Item Life Cycle
User Guide

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Contents

Item Life Cycle

The Trinity Item Life Cycle module allows for specific statuses to be set up and assigned to stock items. These statuses represent the stages in the Item Life Cycle; for example, an item may be assigned the status of "Under Development" or "Obsolete."

The main features of the Item Life Cycle module are:

- The facility to maintain specific stock item statuses with descriptions and attributes
- The facility to assign a status to an item or range of items
- The prevention of selling items where there is insufficient stock or where items have been assigned "Do Not Sell" status
- The prevention of purchasing items where they have been assigned "Do Not Purchase" status

The Trinity Item Life Cycle module is fully integrated into Microsoft Dynamics™ GP, giving additional functionality to standard Microsoft Dynamics™ GP Item Maintenance, Sales, and Purchasing applications. The user is given the option to assign statuses to an item at different stages in its life cycle, and so control which processes are allowed at each stage.

Different statuses assigned to an item can have effects on several transaction types, for example, Sales Orders, so that certain transactions will not be permitted depending upon the attributes assigned to an item. Use the Status Code Maintenance window to create and maintain item Status Codes.

| Status Attribute	Effects On
"Do Not Sell"	Sales Transaction Entry window
"Sell Only When In Stock"	Sales Transaction Entry window
"Do Not Purchase"	Purchase Transaction Entry window
"Do Not Include In Item Lookup"	Items window

Items that have not been assigned a status under the Item Life Cycle module will be subject to standard Microsoft Dynamics™ GP behavior.

1. Status Code Maintenance Window

Cards >> Trinity >> Item Life Cycle >> Status Code Maint

Use the Status Code Maintenance window to:

- Create or edit a Status Code
- Enquire about a specific Status Code
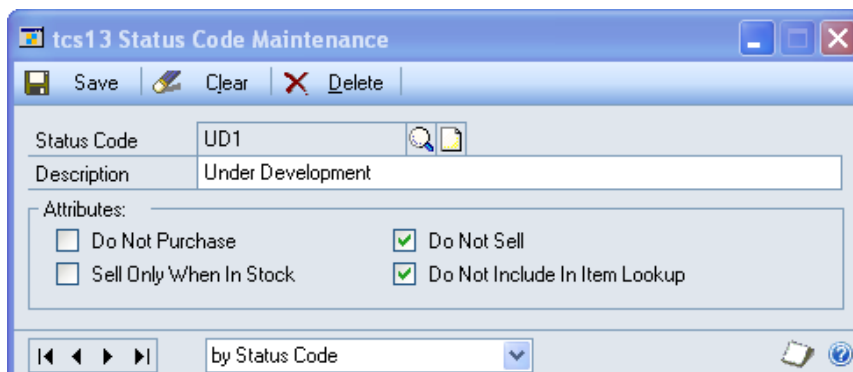
1.1 Creating and Editing Status Codes

An item Status Code has variable attributes and may be used to control the permitted activities for a specified item or items.

To create or edit an item Status Code in the Status Code Maintenance window:

1. Enter a Status Code ID or click the lookup to select one from the Status Code Lookup window. If you select an existing Status Code, its description and attributes will be displayed in the window.

2. For new Status Codes, enter a Status Code description.

3. Confirm any attributes that shall be required by the Status Code by clicking on the relevant checkboxes.

   The "Do Not Sell" and "Sell Only When In Stock" attributes are mutually exclusive and may not be selected for the same item/items.

   If you click the "Do Not Include In Item Lookup" option, then the selected Item Number will not be visible when using the Items window.
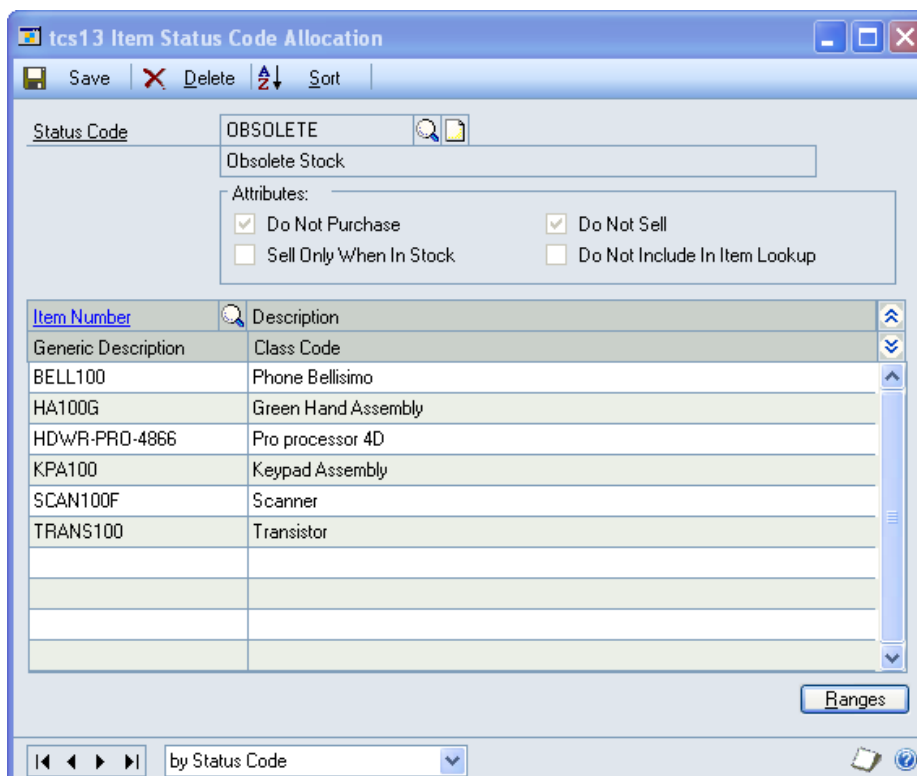
4. Click the Save button.

Click the Delete button to delete a status code. You will not be able to delete a Status Code if there are current items assigned to that Status Code.

2. Item Status Code Allocation Window

Cards >> Trinity >> Item Life Cycle >> Assign Status Range

Use the Item Status Code Allocation Window to:

- Assign Status Codes to multiple items

2.1 Allocating Status Codes to Multiple Items

To assign items to a Status Code in the Item Status Code Allocation window:

1. Enter the required Status Code ID or click the lookup to select one from the Status Code Lookup window. The Status Code description and attributes will be displayed, and any items already assigned to this Status Code will be displayed in the scrolling window.

2. For each item to be assigned to the Status Code, enter an Item Number in the scrolling window or click the lookup to select one from the Items window.

    Items will be added to the Status Code in the order in which you select them. Click the Sort button to sort items by item number (optional).

3. Click the Save button to save the changes to your Status Code

Click the Ranges button to open the Item Status Code Allocation Ranges window where ranges of items can be assigned to a Status Code.

Click the Delete button to de-allocate any items that have been assigned to a Status Code.

3. Item Status Code Allocation Ranges Window

Item Status Code Allocation window>> Click the Ranges button

Use the Item Status Code Allocation Ranges window to:

*   Assign ranges of items to a Status Code

3.1 Assigning Ranges of Items to a Status Code

To assign a range of items to a Status Code in the Item Status Code Allocation Ranges 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. To specify items to be added to the Status Code:

   2.1. Select the Unassigned checkbox to add unassigned items only to the Status Code.

   Note that items previously assigned to different Status Codes will not be reassigned to the new Status Code.

   2.2. Select the Any checkbox to add items previously assigned to any Status Code, or unassigned items, to the new Status Code.

   2.3. Select the Specified checkbox to add items previously assigned to a specified Status Code. Enter the required Status Code ID or click the lookup to select one from the Status Code Lookup window.

3. Click the Preview button to verify your selection in the scrolling window. The item number and item description of each item to be assigned will be listed. Click the Show button to display the generic description, class ID, current Status Code, and Status Code description (where relevant).

4. Click the Transfer button to assign your item selection to the Status Code. Click OK to close the Transfer Completed Successfully dialog box.

5. Click OK to return to the Item Status Code Allocation window.

4. Assign Status Code to Item Number Window

Cards >> Trinity >> Item Life Cycle >> Assign Status Indiv

Use the Assign Status Code to Item Number window to:

- Assign Status Codes to single items.

4.1 Assigning a Status Code to an Individual Item

Status codes can also be assigned to an item via the Additional option in Item Maintenance.

To assign Status Codes to single items in the Assign Status Code to Item Number window:

1. Enter the required Item Number ID or click the lookup to select one from the Item Number Lookup window.
2. Where the item has already been assigned a Status Code, this code will be displayed in the window with any allocated attributes.
3. To add a Status Code to an item, or amend a current item Status Code, either enter the required Status Code ID or click the lookup to select one from the Item Number Lookup window.
4. Click the Save button.

Click the Delete button to de-allocate an item that has been assigned to a Status Code

Note that a record cannot be saved without a valid status.

5. Sales Transactions – Item Life Cycle Version

Transactions >> Sales >> Sales Transaction Entry

Use the Sales Transaction Entry window:

- To enter details of sales orders, invoices, and quotations.

The Microsoft Dynamics™ GP Sales Transaction Entry window has been enhanced for the Item Life Cycle module to account for item status upon entry of sales transactions.

The system will look at the attributes of any Status Codes assigned to items, as the Item Number is selected in the Sales Transaction Entry window. The selection of items with specific Status Code attributes may lead to additional windows or warnings not featured in standard Microsoft Dynamics™ GP.

5.1 "Do Not Sell" Items

If an item is selected in the Sales Transaction Entry window that has been allocated a Status Code incorporating the attribute "Do Not Sell," then a warning will be displayed with the item's status description and the message "Item not available for sale."
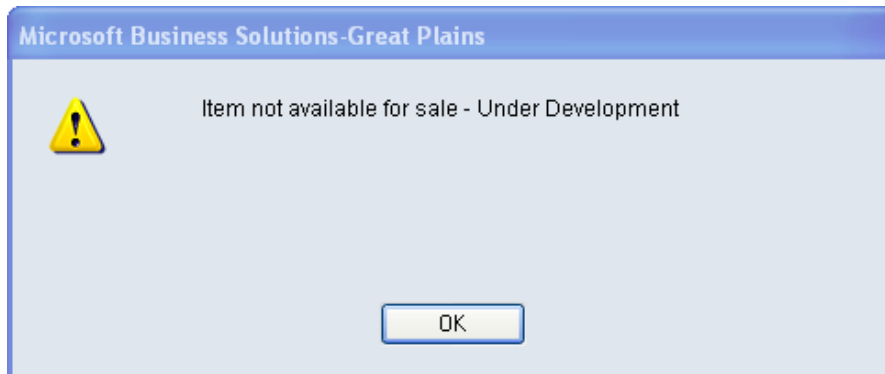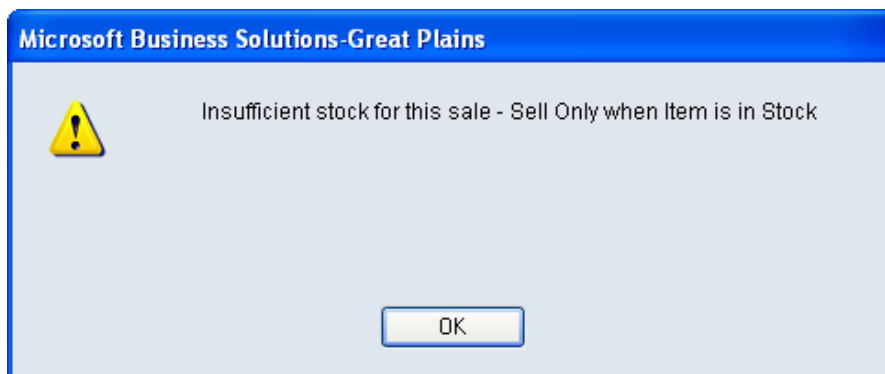

Note that you will not be allowed to continue with this transaction line in the Sales Transaction Entry window. This applies to all transaction types, except for returns.

5.2 "Sell Only When In Stock" Items – Sales Orders, Invoices and Back Orders

An item may be entered into the Sales Transaction Entry window where the quantity required is greater than the quantity available. If that item has been allocated a Status Code incorporating the attribute "Sell Only When In Stock," then a warning will be displayed with the item's status description and the message "Insufficient stock for this sale."

Note that you will not be allowed to continue with this transaction line in the Sales Transaction Entry window. This applies to sales orders and invoices where the document type ID is set to allocate by line item.

Where the document type ID for a sales order or invoice is **not** set to allocate by line item, then a similar warning will be given, but with the option to continue with the sales order/invoice, regardless of the stock balance.

When a "backorder" document is entered, then the "Item not available for sale" warning will be raised, regardless of the stock balance.

## 5.3 "Sell Only When In Stock" Items – Quotations

An item may be entered into the Sales Transaction Entry window that has been allocated a status with the attribute, "Sell Only When In Stock." Should an item with this attribute be entered into a quotation, then a warning will be displayed with the item status description and the message "Item status."
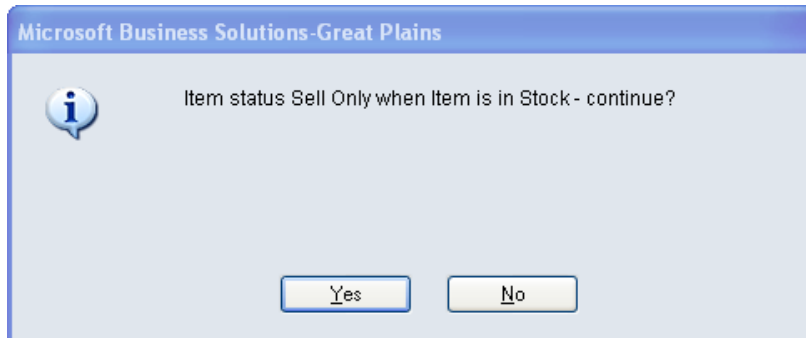
Note that the option will be given to continue with the quotation.

5.4 Transferring Quotations to Sales Orders/Invoices

A standard feature of Microsoft Dynamics™ GP allows you to transfer a quotation document to a sales order or an invoice. If you are using the Item Life Cycle module, then should you select any items to which the status attributes "Do Not Sell" or "Sell Only When In Stock" have been allocated, a scrolling window will be displayed with the message "Check Item Status Codes."
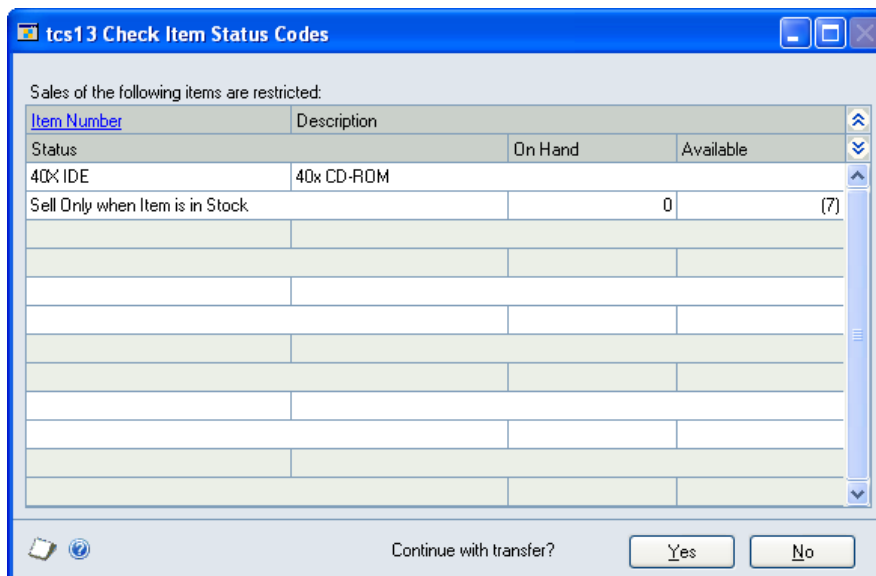
This window will contain the message, "Sales of the following items are restricted." All relevant item numbers will be listed in the scrolling window below, along with their item description, status description, on-hand quantity, and available stock.

To continue with the transfer:

1. Click the Yes button.

   Note that if you select to continue with the transfer, then all items on the transfer, including those with "Do Not Sell" and "Sell Only When In Stock" attributes, will be transferred. Clicking the No button will stop the transfer.
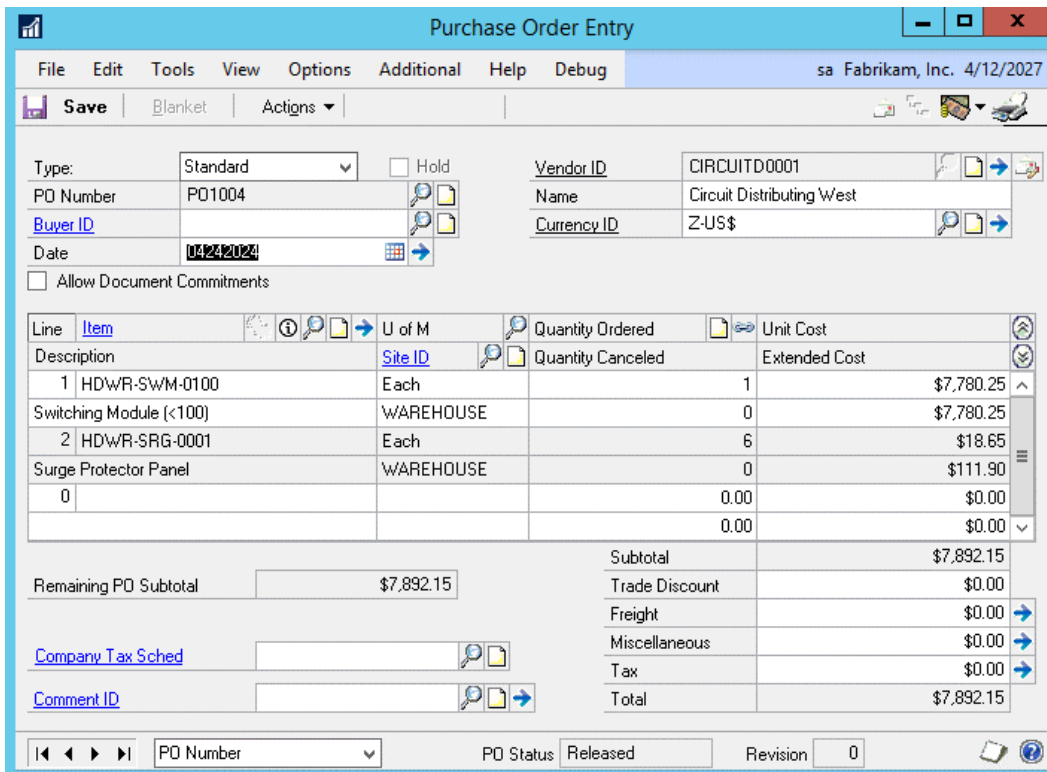
6. Purchase Transactions – Item Life Cycle Version

Transactions >> Purchasing >> Purchase Order Entry

Use the Purchase Order Entry window:

- To enter details of purchase orders.

The Microsoft Dynamics™ GP Purchase Transaction Entry window has been enhanced for the Item Life Cycle module to account for item Status Code upon entry of purchase transactions.

6.1. "Purchase Not Allowed"

If an item is selected in the Purchase Order Entry that has been allocated a Status Code with the attribute "Do Not Purchase," then a warning will be displayed with the item status description and the message "Purchase not allowed."

You will not be allowed to continue with the purchase of this item.

6.2 Purchase Order Generation with the Item Life Cycle Module

Use the Purchase button in the Sales Transaction Entry window or Sales Document Range Inquiry window:

- To generate purchase orders automatically

The Microsoft Dynamics™ GP auto-generation of purchase orders has been given added functionality by the Item Life Cycle module to check for items with a "Do Not Purchase" status attribute before the purchase order is generated.

Note that if you select the Purchase Order Generator through the Transactions >> Purchasing menu, then items restricted from purchase will automatically be repressed.

To check item status through this function:

1. Click the Generate button on the Purchase Order Preview window.

   If any items with the status description "Do Not Purchase" are included in the order, then the Check Purchase Item Status Codes window will be displayed. Any items with the "Do Not Purchase" status attributed to them will be displayed in the scrolling window below.

2. Purchasing of these items is restricted. Clicking the Yes option will generate the purchase order for all items on that order, including those with the status attribute, "Do Not Purchase."

Clicking the No button will return you to the Purchase Order Preview window. You may then edit the purchase order details and/or remove items from the purchase order.
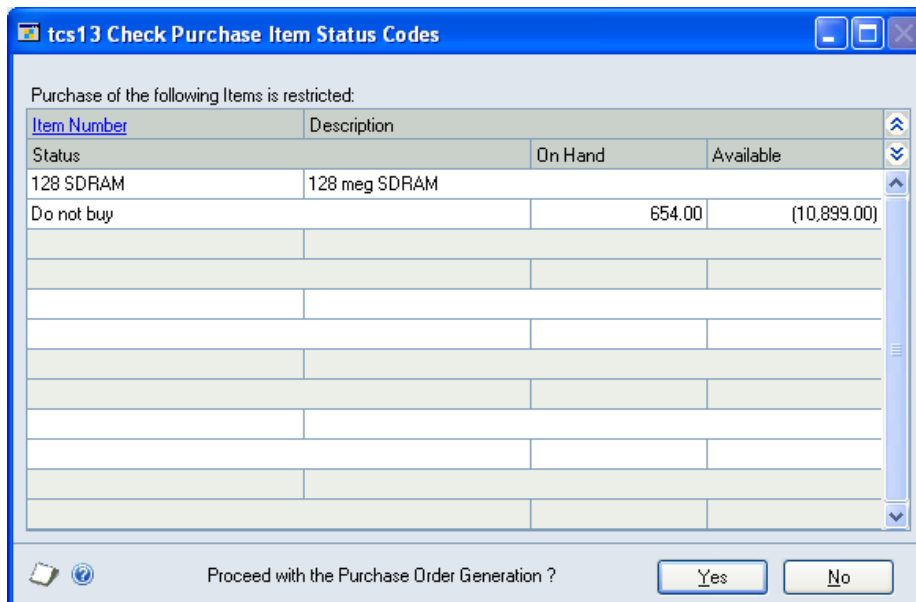
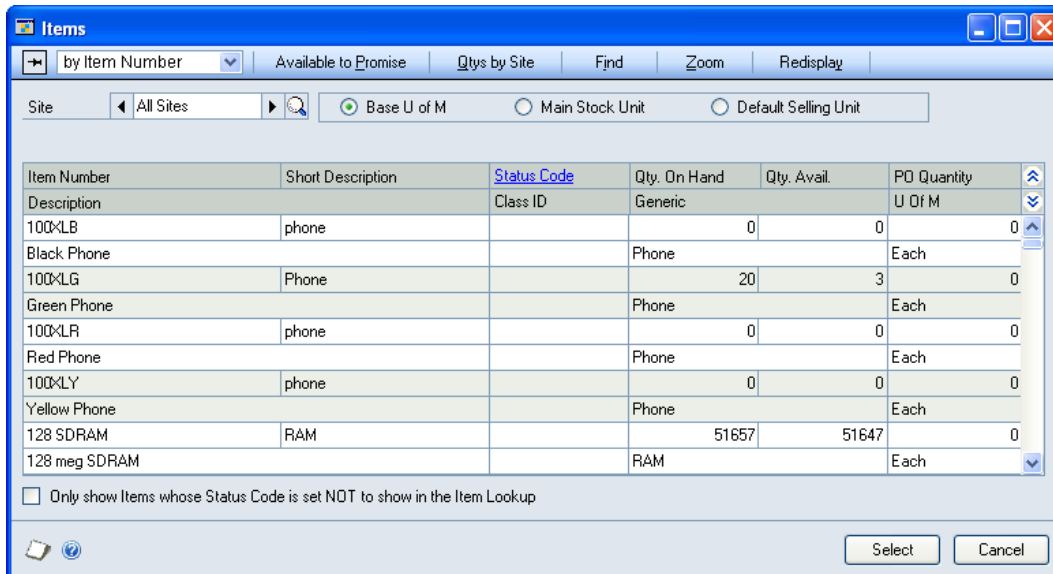# 7. Items Window – Item Life Cycle Version

Cards >> Inventory >> Item Maintenance window >> Click the Item Number lookup button

Use the Items window to:

- View, edit or select items

The Microsoft Dynamics™ GP Items window has been enhanced for the Item Life Cycle module to include the field Status Code. This extra information may be useful during sales transaction entry, for example.

There is also the additional option to Only Show Items whose Status Code is set NOT to show in the Item Lookup. In the Status Code Maintenance window, you had the option to set items to not show on the Items window. These items will not currently be displayed. If you clicked to select the new option on the Items window, then only items that you have set not to display will be displayed.

Note that additional functionality is available in the Items window through other Trinity modules.

Appendix A

Item Life Cycle – Access to windows

Window Name	Menu Access	Other Access
Status Code Maintenance	Cards >> Trinity >> Item Life Cycle >> Status Code Maint.	Cards >> Inventory >> Item >> Click Item Number Lookup >> Items window >> Click Status Code
Item Status Code Allocation	Cards >> Trinity >> Item Life Cycle >> Assign Status Range	
Item Status Code Allocation Ranges	Item Status Code Allocation window >> Ranges button	
Assign Status Code to Item Number	Cards >> Trinity >> Item Life Cycle >> Assign Status Indiv.	Item Maintenance window >> Additional >> Assign Status Code
Check Purchase Item Status Codes	Transactions >> Sales >> Sales Transaction Entry >> Purchase Order Preview >> Generate	

Appendix B

Alternate Microsoft Dynamics™ GP Windows in the Item Life Cycle module

Window Name	Series	Module	Modification
Items	Inventory	Item Life Cycle	Status Code field Option to Only show Items whose Status Code is set Not to show in the Item Lookup

Appendix C

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.