

Sales Navigator User Guide

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Sales Navigator

The Trinity Sales Navigator module provides functionality to give the user greater control when searching for sales documents. The core functionality of the module is implemented through the Sales Search window, where you can search for sales documents based on Customer, delivery address, or item before going into the Sales Transaction Entry window.

Additional windows enable advanced searches, and it is even possible to create a sales document directly from the Sales Search window, based on details that you have entered.

The main features of the Sales Navigator module are:

- Advanced searches for sales documents without having to go through the Sales Transaction Entry window
- Quickly locate a document then click a button to open it up in the Sales Transaction Entry window
- Assign sites to delivery addresses
- Create sales documents based on details entered in the Sales Search window
- Set a default site that sales searches will be based on
- Detail-rich Inquiries about orders and Customers
- Facilities to zoom direct to documents, Customers and items

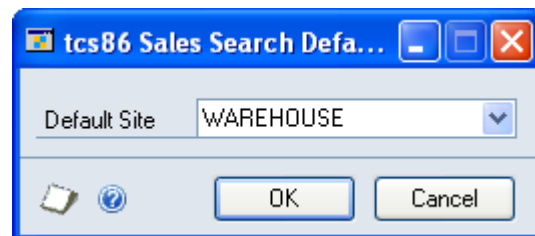
Setup

1. Sales Search Default Site Window

Tools >> Setup >> Trinity >> Sales Navigator >> Default Site

Use the Sales Search Default Site window to

- Set a sales search default site



You must select a default site before you can use the sales search functionality. When using the Delivery Address Search window and the Document Address Search window, the selected default site will be searched.

Note that if you have set up a user default site using the User Defaults Site Maintenance window (Tools >> Setup >> Trinity >> SOP Default Site), then searches will be based on the default site for the user.

1.1 Setting a Sales Search Default Site

To set a sales search default site using the Sales Search Default Site window:

1. Select a default site from the drop-down menu.

Note that you can select All Sites as the default site.

2. Click OK to close the window.

Note that you can click Cancel to close the window without making a selection.

Cards

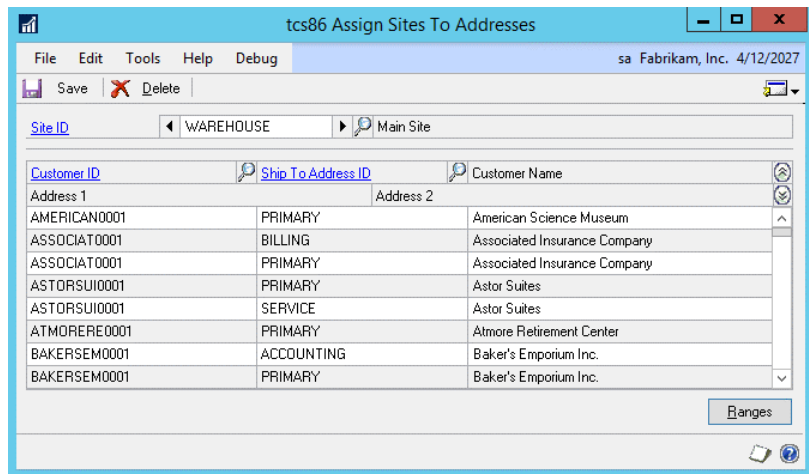
2. Assign Sites to Addresses Window

Card >> Trinity >> Sales Navigator >> Assign Sites to Addresses

Use the Assign Sites to Delivery Addresses window to:

- Assign sites to addresses

Details set up in the window are used when searching for addresses in the Delivery Address Search window.



2.1 Assigning Sites to Addresses

To assign sites to addresses using the Assign Sites To Addresses window:

- Enter a site ID or select one using the lookup or browse buttons.
- Enter a Customer or select one using the lookup.
- Enter a ship to address or select one using the lookup.

Repeat steps 2 and 3 to enter as many Customers as required or click the Ranges button to display the Assign Sites To Addresses By Range window where you can select a range of Customers/Ship to Addresses.

- Click Save and close the window.

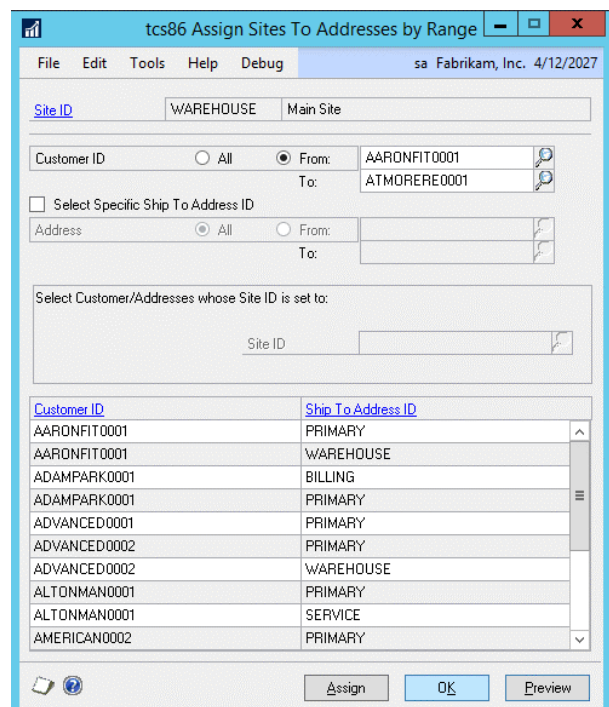
Note that you can click Delete to unassign sites from addresses.

3. Assign Sites To Address By Range Window

Cards >> Trinity >> Sales Navigator >> Assign Sites to Addresses >> Ranges button

Use the Assign Site To Address By Range window to:

- Assign sites to ranges of addresses



3.1 Assigning Sites to Ranges of Addresses

To assign sites to ranges of addresses using the Assign Sites To Address By Range window:

1. The site ID selected in the Assign Sites To Addresses window will be displayed by default.
2. All Customer IDs will be selected by default. Accept this selection or click the From button and enter range values or select them using the lookup buttons.
3. If you selected a single Customer range, then you can click the Select Specific Ship To Address ID checkbox. You can now select all addresses or a range of addresses for the selected Customer.
4. Select Unassigned, Any, or Specified from the drop-down next to “Select Customer/Addresses whose Site ID is set to:”

Unassigned	Only Customers/addresses not currently assigned to a site will be included.
Any	All Customers/addresses will be included, regardless of whether they are already assigned to a site.
Specified	Enter a site or select one using the lookup. Only Customers/addresses assigned to this site will be displayed.

5. Click Preview. All Customers/addresses in the selected range will be displayed in the scrolling window.
6. Click Assign to assign displayed Customers/addresses to the selected site.
7. Click OK to close the window.

Transactions

4. Sales Search Window

Transactions >> Trinity >> Sales Navigator >> Sales Search

Use the Sales Search window to:

- Search for sales documents
- Create sales documents
- Search for documents addresses
- Search for delivery addresses
- Search for items on documents
- Enquire about outstanding sales document lines
- Enquire about Customers

The screenshot shows the 'tcs86 Sales Search' window. At the top, there are menu options: File, Edit, Tools, Help, Debug. The window title is 'tcs86 Sales Search' and the user is logged in as 'sa Fabrikam, Inc. 4/12/2027'. Below the menu is a toolbar with buttons for OK, Clear, Address Search, Document Search, Available to Promise, Outstanding Lines, and Customer Inquiry.

The main area is divided into several sections:

- Customer Information:** Customer ID: ADAMPARK0001, Name: Adam Park Resort, Address ID: PRIMARY. There are checkboxes for 'Hold' and 'Inactive'. Address details include Suite 9876, 321 Chestnut Drive, Indianapolis, IN, Zip Code 46206-1391, and Contact Roberta Masouras.
- Order and Search Options:** Order dropdown set to 'STDORD'. There are buttons for 'Template', 'Catalog', and 'Create Sales Document'. Filter options include 'Unposted' (selected), 'History', 'New Orders', and 'All'. Filter Document Date is set to 'All' and Number of Days is '30'.
- Sales Documents for Customer Address:** A table with columns: Date, Document, Document Number, Customer PO Number, Original Number, Document Status, and Req Ship Date.

Date	Document	Document Number	Customer PO Number	Original Number	Document Status	Req Ship Date
3/5/2027	Return	STDINV2257				3/5/2027
4/12/2027	Fulfillment	FULORD1001				4/12/2027
4/12/2027	Fulfillment	FULORD1005				4/12/2027
4/12/2027	Fulfillment	FULORD1007				4/12/2027
4/21/2027	Back Ord.	BKD1006				4/21/2027
- Item Details:** A table with columns: Item Number, Item Description, U Of M, Quantity, Price, Ext. Price, Remaining, and Req Ship Date.

Item Number	Item Description	U Of M	Quantity	Price	Ext. Price	Remaining	Req Ship Date
333PROC	333 Processor	Each	2	\$239.95	\$479.90	0	4/12/2027
ACCS-CRD-25BK	Phone Cord - 25' Black	Each	2	\$19.95	\$39.90	0	4/12/2027

At the bottom, there is a 'Document Number' field with 'FULORD1001' entered and a 'Find' button.

Note that when documents are displayed, you can click to select a document then click the Go To button to display it in the Sales Transaction Entry or Sales Document Inquiry window.

Also, note that additional buttons will be displayed if you are working with other Trinity modules. If you are working with Customer Templates, then you can click the Template button to display the Template Select window. If you are working with Catalogue Based Sales, then you can click the Catalogue button to display the Item Catalogue and Search window.

4.1 Searching for Sales Documents

To search for sales documents using the Sales Search window:

1. Enter a Customer ID or select one using the lookup. You can also use the lookup to select a prospect ID.
2. The address ID field will automatically be filled with the default address ID for the selected Customer. This can be amended as required, or you can click the Show All Addresses check box to search for documents for all addresses. Address details for the address ID selected in the address ID field are also displayed.
3. From the Include options, select one of the following:

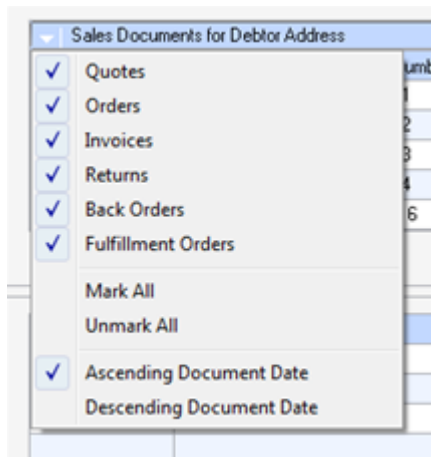
Unposted	Displays documents that have not yet been posted.
History	Displays posted documents.
New Orders	Displays only orders that have a status of new.
All	Displays all documents, both unposted and history

Sales documents meeting the criteria will be displayed in the upper scrolling window.

If you select History, you can choose to filter the documents by date. Select to show all documents, documents more recent than a specified number of days, or documents older than a specified number of days. The filter settings are saved when you exit from the Sales Search window and are used as the default values next time you use the Sales Search.

If you selected Unposted or History, then you can click the Sales Documents for Customer Address menu to select which document types to view. Click on a document type to select/deselect it or use the Mark All/Unmark All option.

From the same menu, you can choose to display the documents in ascending or descending document date order.





Note that if you have selected to view Unposted, then any open orders displayed in the scrolling window will be denoted by the Open Orders icon.

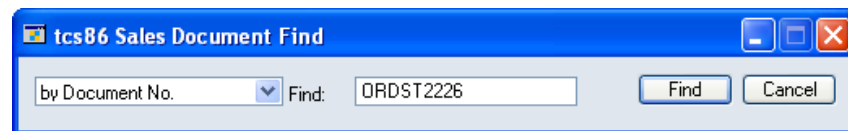


Note that the process hold icon will be displayed against any sales document to which a process hold has been applied.

The Document Status menu gives you the option to view documents based on their status.

When you click on a document in the scrolling window, item details from the document will be displayed in the lower scrolling window. The document number will be displayed at the bottom of the window.

4. You can further refine your document search by clicking the Find button below the upper scrolling window to display the Sales Document Find window.

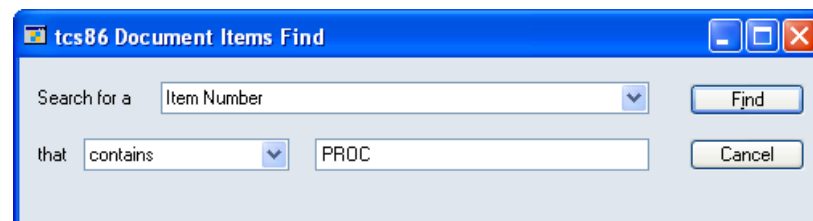


Select Document No., Customer PO Number, or Original Number as the find by option from the drop-down menu.

Enter the Find criteria. This can be any combination of letters or digits.

Click the Find button. If a valid match is found, then the window will close, and the match will be displayed as the first document in the Sales Search window scrolling window.

5. You can further refine your item search by clicking the Find button below the lower scrolling window to display the Document Items Find window.



Select an option from the Search drop-down menu.

Select contains or begins with, then enter any combination of letters or digits. The entered combination will form the basis of the search for items beginning with or containing the combination, depending on your selection.

Click the Find button. If a valid match is found, then the window will close, and the match will be displayed as the first item in the Sales Search window scrolling window.

6. If required, you can click to select a document then click the Go To button to display it in the Sales Transaction Entry or Sales Document Inquiry window.

If you double click on an unposted document, then the Sales Transactions Entry window will be displayed. If you double click on a historical document, then the Sales Document Inquiry window will be displayed.

Note that you can also click to select an item then click the Available To Promise button to display the item in the Inventory Available To Promise window.

7. Click OK to close the window.

4.2 Creating Sales Documents

To create sales documents using the Sales Search window:

1. Enter a Customer and Address as detailed in Searching for Sales Documents.
2. From the Create Sales Document drop-down menu, select the type of document that you want to create.
3. The default Type ID will be displayed by default. The default will change to Quote if you have selected a Prospect ID. Accept this selection or enter a new type ID or select one using the lookup.
4. Click the Create Sales Document button. The Sales Transaction Entry window will open with document type and Customer and address details already entered.

4.3 Searching for Document Addresses

To search for documents addresses using the Document Address Search window:

1. Click the Document Search button to display the Document Address Search window.

Date	Customer ID	Ship to Address ID	Document Number	Site ID	Document PO No.	Zip Code
5/23/2027	LASERMES0001	PRIMARY	STDINV2255	WAREHOUSE		55304-9840
5/23/2027	FRANCHIS0001	WAREHOUSE	STDINV2256	WAREHOUSE		6004-2922
3/5/2027	AARONFIT0001	WAREHOUSE	QTEST1022	WAREHOUSE		60603-0776
3/5/2027	BAKERSEM0001	PRIMARY	QTEST1023	WAREHOUSE		46802-3918
3/5/2027	ADAMPARK0001	PRIMARY	STDINV2257	WAREHOUSE		46206-1391
3/5/2027	AMERICAN0001	PRIMARY	STDINV2258	WAREHOUSE		63115
4/21/2027	BREAKTHR0001	PRIMARY	BKD1005	WAREHOUSE		H3R 3T2

2. If you selected a user default site in the User Defaults Site Maintenance window, then that will be selected. If you don't have a user default site set up but have set up a default site in the Sales Search Default Site window, then this site will be selected.

Select an alternate site from the drop-down menu as required.

3. Enter the Search For criteria. This can be any combination of letters or digits.
4. Select Document No., Customer PO Number, Original Number, or Address as the search in option from the drop-down menu. Your selection will be searched for the entered Search For criteria; for example, if you select Document No., then all sales document numbers will be searched for the entered criteria.
5. To search for documents containing a specific item only, enter an item number in the Containing Item Number field.
6. To search for documents on a specific load only, enter a load number in the On Load Number field.

Note that to use this field, you must be working with the Trinity Vehicle Load Planning module.

- Click the Refresh button. All documents meeting the selected criteria will be displayed in the scrolling window.

Click on a document to select it. Any documents sharing the same master number will be displayed in the Related Documents scrolling window. A master number is a single number that is assigned to a series of documents, and that is used to track related documents. For example, when you issue a quote, then transfer it to an order, and then an invoice, each document will be assigned the same master number. Each document also maintains its document number.

Note that you can click the link buttons to view selected documents in the Sales Transaction Inquiry Zoom window.

- Click the OK button to display the selected document in the Sales Search window.

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

4.4 Searching for Delivery Addresses

To search for delivery addresses using the Delivery Address Search window:

- Click the Address Search button to display the Delivery Address Search window.

Customer ID	Address ID	Site ID	Customer Name	Contact	Zip Code
AARONFIT0001	PRIMARY		Aaron Fitz Electrical	Bob Fitz	98052-6399
(425) 555-0101 Ext. 01	One Microsoft Way, Redmond, WA				
KENSINGT0001	PRIMARY		Kensington Gardens Resort	Judy Hopewell	53204-9900
(414) 555-0152 Ext. 01	12345 Redmond Rd, Milwaukee, WI				

- Enter the Search For criteria. This can be any combination of letters or digits.
- Select Address, Post Code, Telephone Number, User Defined 1, or User Defined 2 as the search in option from the drop-down menu. Your selection will be searched for the entered Search For criteria; for example, if you select Address, then all addresses will be searched for the entered criteria.
- If you selected a user default site in the User Defaults Site Maintenance window, then that will be selected. If you don't have a user default site set up but have set up a default site in the Sales Search Default Site window, then this site will be selected.

Select an alternate site from the drop-down menu as required.

- All addresses meeting the selected criteria will be displayed in the scrolling window.

- Click on an address to select it then click Select. The window will close, and the details will be passed through to the Sales Search window.

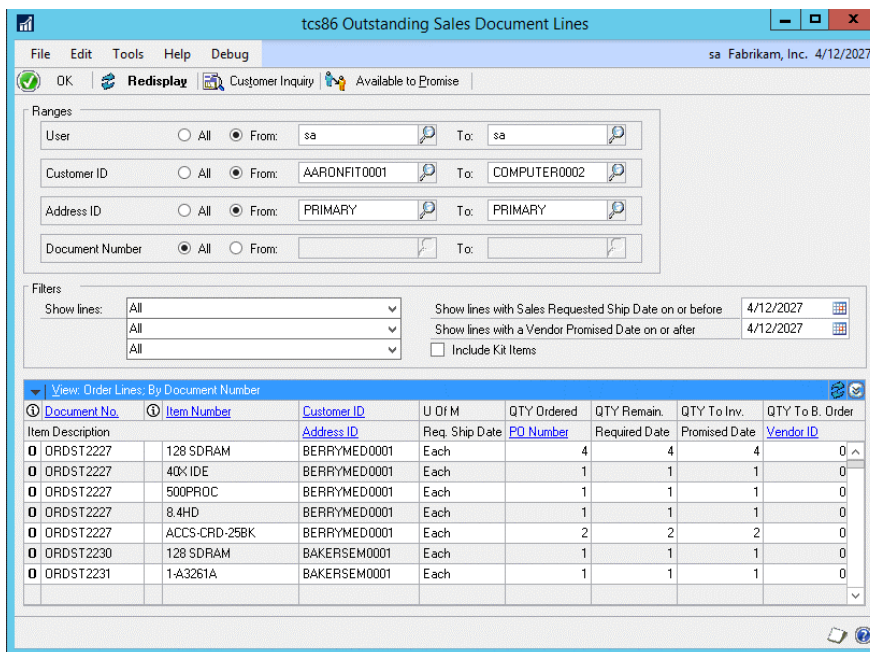
Note that you can click Cancel at any point to close the window.

4.5 Enquiring About Outstanding Sales Document Lines

To enquire about orders using the Outstanding Sales Document Lines window:

- Click the Outstanding Lines button to display the Outstanding Sales Document Lines window.

Note that the window can also be displayed by selecting Inquiries >> Trinity >> Sales Navigator >> Order Lines Inquiry.



- The current user will be selected by default. Accept this selection or enter alternate range values, or click the All button.
- All Customers will be selected by default (unless you had a Customer entered in the Sales Search window). Accept this selection or click From and enter From and To range values or select them using the lookups. You can also change the radio button selection to view document lines for prospects instead of Customers.
- All addresses will be selected by default (unless you had an address entered in the Sales Search window). Accept this selection or click From and enter From and To range values or select them using the lookups.
- All orders/invoices will be selected by default. Accept this selection or click From and enter From and To range values or select them using the lookups.
- Six additional filters can be further selected to restrict range criteria if required:

Remaining Quantity	Restrict to only lines with or without a remaining quantity
Purchase Order Commitment	Restrict to only lines with or without a purchase order commitment

Backorder Quantity	Restrict to only lines with or without a backorder quantity
Sales Requested Ship Date on or before	Enter a date - only lines with a requested ship date on or before the date will be displayed
Creditor Promised Date on or before	Enter a date - only lines with a creditor promised date on or before the date will be displayed
Include Kit Items	Select to include lines for kit header items Note that kit items are shown down to the component level

These features are particularly useful for tracking back-ordered items that need to be purchased if using purchase order commitments.

7. Click Redisplay. All sales lines meeting the range criteria will be displayed in the scrolling window.

You can further restrict documents viewed in the scrolling window by selecting options from the View menu.

Note that you can click the Customer Inquiry button to display the Customer Detailed Inquiry window.

8. Click OK to close the window.

4.6 Enquiring About Customers

To enquire about Customers using the Customer Detailed Inquiry window:

1. Click the Customer Inquiry button to display the Customer Detailed Inquiry window.

Note that if you have a Customer and address selected in the Sales Search window, then by default details for that Customer and address will be displayed.

Note that the window can also be displayed by selecting Inquiries >> Trinity >> Sales Navigator >> Customer Details Inquiry.

The screenshot displays the 'tcs86 Customer Details' window. The window title is 'tcs86 Customer Details'. The interface includes a toolbar with buttons for 'OK', 'Redisplay', 'Clear', 'Create Order', and 'Outstanding Lines'. The main area is divided into several sections:

- Customer Information:** Customer ID: ADAMPARK0001, Name: Adam Park Resort, Short Name: Adam Park Resor, Statement Name: Adam Park Resort.
- Address Information:** Address ID: PRIMARY, Contact: Roberta Masouras, Address: Suite 9876, 321 Chestnut Drive, City: Indianapolis, County: IN, PostCode: 46206-1391, Country: USA.
- Class and Priority:** Class ID: USA-INMI-T2, Priority: None.
- View: Period Balances:** A table showing balances for different periods:

Period	Amount
Current	\$3,506.15
31 - 60 Days	\$0.00
61 - 90 Days	\$0.00
91 - 120 Days	\$0.00
121 - 150 Days	\$0.00
151 - 180 Days	\$0.00
Balance	\$20,676.51
- View: Call History: By Call Date:** A table showing call history:

Contact	Call Date	Time	Action Taken	SOP Type	Document Number
Bob Fitz	16/11/2004	11:50:47		Return	STDINV2281
Bob Fitz	03/11/2004	10:38:40	Create Order	Order	ORDST2243
- Legend:** Fwd Call Request (green), Fwd Call Request (blue), Scheduled Call Action (calendar), Incoming Call (red).
- Comments:** A text area for entering comments.
- Processing:** A progress bar at the bottom.

2. Enter a Customer ID or select one using the lookup. You can also select a Prospect ID if using the lookup, in which case the information displayed will be restricted to that which is relevant to prospects, e.g., no period balances will be shown.
3. The default address ID for the selected Customer will be displayed by default. Alternate addresses can be selected by using the browse buttons or lookup button.
4. Call history details for the Customer/address combination will be displayed in the main scrolling window.

Note that you must be using the Trinity Customer Call Scheduling module to access this functionality.

5. Period balance details for the Customer/address combination will be displayed in the secondary scrolling window.

Note that you can click the Outstanding Lines button to display the Outstanding Sales Document Lines window.

6. Click OK to close the window.

Alternatively, you can click the Create Order button. The Sales Transaction Entry window will open with document type and Customer and address details already entered.

5. Sales Document Search Window

Inquiry >> Trinity >> Sales Navigator >> Sales Document Search

Use the Sales Document Search window to:

- Search for documents and print a summary



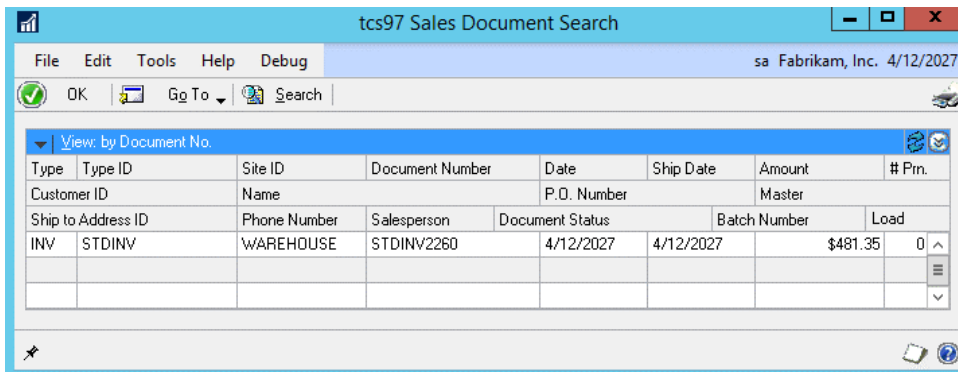
Note that this window can also be displayed by clicking the Document Search button in the Sales Transaction Entry window.

5.1 Using the Document Search Facility

To search for documents in the Sales Document Search window:

1. Select your search parameters from the drop-down lists and enter To and From values to specify ranges. You can choose up to 6 search criteria, from Batch Number, Customer ID, Customer PO Number, Document Date, Document Number, Document Type, Document Type ID, Document Status, Requested Ship Date, Ship to Address and Load Number (see Vehicle Load Planning), Site ID and Coll. Note Status (see Returns Management).
2. Click OK.

The Sales Document Search window will be displayed, showing all the documents that match your search criteria.



3. Select a document in the scrolling window and click the Go To button. From the drop-down list, you can select Sales Trn Entry to display the document in the Sales Transaction Entry window or Sales Doc. Inquiry to display the document in the Sales Transaction Inquiry Zoom window.

Alternatively, double click on a document in the scrolling window to display it in the Sales Transaction Entry window.



You can click the Print button to print the Document Search report detailing the documents located in the search.

Click the Search button to return to the Sales Document Search – Parameters window where you can edit or clear your selection.

4. Click OK to close the window.

Appendix A

Sales Navigator – Access to Windows

Window Name	 Menu Access	 Other Access
Customer Detailed Inquiry	Inquiries >> Trinity >> Sales Navigator >> Customer Details Inquiry	Transactions >> Trinity >> Sales Navigator >> Sales Search >> Customer Inquiry button
Delivery Address Search		Transactions >> Trinity >> Sales Navigator >> Sales Search >> Address Search button
Document Address Search		Transactions >> Trinity >> Sales Navigator >> Sales Search >> Document Search button
Outstanding Sales Document Lines	Inquiries >> Trinity >> Sales Navigator >> Order Lines Inquiry	Transactions >> Trinity >> Sales Navigator >> Sales Search >> Outstanding Lines button
Sales Document Search	Inquiry >> Trinity >> Sales Navigator >> Sales Document Search	Transactions >> Sales >> Sales Transaction Entry >> Document Search button
Sales Search	Transactions >> Trinity >> Sales Navigator >> Sales Search	
Sales Search Default Site	Tools >> Setup >> Trinity >> Sales Navigator >> Default Site	

Appendix B

Sales Navigator - Reports

Report Name	Functionality
Document Search report	Print details of documents found in the document search

Appendix C

Alternate Microsoft Dynamics™ GP Windows in the Sales Navigator module

Window Name	Series	Module	Modification
Sales Transaction Entry	Sales	Sales Navigator	Shows the Document Search button

Appendix D

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.

