

# Item Manager User Guide

Version 18.2 for Dynamics GP 18.2

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## Item Manager

The Trinity Item Manager module is designed to facilitate the creation of new items and the assigning of items to sites. This functionality is provided via two features, the Copy Item Wizard and the Assign/Unassign Sites Wizard.

The Copy Item Wizard allows the user to choose one existing item as a template and then copy selected information from this item to generate unlimited item master records. For the new items, the user can enter item codes and descriptions individually or merge these details automatically from an external source such as a spreadsheet.

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

The main features of the Trinity Item Manager module are:

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

### 1. Copy Item Wizard

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

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

Use the Copy Item Wizard to:

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



## 1.1 Using the Copy Item Wizard


1. Click the Next button to display the next window

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

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

## 2. Copy From Screen

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

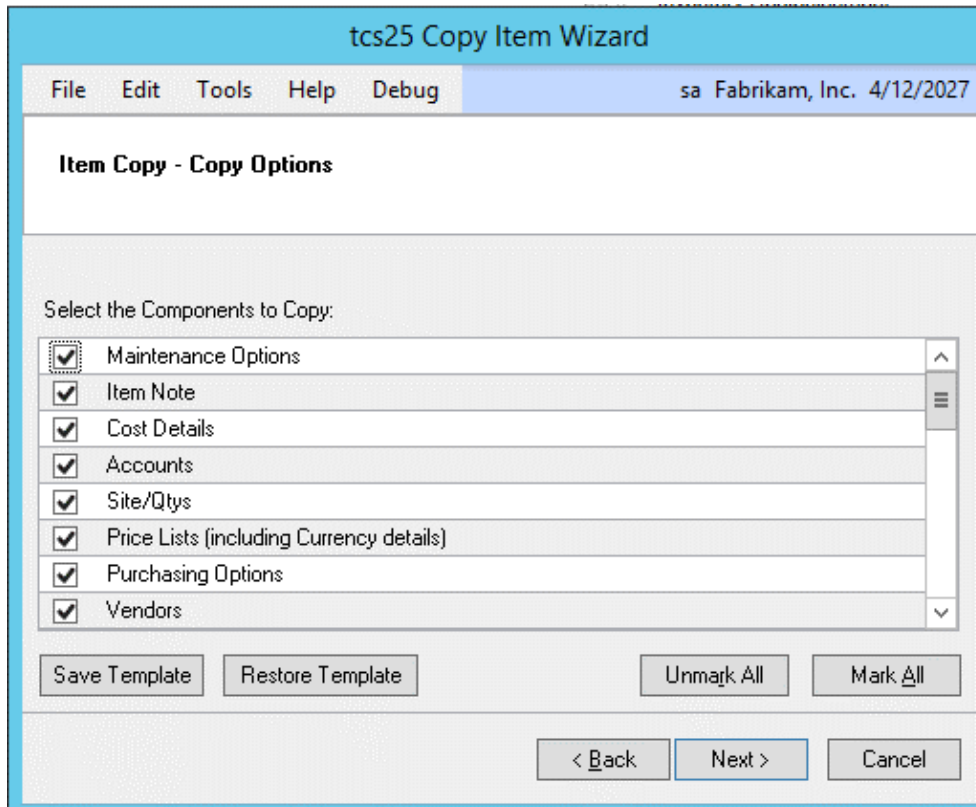
tcs25 Copy Item Wizard	
File Edit Tools Help Debug	sa Fabrikam, Inc. 4/12/2027
<b>Item Copy - Choose Item Number to Copy</b>	
Choose the Item Number that you want to Copy:	
Item Number	1-A3483A 
Description	SIMM EDO 72
Short Name	SIMM
<input type="button" value=" &lt; Back"/> <input type="button" value=" Next &gt; "/> <input type="button" value=" Cancel"/>	

### 2.1 Using the Copy From Screen

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

## 3. Copy Options Screen

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



### 3.1 Using the Copy Options Screen

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

Once you have set the components that you want to copy, you can save the options as a template to be re-used next time you use the Item Copy Wizard. To do this, click Save Template. You will be asked to specify a name for the template. Optionally, you can mark a template as the default. If you create a default template, it will be used to set the copy options automatically whenever you run the Item Copy Wizard. To use a template that has not been marked as the default, click the Restore Template button.

#### Component Properties:

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

<b>Internet Information</b>	Copies information set up in the Internet Information window
<b>Minimum Shelf Life</b>	Copies information set up in the Set Minimum Shelf Life window
<b>Extended Pricing Price Details</b>	Copies pricing details set up with Extended Pricing
<b>Catchweight Details</b>	Copies catchweight information set up against items <b>Required Modules:</b> Catchweights
<b>Split Pack Details</b>	Copies split pack details set up in the Split Pack/Maintain Stock Unit Maintenance window. <b>Required Modules:</b> Unit of Measure Management
<b>Picking Details</b>	Copies picking details set up using Microsoft Dynamics™ GP Advanced Picking
<b>Additional Charge Details</b>	Copies additional charge details set up using the Trinity Additional Charges module <b>Required Modules:</b> Additional Charges
<b>Item Load Details</b>	Copies item load details set up using the Trinity Load Planning module <b>Required Modules:</b> Load Planning
<b>Item Status Code Details</b>	Copies item status code details set up using the Trinity Item Life Cycle module <b>Required Modules:</b> Item Life Cycle
<b>Catalog Attributes</b>	Copies catalog attributes assigned to an Item Number using the Trinity Catalog Based Sales module <b>Required Modules:</b> Catalog Based Sales
<b>Catalog Levels</b>	Copies catalog levels to which an Item Number has been assigned using the Trinity Catalog Based Sales module <b>Required Modules:</b> Catalog Based Sales
<b>Reorder Level Management Details</b>	Copies reorder level management details assigned to an Item Number using the Trinity Reorder Level Management module <b>Required Modules:</b> Reorder Level Management
<b>Duty Processing Details</b>	Copies duty processing details assigned to an Item Number using the Trinity Duty Processing module <b>Required Modules:</b> Duty Processing
<b>Retrospective Discount Details</b>	Copies retrospective discount details assigned to an Item Number using the Trinity Retrospective Discounts module <b>Required Modules:</b> Retrospective Discounts
<b>Vendor Prices Details</b>	Copies vendor price details assigned to an Item Number using the Trinity Vendor Price Management module <b>Required Modules:</b> Vendor Price Management
<b>Site Default Bins</b>	Copies default bins details set for the item in the Item Site Default Bins window
<b>Item Resource Planning</b>	Copies item resource planning details set for the item in the Item Resource Planning Maintenance window
<b>Customer Specific Product Details</b>	Copies details of any Customer-specific settings assigned to items using the Trinity Distribution Enhancements module <b>Required Modules:</b> Distribution Enhancements
<b>Aggregate Pricing Details</b>	Copies any aggregate pricing details set up for the item using the Trinity Extended Pricing Enhancements module <b>Required Modules:</b> Extended Pricing Enhancements

<b>Alternate Item Code Details</b>	Copies any alternate item details set up using the Trinity Distribution Enhancements module <b>Required Modules:</b> Distribution Enhancements
<b>Forward and Scheduled Orders</b>	Copies forward order days. <b>Required Modules:</b> Forward and Scheduled Sales Orders
<b>Adv.Inventory Replenishment</b>	Copies Inventory Replenishment details <b>Required Modules:</b> Advanced Inventory Replenishment
<b>Other</b>	This option allows you to customize the Item Copy to your requirements. If you select "Other," then an SQL stored procedure (tcsINVSP00025_Customer_Specific) will be executed after all other details have been copied. Any required additional information can then be copied by adding the appropriate code to the stored procedure.

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

## 4. Copy To Source Screen

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

### 4.1 Using the Copy To Source Screen

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

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

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

When creating a flat file to import, you should enter the three fields, as shown in the example above. (The first column should contain the Item Number, the second column the Description

and the third column the Short Description). Do not create a header field, as this will also be imported as a new item. The flat file must be saved as a .csv or .txt file type.

2. Click on your selection then click the Next button. If you have selected to copy an Item Number manually, then the Copy To screen will be displayed (see below). If you have selected to copy from an external flat file, then the Select Flat file screen will be displayed.

## 5. Copy To Screen

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

### 5.1 Using the Copy To Screen

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

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

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

## 6. Single Item Copy Update Screen

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



## 6.1 Using the Single Item Copy Update Screen

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

## 7. Select Flat file Screen

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

### 7.1 Selecting a Flat File

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

## 8. Flat File Preview Screen

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

### 8.1 Using the Flat File Preview Screen

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



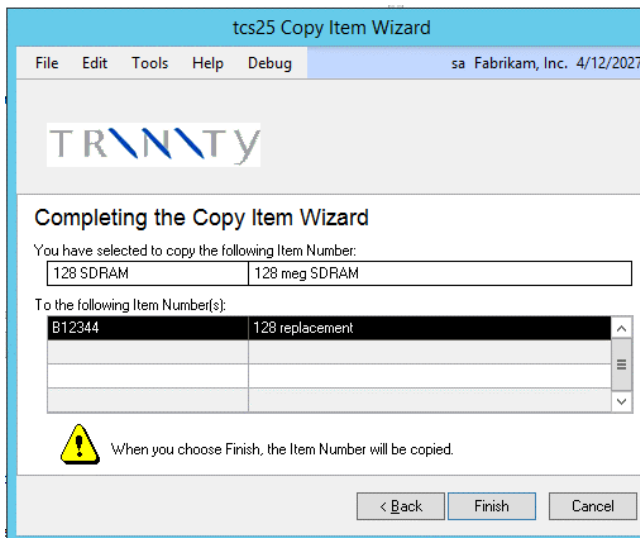
Note that any errors will be displayed with a warning symbol. Items with errors will not be copied. If you require changes to be made to the flat file, you should do so in the relevant program, then re-import the flat file into the Copy Item Wizard.

Include	Item Number	Item Description	Short Description	Error Description
<input checked="" type="checkbox"/>	B12344	128 replacement		
<input type="checkbox"/>				
<input type="checkbox"/>				
<input type="checkbox"/>				
<input type="checkbox"/>				
<input type="checkbox"/>				
<input type="checkbox"/>				
<input type="checkbox"/>				
<input type="checkbox"/>				
<input type="checkbox"/>				

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

## 9. Flat File Update Screen

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



### 9.1 Using the Flat File Update Screen

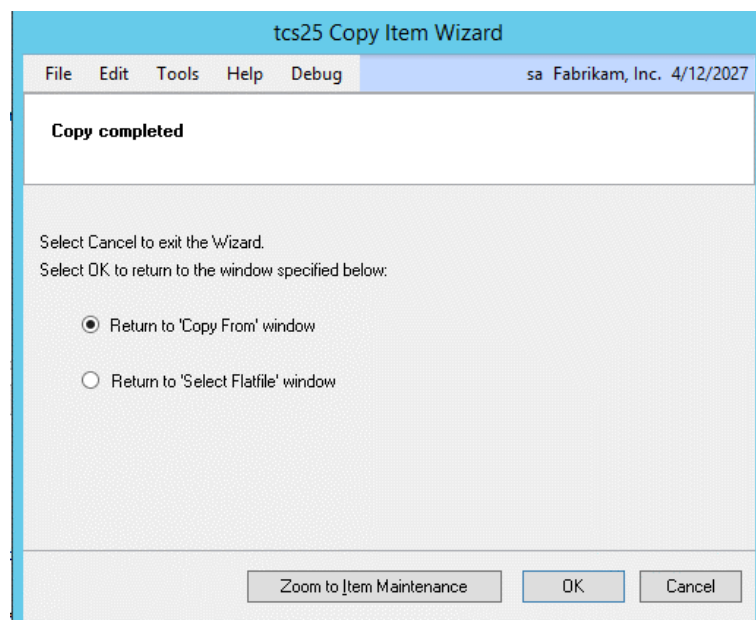
1. Click Finish to Copy the selected Item Number. The Item Numbers will be copied, and the Copy Completed screen (see below) will be displayed.

## 10. Copy Completed Screen

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

### 10.1 Using the Copy Completed Screen

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



# Assign/Unassign Sites Wizard

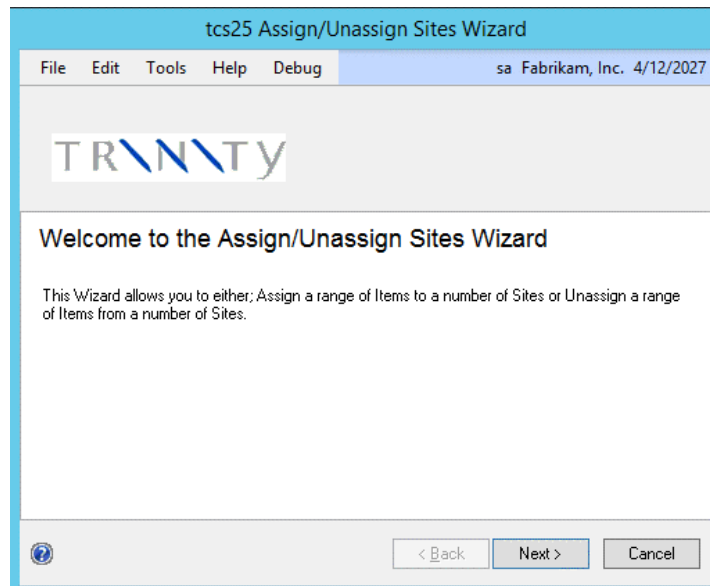
## 11. Assign/Unassign Sites Wizard

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

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

Use the Assign/Unassign Sites Wizard to:

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



### 11.1 Using the Assign/Unassign Sites Wizard

1. Click the Next button to display the next window

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

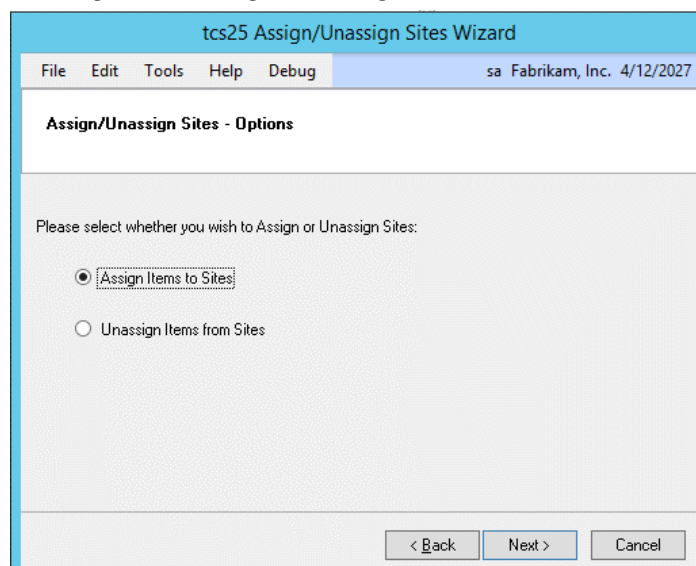
Note also that you can click the Back button whenever it is displayed to return to the previous screen.

## 12. Assign/Unassign Sites Wizard Options Screen

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

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

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



## 13. Assigning Item Range Screen

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

### 13.1 Assigning an Item Range to a Site

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

## 14. Assigning Items to Sites Preview Screen

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

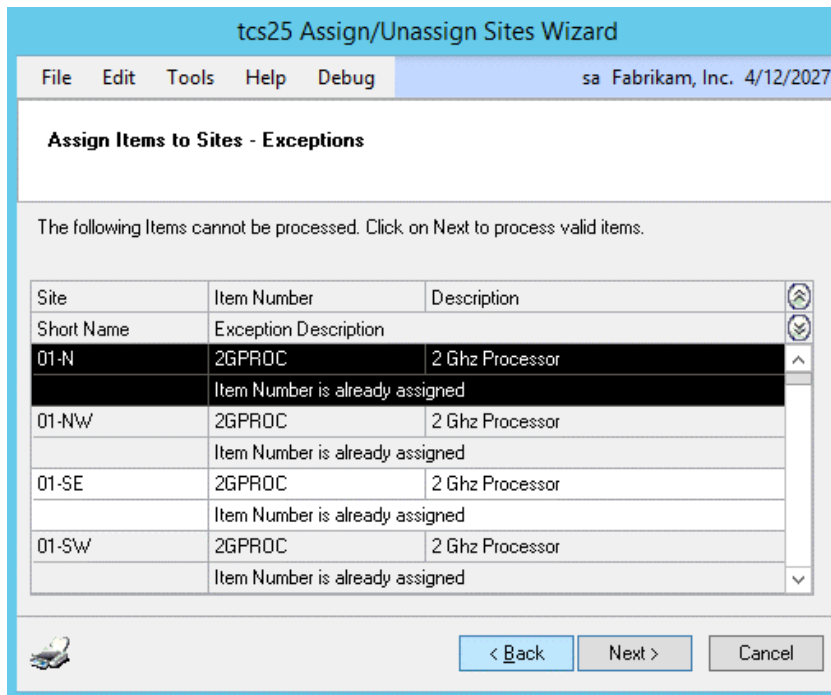
### 14.1 Previewing Items Assigned to Sites

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



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

Site	Item Number	Description
NORTH	2GPROC	2 Ghz Processor
NORTH	3-A2440A	Operating System
PAINT	2GPROC	2 Ghz Processor
PAINT	3-A2440A	Operating System
SOUTH	2GPROC	2 Ghz Processor
SOUTH	3-A2440A	Operating System
WC1	3-A2440A	Operating System
WC2	2GPROC	2 Ghz Processor
WC2	3-A2440A	Operating System

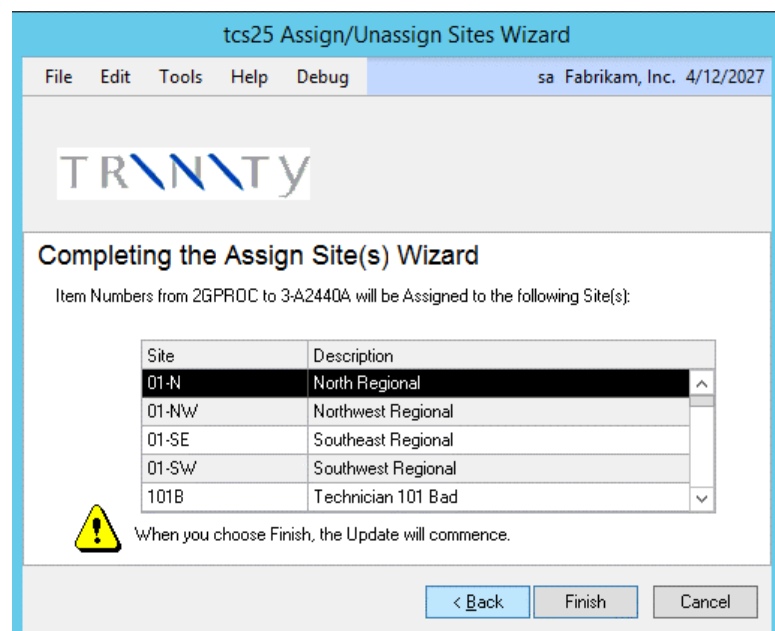


## 15. Assigning Items Update Screen

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

### 15.1 Viewing Items to be Assigned

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



## 16. Unassign Item Range Screen

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

**tcs25 Assign/Unassign Sites Wizard**

File Edit Tools Help Debug sa Fabrikam, Inc. 4/12/2027

**Unassign Items to Sites - Range Selection**

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

Item Number From 3-B3897A

Item Number To 3-B3897A

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

Sites		
<input checked="" type="checkbox"/>	01-N	North Regional
<input checked="" type="checkbox"/>	01-NW	Northwest Regional
<input checked="" type="checkbox"/>	01-SE	Southeast Regional
<input checked="" type="checkbox"/>	01-SW	Southwest Regional
<input checked="" type="checkbox"/>	101B	Technician 101 Bad
<input checked="" type="checkbox"/>	101G	Andrew Wood

Mark All Unmark All

< Back Next > Cancel

### 16.1 Unassigning an Item Range

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

## 17. Unassigning Items from Sites Preview Screen

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

**tcs25 Assign/Unassign Sites Wizard**

File Edit Tools Help Debug sa Fabrikam, Inc. 4/12/2027

**Unassign Items to Sites - Preview**

The listed Items will be Unassigned from the selected Site(s). Not all Items within the range can be processed.

Site	Item Number	Description
01-N	3-B3897A	CD-ROM Media
01-NW	3-B3897A	CD-ROM Media
01-SE	3-B3897A	CD-ROM Media
01-SW	3-B3897A	CD-ROM Media
101B	3-B3897A	CD-ROM Media
101G	3-B3897A	CD-ROM Media
102B	3-B3897A	CD-ROM Media
102G	3-B3897A	CD-ROM Media
103B	3-B3897A	CD-ROM Media

< Back Next > Cancel

## 17.1 Previewing Unassigned Items

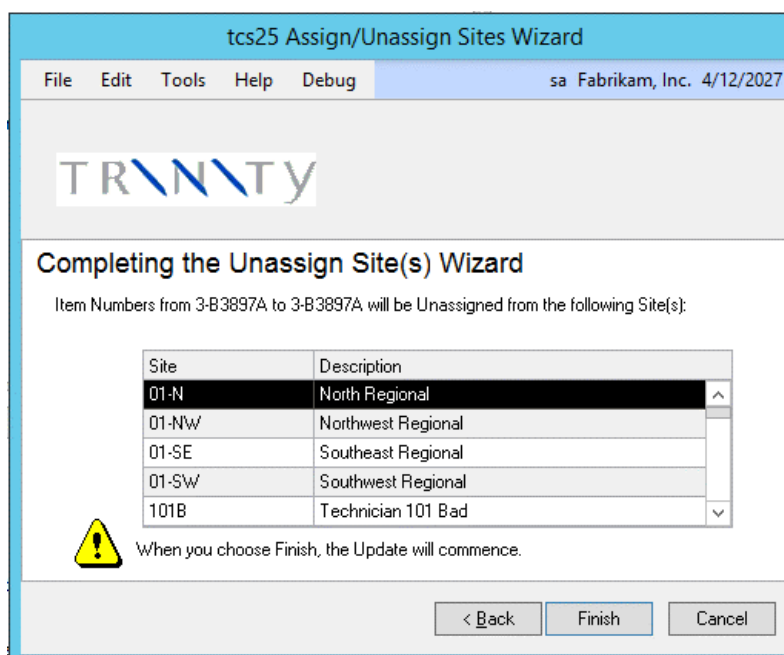
1. The selected Sites and the range of Item Numbers that you have selected to be unassigned from the Sites will be displayed in the scrolling window.
2. Click Next to display the next screen.



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

## 18. Unassigning Items Update Screen

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





### 18.1 Viewing Items to be Unassigned

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

## Appendix A

### Item Manager – Access to Windows

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



## Appendix B

### Item Manager - Reports

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

## 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.

The screenshot shows the 'About Trinity Suite' window with the following sections:

**License Information**

Company Name	<input type="text"/>	<input type="button" value="Edit Keys"/>
Max Users	<input type="text"/>	
Key 1	<input type="text"/>	Key 2 <input type="text"/>
Key 3	<input type="text"/>	Key 4 <input type="text"/>
Key 5	<input type="text"/>	Required Key Version 18.2

**Installation Details**

Company ID	<input type="text" value="Fabrikam, Inc."/>		
<b>Installer Version</b>	18.2.33	<b>Dictionary Build</b>	18.2.33.0
		<b>Trinity Extensions Build</b>	18.0.0.0

Module	Registered	Installed
Additional Charges	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Adv. Inventory Replenishment	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Automated Data Capture	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Call Scheduling	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Catalog Based Sales	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Catchweights	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>