

The Largest Independent Gathering  
of the Microsoft User Ecosystem



# Quick and Easy Advanced Warehousing for D365 F&O

Decrease Complexities,  
Deliver Results.

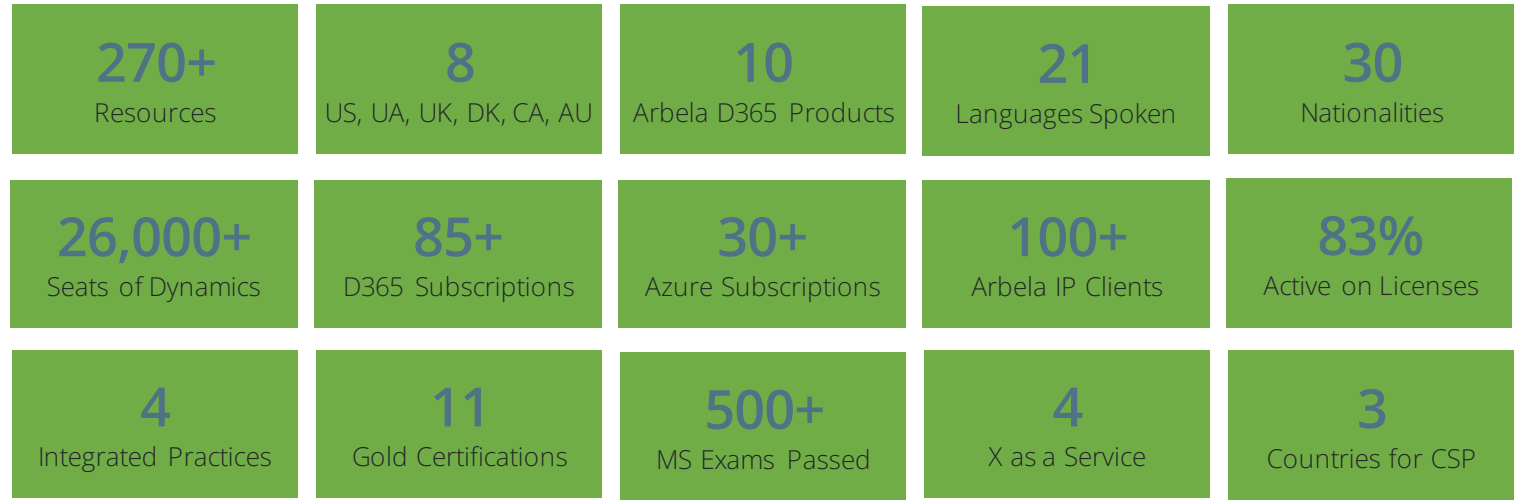
@ 2022 Dynamic Communities



Jessica Vaughn  
Delivery Lead  
Argano (Booth #1319)

Winner  
**Microsoft Partner**  
 2022 U.S. Partner of the Year  
 Dynamics 365 Finance Award

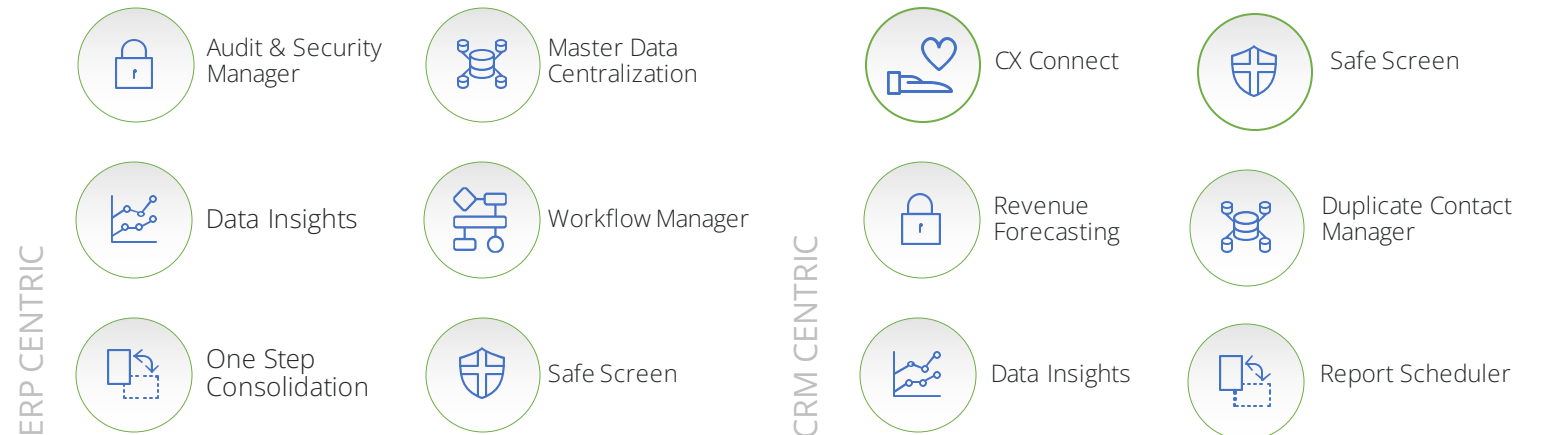
## By the Numbers



## Industry



## Products



- Gold Application Development
- Gold Application Integration
- Gold Cloud Business Applications
- Gold Cloud Platform
- Gold Cloud Productivity
- Gold Data Analytics
- Gold Data Platform
- Gold Datacenter
- Gold Enterprise Resource Planning
- Gold Security
- Gold Small and Midmarket Cloud Solutions

# | Agenda

- Things we don't have time for
- Needed Base Configurations
- Inbound
- Outbound

The Largest Independent Gathering of  
the Microsoft User Ecosystem

Decrease Complexities,  
Deliver Results.



For Users, By Users

@ 2022 Dynamic Communities

# Things We Don't Have Time For

- Advanced warehousing concepts
- Sites, warehouses and location setup
- Warehouse Mobile App setup

The Largest Independent Gathering of  
the Microsoft User Ecosystem

Decrease Complexities,  
Deliver Results.

# Needed Configurations



For Users, By Users

@ 2022 Dynamic Communities

# Products – Storage Dimension Groups

Finance and Operations | Cost management > Inventory accounting policies setup > Storage dimension groups

Edit +New Delete Related items Options

Filter

Ware  
Warehouse Management Processes

Standard view

## Storage dimension groups

Name	Description
Ware	Warehouse Management Pro...

Storage dimensions

Name	Active	Blank recei...	Blank issue...	Physical in...	Financial inventory	Coverage plan by dime...	For purchase
Site	✓			✓	✓	✓	✓
Warehouse	✓			✓		✓	✓
Location	✓			✓			
Inventory status	✓			✓			
License plate	✓	✓	✓	✓			

Warehouse specific setup

Use warehouse management p...  Yes

**WAREHOUSE SPECIFIC SETUP**

Mandatory  No

Primary stocking  Yes

# Products – Reservation Hierarchy

Finance and Operations | Product information management > Products > Released products

Edit +New Delete Product Purchase Sell Manage inventory Engineer Plan Manage projects Manage costs Commerce General Setup Options

**Maintain** | **Readiness checks** | **New** | **Product master** | **Languages** | **Set up**

Apply template | Readiness checks | Engineering product | Released product variants | Translations | Dimension groups v | Product attributes | Related prod  
Validate | Products not passed readiness checks | Product | Product dimensions | Reservation hierarchy v | Product categories | Unit conversi  
Release product structure | All products | Template v | Counting reason code policy v | Product catalogs | Advanced not

Released product details | Standard view v

## A0001 : HDMI 6' Cables

**General**

IDENTIFICATION	Item number	FURTHER IDENTIFICATION	ADMINISTRATION	Reservation hierarchy
Product type	<a href="#">A0001</a>	Product name	Storage dimension group	<a href="#">Default</a>
Item	Product number	HDMI 6' Cables	<a href="#">Ware</a>	Counting reason code policy
Product subtype	<a href="#">A0001</a>	Search name	Tracking dimension group	Product lifecycle state
Product	Engineering product category de...	HDMI 6' Cables	<a href="#">None</a>	Advanced notes group
Product service type	Product owner	Description	Item model group	
<a href="#">Not specified</a>			<a href="#">FIFO</a>	



# Products – Unit Sequence Groups

**Finance and Operations** | Product information management > Products > Released products

Edit +New Delete | Product Purchase Sell Manage inventory Engineer Plan Manage projects Manage costs Commerce General Setup Options

Maintain	Readiness checks	New	Product master	Languages	Set up
Apply template Validate Release product structure	Readiness checks Products not passed readiness checks All products	Engineering product Product Template	Released product variants Product dimensions	Translations	Dimension groups Reservation hierarchy Counting reason code policy

Released product details | Standard view

## A0001 : HDMI 6' Cables

Manage costs

Manage projects

Financial dimensions

Warehouse

PHYSICAL DIMENSION	FIXED PRODUCT LOCATIONS	PRODUCT FILTER CODES	GROUPING OF FILTER C
Unit sequence group ID <u>Pcs</u>	<input type="radio"/> Warehouse    Site    Location	Code 1 <u>15 to 30 C</u>	Group 1
Maximum pick quantity <u>0.00</u>	<input checked="" type="radio"/> 24    2    CP-001	Code 2	Group 2

# Warehouses

Finance and Operations | Inventory management > Setup > Inventory breakdown > Warehouses

Warehouse Options

sum

SUM2022  
Summit 2022 Demo

Standard view

## Warehouses

Warehouse	Name
<a href="#">SUM2022</a>	Summit 2022 Demo

**General**

**Master planning**

**Inventory and warehouse management**

Default receipt location <a href="#">RECV</a>	Default production finished goo...	Issue status after raw material pi... Picked	Default shipment mainten...
Default issue location	Default production input location	Default kanban finished goods lo...	Default location for credit

**Location names**

**Addresses**

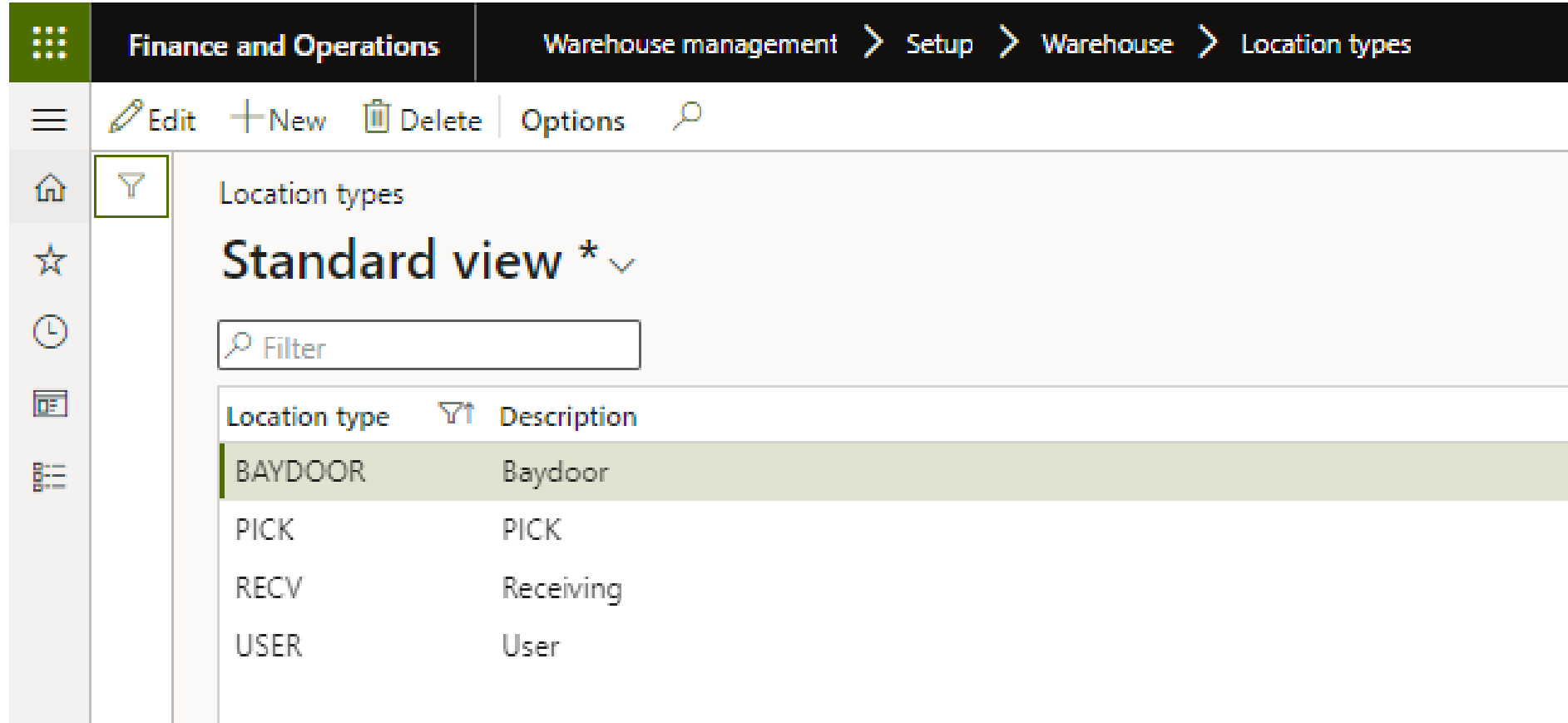
**Hierarchy**

**Retail**

**Warehouse**

Use warehouse management p... <input checked="" type="checkbox"/> Yes	<b>RESERVATIONS</b> Reserve only warehouse in pro...	<b>NEGATIVE INVENTORY</b> Financial negative inventory	<b>REDUCE PICKED QUANTITIES, results.</b> Decrement load line
--	---	---	--

# Location Types



The screenshot shows the Dynamics 365 Finance and Operations interface for the 'Location types' entity. The breadcrumb trail is 'Warehouse management > Setup > Warehouse > Location types'. The top bar includes 'Edit', 'New', 'Delete', and 'Options' actions. The main area displays 'Location types' in 'Standard view'. A filter box is present above a table with columns 'Location type' and 'Description'. The table lists four entries: BAYDOOR (Baydoor), PICK (PICK), RECV (Receiving), and USER (User). The 'BAYDOOR' row is highlighted.

Location type	Description
BAYDOOR	Baydoor
PICK	PICK
RECV	Receiving
USER	User

Finance and Operations Warehouse management > Setup > Warehouse > Locations USMF

Save +New Delete Options

Filter

- BAYDOOR Baydoor
- PICKNOLP PICKNOLP
- RECV Receive
- USER User

### Location profiles

Standard view

Location profile ID: BAYDOOR Name: Baydoor

#### General

Location format: BAYDOOR	Allow negative inventory: No	Allow mixed inventory batches: Yes	Allowed container type group:	Enable license plate positioning: No
Location type: BAYDOOR	Allow mixed items: Yes	Allow cycle counting: No	Enable item in location: No	Display mobile device LP posit...: No
Dock management profile ID:	Enable location product dimen...: No	Generate check digit: No	Enable location activity date a...: No	
Use license plate tracking: Yes	Allow mixed inventory statuses: Yes	Override rules for batch days: Yes	Enable location status: No	

Allowed product dimension mixing

Finance and Operations Warehouse management > Setup > Warehouse > Locations

Edit + New Delete Generate check digit On-hand list Transactions Location setup wizard Create inventory movement work Options

Locations

SUM2022 \* v

Filter  Generate check digits for location

<input type="radio"/> Warehouse	Location	Check digits	Location profile...	Zone ID	Additional Zone 1	Additional Zone 2
<input type="radio"/> SUM2022	A01		PICKNOLP			
SUM2022	A02		PICKNOLP			
SUM2022	B01		PICKNOLP			
SUM2022	B02		PICKNOLP			
SUM2022	BAYDOOR		BAYDOOR			
SUM2022	RECV		RECV			

Finance and Operations Warehouse management > Setup > Warehouse management parameters

Save Options

Standard view

## Warehouse management parameters

General

### Set up parameters for Warehouse management

Company information

Location profiles

User Location Profile  
USER

Location types

Staging location type  
STAGE

Packing location type  
PACK

Final shipping location type  
BAYDOOR

Sorting location type

Loads

Location directive failures

Cycle counting

Product filters

Reports

Packing

Receiving

Decrease Complexities,  
Deliver Results.

# Inbound



For Users, By Users

@ 2022 Dynamic Communities

- **Work (How)**
  - Pick and Put Only
  - Work Classes
- **Location Directives (Where)**
  - Only need Put
  - Fixed Locations/ Failure/ Pick Zone
- **Mobile Device Menu Item**
  - Receive and Put
  - Generate LP
  - User Directed



Decrease Complexities,  
Deliver Results.

# Inbound Demo



For Users, By Users

@ 2022 Dynamic Communities

Decrease Complexities,  
Deliver Results.

# Outbound



For Users, By Users

@ 2022 Dynamic Communities

- **Work Templates (How)**
  - Pick and Put Only
  - Work Classes
- **Location Directives (Where)**
  - Pick and Put
- **Wave Templates (When)**
  - Automate wave release
  - Process wave at release to warehouse
  - Automate wave release

- **Mobile Device Menu Items**
- Use existing work
- System Generated
- System directed work sequences
- Generate LP
- Work Classes

Decrease Complexities,  
Deliver Results.

# Outbound Demo



For Users, By Users

@ 2022 Dynamic Communities

Decrease Complexities,  
Deliver Results.

Questions?



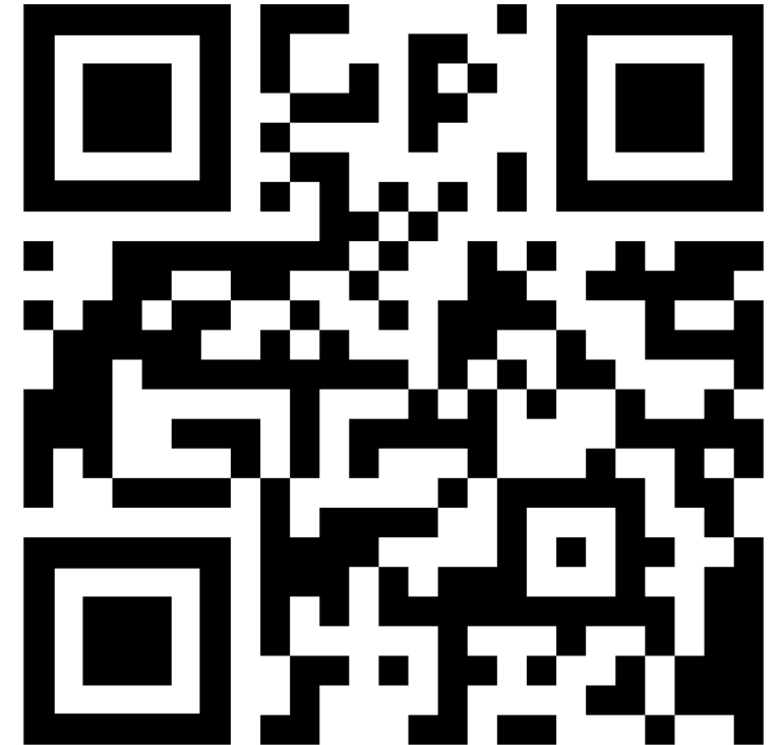
For Users, By Users

@ 2022 Dynamic Communities

# Thank you!

- **Please use this QR code to reach the Session Survey and tell us what you thought of this session!**

- [Jessica.Vaughn@Argano.com](mailto:Jessica.Vaughn@Argano.com)



**Thank you for  
attending!**

Decrease Complexities,  
Deliver Results.

The Largest Independent Gathering  
of the Microsoft User Ecosystem