



# Microsoft Dynamics™ GP

## OVERVIEW OF TRINITY DISTRIBUTION MODULES

### Additional Charges

The sale of one item may frequently need to trigger the sale of another. This could, for example, be a deposit on a container, a delivery charge, a spares kit or an annual support charge. This Trinity module allows the user to create relationships between items so that additional charge lines are generated automatically by the system. The module lends additional functionality to both Sales and Purchase Order Processing.

#### Key Features

- Item relationship maintenance - link a trigger item to a number of other items
- Easy generation of the additional charge item on the sales order
- Additional charge calculation
- Additional charges in purchase receipts

#### Application Power

- Improved sales order accuracy and control
- Facilitates selling additional / related products, eg spares kits or support contracts
- Improved purchase receipt matching, adding standard charges automatically

### Advanced Distribution

A part of Great Plains since v7.5!

### Advanced Inventory Replenishment

A critical measure of success for any distributor is the ability to effectively balance inventory investment and customer service levels. In a typical business this process can be a complex and ultimately unrewarding challenge. Trinity's inventory replenishment module harnesses all of the transactional information in the business system to a set of rules and formulae based on best industry practice to generate realistic and informed demand forecasts.

#### Key Features

- Detailed demand tracking
- Automated demand forecast
- ABCD analysis
- Additional item parameters
- Intelligent order suggestion
- Key performance indicators

#### Application Power

- Improved buying efficiency
- Improved Customer Service
- Reduce overstocking releasing capital

## Advanced Picking

A part of Great Plains since v7.5!

## Available to Promise

A part of Great Plains since v7.5!

## Catalogue Based Sales

Sales order entry is a critical activity in a customer focused business like distribution. It may be the only regular point of contact with the customer so the speed, skill and knowledge that is shown by the order taker will have a major influence on that customer's perception of the whole company. An order taker who can answer technical queries, offer substitutes, introduce promotions and understand typical buying patterns will leave a lasting positive impression. Even if the order is being entered one step removed from the customer eg via fax or order form, it is vital that the operator can record the order quickly and accurately with appropriate information readily to hand.

### Key Features

- Catalogue and screen search
- Section search
- Item catalogue
- Item attributes
- Item display
- Information point
- Fast order entry

### Application Power

- Increased sales
- Increased profitability
- Improved customer service

## Catchweights

Many items require quantities to be tracked in more than one unit of measure, where there is no fixed relationship between the units of measure. This could be the case where the base unit of measurement is weight, but the item is sold in many sizes. The Catchweights module focuses on these requirements, providing catchweight functionality in Sales, Purchasing and Inventory functions.

### Key Features

- Set a series of units of measure for orders
- Adjust invoice units automatically once weighing is carried out
- Dual unit reporting
- Record and match company purchases easily
- Full Dual Tracking
- Enhanced lot handling
- Unit of measure enhancements

### Application Power

- Improved control
- Quality of information
- Improved picking management

## Consolidated Invoicing

Minimizing cost whilst providing the highest level of customer service is at the heart of distribution. The ability to consolidate many deliveries into a single invoice can significantly reduce administrative overheads and simplify financial ledgers. It is also important to meet customers' service level expectations by providing them with invoices in the format and to the level of consolidation that they specify. The Trinity Consolidated Invoicing module addresses all of these requirements.

*Each of these named modules can be purchased separately or in any combination to meet the needs of specific customers and industries*

## Key Features

- Customer options
- Automated invoicing routines
- Audit & drill down
- Invoice documents
- Document numbering

## Application Power

- Win more key accounts
- Save time and reduce paperwork
- Simplify accounts

## Customer Call Scheduling

Managing customer calls, whether it be as part of regular telesales schedules or responding to a one-off request for technical information, is at the heart of good customer relationship management.

The Trinity Customer Call Scheduling module offers sophisticated call management facilities, via simple implementation and set up routines, that radically improve customer contact management giving immediate benefits for sales and service.

## Key Features

- Call schedule management
- Call control
- Action linking
- User-defined results
- Follow-up calls
- Detailed history
- Call schedule import

## Application Power

- Telesales schedules
- Marketing campaigns
- Customer service benefits
- Delivery optimization

## Customer Templates

Successful distribution starts with successful selling. This means having immediately available all of the information that can help to maximize sales and ensure that the customer gets the product they need at the right price. The Trinity Customer Templates module has been produced with these objectives in mind.

## Key Features

- Easy generation of a number of templates
- Automatic generation of specific historical templates that reflect buying patterns
- Direct access to one or more templates during order entry
- Drill down to a complete list of previous orders
- Additional drill down to show the document containing a particular individual order line
- Customer template reports
- Full housekeeping and purge facilities

## Application Power

- Selling up
- Early problem identification
- Selling to price contract
- Price negotiation
- Spares and accessories lists
- Customer buying list

### Focused market bundles....

As part of the Microsoft Dynamics Vertical Industry Initiative Trinity now provides highly focused module bundles to address the specific need of Food & Beverage Distributors and High Volume Fast Service Wholesalers - Learn more at [www.trinitypartner.com](http://www.trinitypartner.com)

## Distribution Enhancements

Following on from Trinity's highly successful Advanced Distribution – now owned and distributed by Microsoft Dynamics, Trinity have produced a further set of general enhancements to distribution that provide some frequently requested functionality.

### Key Features

- Bar code management
- Part-shipment control
- Reason code analysis
- Item alternate key searches
- Batch tidy up facilities
- Customer specific items
- Customer PO number

### Application Power

- Bar code scanning
- Avoid expensive multi-shipments
- Returns monitoring

## Duty Processing

A key challenge for the inventory controller is to minimize or at least defer unnecessary inventory related expenditure whilst maintaining target service levels.

Holding inventory in a bonded location means that payment of duty, taxes and other tariffs on those items can be delayed until much closer to the point of sale. Alcoholic beverages and tobacco-based products are examples of products that are typically managed in this way.

Trinity Duty Processing recognises the differences between bonded and duty paid locations and manages the cost implications of moving specific

inventory between the two types of site.

### Key Features

- Bonded site management
- Item duty information
- Under bond sales & pricing
- Duty liability tracking

### Application Power

- Inventory control
- Duty accounting
- Responsive to individual customer requirements

## Extended Pricing Integration

Distribution is typified by intense pricing competition. With that can come complexity and often large volumes of price records, to meet the needs of a diverse inventory and a demanding customer base. Extended Pricing Integration simplifies the process by off-line data management that can be supported by data imports / exports that recognize and support the architecture of Microsoft Dynamics GP Extended Pricing.

### Key Features

- Import pricing data
- Export pricing data
- Full compatibility with Microsoft Dynamics extended pricing
- Customer specific pricing

### Application Power

- Accelerate data take-on
- Load new customer details

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## Extended Pricing Enhancements

Extended Pricing already offers a highly functional pricing model for Microsoft Dynamics GP including unlimited price lists, date sensitive pricing, customer contracts and promotions.

The Enhancements package provides new promotion options, but most importantly provides a new flexible cost-mark-up pricing function that will be welcomed by many distributors.

### Key Features

- New base cost list
- Different mark-up types
- New promotion options
- Aggregate pricing
- Negative discounts

### Application Power

- Minimize pricing maintenance
- Maximize flexibility
- Pro-active promotions

## Forward & Scheduled Sales Orders

In busy distribution markets it is not uncommon for a customer to place an order for phased delivery over a long period of time. It is important that such orders are recorded quickly and easily, but without having the effect of tying up inventory unnecessarily and prematurely. The buyer needs to be prompted to purchase at the appropriate times, to help ensure that inventory is available for the customer on a reliable just in time basis with deliveries triggered on appropriate dates.

### Key Features

- New forward order days parameters
- Scheduled order generator
- Allocation review
- Fulfilment order based on line requested ship date

### Application Power

- Business process automation
- More effective inventory utilisation
- JIT purchasing and delivery

## Front Counter (Trade Counter)

The Trinity Front Counter module provides functionality that allows companies who offer self collection and cash sales counter services at their premises to process these orders on their Microsoft Dynamics GP system at the point of sale. Supported by cash till, cash drawer and bar code scanner integration, these transactions automatically update current inventory levels as sales are made.

### Key Features

- Seamless integration
- Accurate auditing on till transactions
- Flexible user management
- Comprehensive transaction control

### Application Power

- Profit through integration
- Enhance customer relations

## Inter-Site Transfers

In a multi-site distribution environment the management of inter-site transfers can be critical to operational effectiveness. Whether it is for re-distribution of stock from a central warehouse to satellite depots or simply to control ad-hoc movements of inventory from one location to another, Trinity Inter-Site Transfers brings new levels of control and automation to this important and potentially costly business process.

### Key Features

- Inter-site order generation
- Inter-site order management
- Distribution and workflow
- In transit
- Receiving
- Auto receiving
- Item history

### Application Power

- Central site / satellites model
- Inter-site back-to-back ordering
- Distribution efficiency
- In-transit inventory accounting

## Item Life Cycle

In today's world of rapid change and brand-led marketing the life of the inventory item can be fleeting. New items may be developed, sourced, brought to market and then sold to exhaustion before being removed from inventory altogether, sometimes in a matter of months, or even weeks. Inventory management systems need to reflect this style of operation and the Trinity "Item Life Cycle" provides this facility. In keeping with the high standards set in all Trinity modules, this functionality is delivered in a way that is

flexible and highly configurable to meet individual business requirements.

### Key Features

- User configurable item status
- Fast and simple status assignment
- Interface with Trinity inventory look-up
- Interface with sales & purchase transaction entry

### Application Power

- An easy-to-use additional tool in Quality Assurance
- Progress tracking tool when bringing new products to market
- Launch new product ranges quickly and effectively into the sales cycle
- Item 'run-down' can be conducted in an orderly way

## Item Manager

Managing an inventory of several thousand items is a time consuming business involving a high risk of error. In today's fast moving environment new items and brands are constantly being introduced and replaced. The Trinity Item Manager module is a fast and error proof method for creating whole ranges of items across many sites in minutes.

### Key Features

- Item copy wizard
- Item site assign wizard

### Application Power

- Item range set up
- Mass un-assign
- Link to other Trinity modules
- Improved accuracy

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## Linked Item Selling

In many distribution businesses it is the ability to make the most of every sales opportunity that can mean the difference between success and failure. Linked Item Selling is a simple but effective tool that helps ensure that the all-important opportunity to 'up-sell' is not missed.

### Key Features

- Linked item groups
- Linked item selling

### Application Power

- Instant sales tool
- Complete the sale

## Price Negotiation

In many distribution environments it is not always possible to work from fixed price lists. It is important to be able to negotiate and agree prices with customers, sometimes over the telephone. To do this effectively the sales negotiator needs to be armed with all possible relevant information and have a tool that enables adjustment of any of the three key variables, price, cost and margin and see the overall result. Price Negotiation provides all of these facilities.

### Key Features

- New price negotiation window
- Information access
- Price change input
- Audit & track

### Application Power

- Real-time negotiation
- Sales person performance tracking

- Handling customer queries
- Improved accuracy

## Purchase Retrospective Discounts

Vendor incentives come in many forms and need to be appropriate to individual trading circumstances. For some vendors, particularly those who are selling to a customer regularly but in small amounts, it is often more practical to incentivize them over a period of time by providing a retrospective discount plan that will allow the customer to achieve a cumulative discount. The plan may be related to individual product volumes or overall turnover. The Trinity Purchase Retrospective Discounts module allows for the management and monitoring of these plans.

### Key Features

- Flexible discount plans and schedules
- Discount parameters
- Automated update routines
- Progress monitoring

### Application Power

- Manage complex plans and schedules
- Accrue for discount liability
- Monitor true profitability

### How do I learn all this software?

- A Virtual PC differencing disk is now available with easy to follow scripts for all of these modules. Find out more at [www.trinitypartner.com](http://www.trinitypartner.com)
- Or call Trinity for a WEBEX

## Re-order Level Management

The key challenge for any inventory controller is to strike a balance between maximizing the service levels offered to customers whilst ensuring that potentially wasteful overstocking is avoided. In a typical high volume environment with many inventory items, the controller will need to combine their knowledge and skills with the most flexible automated tools available to help establish optimum re-order levels and quantities. Trinity Re-order Level Management provides the tools required for the controller to achieve these efficiencies.

### Key Features

- User defined item parameters
- Data extraction
- Suggested re-order level calculation
- Import and review

### Application Power

- Inventory reduction
- Focused implementation
- Flexibility & control

## Reserved Stock

There are many reasons why inventory may need to be set-aside or earmarked for particular customers or salespeople without necessarily being part of a firm order. The Reserved Stock module provides the means of setting up and managing this type of transaction.

### Key Features

- Create named reserves of stock
- Assign each reserve a quantity and expiry date
- Set aside inventory (optional)

- Report on reserves using Crystal Reports
- Quantity based contract prices

### Application Power

- Sales activity monitoring
- Handling limited availability inventory
- Guarantee supply

## Returns Management

Every distribution business will wish to minimize the number of returns it has to handle. Return transactions reduce revenue and generate cost, therefore, when they do happen it is vital that they are managed as quickly and accurately as possible. Trinity Returns Management speeds up the handling of returns and improves operational control. At a financial level Returns Management can ensure that only valid returns that are linked to an originating invoice can be processed.

### Key Features

- Returns authorisation and collection
- Linking to originating invoice
- Step by step inventory control

### Application Power

- Selective empowerment
- Managing the collection process
- Automated credit valuation
- Inventory tracking

### How would I implement?

All the modules are supported by manuals and tutorials. Individually the products are not complex to learn and being in written in Dexterity much is intuitive. If you need assistance with more complex installs we can put you in touch with experienced partners.



## Sales Pattern Analysis

An important part of customer relationship management is to understand a customer's buying patterns; not just what products they buy, but how many and how regularly. Sales Pattern Analysis gives easy access to this information in a form prescribed by the user.

### Key Features

- Sales period definition
- History take-on
- Sales pattern enquiry & report
- Sales pattern warning

### Application Power

When used in conjunction with Catalogue Based Sales:

- Helps aid proactive selling
- Helps improved customer service
- Early identification of changes in buying patterns

## Sales Retrospective Discounts

Customer incentives come in many forms and need to be appropriate to individual trading circumstances. For some customers, particularly those who are buying regularly but in small amounts, it is often more practical to incentivize them over a period of time by providing a retrospective discount plan that will allow the customer to achieve a cumulative discount. The plan may be related to individual product volumes or overall turnover. Sometimes referred to also as 'Customer Earned Rebates' this Trinity module allows for the management and monitoring of these plans.

### Key Features

- Flexible discount plans and schedules
- Discount parameters
- Automated update routines
- Progress monitoring

### Application Power

- Manage complex plans and schedules
- Accrue for discount liability
- Monitor true profitability

## Unit of Measure Management

Products come packaged in many shapes and sizes. Buying by the pallet, counting by the case, selling by the carton or even individually, and at the end of the day users need to look at sales performance in one consolidating unit, perhaps tonnage, litres or cases. The Trinity Unit of Measurement module directs the power of Microsoft Dynamics GP to provide all of these facilities at the click of a button.

### Key Features

- Main stock unit identification
- Sales consolidation unit identification
- Split-pack management

### Application Power

- Stock visibility
- Enhanced sales analysis
- Split-pack visibility

### Global Reach; Great Scaleability

Trinity Modules for distribution have now been installed in over twenty countries worldwide and in sites from 2 to 250 users.

## Vehicle Load Planning

Effective use of a vehicle fleet, whether it is your own or a third party's, demands the ability to organise deliveries quickly and easily based upon known routes, product weights and vehicle capacities. Trinity Vehicle Load Planning provides all of these facilities in an easy to use, interactive planning module. The system also produces drivers' manifests plus the facility to produce documents on a 'by load' basis.

### Key features

- Customer delivery profiles
- Vehicle / carrier profiles
- Service level management
- Load building
- Documentation
- Enhanced route assignment
- Close loads
- Load profitability enhancements

### Application Power

- Optimise use of the vehicle fleet
- Improve journey times and mileage
- Identify space on vehicles ahead of time
- Ensuring delivery slots are correctly booked and recorded
- Plan workloads and identify potential bottlenecks well ahead of time

## Vendor Price Management

Distribution includes the entire supply chain of activity from product sourcing through to successful delivery and satisfied customers. One vital early link in the chain is accurate tracking of vendor pricing. This information provides vital information to support decisions in the buying process.

Further down the chain an accurately priced purchase order will reduce administration costs by speeding up the process of receipt and invoice matching, as well as improving accuracy of cost of sales. Vendor Price Management provides the functionality to enable all of these functions to be achieved.

### Key Features

- Vendor contracts
- Individual vendor prices
- Purchase order entry prompt
- Vendor price enquiry
- Auto purchase order generator for groups of suppliers
- Order valuation in auto order generator

### Application Power

- Improved buying power
- Administration efficiency
- Improve speed and accuracy

### To learn more...

Trinity modules are sold around the world via our trained and accredited premier partner channel. With an on-going development program, Trinity provides a one-stop shop for all your specialized distribution needs.

Download and evaluate Trinity by visiting our web site [www.trinitypartner.com](http://www.trinitypartner.com). User manuals are also available at the web site.

You can now also apply for a virtual PC differencing disk at the web-site.