



VERSION 1.0

MAY 8, 2018

Apps for Greentree

INVENTORY DIMENSIONS

APP NUMBER: 010109

Powered by:

MYOB Greentree



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FEATURES

1. Inventory Dimensions

This App will allow mass creation of multiple stock items from a master, using predefined dimensions and then selection of stock items in both Sales Order Entry and Purchase Order Entry based on dimension data.

During both order entry screens, Entering the parent stock item pops up a window to show all products linked to the parent, enabling simpler selection and visibility of availability across the linked items. This will only occur for products that have been “dimensioned”.

Note there is no control over transacting “master” vs generated stock items – to prevent transacting on the parent you would need to add an Alert rule. It is expected that the app is used to create the dimensioned stock items, then only the dimensioned items are used in transactions.

Before use, trees must be defined for the dimensions required, and then dimension combinations (“groups”), set up. See Greentree configuration.

IMPORTANT NOTES

- We recommend that you test the configuration of the App thoroughly in a test system prior to deploying the App in your live Greentree system.

OTHER REQUIREMENTS

Greentree Modules: Inventory, Sales Orders, Purchase Orders

Associated Apps: None.

USER INSTRUCTIONS

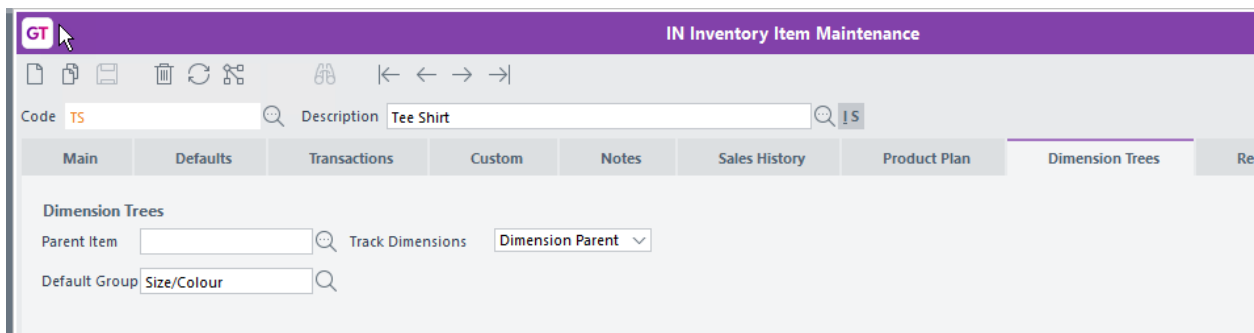
INVENTORY MAINTENANCE

| Data Entry | Inventory | Inventory Item Maintenance

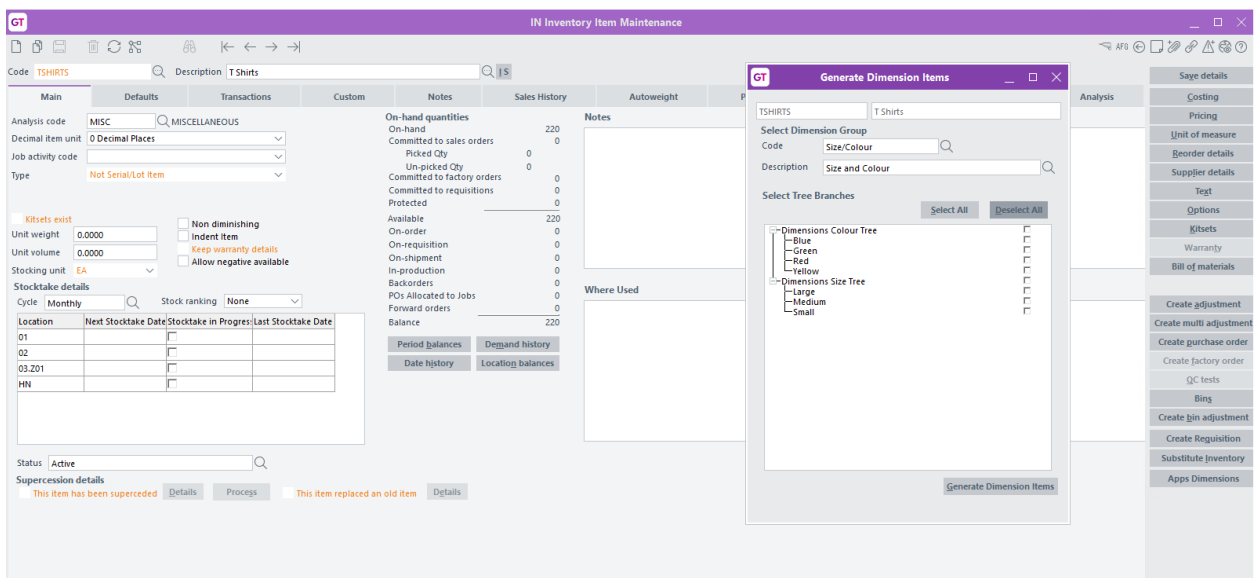
A parent stock item can be created and then child stock items generated automatically, for all combinations of dimensions.

Note: When setting up parent stock items codes, it is necessary to bear in mind that that total number of characters available for a stock item code is 20. When child items are created, the dimension short codes are appended to create the new stock code. Therefore, both short parent stock items codes and short codes for tree dimensions is highly recommended.

Setup all the details of the parent stock item including any pricing, re-order and warehouse details that will apply to all the child/dimension items as well – save.



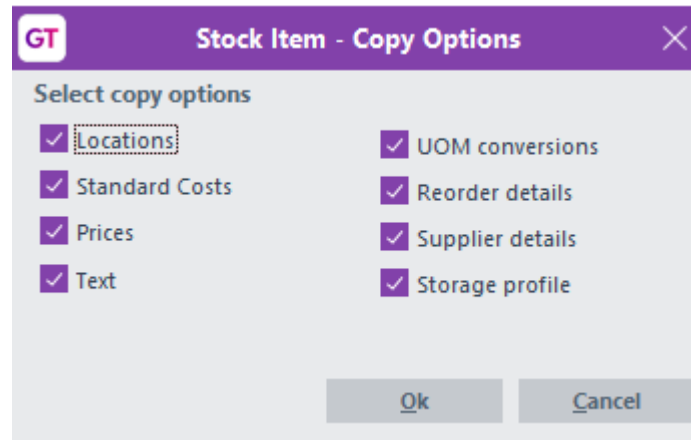
Include setting this item as the Dimension Parent on the Dimensions tab and specifying the Dimension group to be used.



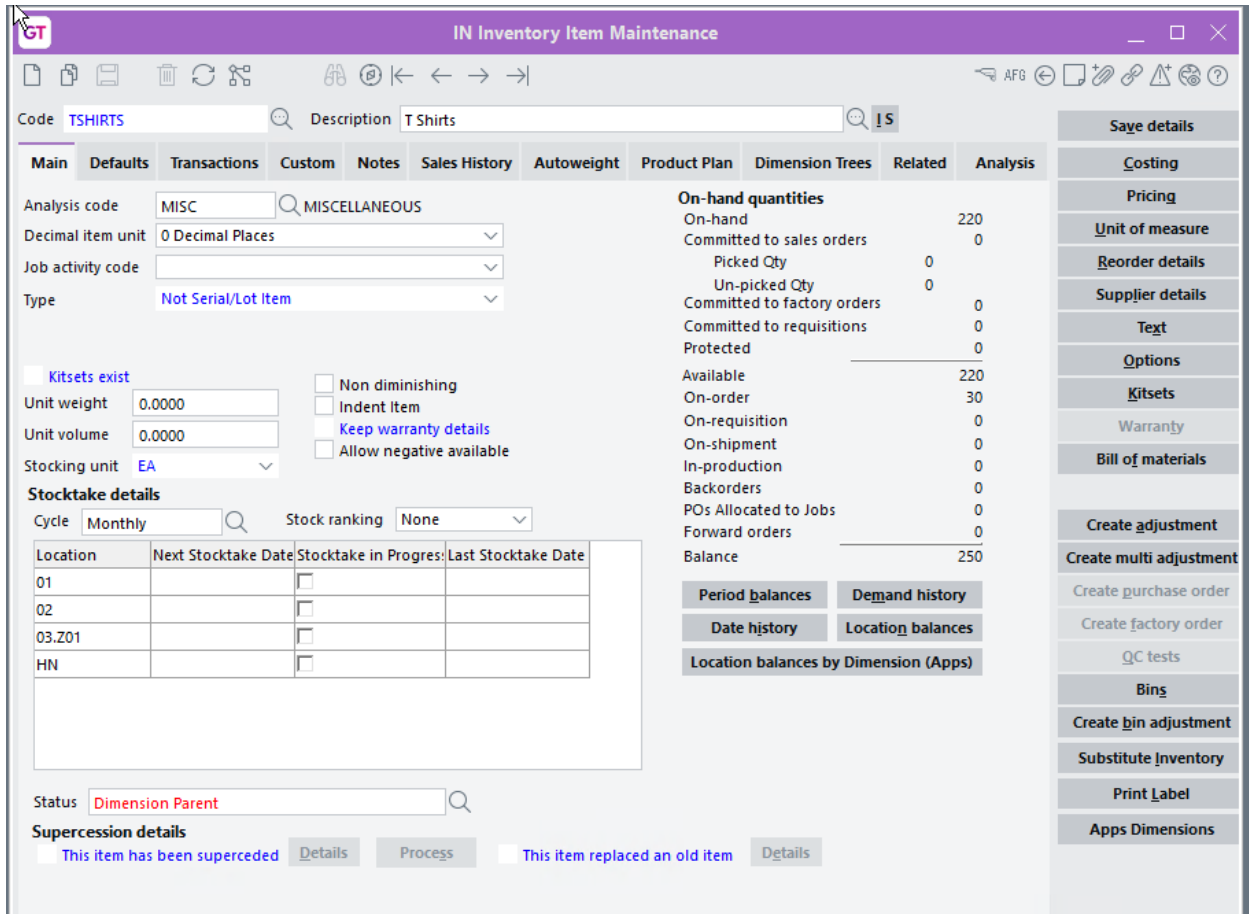
Recall the parent stock item and click App Dimensions button to get the Generate Dimensions popup.

Select which combinations of dimensions are to be created for this parent.

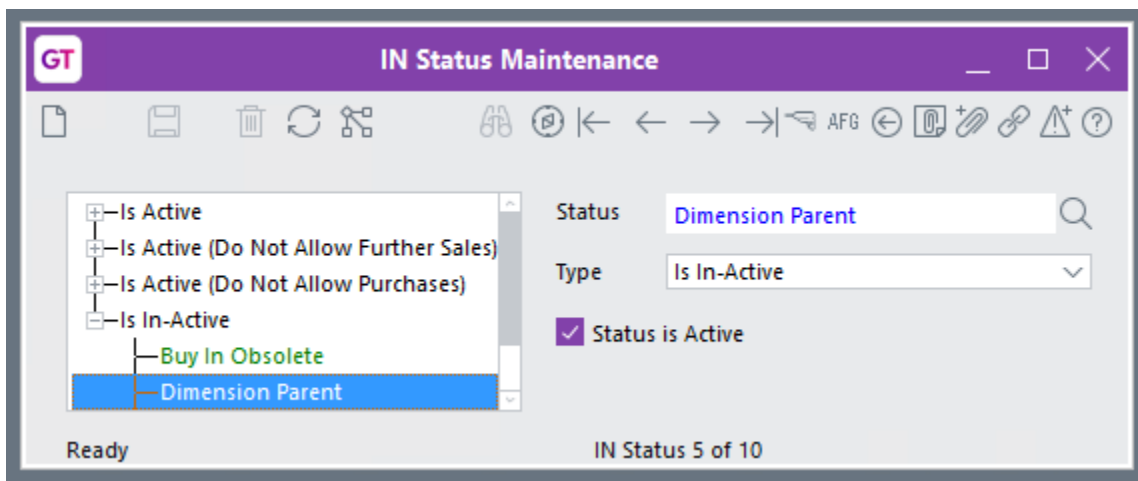
Clicking on Generate Dimension Items initiates a further popup to allow selection of details to be copied from the parent. Any of these sets of data can be deselected, before clicking OK to continue or Cancel to abort.



The resulting child stock items are named according to the parent stock description with dimensions appended.



The Parent item should then be set to an Inactive status so that it can not be selected on Sales orders or purchase orders.



You can optionally have a separate status or use the standard Inactive.

SALES ORDER MAINTENANCE

| Data Entry | Sales Orders | Sales Order Entry

The screenshot shows the 'SO Order Entry' application window. The main interface is divided into several sections: Order Detail, Customer Detail, and a central table for line items. An 'IN Dimension Search' dialog box is overlaid on the right side of the screen. This dialog box contains a search criteria field with 'TS' entered and a table of search results. The table has the following columns: Code, Description, Qty Available, Suggested Qty, Qty to Order, Min Qty, Max Qty, and On Order. The first row is highlighted in blue and contains the following data: Code: TS BLUE1 LGE, Description: Tee Shirt BLUE1 LGE, Qty Available: 0.0000, Suggested Qty: (empty), Qty to Order: (empty), Min Qty: (empty), Max Qty: (empty), On Order: 0. Below the table are buttons for 'Select Item', 'Add Lines', 'OK', and 'Cancel'. The status bar at the bottom of the application window reads 'Editing an existing Sales Order' and 'Sales Order 810 of 1037'.

Click on the dimension item required on the order then click the Select Item button in the IN Dimension Search screen to add that particular dimension item to the sales order. The line quantity can then be entered within the sales order maintenance screen as normal.

GT IN Dimension Search

Search Criteria
Dimension parent iter

Current Default Location: 01

	Code	Description	Qty Available	Suggested Qty	Qty to Order	Min Qty	Max Qty	On Order
-	TS BLUE1 LGE	Tee Shirt BLUE1 LGE	0.0000					0
	02	[location here]	0.0000					0.0000
+	TS BLUE1 MED	Tee Shirt BLUE1 MED	0.0000					0
+	TS REEN1 LGE	Tee Shirt REEN1 LGE	0.0000					0
+	TS REEN1 MED	Tee Shirt REEN1 MED	0.0000					0
+	TS D1 LGE	Tee Shirt D1 LGE	0.0000					0
+	TS D1 MED	Tee Shirt D1 MED	0.0000					0
+	TS LLOW1 LGE	Tee Shirt LLOW1 LGE	0.0000					0
+	TS LLOW1 MED	Tee Shirt LLOW1 MED	0.0000					0

Context menu options:
 - Set selection criteria
 - Clear selection criteria
 - Edit column
 - Save settings
 - Reset to defaults
 - **Expand child lines** (highlighted)
 - Collapse child lines
 - Select column
 - Select table
 - Clear selected cells
 - Launch table contents in...
 - Send table contents to clipboard
 - Output table contents to file

Buttons: Select Item, Add Lines, OK, Cancel

Alternatively, you can make multiple item selections including locations by expanding the form to show child lines. This can be done in bulk by right clicking on the column headings and choosing Expand child lines, or by clicking on the + symbol for a particular dimension.

GT IN Dimension Search

Search Criteria
Dimension parent iter

Current Default Location: 02

	Code	Description	Qty Available	Suggested Qty	Qty to Order	Min Qty	Max Qty	On Order
-	TS BLUE1 LGE	Tee Shirt BLUE1 LGE	-2.0000					0
	02	[Select stock location here]	-2.0000		2			0.0000
+	TS BLUE1 MED	Tee Shirt BLUE1 MED	0.0000					0
+	TS GREEN1 LGE	Tee Shirt GREEN1 LGE	0.0000					0
+	TS GREEN1 MED	Tee Shirt GREEN1 MED	0.0000					0
-	TS RED1 LGE	Tee Shirt RED1 LGE	-5.0000					0
	02	[Select stock location here]	-5.0000		5			0.0000
+	TS RED1 MED	Tee Shirt RED1 MED	0.0000					0
-	TS YELLOW1 LGE	Tee Shirt YELLOW1 LGE	0.0000					0
	02	[Select stock location here]	0.0000					0.0000
		[Select stock location here]			3			
+	TS YELLOW1 MED	Tee Shirt YELLOW1 MED	0.0000					0

Buttons: Select Item, Add Lines, OK, Cancel

Multiple selections can be made by clicking the plus for each item required and entering a quantity.

If you choose expand child lines from the right click then all dimension items open and you can enter quantities against multiple dimension items, then click the Add Lines button – the lines are added to the Sales order.

The dimension box displays the quantity available and also the quantity on purchase order.

Click cancel or click the X to close the dimension pop-up.

Insufficient Inventory Available

Inventory Item: TS BLUE1 LGE
 Description: Tee Shirt BLUE1 LGE
 Location: 02 UOM: EA

Quantity
 Required: 2
 Available: 0

Quantity Statistics

	02 <input checked="" type="radio"/>	All Locations <input type="radio"/>
On-Hand	0	0
Committed to Sales Orders	0	0
Committed to Factory Orders	0	0
Committed to Requisitions	0	0
Available	0	0
On-Order	0	0
On-Requisition	0	0
On-Shipment	0	0
In-Production	0	0
Backorders	0	0
Forward Orders	0	0

Actions:

- Qty Required
- Qty Available
- Substitute Inventory Item
- Alternative Location ...
- Over Selling
- Put on Backorder
- Make-to-Inventory
- Cancel
- Purchase Orders
- Shipments
- Transfer

Location	Name	Available	On Order	On Shipment

If there is no Available stock of any of the dimensions, the Insufficient Inventory available box is displayed for you to select the appropriate action.

GT **IN Dimension Search** _ □ ×

Search Criteria

Dimension parent iter

Current Default Location: 01

+	Code	Description	Lot Num	Expiry	Qty Avail	Quantity
-	TSHIRTS ET	T Shirts BLUE1 LGE			49.0000	
	01				49.0000	10
	02				0.0000	
		[Select stock location here]				
-	TSHIRTS ET	T Shirts BLUE1 MED			10.0000	
	01				0.0000	
	02				10.0000	10
	04				0.0000	
	30DG.DG				0.0000	
		[Select stock location here]				
-	TSHIRTS ET	T Shirts BLUE1 SML			0.0000	
	01				0.0000	
	02				0.0000	
		[Select stock location here]				

If your item is serial or lot tracked, you will also be prompted to select the serial/lot number.

The order is then processed in the usual manner.

PURCHASE ORDER MAINTENANCE

| Data Entry | Purchase Orders | Purchase Order Entry

The screenshot displays the 'PO Purchase Order Entry' application. The main window is titled 'PO Purchase Order Entry' and shows the following details:

- Branch: 02 (Wellington)
- Last Order Number: 100686
- Supplier: Inventec Technologies
- Order Date: 04/10/18
- Expected Date: 04/10/18
- Location: 02
- Discount %: 0.00
- Status: Entered
- Entered by: SUPER

An 'IN Dimension Search' dialog box is open, showing search criteria for dimension parent 'TS'. The search results are as follows:

Code	Description	Qty Available	Suggested Qty	Qty to Order	Min Qty	Max Qty	On Order
TS BLUE1 LGE	Tee Shirt BLUE1 LGE	0.0000					0
TS BLUE1 MED	Tee Shirt BLUE1 MED	0.0000					0
TS GREEN1 LGE	Tee Shirt GREEN1 LGE	0.0000					0
TS GREEN1 MED	Tee Shirt GREEN1 MED	0.0000					0
TS RED1 LGE	Tee Shirt RED1 LGE	0.0000					0
TS RED1 MED	Tee Shirt RED1 MED	0.0000					0
TS YELLOW1 LGE	Tee Shirt YELLOW1 LGE	0.0000					0
TS YELLOW1 MED	Tee Shirt YELLOW1 MED	0.0000					0

The main window also shows a table with the following data:

No.	Type	Tax Tj	Company/F Account/Code	Description	SubCode/Location
1	INV		TS	Tee Shirt	02

Enter the dimension parent into the purchase order and the IN Dimension Search form is displayed.

GT IN Dimension Search

Search Criteria
Dimension parent iter TS

Current Default Location: 01

+	Code	Description	Qty Available	Suggested Qty	Qty to Order	Min Qty	Max Qty	On Order
-	TS BLUE1 LGE	Tee Shirt BLUE1 LGE	0.0000					0
	02		0.0000					0.0000
		[Select stock location here]						
-	TS BLUE1 MED	Tee Shirt BLUE1 MED	0.0000					0
	02		0.0000	50.0000		10.0000	50.0000	0.0000
		[Select stock location here]						
-	TS GREEN1 LGE	Tee Shirt GREEN1 LGE	0.0000					0
	02		0.0000	50.0000		5.0000	50.0000	0.0000
		[Select stock location here]						
-	TS GREEN1 MED	Tee Shirt GREEN1 MED	0.0000					0
	02		0.0000					0.0000
		[Select stock location here]						
-	TS RED1 LGE	Tee Shirt RED1 LGE	0.0000					0
	02		0.0000	50.0000		10.0000	50.0000	0.0000
		[Select stock location here]						
-	TS RED1 MED	Tee Shirt RED1 MED	0.0000					0
	02		0.0000					0.0000
		[Select stock location here]						
-	TS YELLOW1 LGE	Tee Shirt YELLOW1 LGE	0.0000					0
	02		0.0000					0.0000

Select Item Add Lines OK Cancel

If you right click and Expand child lines, you can see the Qty Available and On Order for all dimension items. The form also displays Minimum and Maximum stock levels and will Suggest a quantity based on these provides you have Re-order details setup for the warehouse/location selected in the header.

Enter quantities as required, then click the Add Lines button, the lines are added to the Purchase order. Click Cancel or X to close the Dimension search box.

GT SO-PO Link Form

Inventory Item: TS RED1 LGE Location: 02

Qty Ordered: 40.0000 Unit of Measure: EA

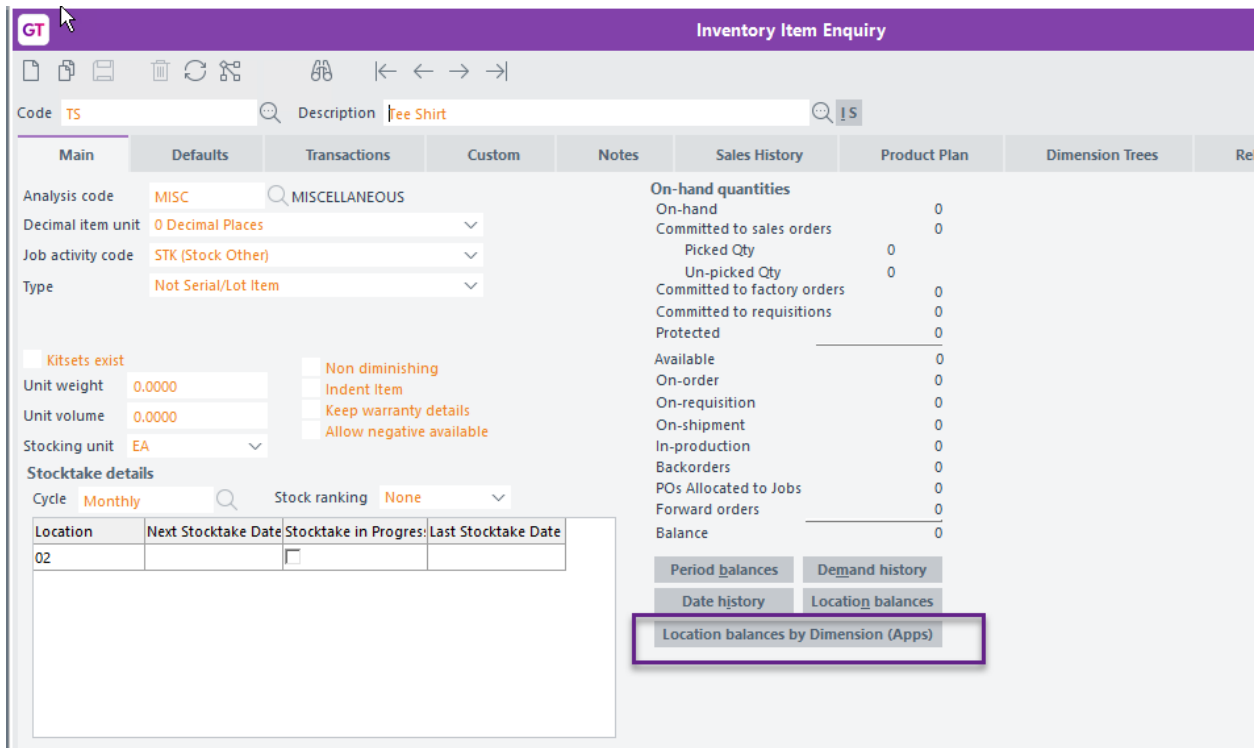
Reference	Customer Code	Customer Name	Qty Ordered	Unallocated Qty	Delivery Date	Linking Qty	Released Qty
501033	1004	HighLake Primary	5.0000	5.0000	04/10/18	0.0000	0.0000

If you have SO/PO linking enabled, you will be prompted to link.

The order is then processed in the usual manner.

INVENTORY ENQUIRY

| Enquiry | Inventory | Inventory Items



A button has been added to Enquiry and Maintenance to allow you to view location balances for all dimension items together.

GT **Location Balance by Dimensions**

Code: TS
 Description: Tee Shirt
 Unit of Measure: Each
 Location: 01 All Locations
 View by: Size/Colour Show All

Size and Colour	On-Hand	Committed	Available	On Backorder	On Fwd Order	On-Order	On Shipment
Blue	0	0	0	2	0	40	0
Large	0	0	0	2	0	0	0
Medium	0	0	0	0	0	40	0
Green	0	0	0	4	0	40	0
Large	0	0	0	0	0	40	0
Medium	0	0	0	4	0	0	0
Red	0	0	0	5	0	40	0
Large	0	0	0	5	0	40	0
Medium	0	0	0	0	0	0	0
Yellow	0	0	0	3	0	60	0
Large	0	0	0	3	0	40	0
Medium	0	0	0	0	0	20	0

When the form is first displayed it defaults to showing balances based on the users' default location from Inventory user preferences.

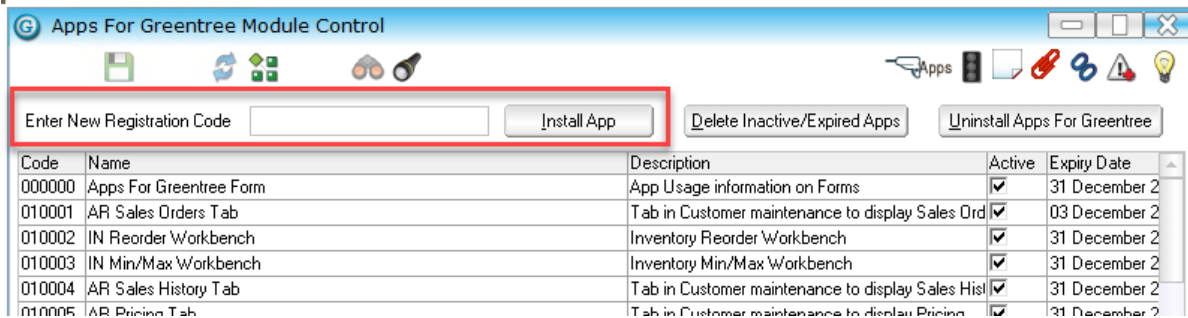
You can tick it display All locations

IMPLEMENTATION GUIDE

Please refer to the Important Notes section above before installing and configuring this App

APP INSTALLATION

1. Log into Greentree as the **Super** user
2. Select the menu item | **System** | **Apps for Greentree** | **Apps Module Control** |
3. Enter the New Registration Codes supplied and click Install App



Code	Name	Description	Active	Expiry Date
000000	Apps For Greentree Form	App Usage information on Forms	<input checked="" type="checkbox"/>	31 December 2
010001	AR Sales Orders Tab	Tab in Customer maintenance to display Sales Ord	<input checked="" type="checkbox"/>	03 December 2
010002	IN Reorder Workbench	Inventory Reorder Workbench	<input checked="" type="checkbox"/>	31 December 2
010003	IN Min/Max Workbench	Inventory Min/Max Workbench	<input checked="" type="checkbox"/>	31 December 2
010004	AR Sales History Tab	Tab in Customer maintenance to display Sales Hist	<input checked="" type="checkbox"/>	31 December 2
010005	AR Pricing Tab	Tab in Customer maintenance to display Pricing	<input checked="" type="checkbox"/>	31 December 2

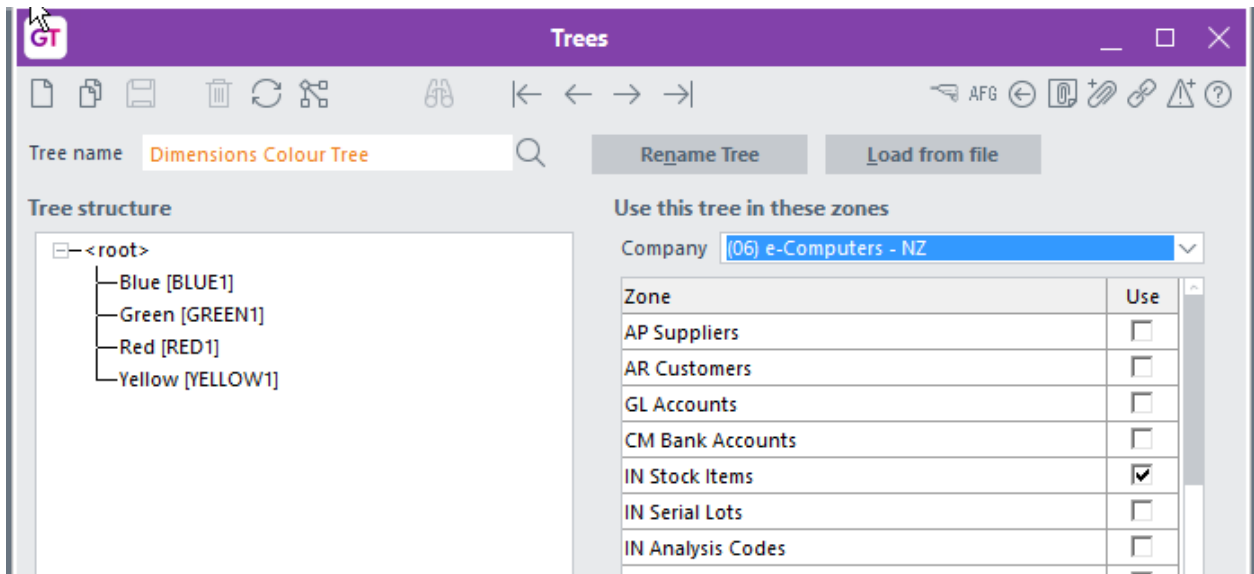
4. Select/Highlight the **Inventory Dimensions** App.
5. Click on the **Edit Users** button and select the users who will be configured to use Invoice Preview, for which companies.
6. **Save** and **Close** the form.

GREENTREE CONFIGURATION

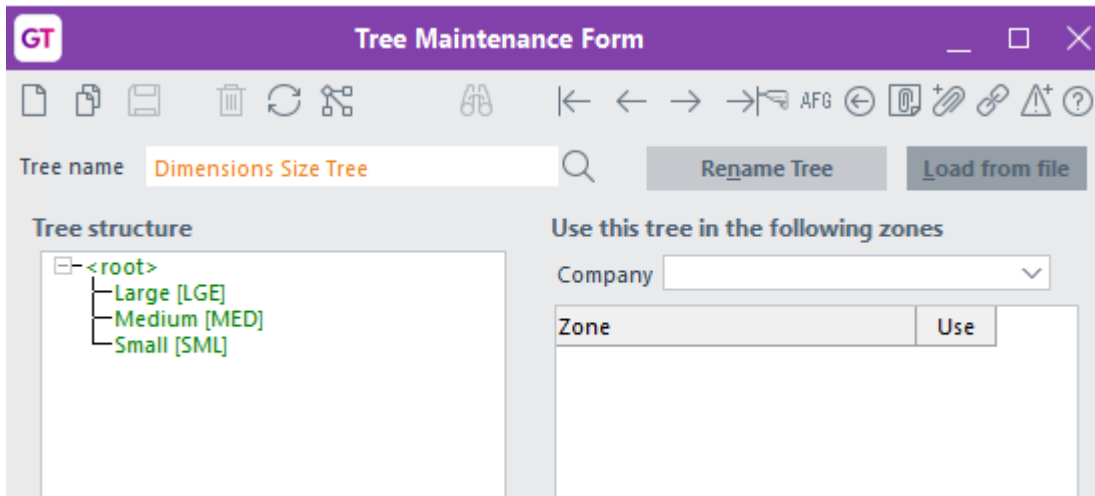
1. Set up all dimension trees required for creating child products.
2. Following this, group them as a Dimension Group.

| System | Trees |

The following trees are examples of dimensions that might be used.



The tree must be assigned to IN Stock Items.



GT **Inventory Item Tree Assignment**

Tree name:

Tree structure

- <All Inventory Items>
- <All Unallocated Inventory Items>
- <Root>
 - Blue [BLUE1]
 - Green [GREEN1]
 - Red [RED1]
 - Yellow [YELLOW1]

Item Code	Description	Analysis C
T200 BLUE1 LGE	Tape 200mm roll BLUE1 LGE	MISC
T200 BLUE1 MED	Tape 200mm roll BLUE1 MED	MISC
T200 BLUE1 SML	Tape 200mm roll BLUE1 SML	MISC
TS BLUE1 LGE	Tee Shirt BLUE1 LGE	MISC
TS BLUE1 MED	Tee Shirt BLUE1 MED	MISC
TSHIRTS BLUE1 LGE	T Shirts BLUE1 LGE	MISC
TSHIRTS BLUE1 MED	T Shirts BLUE1 MED	MISC
TSHIRTS BLUE1 SML	T Shirts BLUE1 SML	MISC

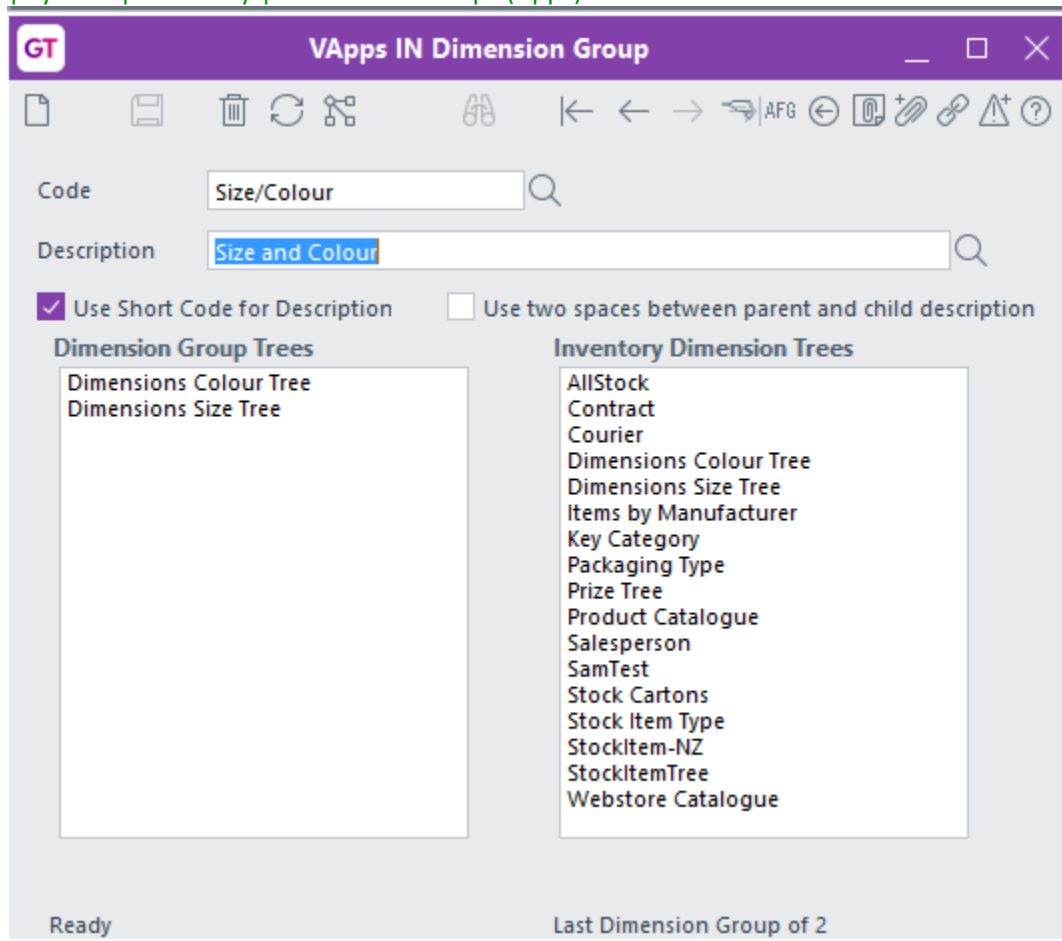
Select Range Select All 8 Inventory Items

Tree/zone settings

This is a mandatory tree Include in catalogue

Ready Tree 5 of 18

The individual dimension items will be assigned to the appropriate branch as they are created, the parent item is not assigned.



Code Code to reference this Dimension Group.

Description Longer description of the group.

Use Short Code for Description Used in the Generate Dimension Items in constructing the Stock Item description of the child part codes. This is the tree short code value such as LGE, MED, SML in example.

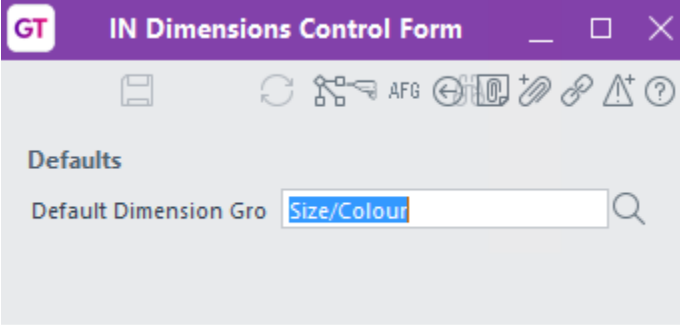
Use two spaces between parent and child descriptions

Used in the Generate Dimension Items in constructing the Stock Item description of the child part codes, to include an extra space before dimensions.

APP CONFIGURATION

In the Apps for Greentree Module Control, click the **Change** button beside the **Inventory Dimensions** App, which will launch the **IN Dimensions Control** form below. Note this configuration requires valid values IN Dimension Groups.

The Default Dimensions Group options available will depend on what has been defined within IN Dimension Groups. See Greentree Configuration above. This is used as default in Generate Dimension Items only.



The screenshot shows a software window titled "IN Dimensions Control Form" with a purple header bar containing the "GT" logo and window control buttons. Below the header is a toolbar with icons for save, refresh, undo, redo, AFG, print, copy, paste, link, warning, and help. The main content area is labeled "Defaults" and contains a text field for "Default Dimension Gro" with the value "Size/Colour" entered and a search icon to its right.