Linked Item Selling
User Guide

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Contents

Linked Item Selling

The Trinity Linked Item Selling module provides extended functionality for sales transactions. You can create Linked Item Groups so that the module prompts the user as to whether they want to add further specified linked items to the sales transaction when they enter a trigger item. This feature would be useful, for example, if you require users to recommend the purchase toner and paper when selling printers to customers.

The main features of Linked Item Selling are:

- The ability to set up linked item groups with single or multiple trigger items
- The automatic prompting of users with linked items in sales transactions

Trigger Items

Trigger items are item numbers that have been assigned to a linked item group in the Linked Item Group Maintenance window and specified as trigger items. When you enter a trigger item into a sales transaction, the Linked Item Lookup window displays details of other items in the group.

Any number of items in a group can be trigger items, but an item can only be a trigger item in one group.

To restrict items from being displayed in the Linked Item Lookup window, click the Non-Supplementary Item checkbox for each required item. This feature is useful for setting up the group so that only non-trigger items are display as linked items.

1. Linked Item Group Maintenance Window

Cards >> Trinity >> Linked Item Selling >> Link Item Maintenance

Use the Linked Item Group Maintenance window to:

- Set up linked item groups
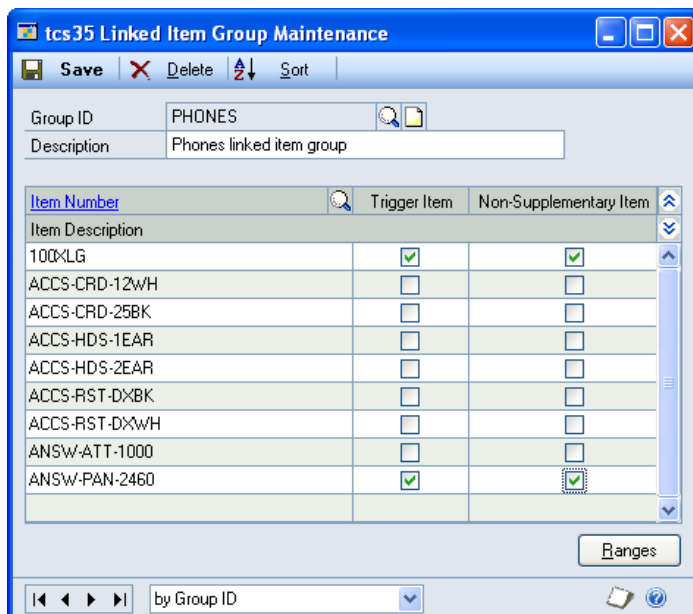
1.1 Setting Up Linked Item Groups

To set up linked item groups in the Linked Item Group Maintenance window:

1. Enter the group ID or select one using the lookup.
2. Enter a description for the group ID.
3. Enter the item numbers that you want to assign to the group ID, or select them using the lookup.
    Note that you can click the Ranges button to assign a range of items to a group ID in the Linked Item Group Range Allocation window.
4. Click the trigger item checkbox for each item that you want to define as a trigger item.
    A trigger item is an item that activates the Linked Item Lookup window in sales transaction processing, where you can view linked item group information and add linked items to a transaction.
    Any number of items in a group can be a trigger item, but an item can only be a trigger item in one group.
    To restrict items from being displayed in the Linked Item Lookup window, click the Non-Supplementary Item checkbox for each required item. This feature is useful for setting up the group so that only non-trigger items display as linked items.
5. Click Save to save any changes you have made to a group ID.
    Note that you can click Sort at any point to sort the item numbers into alphanumeric order.
    To delete a group ID, click the Delete button.

2. Linked Item Group Range Allocation Window

Cards >> Trinity >> Linked Item Selling >> Link Item Maintenance >> Ranges button

Use the Linked Item Group Range Allocation window to:

*   Allocate a range of items to a group ID

2.1 Allocating a Range of Items to a Group ID

To allocate a range of items to a group ID in the Linked Item Group Range Allocation window:

1. All item numbers are selected by default. Accept this selection or click From and enter a range of item numbers or select them using the lookups.

2. All generic descriptions are selected by default. Accept this selection or click From and enter a range of generic descriptions or select them using the lookups.

3. All class IDs are selected by default. Accept this selection or click From and enter a range of class IDs or select them using the lookups.

4. Click the Preview button to view your selection in the scrolling window. The item number and item description of each item to be assigned is displayed. Click the Show button to display the generic description, class ID, and item short name.

5. Click the Transfer button to assign the selected item range to the group ID. Click OK to close the Transfer Completed Successfully dialog box.

6. Click the OK button to return to the Linked Item Group Maintenance window.

3. Linked Item Lookup Window

Transactions >> Sales >> Sales Trn Entry >> Additional >> Linked Item Lookup

Use the Linked Item Lookup window to:

*   Select linked items

Note that this window automatically displays when you complete the entry of a trigger item line in a sales transaction. Linked items are only available for quote, order, and invoice documents.

Also note that if you are working with the Duty Processing module, two radio buttons are also available to enable viewing of stock figures for Current Site Stock Only or to Include Linked Site Stock.

The Linked Item Lookup window is also available through the Microsoft Dynamics™ GP Sales Item Detail Entry window.

3.1 Adding Linked Items to Sales Transactions

To add linked items to sales transactions using the Linked Item Lookup window:

1. The Linked Item Lookup window opens details of the group ID to which the trigger item entered into the sales transaction belongs.

   Note that if you have trigger items in the sales transaction for more than one group ID, and select the Linked Item Lookup window as an additional option, then the group ID for the first trigger item in the transaction is displayed.

2. All linked items within the group are displayed in the scrolling window with relevant details and quantities. Next to the item number field are two checkboxes. If the first box is checked, then the item has already been assigned to the current sales transaction document. If the second is checked, then the associated item is a trigger item on the displayed group.

3. You can select to scroll between sites by clicking the Site browse buttons. Click Redisplay to display the linked item details for each selected site.

4. If more than one linked item group is available for the transaction (where more than one trigger item has been entered into the transaction), then you can select to scroll between groups by clicking the Linked Item Group ID browse buttons. Click Redisplay to display the linked item details for each selected group.

   There are also Avail To Promise, Qtys by Site, Find, and Zoom buttons.

   If you have access to the Microsoft Dynamics™ GP Advanced Distribution module, then clicking the Qtys by Site button displays the currently selected item number in the Qty By Site Lookup.

   If you have access to the Microsoft Dynamics™ GP Available To Promise module, then clicking the Avail To Promise button displays the currently selected item number in the Available To Promise window.

   Click the Find button to search for an item number using the Find window.

   Click the Zoom button to display the selected item number in the Microsoft Dynamics™ GP Item Maintenance window

   The Display Stock Quantities In option allows you to select the units in which to display items. This feature is only available if you also have access to the Trinity Unit of Measure Management module.

5. To add a linked item to the sales transaction, click on the Item Number, then click Select.

Note that you can click Cancel at any point before clicking the Select button to close the Linked Item Lookup window.

Appendix A
Linked Item Selling – Access to Windows

Window Name	🖱 Menu Access	🖱 Other Access
Linked Item Group Maintenance	Cards >> Trinity >> Linked Item Selling >> Link Item Maintenance	
Linked Item Group Range Allocation		Linked Item Group Maintenance window >> Ranges button
Linked Item Lookup		Transactions >> Sales >> Sales Transaction Entry >> Additional >> Linked Item Lookup Transactions >> Sales >> Sales Transaction Entry >> Enter full line containing a Trigger Item

Appendix B

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 shows you which Trinity modules you are registered to use, and which are installed on your system.