Inventory 101

Aleiha Hanson, Sr ERP Consultant, HBS

Feb 17, 2026

VOLUNTEERS!!!!

- Are you a BC user?
- Do you consider yourself a SME on a particular BC function or topic?
- Do others consider you to be an SME on a particular BC function or topic?
- **Please consider being a presenter**
- **….or co-presenter!**

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Webinar Program

Upcoming Webinars

- 2/17: Inventory 101 with Aleiha Hanson.

- 3/5: AI in Business Central for Dummies with Steve Chinsky

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- Looking for late March and April speakers – touch base with Blaine and David if you have a topic to share!

- **SIGN UP FOR LEARNERS AND CHOOSE A REGION!**

Upcoming Key UG Events

Roadshows

Tampa (Supply Chain Management & AI) Feb 19, 2026
Washington, D.C. (Manufacturing) Feb 24, 2026
Atlanta (Supply Chain Management) Feb 25, 2026
Houston (IT) Mar 5, 2026
Seattle (AI) Apr 7, 2026
Vancouver (AI) Apr 9, 2026
Toronto (Business Central, AI) Apr 14, 2026
Montreal (SMB) Apr 16, 2026
Chicago May 5, 2026
Charlotte (Accounting/Finance) Jun 9, 2026
Pittsburgh (Manufacturing) Jun 23, 2026
Cleveland (Manufacturing) Jun 25, 2026

National User Group Meetings		
19-MAR	Cari Corozza	Your Business Central Reporting Roadmap
	Kim Dallefeld	Financial Reporting
16-APR	Ben Baxter	Planning (MRP/MPS): Where to start and how to dial in the results!
	Andrew Good	What's New in BC 2026 Wave 2: Leveraging the Microsoft Stack with your Business Central application
14-MAY	Gwendolynn Stearns	How to leverage the Excel, Word, Outlook integrations with BC (and more!)
	David Stevenson	Solving BC Integration Challenges with Azure Functions

October 11-15, 2026

Gaylord Opryland
2800 Opryland Dr,
Nashville, TN 37214

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...and now...

The Main Event!

About Me

- Long time DC member & contributor
- Past Dynamic GP end-user
- 5 Years Consulting – both for GP & BC
- Find me on LinkedIn or at a DC event!
- Fun fact – I spend most of my free time outdoors (at our cabin, hunting, fishing, riding motorcycles)

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Inventory 101

✓ Basic Requirements

✓ Nice to Have

✓ Optional Input

✓ Gotcha!

✓ GP to BC Comparisons

✓ Reporting

Basic Requirements

- Base UOM
    Tip – set the base UOM as the smallest to avoid decimals
- Costing
- Posting Groups (Inventory, Product, Tax)
- Replenishment
    Watch for dependencies based on how you replenish

Nice to Have

- Planning

  Set policies, use the worksheets to create POs and RPOs

- Defaults

  Setup pricing, costs, primary vendors

- References & Identifiers

  Define customer/vendor part numbers, UPCs, etc. to allow

  lookups by those numbers AND scanning from vendor barcodes

- Scrap & Lot Sizes

Optional (In most cases)

- Variants
    - Great way to keep your item list shorter
    - Is the variant required on the part?
- Attributes
    - Define details about a product & use CoPilot to create marketing text
- Substitutes
    - Do you constantly run short and swap products?
- Warehousing (Start basic)
    - Implement barcoding and warehousing for streamlined processes
    - Utilize bins to organize inventory

Gotchas!

- Item Tracking
  - Inbound vs. Outbound – "specific tracking"
- UOM Translations
- Stockkeeping Units (SKUs)
  - Necessary for planning when multiple locations exist
- Over pick (IW) & Over receive
  - Think about rules to "control" inventory oops

Example GP to BC Fields

GP		BC
Class	→	Template
Item Type	→	Type
List Price	→	Unit Price
Valuation: Perpetual	→	Costing: FIFO
Valuation: Periodic	→	Costing: Standard
Valuation: Average	→	Costing: Average
Current Cost	→	Unit Cost
Standard Cost	→	Standard Cost
Primary Vendor	→	Vendor No. / Purchase Price / Ref
ABC Code	→	Phys Invt Counting Period
Tax Schedule ID	→	Tax Group Code (plus others)
UOM Schedule	→	Base UOM / UOM Table
Accounts	→	Gen Prod & Inventory Posting
Substitute Item 1 & 2	→	Substitutes
Track	→	Item Tracking Code
Item Resource Planning	→	Planning Fields

Example GP to BC Processes / Reports

- Transaction Entry   →   • Item Journal
- Transfer / Item Bin Transfer   →   • Item Reclass
- PO Receipt   →   • PO Receipt or Warehouse Receipt
- Stock Count Schedule   →   • Physical Inventory Journal
- Price List(s)   →   • Sales Prices
- Item Inquiries   →   • Item Ledger Entries / Availability / Bin Contents

- Serial/Lot Trace   →   • Item Tracing
- Stock Status Report   →   • Inventory Valuation and/or Inventory by Location

Reports & Drilling

- Inventory Section – Drill into quantities
- Item Tab – Item Availability by…
- Bin Contents
- Item Tracking
- 20+ Inventory Reports (Inventory by Location, Inventory Valuation, etc.)
- Inventory Power BI Dashboard

Demo

THANK YOU