog Sections

An Item Catalog can be made up of up to five different levels, each level containing an unlimited number of sections. Create and edit Catalog sections and levels in the Catalog Sections window.

Catalog Maintenance

A Catalog can be built up using the levels and sections that you have created in the Catalog Sections window. This Catalog will be displayed as a tree view.

Catalog Tree View
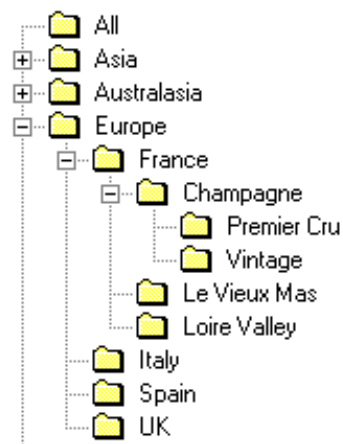
Items can be assigned at the lowest level of the Catalog, and will automatically be assigned to the parent levels. Additionally, an item can be assigned to more than one position in the Catalog. To build up a Catalog and assign items to levels, use the Catalog Maintenance window.

Item Catalog and Search

The results of the attribute and Catalog maintenance are displayed in the Item Catalog and Search window, an Additional option in Microsoft Dynamics™ GP Sales Transaction Entry, and the Item Catalog Lookup window, an Additional option in Microsoft Dynamics™ GP Item Maintenance. Dependant upon the default settings initiated in the Maintain Item Catalog and Search Defaults window, you can use the Catalog and item attributes to rapidly locate an item and add it to a sales transaction. You also have the option when setting defaults to choose whether or not the Catalog and attributes are displayed in this window, for example, you could set the window to display the Catalog and search but not attributes, to display attributes only and so on. From this window, you can also see multiple item properties (such as cost, quantity available, and where applicable an item image) and view numerous other relevant windows.

Additional Module Functionality

The item Catalog is given additional functionality when used in conjunction with other Trinity modules. See Appendix B for details of this functionality.
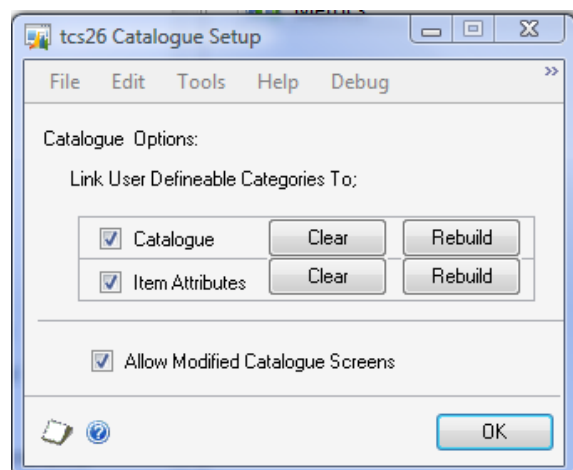
Setup

1. Catalog Setup Window

Tools >> Setup >> Trinity >> Catalog Based Sales >> Setup

Use the Catalog Setup window to:

- Automatically link item attributes and Catalogs to user-definable categories
- Change the option to allow modified Catalog windows to be used

Note that it is not required that you use this window. It is provided to allow immediate Catalog building.

1.1 Automatically Linking Item Attributes and Catalogs to User-definable Categories

To automatically link item attributes and Catalogs to user-definable categories using the Catalog Setup window:

1. To automatically link a Catalog to user-definable categories, click the Catalog checkbox and click Rebuild.

   A Catalog will be built based on item classes, for which user categories can be set up using the Inventory Control Setup window. Catalog levels will be built based upon the values assigned to these user categories. The order of these user categories defines the levels of the Catalog; for example, the value for user category one will become Catalog level one, the value for user category two will become Catalog level two, and so on. All items that have user categories values set up against their item class will be assigned to the appropriate Catalog level.

   Note that if you already have a Catalog created, then it will be overwritten if you choose to rebuild a Catalog in this window.

   If you click Clear, then the Catalog will be deleted.

2. To automatically link item attributes to user-definable categories, click the Item Attributes checkbox and click Rebuild.

   Item attributes are also based on item classes. User categories can be set up for item classes using the Inventory Control Setup window. Item attributes groups will be built based upon the user categories themselves, rather than any values assigned to them, and these values will be used as attributes within the attribute group.

   Note that if you select to rebuild attributes, then they will be appended to any current attribute groups

   If you click Clear, then any attribute groups created through this window will be deleted.

3. Select Allow Modified Catalog Screens if you want to use a Modifier to change the layout of the Catalog windows. If you select this option, automatic formatting of the Catalog windows will be disabled.

4. Click OK to close the window.

Note that if your changes are made to item classes, then these will be reflected in the Catalog and the item attributes.

2. Maintain Item Catalog Lookup Defaults Window

Tools >> Setup >> Trinity >> Catalog Based Sales >> Catalog Lookup Defaults Maintenance

Use the Maintain Item Catalog Lookup Defaults window to:

- Set defaults for the Item Catalog Lookup window

2.1 Setting defaults for the Item Catalog Lookup Window

Note that most settings in the window can be changed within the Item Catalog Lookup window itself. The only exceptions to this are Include Item Attributes, Include Item Catalog, Include Item Search, and the List View Options.

To set defaults for the Item Catalog Lookup window in the Maintain Item Catalog Lookup Defaults window:

1. To set these defaults across the entire system, click General. If your defaults are for a specified user, then click User and enter a user or click the lookup to select a user from the Users window.

2. To display Item Attributes on the Item Catalog Lookup window, click the Include Item Attributes checkbox. Then use the Default Attributes drop-down menus to select which attributes will be shown in the Item Catalog Lookup window.

    Note that displayed attributes may be amended as required in the Item Catalog Lookup window.

3. To display the Item Catalog on the Item Catalog and Search window, click the Include Item Catalog checkbox.

4. To only search the Catalog section currently highlighted in the Item Catalog Lookup window, click the Include Catalog in the Search option.

5. To display the Item Search function on the Item Catalog and Search window, click the Include Item Search checkbox.

6. To further specify your search range, use the Contains/Begins with option. From the drop-down menu, select between Item Number, Item Description, Item Class, Generic Description, Short Description, and Item Class Description. Then select Contains or Begins with from the next drop-down menu, then enter the required letters in the text box.

For example, if you (or a specified user) will only be searching for Items containing the letters Ch, you could select Item Description, Contains, Ch.

Note that if you deselect Ignore Case, then the case (i.e., upper or lower case) will be taken account of in defining your search range, so Item Descriptions containing "Ch" would be included in the range, those with "ch" would not be included.

7. To remove any search parameters that have been set up (see step 6 above), click Clear Search Parameters.

8. The Default Site Filter option allows you to select a site from which to display items in the Item Catalog Lookup window. To specify a site choose from the drop-down menu.

Note that sites other than the default may be viewed in the Item Catalog Lookup window, by using the appropriate drop-down menu.

9. Click the Only Show Available option to only items where stock is available for sales will be displayed.

Note that this setting can be deactivated in the Item Catalog Lookup window.

10. Click Include Inactive Items if to include items marked as Inactive in the Item Maintenance window.

11. In Maximum Items type the number of items that you want to be displayed on the Item Catalog Lookup screen at any one time.

12. When in the Item Catalog Lookup window pressing an alphanumeric key will take you to the first Item Number in the scrolling window beginning with that letter/number. If you select Keypress On Item Description, then pressing the key will take you to the first Item Description beginning with that letter.

13. The List View Options displays the columns and buttons that can be included on the Item Catalog Lookup window (see Using the Item Catalog Lookup window for more details). If there are any options that you do not want to be displayed, then ensure that they are unchecked.

Use the Mark All/Unmark All buttons to select/deselect all columns/buttons or click on them to select/deselect individual options. Note that you should double click the text and not the checkbox to select an option.

14. From the Price Method drop-down menu, select the pricing source to use in the Catalog. By default, Microsoft Dynamics™ GP pricing will be selected. If you have Horizon third party pricing software installed on your system, then you can select to use this as your pricing source.

15. Click Save to save any defaults that you have set.

Note that you can click Clear at any point to clear any changes that you have made. You can also click Delete to delete any default settings that you have made.

3. Maintain Item Catalog and Search Defaults Window

Tools >> Setup >> Trinity >> Catalog Based Sales >> Catalog Defaults Maintenance

Use the Maintain Item Catalog and Search Defaults window to:

- Set defaults for the Item Catalog and Search window
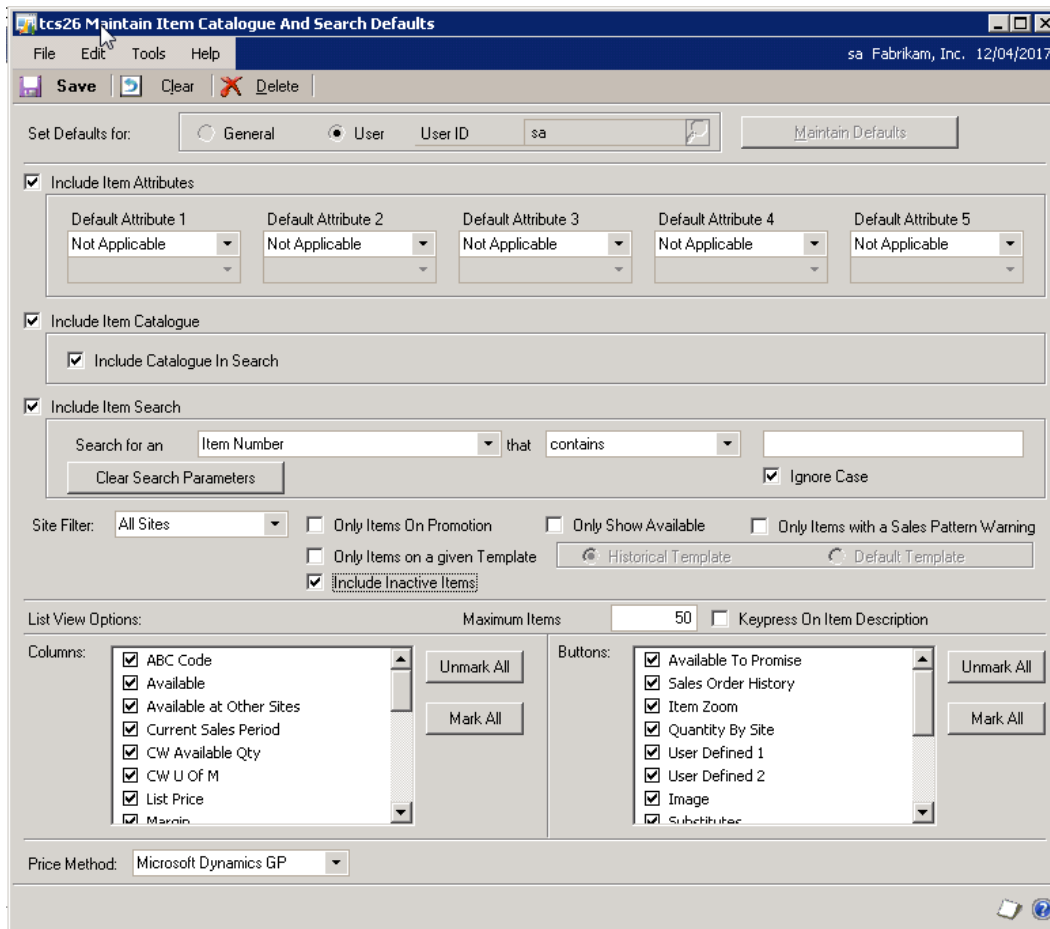
3.1 Setting Defaults for the Item Catalog and Search Window

Note that most settings in the window can be changed within the Item Catalog and Search window itself. The only exceptions to this are Include Item Attributes, Include Item Catalog, Include Item Search, and the List View Options.

To set defaults for the Item Catalog and Search window in the Maintain Item Catalog and Search Defaults window:

1. To set these defaults across the entire system, click General. If your defaults are for a specified user, then click User and enter a user or click the lookup to select a user from the Users window.

2. To display Item Attributes on the Item Catalog and Search window, click the Include Item Attributes checkbox. Then use the Default Attributes drop-down menus to select which attributes will be shown in the Item Catalog and Search window.

   Note that displayed attributes may be amended as required in the Item Catalog and Search window.

3. To display the Item Catalog on the Item Catalog and Search window, click the Include Item Catalog checkbox.

4. To only search the Catalog section currently highlighted in the Item Catalog and Search window, click the Include Catalog in the Search option.

5. To display the Item Search function on the Item Catalog and Search window, click the Include Item Search checkbox.

6. To further specify your search range, use the Contains/Begins with option. From the drop-down menu, select between Item Number, Item Description, Item Class, Generic Description, Short Description, and Item Class Description. Then select Contains or Begins with from the next drop-down menu, then enter the required letters in the text box.

For example, if you (or a specified user) will only be searching for Items containing the letters Ch, you could select Item Description, Contains, Ch.

Note that if you deselect Ignore Case, then the Case (i.e., upper or lower case) will be taken account of in defining your search range, so Item Descriptions containing "Ch" would be included in the range, those with "ch" would not be included.

7. To remove any search parameters that have been set up (see step 6 above), click Clear Search Parameters.

8. The Default Site Filter option allows you to select a site from which to display items in the Item Catalog and Search window. To specify a site choose from the drop-down menu.

    Note that sites other than the default may be viewed in the Item Catalog and Search by using the appropriate drop-down menu.

9. Five further options are also available:

Only Items on Promotion	Only items on Extended Pricing promotions will be displayed (requires Microsoft Dynamics™ GP Extended Pricing)
Only Show Available	Only items where stock is available for sales will be displayed
Only Items on a given Template	Select Historical Template or Default Template. Only items that appear on the selected template will be displayed (requires Trinity Template Selling module)
Include Inactive Items	Select this option to include items marked as Inactive in the Item Maintenance window.
Only Items with a Sales Pattern Warning	Only items with a sales pattern warning will be displayed (requires Trinity Sales Pattern Analysis module)

Note that these settings can be deactivated in the Item Catalog and Search window.

10. In Maximum Items, type the number of items that you want to be displayed on the Item Catalog and Search screen at any one time.

11. When in the Item Catalog and Search window, pressing an alphanumeric key will take you to the first Item Number in the scrolling window beginning with that letter/number. If

you select Keypress On Item Description, then pressing the key will take you to the first Item Description beginning with that letter.

12. The List View Options displays the columns and buttons that can be included on the Item Catalog and Search window (see Using the Item Catalog and Search window for more details). If there are any options that you do not want to be displayed, then ensure that they are unchecked.

Use the Mark All/Unmark All buttons to select/deselect all columns/buttons or click on them to select/deselect individual options. Note that you should double click the text and not the checkbox to select an option.

See Appendix C for details of how to set up margin calculations.

13. From the Price Method drop-down menu, select the pricing source to use in the Catalog. By default, Microsoft Dynamics™ GP pricing will be selected. If you have Horizon third party pricing software installed on your system, then you can select to use this as your pricing source.

14. Click Save to save any defaults that you have set.

Note that you can click Clear at any point to clear any changes that you have made. You can also click Delete to delete any default settings that you have made.

4. Excel File Template Maintenance Window

Tools >> Setup >> Trinity >> Catalog Based Sales >> Item Attributes Excel Templates

Use the Excel File Template Maintenance window to:

- Set up excel template IDs to enable importing/exporting of item attributes
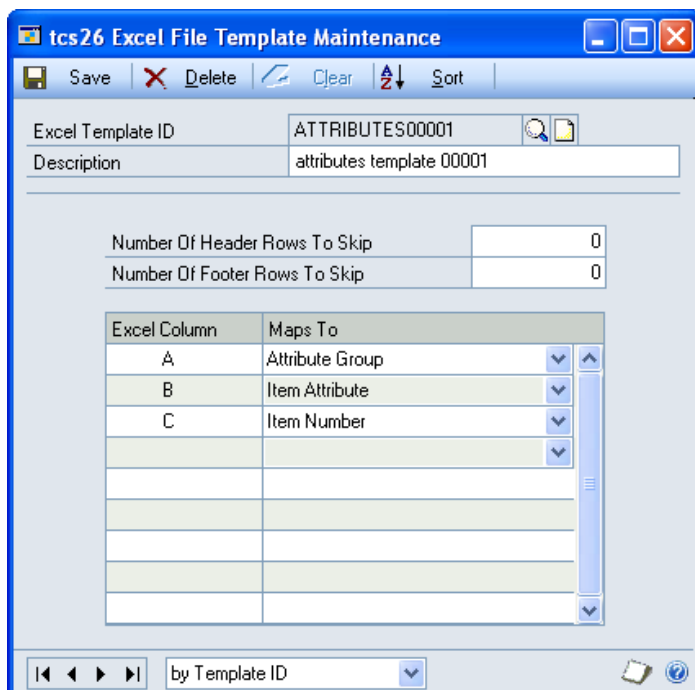
Note that you must set up templates in this window before importing/exporting item attributes.

4.1 Setting Up Excel Template IDs

To set up Excel Template IDs in the Excel File Template Maintenance window:

1. Enter an excel template ID.

   If you are maintaining a template ID, then you can select one using the lookup.

2. Enter a description for the excel template ID.

3. You can select to have the template not include header or footer rows on imported excel sheets. This would be useful, for example, where columns on the required spreadsheets have headings.

   Under the Number Of Header Rows To Skip and Number Of Footer Rows To Skip fields, enter the number of rows that you do not want to be included in the import. If you do not require rows to be skipped, then leave these fields set to 0.

   Note that the contents of these fields have no effects when exporting item attributes. If you are exporting item attributes that you will be amending in Excel then re-importing, you should use an excel template ID with header and footer rows to skip set to 0.

4. In the scrolling window, you should set how Excel columns will map to Catalog Based Sales fields for the excel template ID. From the drop-down menus, you can select the following options:

   - Attribute Group
   - Item Attribute
   - Item Number

   For each option, you should enter an Excel Column, for example, A, B, or C. When you have entered a column, select which Catalog Based Sales field this column will be mapped to from the drop-down menu. When you import/export item attributes, the entered Excel column will contain data relating to the selected Map To option.

Excel Column	Maps To	
A	Attribute Group	⌄
B	Item Attribute	⌄
C	Item Number	⌄

   Note that all map to options must be selected.

5. Click Save to save the excel template ID.

Note that you can click Delete to delete an excel template ID.

4.2 Setting Up Excel Sheets for Importing and Exporting

You do not need to set the cells in the spreadsheets to a specific format. You should, however, be aware that the import/export process is case sensitive.

The import/export process functions with standard .xls Excel file types.

It is recommended that Excel is **closed** when you are using the Item Attribute Import/Export Wizard.

5. Item Attribute Import/Export Wizard

Tools >> Setup >> Trinity >> Catalog Based Sales >> Item Attributes Wizard

The Item Attributes Import/Export Wizard allows the user to import or export item attributes.

Use the Item Attributes Import/Export Wizard to:

- Import or export item attributes to/from an Excel spreadsheet

5.1 Using the Item Attribute Import/Export Wizard

1. Click the Next button to display the next window

Note that you can click Cancel on this or any other Item Attribute Import/Export Wizard screen to close the Item Attribute Import/Export Wizard.

Note also that you can click the Back button on any other Item Attribute Import/Export Wizard screen to return to the previous screen.
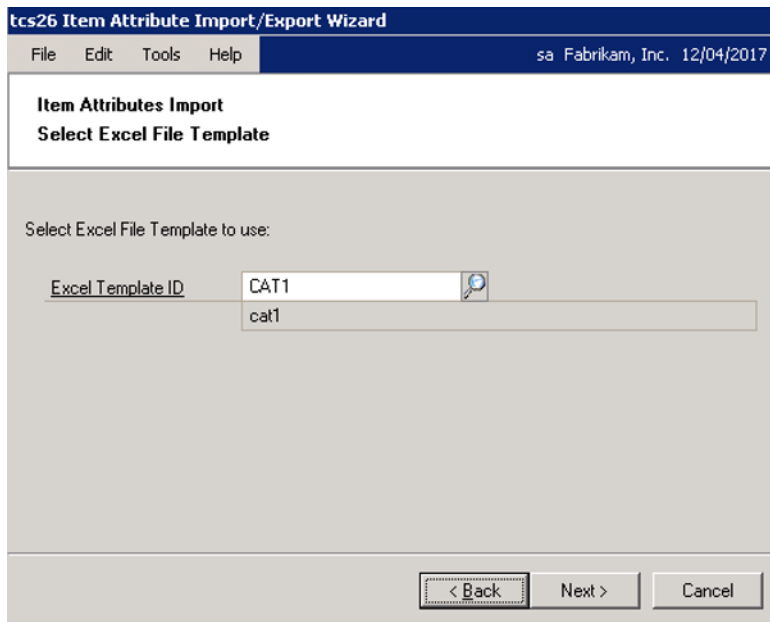
5.2 Import / Export Screen
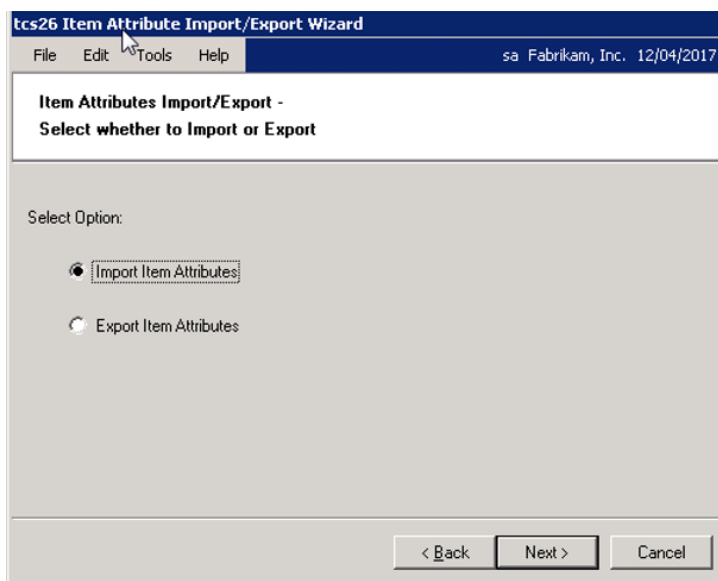
5.2.1 Using the Import/Export Screen

1. Click whether you want to Import Item Attributes or Export Item Attributes.

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

Note that details of exporting item attributes are to be found at 5.9. See below for details on importing item attributes.

Importing Item Attributes

5.3 Select Import File Screen

5.3.1 Using the Select Import File Screen

1. Enter the Excel Template ID (set up in the Excel File Template Maintenance window) that you want to base the import on or select one using the lookup.

2. Click Next.

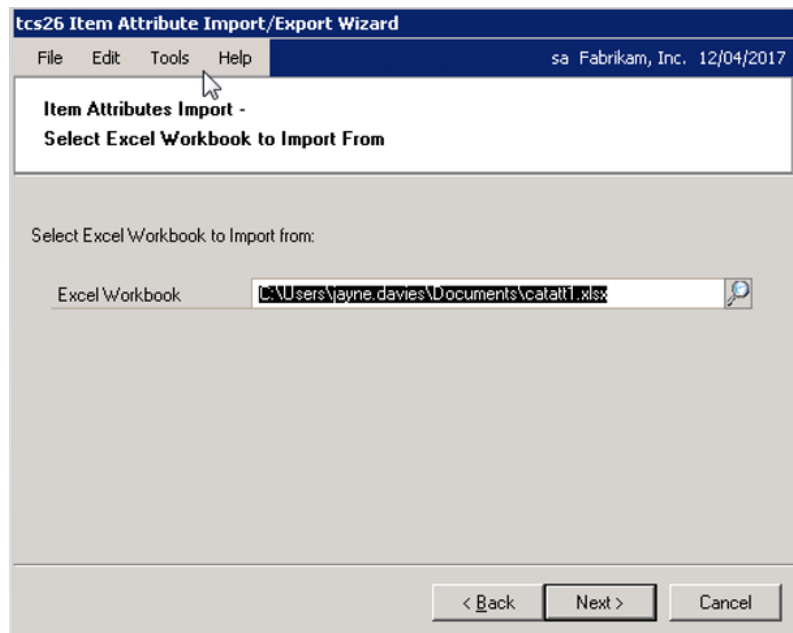## 5.4 Select Workbook Screen

5.4.1 Using the Select Workbook Screen

1. Enter the Excel file that you want to import or select one using the lookup.
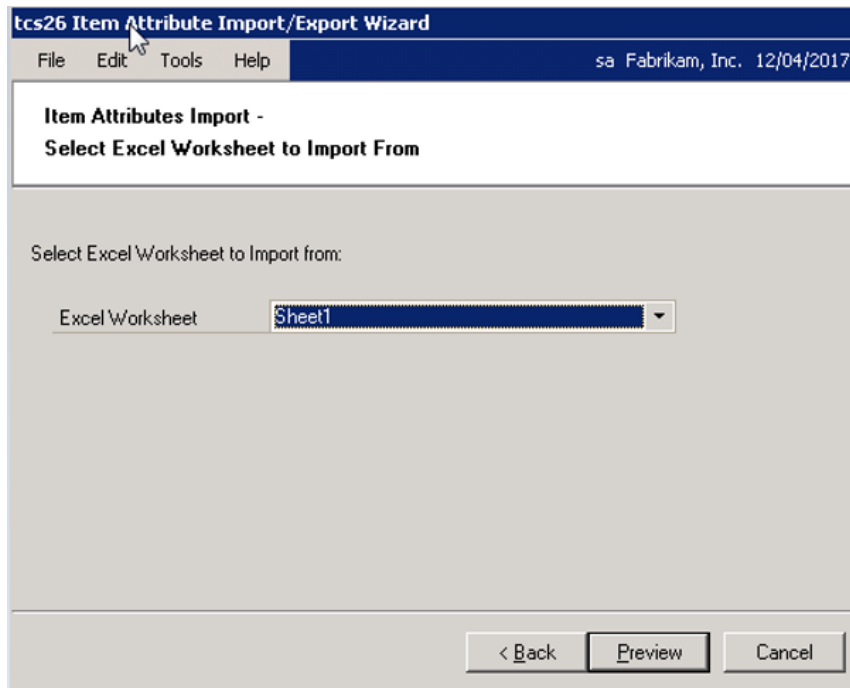
   Note that you cannot just enter the name of the file, you must also enter the system path to the file, for example, C:\TEMP\attributes.xls.

   Also, note that you can only import .xls file types. You cannot import files that are currently open in Excel.

2. Click Next.

5.5 Select Worksheet Screen

5.5.1 Using the Select Worksheet Screen

1. From the drop-down menu, select the specific worksheet that you want to import.

    Note that the worksheets are the individual spreadsheets held within a workbook or Excel file. Worksheets will be displayed in the order that they are held in the selected workbook.

2. Click Preview. The details from the selected Excel worksheet will be imported into Microsoft Dynamics™ GP, and the progress will be displayed on the Import Wizard progress bar.
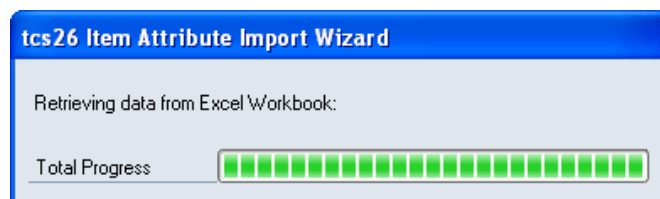

    Note that if any errors are encountered during the import, then the Import Errors screen will be displayed (see 5.5.2).

When the import is complete (if no errors were encountered), then the Import Preview screen will be displayed (5.6).

5.5.2 Using the Import Errors Screen

1. The Import Errors screen will be displayed where any errors are encountered during the import process. The location of the error in the spreadsheet will be displayed with details of the error.
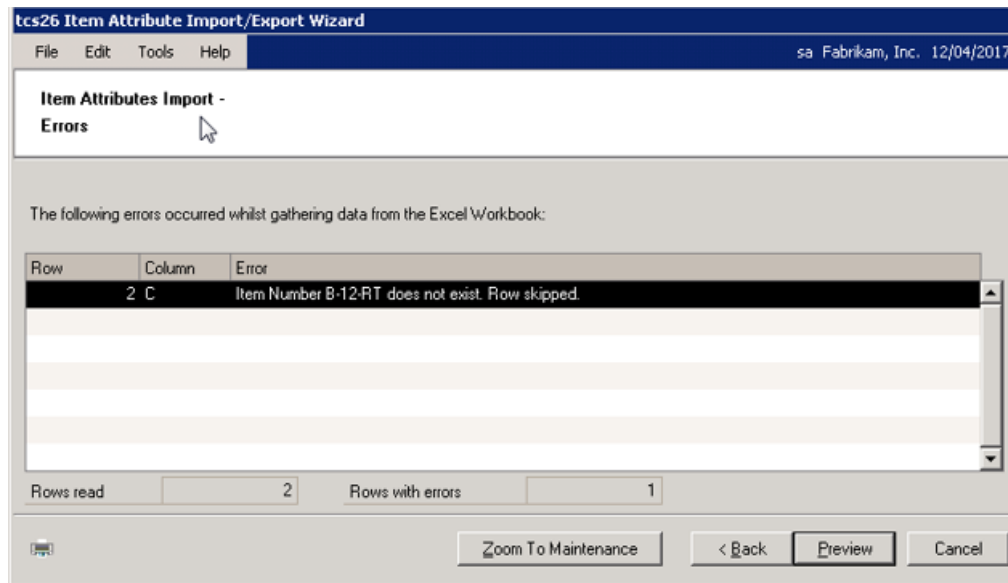
- There is an "Invalid Excel Cell Format" - for example, you have entered text data into a field where a date is required
- There is a "Duplicate Record" - when a row has been duplicated in the spreadsheet
- Some data "does not exist"

Click the Print icon to print the Import Errors Report detailing the import errors.

2. Where you have an error with data that "does not exist," it is possible to amend the details so that the import will be accepted.

    Click on the relevant line in the scrolling window and click the Zoom to Maintenance button. The relevant maintenance window will be displayed (for example, the Item Maintenance window will be displayed where the error concerns an Item Number that does not exist) with a new record created for the data that does not exist. Complete the data as required, then return to the Import Errors window and click Back. The Select Worksheet screen will be displayed where you can re-import the spreadsheet.

3. Where a spreadsheet contains lines both with and without errors, the lines without errors will still be imported. Click Preview to preview these lines in the Import Preview window.

    Note that if there are no valid rows, then you will not be permitted to proceed.

5.6 Import Preview Screen
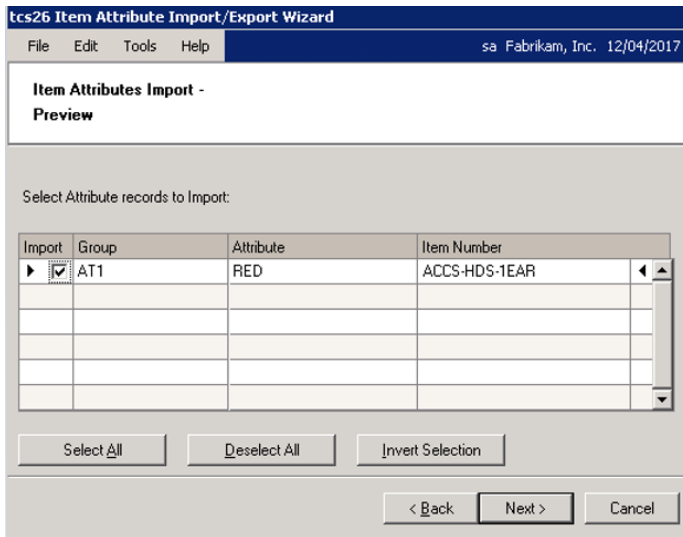
5.6.1 Using the Import Preview Screen

1. The scrolling window will display all valid lines that you have selected for import, with all relevant information.

2. You need to select which lines in the scrolling window you want to import. When the checkbox for a line is marked, that indicates that the line will be imported. You can check the lines manually or use the buttons detailed below.

Select All	Selects all lines for import
Deselect All	Deselects all lines so that they will not be imported
Invert Selection	Inverts the current selection - all lines selected for import will be deselected and vice versa

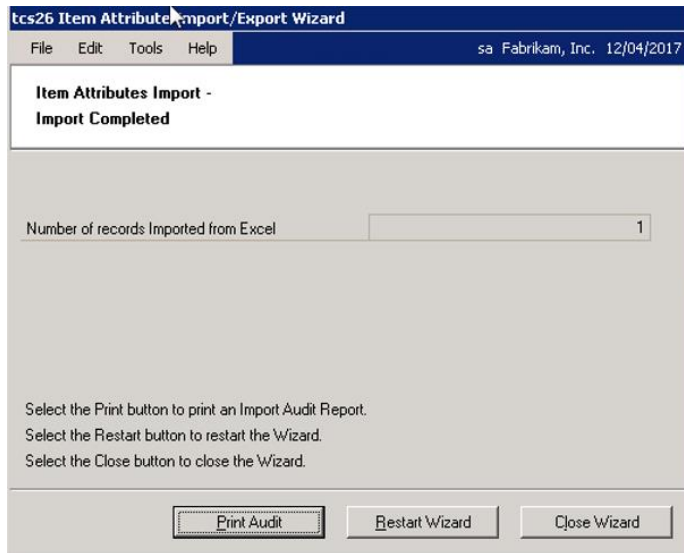3. When you have completed your import selection, click Next.

5.7 Completing Import Screen

5.7.1 Using the Completing Import Screen

1. The Excel Template ID, Excel Workbook, and Worksheet that you have selected will be displayed.

2. Click Import to Import the workbook and worksheet based on the details set in the Excel Template ID.

5.8 Import Completed Screen


5.8.1 Using the Import Completed Screen

1. The number of item attributes imported will be displayed.

2. The number of rows imported with errors will also be displayed, as will a warning that errors have occurred. Errors will occur where another user is editing the record being imported. This record will not be imported.

3. Click the Print Audit button to print the Import Audit report displaying details of the import errors.

4. Click Restart Wizard if you want to import (or export) more item attributes. Alternatively, click Close Wizard to close the wizard.

Exporting Item Attributes

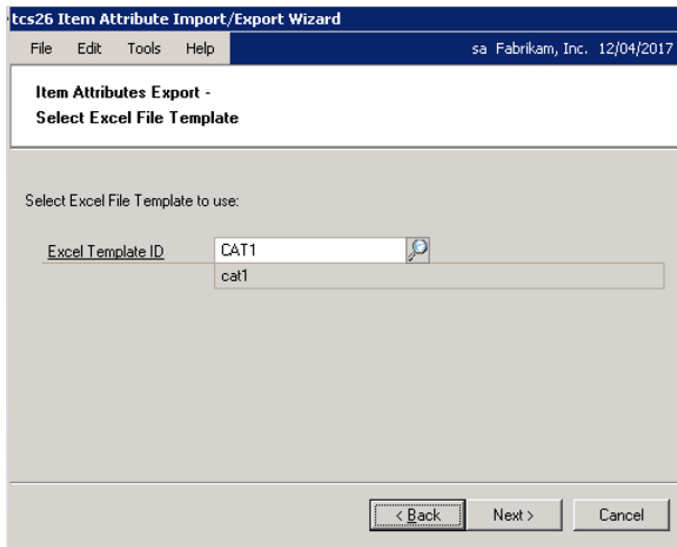## 5.9 Item Attributes Selection Screen
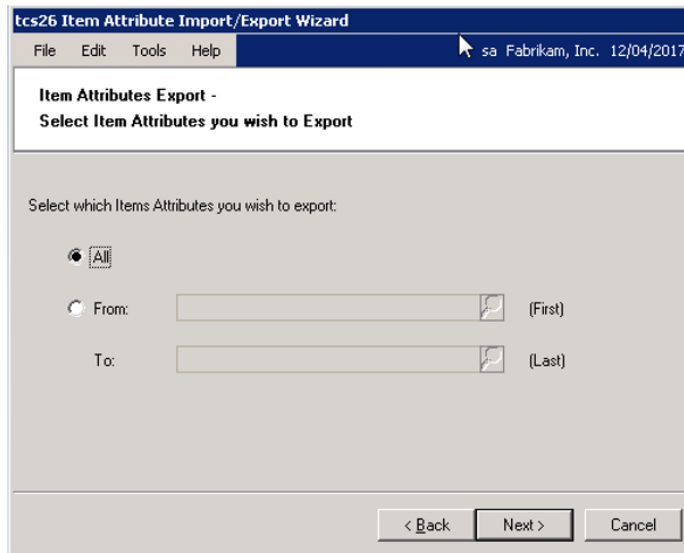
5.9.1 Using the Item Attributes Selection Screen

1. Click All to select to export all item attributes or click From then enter an item attribute range or select them using the lookups.

2. Click Next.

5.10 Select Excel File Template Screen

5.10.1 Using the Select Excel File Template Screen

1. Enter the Excel Template ID (set up in the Excel File Template Maintenance window) that you want to base the export on or select one using the lookup.

Note that any Number Of Header/Footer Rows To Skip settings applied in the Excel File Maintenance window are not applicable when exporting alternate item numbers.

2. Click Next.

5.11 Select Workbook Screen
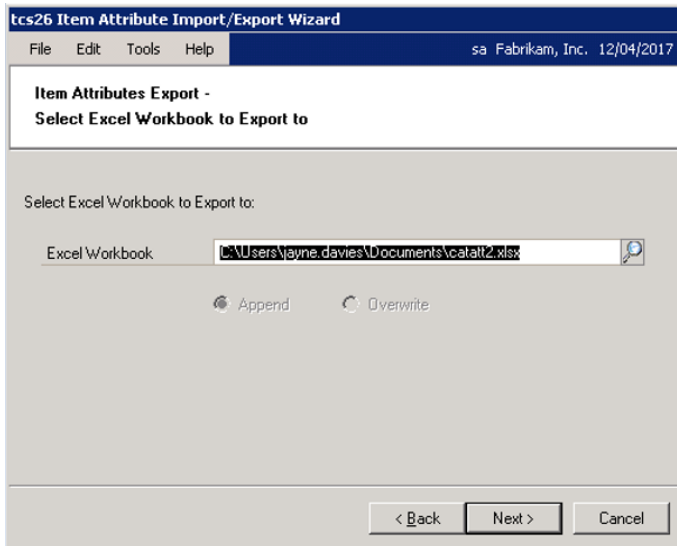
5.11.1 Using the Select Workbook Screen

1. Enter the Excel file that you want to export item attributes to or select one using the lookup.

Note that you cannot just enter the name of the file, you must also enter the system path to the file, for example, C:\TEMP\attributes.xls. You can choose to select a workbook that has not yet been created - the workbook will be created automatically during the export.

Also, note that you cannot export to files that are currently open in Excel.

2. If you select a workbook that has already been created, then you should also select whether to Append or Overwrite.

| Append | Append exported details to the selected workbook |
| Overwrite | Overwrite the selected workbook with exported details |

3. Click Next.

5.12 Select Worksheet Screen

5.12.1 Using the Select Worksheet Screen

1. Enter a worksheet or select one from the drop-down menu. You can choose to enter a new worksheet - if you do so, then the worksheet will be automatically created during the export process.

Note that if you selected to overwrite an existing workbook in the previous window, then you will not have the option to select a current worksheet from the drop-down menu.
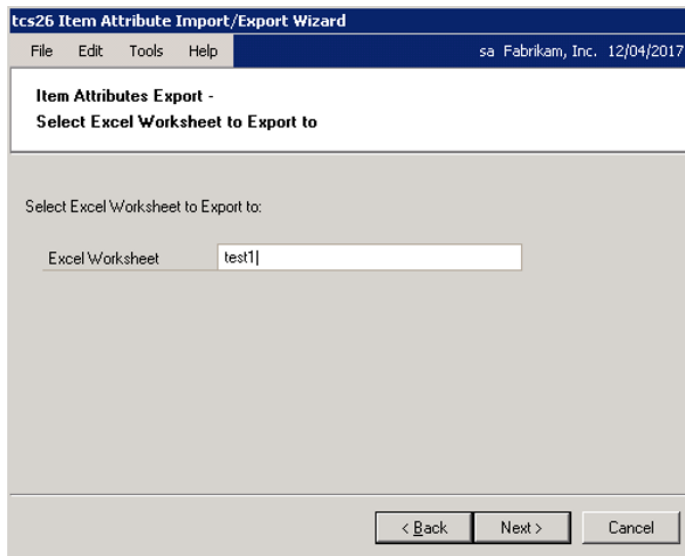
Also, note that you cannot export to files that are currently open in Excel.

2. If you select a worksheet that has already been created, then you should also select whether to Append or Overwrite.

| Append | Append exported details to the selected worksheet |
| Overwrite | Overwrite the selected worksheet with exported details |

3. Click Next.

5.13 Completing Export Screen

5.13.1 Using the Completing Export Screen

1. The range that you have selected to export will be displayed.
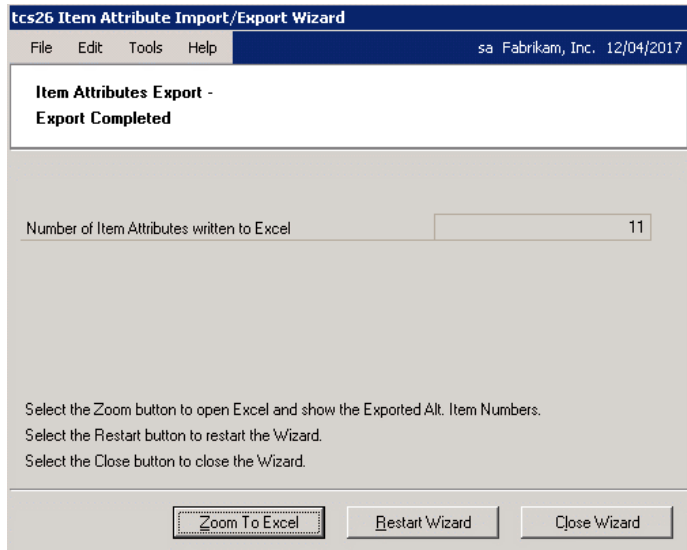
2. Click Next.

5.14 Completing Export Screen 2

5.14.1 Using the Completing Export Screen 2

1. All Excel details that you have selected to export will be displayed.

2. Click Export.

5.15 Export Completed Screen

5.15.1 Using the Export Completed Screen

1. The number of item attributes exported will be displayed.

2. Click Zoom To Excel to display the worksheet that has been exported.

3. Click Restart Wizard if you want to export (or import) more item attributes. Alternatively, click Close Wizard to close the wizard.
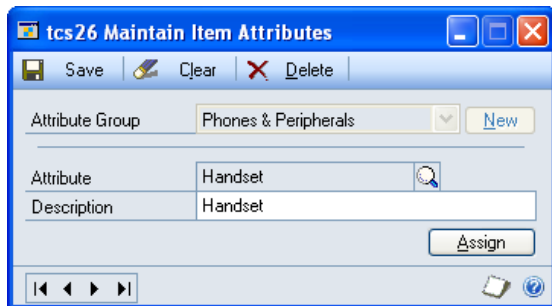
Cards

6. Maintain Item Attributes Window

Cards >> Trinity >> Catalog Based Sales >> Attributes Maintenance
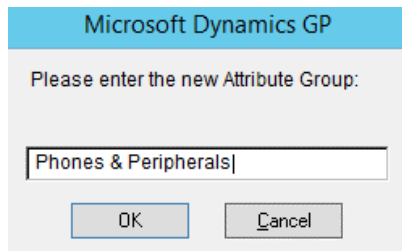
Use the Maintain Item Attributes window to:

- Create and Maintain Item Attributes

6.1 Creating and Editing Item Attributes

To create and maintain item attributes in the Maintain Item Attributes window:

1. To create a new attribute group, click the New button. This will open the Add New Attribute Group window.

2. Enter the Name of your new Attribute Group then click OK.

Note that you can click Cancel to return to the Maintain Item Attributes window.

3. Once you have entered a new Attribute Group (or selected an existing Attribute Group from the drop-down menu), enter the attribute and description that you want to assign to the Attribute Group.

4. If you want to assign the attribute to an item or items now, then click the Assign button to display the Assign Items To Attributes window.

Note that if you click Assign without first saving any new attributes you have created, you will be asked whether you want to save changes. Click Yes to save the attribute and continue to the Assign Items To Attributes window. If you click No, the Assign Items To Attributes window will still be displayed, but the new attribute will not have been saved.

5. If you don't want to assign the attribute to an item or items now, then click Save to save the new attribute, and if applicable, the Attribute Group.

Note that you can click Clear at any point to clear any changes you have made.

To delete an attribute, click the Delete button. If there are no attributes held against an Attribute Group, then clicking Delete will delete the Attribute Group.

7. Assign Items To Attributes Window

Cards >> Trinity >> Catalog Based Sales >> Assign Item Numbers To Attributes

Use the Assign Items To Attributes window to:

- Assign items to attributes
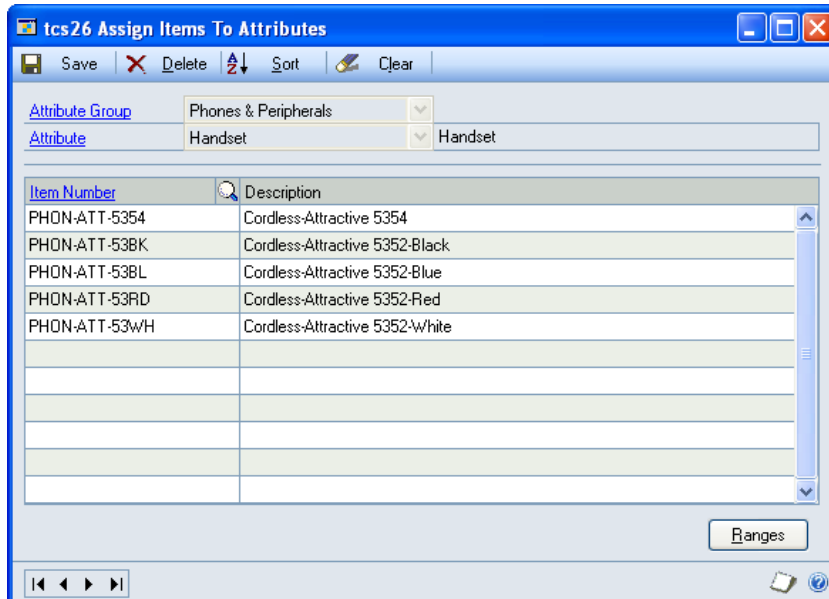
7.1 Assigning Items to Attributes

To assign items to attributes in the Assigning Items To Attributes window:

1. Select an attribute group from the drop-down menu.

Note that if you have opened this window from the Maintain Item Attributes window, then the Attribute Group and attribute will already be displayed.

2. Select an attribute from the drop-down menu. All items already assigned to this attribute will be displayed in the scrolling window.

3. To assign a new item to the attribute, enter into the next free line in the scrolling window the Item Number that you want to assign to the attribute or click the lookup to select an item from the Items window. As many items as required can be added to the scrolling window.

4. Click Save to save any new items assigned to the selected attribute.

Note that you can click the Sort button to redisplay items in the scrolling window in alphabetical order. Clicking Clear will remove your selections from the window, saving any changes that you have made to your selection.

5. If you want to assign items by range to an attribute, click the Ranges button to display the Assign Item Range To Attribute window.

To unassign all displayed items from an attribute, click the Delete button. To unassign a single line (i.e., a single item) from an attribute, click Edit then the Delete Row option.

8. Assign Item Range To Attribute Window

Assign Items To Attributes window >> Ranges

Use the Assign Item Range To Attribute window to:

- Assign item ranges to an attribute

8.1 Assigning an Item Range to an Attribute

To assign an item range to an attribute in the Assign Item Range To Attribute window:

The Assign Item Range To Attribute window will open with details of the current attribute selection. Item ranges are assigned by Item Number, Generic Description, and by Class ID.

1. Click All to assign all records or From to assign a selection of records for Item Number, Generic Description, and Class ID. If you select From, enter To and From values to specify a range, or use the lookups.

2. You can further specify your range by using the Contains/Begins with option. From the drop-down menu, select between Item Number, Item Description, Item Class, and Generic Description. Then select Contains or Begins with from the next drop-down menu then enter the required letters in the text box.

   For example, if you have selected Consumables as a Class ID Range, but know that you only want to assign the attribute to Consumables that contain the letters "Ch," you could select Item Class, Contains, Ch.

Note that if you deselect Ignore Case, then the Case (i.e., upper or lower case) will be taken account of in defining your selected range, so Item Classes containing "Ch" would be included in the range, those with "ch" would not be included.

3. Click the Preview button to view your selection in the scrolling window. The Item Number and Item Description of each item to be assigned will be displayed. Click the Show button to display the Generic Description, Class ID, and Item Short Name.

4. Use the Unmark All and Mark All to deselect/select all items displayed in the scrolling window. Alternatively, you can click on each item's checkbox to mark/unmark it.

5. Click the Transfer button to assign the selected item range to the attribute. Click OK to close the Transfer completed successfully dialog box.

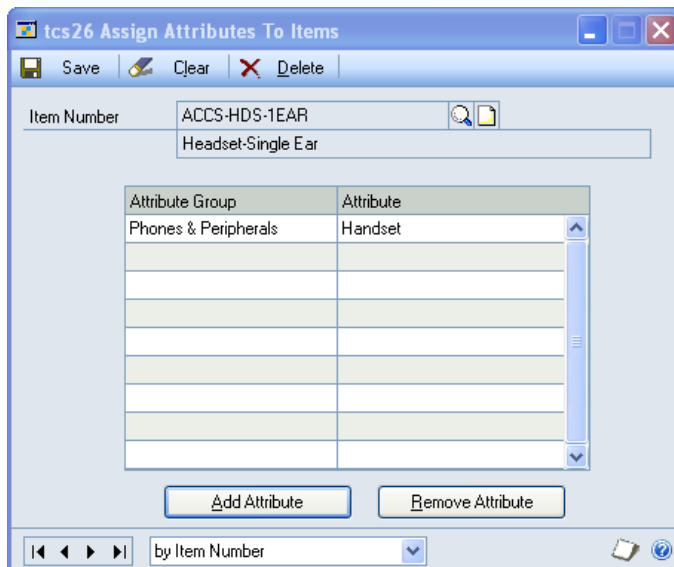6. Click OK to return to the Assign Items To Attributes window.

Note that you can click OK at any point to return to the Assign Items To Attributes window without saving any changes.

9. Assign Attributes To Items Window

Cards >> Trinity >> Catalog Based Sales >> Assign Attributes to Item Numbers

Use the Assign Attributes To Items window to:

- Assign attributes to items

9.1 Assigning Attributes To Items

To assign attributes to items in the Assign Attributes To Items window:

1. Enter the Item Number that you want to assign attributes to or click the lookup to select an item from the Items window. All attributes already assigned to the item will be displayed in the scrolling window.

2. If you want to add an attribute to the item, click the Add Attribute button. This will display the Add Attributes to Items window.
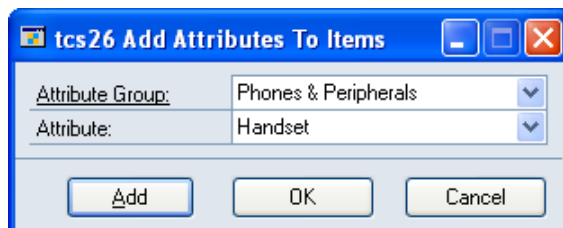
3. Select the Attribute Group and specific attribute that you want to assign to the item from the drop-down menus.

4. Click Add to assign the attribute to the item and keep the secondary window open. Click OK to assign the attribute to the item and close the secondary window.

5. If you want to remove a single attribute from an item, click on the item line then click the Remove Attribute button. If you want to remove all attributes assigned to an item, click on the attribute, then click Delete.
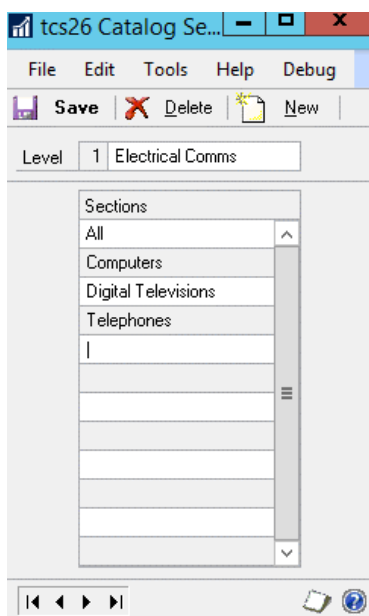
6. To save attributes assigned to an item, click Save.

Note that you can click Clear at any point to clear the Item and attribute selections. Any changes that you have made **will** be saved.

10. Catalog Sections Window

Cards >> Trinity >> Catalog Based Sales >> Catalog Section Maintenance

Use the Catalog Sections window to:

- Create Catalog sections

10.1 Creating Catalog Sections

The item Catalogs are made up of sections and levels. The Catalog Sections window will allow you to create up to five levels in a Catalog. You could, for example, create Level 1 as World Regions, Level 2 as Countries, and Level 3 as Wine Regions. Unlimited sections may be set up for each Catalog level.

To create Catalog sections in the Catalog Sections window:

1. Enter the title of your first Catalog level in the Level 1 Box.

2. Click on the scrolling window and enter as many sections to the Catalog level (one on each line of the scrolling window) as you require.

3. Click the Save button to save your new Catalog level.

4. To create a new Catalog level, click the New button. This will open as Level 2, where you should repeat steps 1 to 3. These steps should be repeated until you have set up all your Catalog levels.

You can edit Catalog sections and levels by clicking on the required text and editing as required, then clicking Save to save your changes. You can add a new section to a current level by clicking on the next free line in the scrolling window and following the steps above. To delete a Catalog section click the Delete Row option under Edit. To delete a Catalog level, click the Delete button.

Note that if you attempt to delete a level of a Catalog that contains items, then you will be given the warning, "This Level is still in use - Cannot delete."

You can only delete a Catalog section if items have not been assigned to that section in the Catalog Maintenance window (see below).
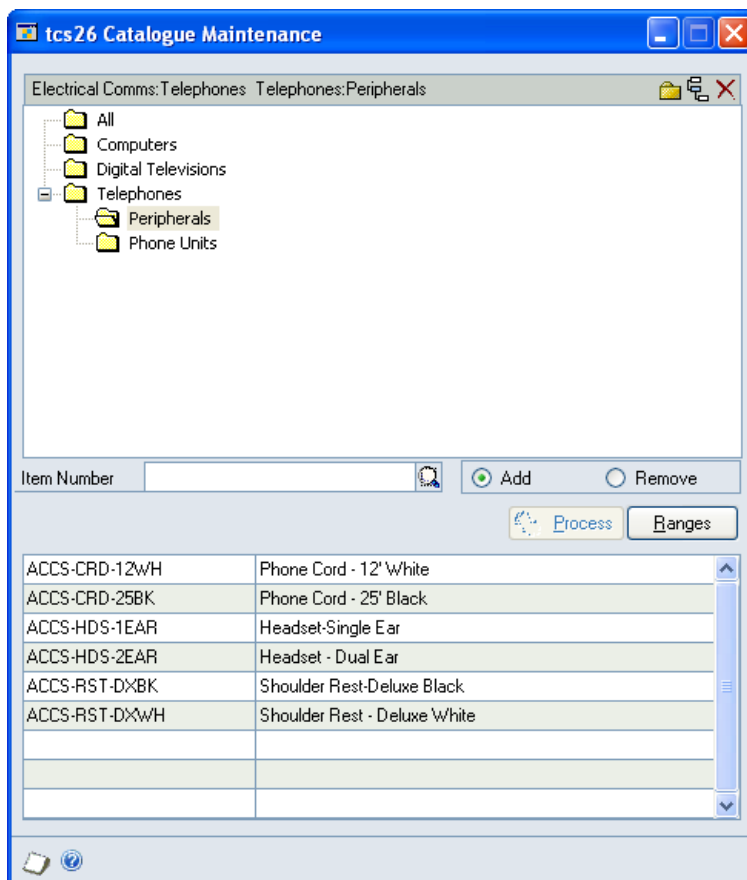
Also, note that you can only delete the lowest level of a Catalog - i.e., you could not delete Level 2 of a Catalog without first deleting Level 3.

11. Catalog Maintenance Window

Cards >> Trinity *>> Catalog Based Sales >> Catalog Maintenance*

Use the Catalog Sections window to:

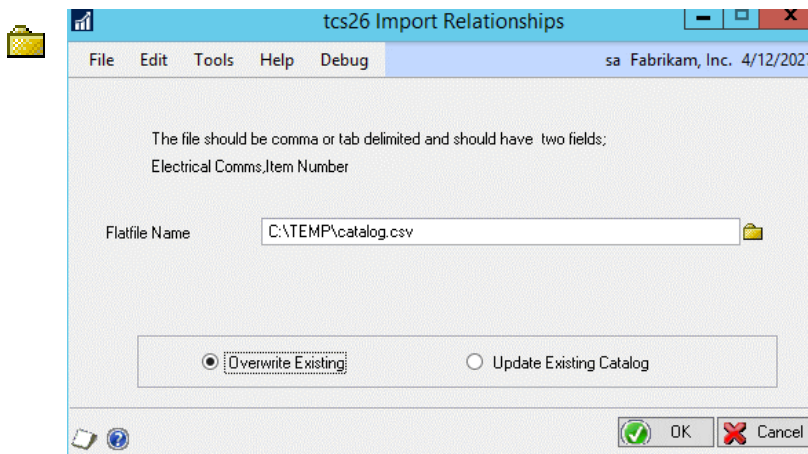- Create and maintain Catalog sections

11.1 Creating and Maintaining Catalogs

To create and maintain Catalogs in the Catalog Maintenance window:

1. You can create Catalogs manually or by importing a flat file.

   1.1 To import a flat file:

a) Click the Import Catalog button. This will open the Import Relationships window.

b) Enter the flat file name or use the lookup to locate the flat file on your system.

When creating a flat file to import, the flat file should contain the same number of fields as you have created Catalog sections in the Catalog Sections window (see window image above). You cannot import a flat file unless you have already created Catalog sections in the Catalog Sections window. Do not create a header field, as this will also be imported. The Flat file must be saved as a .csv or .txt file type.

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

Europe	France	Le Vieux Vin	Chardonnay
Europe	France	Le Vieux Vin	Chenin Blanc
Europe	France	Le Vieux Vin	Montrachet

c) If you want to overwrite any current Catalog, then click Overwrite Existing. If you want to update a current Catalog with the flat file, then click Update Existing Catalog.

d) Click OK to import the flat file. If there are any problems with the flat file import, then a warning will be displayed.

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

1.2 To manually create Catalogs:

a) Click the Add Relationship button. This will open the Catalog Section Lookup window.

b) Select the Catalog section that you want to add.

c) To add lower-level Catalog sections, highlight the section you want to add a section to and click the Add Relationship button. A dialogue box asking at what level you want to add the relationship will be displayed. For example, if you have set up Catalog levels of World Region and Countries, the dialogue box will be displayed, as shown below.
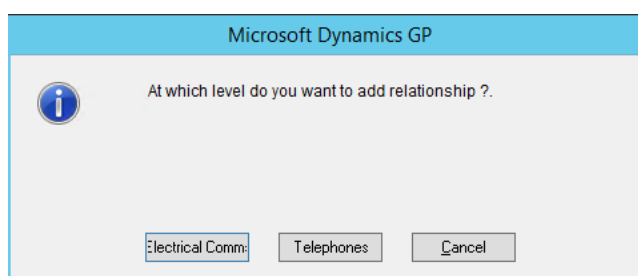
Click on the level for which you want to add a relationship.

d) The Catalog Sections Lookup window will be displayed showing the appropriate level. Click on the section you want to add then click Select. This section will be added to the required location in the Catalog.

Note that you can delete a Catalog section at any point by clicking on the appropriate section then clicking the delete button.

2. To add an Item Number to a Catalog section, click on the appropriate Catalog section, then enter an Item Number or use the lookup to select an Item Number from the Items window.

3. Click Add, then click the Process button. The item will be displayed in the scrolling window whenever its section is highlighted in the upper window.

4. To remove an item from a Catalog section, repeat steps 2 and 3, clicking the Remove button rather than the Add button.
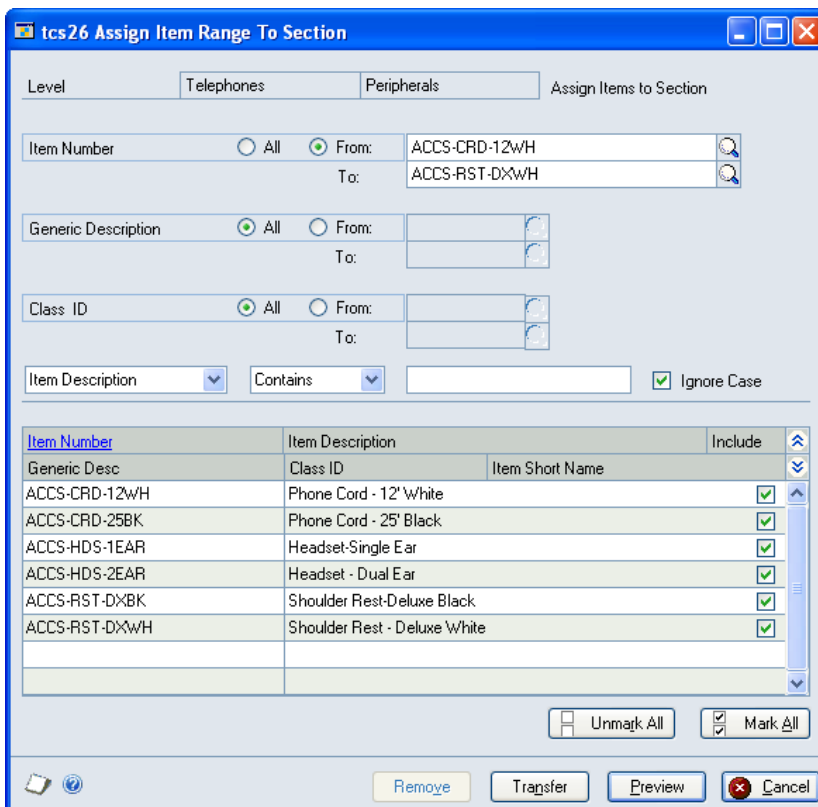
Note that you can also add/remove ranges of items to/from a Catalog section by clicking the Ranges button.

12. Assign Item Range To Section Window

Catalog Maintenance window >> Ranges button

Use the Assign Item Range To Section window to:

- Assign item ranges to a Catalog section
- Remove item ranges from a Catalog section

12.1 Assigning Item Ranges to Catalog Sections

The Assign Item Range To Section window will open with details of the current level and section selection. Item ranges are assigned by Item Number, Generic Description, and by Class ID. The current level and section will be displayed whether items are to be added to or removed from a section.

To assign or remove an item range to a Catalog section in the Assign Item Range To Section window:

1. Click All to assign all records or From to assign a selection of records for Item Number, Generic Description, and Class ID. If you select From, enter To and From values to specify a range, or use the lookups.

2. You can further specify your range by using the Contains/Begins with option. From the drop-down menu, select between Item Number, Item Description, Item Class, and Generic Description. Then select Contains or Begins with from the next drop-down menu then enter the required letters in the text box.

For example, if you have selected Consumables as a Class ID range, but know that you only want to assign Consumables that contain the letters "Ch," you could select Item Description, Contains, Ch.

Note that if you deselect Ignore Case, then the Case (i.e., upper or lower case) will be taken account of in defining your selected range, so Item Descriptions containing "Ch" would be included in the range, those with "ch" would not be included.

3. Click the Preview button to view your selection in the scrolling window. The Item Number and Item Description of each item to be assigned will be displayed. Click the Show button to display the Generic Description, Class ID, and Item Short Name.

4. You can use the Unmark All and Mark All to deselect/select all items displayed in the scrolling window. Alternatively, you can click on each item's Include checkbox to mark/unmark it.

5. Click the Transfer button to assign the selected item range to the section. If you are removing items from a section, click the Remove button. Click OK to close the Transfer completed successfully dialog box.

6. Click Cancel to return to the Catalog Maintenance window.

Note that you can click Cancel at any point to return to the Catalog Maintenance window without saving any changes.

13. Item Catalog Lookup Window

Cards >> Inventory >> Item >> Additional >> Item Catalog

Use the Item Catalog Lookup window to:

- Perform parameter-based searches for items
- Browse the item Catalog for items
- View and email item specifications
- Link to other information screens

Item
Catalog

Item Attributes

Item Search

Item Properties
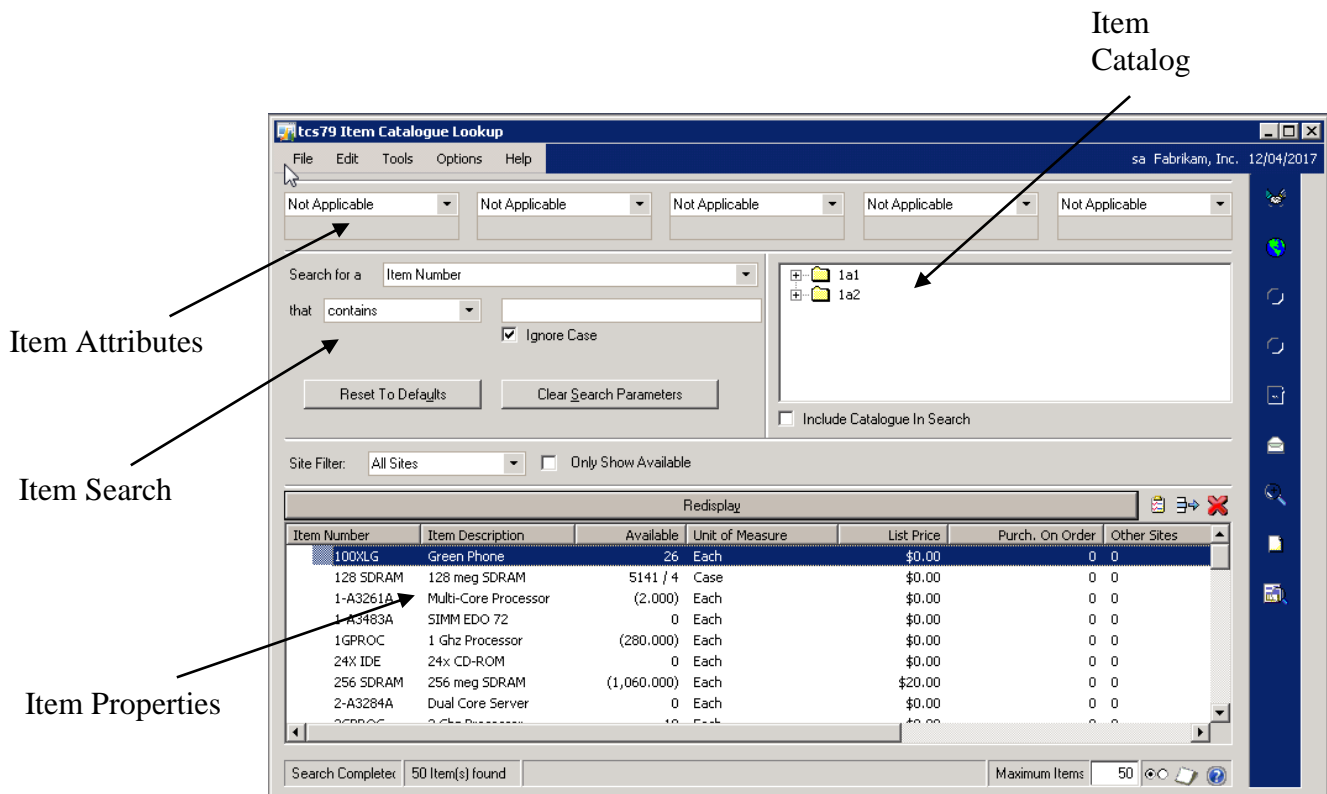
Note that the display of the Item Catalog Lookup window is dependent upon the selection made in the Maintain Item Catalog Lookup Defaults window, for example, the window could be set to display the Catalog and search but not attributes, to display attributes only and so on.

Also, note that certain buttons on the Item Catalog Lookup window will only be enabled if you have access to the relevant Trinity modules (see Appendix B).

A new Find button is also available in the Microsoft Dynamics™ GP Items window enabling you to search the Item Catalog Lookup window.

13.1 Using the Item Catalog Lookup Window

This section describes the full range of options available in the Item Catalog Lookup window.

To use the Item Catalog Lookup window:

1. The default attributes set in the Maintain Item Catalog Lookup Defaults window are displayed at the top of the screen. Only items with these attributes will be displayed in the bottom window.

   You may change these defaults as required by selecting alternative options from the drop-down menus, or select Not Applicable to perform a non-attribute based search.

2. You can further specify your range by using the "Search for an" option. (Note that this may have been set to a default in the Maintain Item Catalog Lookup Defaults window). From the drop-down menu, select between Item Number, Item Description, Item Class, Item Class Description, and Generic Description. Then select Contains or Begins with from the next drop-down menu then enter the required letters in the text box.

For example, if you want to search for items that contain the letters "Ch," you could select Item Description, Contains, Ch.

Note that if you deselect Ignore Case, then the Case (i.e., upper or lower case) will be taken account of in defining your selected range, so Item Descriptions containing "Ch" would be included in the range, those with "ch" would not be included.

When searching for a contains option, you can select up to five strings. For example, searching for "ch+ay" would search for items containing the letters "ch" and "ay."

To specify a string not to include in the search, you should precede it with space and minus sign, for example, " –ch." So if you were searching for wireless phones but not in red, the search would be "phone+wireless –red." Note that if your first string is a not included option, then you should precede it with a plus sign, for example, "+ -ch."

If you are displaying the Catalog tree view, then there is an additional search field Catalog section.

This will search for a Catalog section within the Catalog tree view itself. The usual multiple string searches using the plus character (+) apply as well as an option to limit the search to sections that have a particular item associated with them. This is done using the character (?) so that selecting 'Catalog Section' in the drop-down list and then entering "ch +ay ?100XLG" into the search field would return all Catalog sections containing the letters "ch" and "ay" that have the item 100XLG associated with them.

3. Clicking Clear Search Parameters will remove any "Search for an" options that you have set and return all displayed attributes to Not Applicable.

4. Clicking Reset To Defaults will reset any search parameters you have amended to those defined in the Maintain Item Catalog Lookup Defaults window.

5. If you have the Item Catalog displayed, then this will also form part of your search parameters. Use the plus sign ⊞ to open up levels of the Catalog, and the minus sign ⊟ to close levels. Clicking on a specific Catalog section will lead to the search being performed in that section.

6. Use the Site Filter drop-down menu to select whether you want to search all sites or specified sites.

7. If you only want to search for Only Show Available (only items that have stock available), then click the checkbox.

8. When you have set all your parameters, then click the Redisplay button. All items falling within set parameters will be displayed in the scrolling window below.

9. The items found in your search will be displayed by the column list view options you selected in the Maintain Item Catalog Lookup Defaults window.

   The order in which items are displayed can be governed by any of these characteristics. The window will open with Item Number as the characteristic by which items are displayed. Clicking on Item Number will cause items to be displayed in reverse order. Clicking on another characteristic will cause items to be displayed by that characteristic.

   You can also move the item characteristic columns to your preferred display by dragging them.

10. To locate a specific Item Number, enter the first letter or number of it into your keypad.

    Note that if you have selected the Keypress On Item Description in the Maintain Item Catalog Lookup Defaults window, then entering a letter or number will locate the first Item Description beginning with that letter or number.

11. The Maximum Items to be displayed in the window is shown in the bottom corner of the window. This is the default established in the Maintain Item Catalog Lookup Defaults window. You can change this manually by clicking on it and entering your preferred quantity. Click Redisplay to display the new item list.

12. To search for an item outside of the currently selected Catalog section, deselect the Include Catalog in Search option.

13. To select an item from the list, click on it. You then have numerous options.

Button	Action
	Clicking this button will enter the selected item into the Item Maintenance window.
	Clicking this button will set the attribute fields at the top of the window to be populated with the currently selected item attributes. The window will be refreshed to display all items sharing the displayed attributes. Note that this option is only available if you have selected to display attributes in the Item Catalog Lookup window.
	Clicking this button will display the selected item in the Microsoft Dynamics™ GP Available to Promise window.
	These buttons are linked to the User Defined item properties set in the Microsoft Dynamics™ GP Internet Information window. If you have entered user-defined attributes, then clicking on these buttons will open user-defined 1 and user-defined 2.
	Clicking this button will open the Quantity By Site window (see the Microsoft Dynamics™ GP Advanced Distribution module).
	If you have attached an item image to the selected item in the Microsoft Dynamics™ GP Internet Information window, then clicking this button will display that image.
	Clicking this button will open up a new email message with the item image and user-defined properties attached. If you have an email address set against the current Customer, then this address will be the "To" address for the email.
	Clicking this button will display the selected item in the Item Maintenance window.
	Clicking this button will allow you to make a standard Microsoft Dynamics™ GP note against the selected item.
	Clicking this button will display the selected item in the Available Quantity Breakdown window. The item must be a duty item (see Trinity Duty Processing module).
	You can click this button to save as default any parameters that you have set up in the Item Catalog Lookup window.

Note that under the Options menu, you can choose whether or not to include Inactive Items in your search.

Note that you can click the Cancel button at any point to hide the Item Catalog Lookup window and return to the Item Maintenance window.
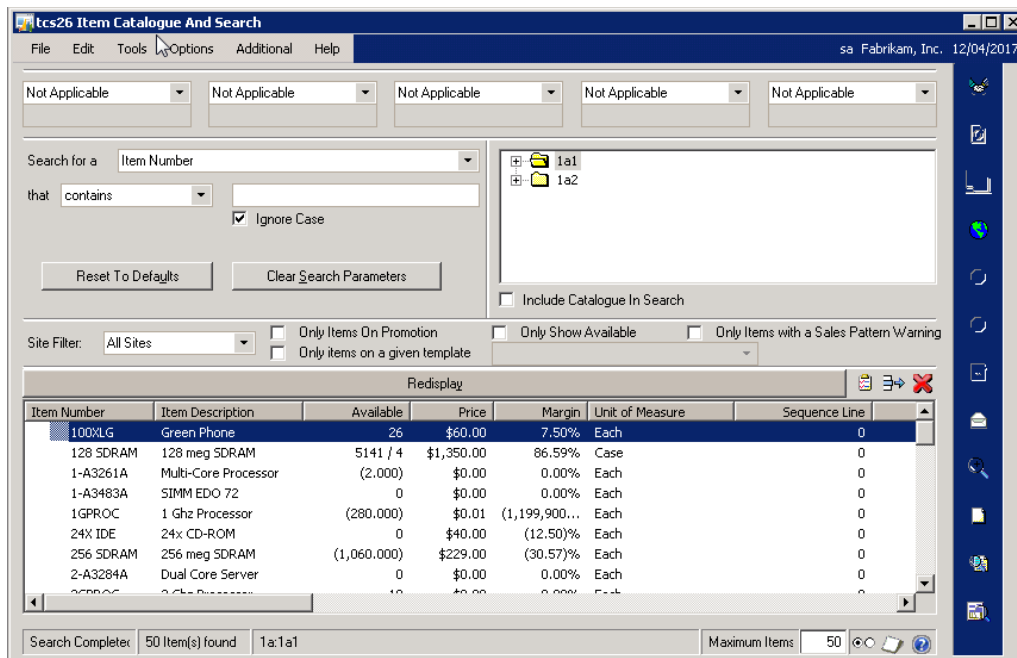
Transactions

14. Item Catalog and Search Window

Transactions >> Sales >> Sales Transaction Entry >> Additional >> Item Catalog

Use the Item Catalog and Search window to:

- Perform parameter-based searches for sales options
- Browse the item Catalog for sales options
- Add items to sales transactions
- View and email item specifications
- Link to other information screens

Note that the display of the Item Catalog and Search window is dependent upon the selection made in the Maintain Item Catalog and Search Defaults window, for example, the window could be set to display the Catalog and search but not attributes, to display attributes only and so on.

Also, note that certain buttons on the Item Catalog and Search window will only be enabled if you have access to the relevant Trinity modules (see Appendix B).

This window can also be displayed from the Customer Item Catalog And Search Inquiry window.

14.1 Using the Item Catalog and Search Window

This section describes the full range of options available in the Item Catalog and Search window.

To use the Item Catalog and Search window:

1. The default attributes set in the Maintain Item Catalog and Search Defaults window are displayed at the top of the screen. Only items with these attributes will be displayed in the bottom window.

You may change these defaults as required by selecting alternative options from the drop-down menus, or select Not Applicable to perform a non-attribute based Search.

2. You can further specify your range by using the "Search for an" option. (Note that this may have been set to a default in the Maintain Item Catalog and Search Defaults window). From the drop-down menu, select between Item Number, Item Description, Item Class, Item Class Description, and Generic Description. Then select Contains or Begins with from the next drop-down menu then enter the required letters in the text box.

For example, if you want to search for items that contain the letters "Ch," you could select Item Description, Contains, Ch.

Note that if you deselect Ignore Case, then the Case (i.e., upper or lower case) will be taken account of in defining your selected range, so Item Descriptions containing "Ch" would be included in the range, those with "ch" would not be included.

When searching for a contains option, you can select up to five strings. For example, searching for "ch+ay" would search for items containing the letters "ch" and "ay."

To specify a string not to include in the search, you should precede it with space and minus sign, for example, " –ch." So if you were searching for wireless phones but not in red, the search would be "phone+wireless –red." Note that if your first string is a not include option, then you should precede it with a plus sign, for example, "+ -ch."

If you are displaying the Catalog tree view, then there is an additional search field Catalog section.

This will search for the Catalog section within the Catalog tree view itself. The usual multiple string searches using the plus character(+) apply as well as an option to limit the search to sections that have a particular item associated with them. This is done using the character (?) so that selecting 'Catalog Section' in the drop-down list and then entering "ch +ay ?100XLG" into the search field would return all Catalog sections containing the letters "ch" and "ay" that have the item 100XLG associated with them.

3. Clicking Clear Search Parameters will remove any "Search for an" options that you have set and return all displayed attributes to Not Applicable.

4. Clicking Reset To Defaults will reset any search parameters you have amended to those defined in the Maintain Item Catalog and Search Defaults window.

5. If you have the Item Catalog displayed, then this will also form part of your search parameters. Use the plus sign ⊞ to open up levels of the Catalog, and the minus sign ⊟ to close levels. Clicking on a specific Catalog section will lead to the search being performed in that section.

6. Use the Site Filter drop-down menu to select whether you want to search all sites or specified sites.

7. If you only want to search for Only Items on Promotion (requires Microsoft Dynamics™ GP Extended Pricing), Only Show Available (only items that have stock available), Only Items with a Sales Pattern Warning (requires the Trinity Sales Pattern Analysis module) or Only items on a given template (requires the Trinity Customer Templates module) then click the appropriate option.

If you select Only items on a given template, then you can select a template from the drop-down menu.

8. When you have set all your parameters, click the Redisplay button. All items falling within set parameters will be displayed in the scrolling window below.

9. The items found in your search will be displayed by the column list view options you selected in the Maintain Item Catalog and Search Defaults window.

   See Appendix C for details of how to set up margin calculations.

   The order in which items are displayed can be governed by any of these characteristics. The window will open with Item Number as the characteristic by which items are displayed. Clicking on Item Number will cause items to be displayed in reverse order. Clicking on another characteristic will cause items to be displayed by that characteristic.

   You can also move the item characteristic columns to your preferred display by dragging them.

   If you are using Site Specific Pricing (see Trinity Extended Pricing Enhancements), then site-specific prices will be displayed.

   If you have the Pricing Indicator column enabled, then a **C** denotes a contract price, and an **A** denotes an aggregate price**.**

   The following icons also provide further item information:

T	Item is a template item
P	Item is a promotional item
P T	Item is both a template and promotional item

10. To locate a specific Item Number, enter the first letter or number of it into your keypad.

    Note that if you have selected the Keypress On Item Description in the Maintain Item Catalog and Search Defaults window, then entering a letter or number will locate the first Item Description beginning with that letter or number.

11. The Maximum Items to be displayed in the window is shown in the bottom corner of the window. This is the default established in the Maintain Item Catalog and Search Defaults window. You can change this manually by clicking on it and entering your preferred quantity. Click Redisplay to display the new item list.

12. To search for an item outside of the currently selected Catalog section, deselect the Include Catalog in Search option.

13. To select an item from the list, click on it. You then have numerous options.

Button	Action
⧉⇒	Clicking this button will enter the selected item into the current Sales Transaction Entry.
📋	Clicking this button will set the attribute fields at the top of the window to be populated with the currently selected item's attributes. The window will be refreshed to display all items sharing the displayed attributes. Note that this option is only available if you have selected to display attributes in the Item Catalog and Search window.
🐦	Clicking this button will display the selected item in the Microsoft Dynamics™ GP Available to Promise window.
O	Clicking this button will display the selected item in the Order History window (see the Customer Templates Module).

🖼️	Clicking this button will open the Substitutes window, containing details of the item substitutes available. If you want to insert one of these into the sales order, click the Select Item button.
🌐	Clicking this button will open the Quantity By Site window (see the Microsoft Dynamics™ GP Advanced Distribution module).
ⓘ	These buttons are linked to the User Defined item properties set in the Microsoft Dynamics™ GP Internet Information window. If you have entered user-defined attributes, then clicking on these buttons will open user-defined 1 and user-defined 2.
🖼️	If you have attached an item image to the selected item in the Microsoft Dynamics™ GP Internet Information window, then clicking this button will display that image.
✉️	Clicking this button will open up a new email message with the item image and user-defined properties attached. If you have an email address set against the current Customer, then this address will be the "To" address for the email.
🔍	Clicking this button will display the selected item in the Item Maintenance window.
📄	Clicking this button will allow you to make a standard Microsoft Dynamics™ GP note against the selected item.
🔍	Clicking this button will display the selected item in the Price Trace Inquiry window.
🖼️	Clicking this button will display the selected item in the Aggregate Pricing Tracker window. The item must be an aggregate item (see Trinity Extended Pricing Enhancements module).
🖼️	Clicking this button will display the selected item in the Available Quantity Breakdown window. The item must be a duty item (see Trinity Duty Processing module).
◉○	You can click this button to save as default any parameters that you have set up in the Item Catalog and Search window.

Note that under the Options menu, you can select whether or not to include Inactive Items in your search.

❌ Note that you can click the Cancel button at any point to hide the Item Catalog and Search window and return to the Sales Transaction Entry window.
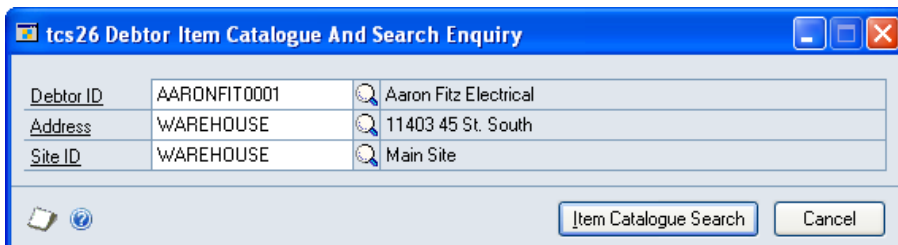
Inquiries

15. Customer Item Catalog And Search Inquiry

Inquiry >> Trinity >> Catalog Based Sales >> Customer Item Catalog And Search Inquiry

Use the Customer Item Catalog And Search Inquiry window to:

- View the item Catalog for a specific Customer

15.1 Viewing the Item Catalog for a Specific Customer

To view the item Catalog for a specific Customer using the Customer Item Catalog And Search Inquiry window:

1. Enter a Customer ID or select one using the lookup.

2. Enter an address or select one using the lookup.

3. Enter a site ID or select one using the lookup.

4. Click the Item Catalog Search button to display the Item Catalog and Search window with details of the selected Customer/address/site combination.

   The select item function will be disabled in the Item Catalog as it is for viewing purposes only.

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

Appendix A

Catalog Based Sales – Access to Windows

Window Name	🖱 Menu Access	🖱 Other Access
Assign Attributes To Items	Cards >> Trinity >> Catalog Based Sales >> Assign Attributes To Item Numbers	
Assign Item Range To Attributes		Assign Items To Attributes window >> Ranges
Assign Item Range To Section	Catalog Maintenance window >> Ranges button	
Assign Items To Attributes	Cards >> Trinity >> Catalog Based Sales >> Assign Item Numbers To Attributes	Maintain Item Attributes window >> Assign button
Catalog Maintenance	Cards >> Trinity >> Catalog Based Sales >> Catalog Maintenance	
Catalog Sections	Cards >> Trinity >> Catalog Based Sales >> Catalog Section Maintenance	
Catalog Setup	Tools >> Setup >> Trinity >> Catalog Based Sales >> Setup	
Customer Item Catalog and Search Inquiry	Inquiry >> Trinity >> Catalog Based Sales >> Customer Item Catalog And Search Inquiry	
Excel File Template Maintenance	Tools >> Setup >> Trinity >> Catalog Based Sales >> Item Attributes Excel Templates	
Item Attribute Import / Export Wizard	Tools >> Setup >> Trinity >> Catalog Based Sales >> Item Attributes Wizard	
Item Catalog and Search	Transactions >> Sales >> Sales Transaction Entry >> Additional >> Item Catalog	
Item Catalog Lookup	Cards >> Inventory >> Item >> Additional >> Item Catalog	
Maintain Item Attributes	Cards >> Trinity >> Catalog Based Sales >> Attributes Maintenance	
Maintain Item Catalog And Search Defaults	Tools >> Setup >> Trinity >> Catalog Based Sales >> Catalog Defaults Maintenance	
Maintain Item Catalog Lookup Defaults	Tools >> Setup >> Trinity >> Catalog Based Sales >> Catalog Lookup Defaults Maintenance	

Appendix B

Catalog Based Sales – Links to Other Trinity Modules

Catalog window	Module	Additional functionality
Item Catalog and Search	Duty Processing	Option to display the Available Quantity Breakdown window for duty items
Item Catalog and Search	Extended Pricing Enhancements	Where applicable prices displayed will be site-specific prices Option to display the Aggregate Pricing Tracker window for aggregate items Aggregate items will be marked with an **A** and contract prices with a **C** in the Pricing Indicator column
Item Catalog and Search	Sales Pattern Analysis	Option to select Only Items with a Sales Pattern Warning. Sales period quantities and warnings can be displayed in the scrolling window
Item Catalog and Search	Customer Templates	Order History button opens the Order History window Option to view Only Items on Historical Template Template sequences can be displayed in the scrolling window
Item Catalog Lookup	Duty Processing	Option to display the Available Quantity Breakdown window for duty items
Maintain Item Catalog And Search Defaults	Duty Processing	Option to select the Consolidated Available Breakdown button as a default
Maintain Item Catalog And Search Defaults	Extended Pricing Enhancements	Option to select the Aggregate Pricing Information button as a default
Maintain Item Catalog And Search Defaults	Sales Pattern Analysis	Options to select sales periods, sales period warnings, and only items with a sales pattern warning for the item Catalog as defaults
Maintain Item Catalog And Search Defaults	Customer Templates	Option to select the Order History button as a default Option to select Only Items on Historical Template as a default Option to have template sequence as a column
Maintain Item Catalog Lookup Defaults	Duty Processing	Option to select the Consolidated Available Breakdown button as a default

Appendix C

Alternate Microsoft Dynamics™ GP Windows in the Catalog Based Sales Module

Window Name	Series	Module	Modification
Items	Inventory	Catalog Based Sales	A new Find button is also available in the Items window enabling you to search the Item Catalog Lookup window.

Appendix D

Catalog Based Sales - Reports

Report Name	Module	Functionality
Import Errors report	Catalog Based Sales	Prints errors occurring during item attribute import

Appendix E

Margin Percentage Setup Window

Tools >> Setup >> Trinity >> Margin Percentage Setup

Use the Margin Percentage Setup window:

- Set up document margin calculation details
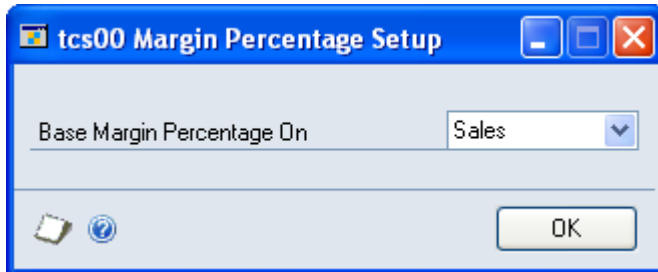
The settings made in this window will define how document margins displayed in the Item Catalog and Search window are calculated. See below for further details.

Note that the settings made in this window also set how the margin is calculated in the Price Negotiation window (see Trinity Price Negotiation) and the Document Margins window (see Trinity Distribution Enhancements).

Setting Up Document Margin Calculation Details

To setup document margin calculations in the Margin Percentage Setup window:

1. From the Base Margin Percentage On the drop-down menu, select Costs or Sales.

    The margin is the sum of all extended prices minus the sum of all unit cost prices for items on a transaction. The margin percentage is calculated dependant on your selection:

Sales	Margin / Total sales value for document lines
Costs	Margin / Total cost value for document lines

2. Click OK to save your settings and close the window.

Appendix F

About Trinity

Help >> About Microsoft Dynamics GP >> Additional >> About Trinity Suite

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