Contents

1 INF99X: Sample Course

- **Download Latest Student Handbook and AllFiles Content**

- **Are you a MCT?** - Have a look at our GitHub User Guide for MCTs
- **Need to manually build the lab instructions?** - Instructions are available in the MicrosoftLearning/Docker-Build repository

1.1 What are we doing?

- To support this course, we will need to make frequent updates to the course content to keep it current with the Azure services used in the course. We are publishing the lab instructions and lab files on GitHub to allow for open contributions between the course authors and MCTs to keep the content current with changes in the Azure platform.
- We hope that this brings a sense of collaboration to the labs like we've never had before - when Azure changes and you find it first during a live delivery, go ahead and make an enhancement right in the lab source. Help your fellow MCTs.

1.2 How should I use these files relative to the released MOC files?

- The instructor handbook and PowerPoints are still going to be your primary source for teaching the course content.
- These files on GitHub are designed to be used in conjunction with the student handbook, but are in GitHub as a central repository so MCTs and course authors can have a shared source for the latest lab files.
- It will be recommended that for every delivery, trainers check GitHub for any changes that may have been made to support the latest Azure services, and get the latest files for their delivery.

1.3 What about changes to the student handbook?

- We will review the student handbook on a quarterly basis and update through the normal MOC release channels as needed.

1.4 How do I contribute?

- Any MCT can submit a pull request to the code or content in the GitHub repro, Microsoft and the course author will triage and include content and lab code changes as needed.
- You can submit bugs, changes, improvement and ideas. Find a new Azure feature before we have? Submit a new demo!

1.5 Notes

1.5.1 Classroom Materials

1.6 It is strongly recommended that MCTs and Partners access these materials and in turn, provide them separately to students. Pointing students directly to GitHub to access Lab steps as part of an ongoing class will require them to access yet another UI as part of the course, contributing to a confusing experience for the student. An explanation to the student regarding why they are receiving separate Lab instructions can highlight the nature of an always-changing cloud-based interface and platform. Microsoft Learning support for accessing files on GitHub and support for navigation of the GitHub site is limited to MCTs teaching this course only.

1.7 title: Online Hosted Instructions permalink: index.html layout: home

2 Content Directory

Hyperlinks to each of the lab exercises and demos are listed below.

2.1 Labs

{% assign labs = site.pages | where_exp:"page", "page.url contains '/Instructions/Labs'" %} | Module | Lab | | --- | --- | {% for activity in labs %}| {{ activity.lab.module }} | [{{ activity.lab.title }}{% if activity.lab.type %} - {{ activity.lab.type }}{% endif %}](/home/ll/Azure_clone/Azure_new/MB-330-Microsoft-Dynamics-365-Supply-Chain-Management/{{ site.github.url }}{{ activity.url }}) | {% endfor %}

2.2 Demos

2.3 {% assign demos = site.pages | where_exp:"page", "page.url contains '/Instructions/Demos'" %} | Module | Demo | | --- | --- | {% for activity in demos %}| {{ activity.demo.module }} | [{{ activity.demo.title }}](/home/ll/Azure_clone/Azure_new/MB-330-Microsoft-Dynamics-365-Supply-Chain-Management/{{ site.github.url }}{{ activity.url }}) | {% endfor %}

2.4 demo: title: 'Demo: Deploying an ARM Template' module: 'Module 1: Exploring Azure Resource Manager'

3 Demo: Deploying an ARM Template

3.1 Instructions

1. Quisque dictum convallis metus, vitae vestibulum turpis dapibus non.
    1. Suspendisse commodo tempor convallis.
    2. Nunc eget quam facilisis, imperdiet felis ut, blandit nibh.
    3. Phasellus pulvinar ornare sem, ut imperdiet justo volutpat et.
2. Class aptent taciti sociosqu ad litora torquent per conubia nostra, per inceptos himenaeos.
3. Vestibulum hendrerit orci urna, non aliquet eros eleifend vitae.
4. Curabitur nibh dui, vestibulum cursus neque commodo, aliquet accumsan risus.

    ```
    Sed at malesuada orci, eu volutpat ex
    ```

5. In ac odio vulputate, faucibus lorem at, sagittis felis.
6. Fusce tincidunt sapien nec dolor congue facilisis lacinia quis urna.

    Note: Ut feugiat est id ultrices gravida.
7. Phasellus urna lacus, luctus at suscipit vitae, maximus ac nisl.
    - Morbi in tortor finibus, tempus dolor a, cursus lorem.
    - Maecenas id risus pharetra, viverra elit quis, lacinia odio.
    - Etiam rutrum pretium enim.
8. Curabitur in pretium urna, nec ullamcorper diam.

3.2 lab: title: 'Case study instructions' module: 'Module 0: Supply chain management case studies '

4 Case study instructions

- Please observe and follow the instructor introduction to the case study on the power point.
- The sequence of exercises in this UI may be different that the sequence the instructor will indicate to you. please follow the sequence indicated by the instructor.
- Bonus exercises: are exercises students can practiced on their own.

5 Supply chain management case studies

- **Case study 1:**
  - This case study will cover the product information management and inventory management modules.
  - **You** will be using the USMF legal entity.
  - **You** will be the SCM Functional consultant helping the warehouse managers and product designers in our scenarios.
- **Case study 2A:**
  - This case study will cover the procurement and sourcing modules.
  - **You** will be using the USMF legal entity.
  - **You** will be the SCM Functional consultant helping the procurement manager and purchasing clerk.
- **Case study 2B:**
  - This case study will cover the sales and marketing modules.
  - **You** will be using USMF legal entity.
  - **You** will be the SCM Functional consultant helping the sales manager and salesclerk.
- **Case study 3:**
  - This case study will cover the warehouse management and transportation management modules.
  - **You** will be using SRHQ and USP2 legal entities.
  - **You** will be the SCM Functional consultant helping the warehouse manager in addition to assisting other legal entity teams with their WMS setups.
- **Case study 4**:
  - This case study will cover the quality control and quality management feature which is part of the inventory management modules.
  - **You** will be using the USMF legal entity.
  - **You** will be the SCM Functional consultant helping the quality manager.
- **Case study 5:**
  - This case study will cover the master planning modules.
  - **You** will be using USMF and DEMF legal entities.
  - **You** will be the SCM Functional consultant helping the planning managers.

5.1 lab: title: 'Case study 1 Product information management and inventory management' module: 'Module 2: Implement inventory management '

6 Case study 1 Product information management and inventory management

6.1 Objectives

- Create and manage products.
- Manage inventory pricing and costing.
- Configure inventory management.
- Manage and process inventory activities.

6.2 Scenario

Company Information

USMF is a United States company that manufactures products for several different industries and has a diverse portfolio of products.

Business Challenges and Requirements

USMF recently implemented Dynamics 365 Supply Chain Management. They hired a new full-time team to manage the warehouse and inventory, the new staff doesn't have Dynamics 365 Supply Chain management knowledge.

Your Role

You are the Dynamics 365 Supply Chain Management functional consultant that implemented the solution. You are called to help the new staff in multiple areas.

6.3 Exercise #1 Adding products to a new warehouse using basic inventory management.

Objective: Add products to a new warehouse using basic inventory management.

You are the supply chain management functional consultant on a project team advising your customer on best way to create new warehouse to store the overflow of new products.

Your customer is managing a small warehouse that does not require the full capabilities of warehouse management systems (WMS).

you and the Solution architect are in favor of using basic inventory management to help them creating the new warehouse.

What would you do?

6.3.1 Set the default location capacity.

1. Go to **Inventory management > Setup > Inventory and warehouse management parameters**.
2. Click the **Locations** tab.
3. In the **Standard width** field, enter 450.
4. In the **Standard depth** field, enter 250.
5. In the **Standard height** field, enter 200.
6. Click **Save**.
7. Close the page.

6.3.2 Define the location name format.

1. Go to **Inventory management > Setup > Inventory breakdown > Warehouses**.
2. Click **New**.
3. In the **Warehouse** field, type 17.
4. In the **Name** field, type Raw materials.
5. In the **Site** field, click the drop-down button to open the lookup.
6. In the list, find and select site 1.
7. Expand the **Location names** section. The options in this section define the default format for location names. In our example, we'll include the aisle number, rack number and shelf number.
8. Set the **Include aisle** option to **Yes**.
9. Set the **Include rack** option to **Yes**.
10. In the **Format** field, for the rack, type -##
11. Set the **Include shelf** option to **Yes**.

12. In the **Format** field, for the shelf, type -##
13. Click **Save**.

6.3.3 Define warehouse locations

1. On the Action Pane, click **Warehouse**.
2. Click **Location Wizard**.
3. On the Welcome screen, click **Next**.
4. De-select the **Outbound docks** option
5. De-select the **Bulk locations** option
6. Click **Next**.
7. On the Create inventory aisles screen, click **Next**.
8. On the Edit and delete aisles screen, click **Next**.
9. On the Create inbound docks screen, click **Next**.
10. On the Edit and delete inbound docks screen, click **Next**.
11. On the Create picking locations screen, click **Next**.
12. On the **Specify additional information for all your picking locations** screen, note that the physical dimensions shown on this page are the ones that you set at the start of this procedure. Click **Next**.
13. On the **Edit and delete picking locations** screen, click **Next**.
14. Click **Finish**.
15. Close all pages.

6.4 Exercise #2 Creating a standard cost version that uses a specific model group.

Objective: Create a standard cost version to record certain model group products.

The warehouse employee at USMF, need to create a standard cost version to record products that use the item model group with inventory model of Standard. The items must be grouped based on FIFO inventory model.

What would you do to help this employee?

6.4.1 Create cost version

1. Go to **Cost management > Predetermined cost policies setup > Costing versions**.
2. Click **New**.
3. In the **Costing type** field, select **Standard cost**.
4. In the **Version** field, type **SeahorseST**.
5. In the **Name** field, type **Seahorse Standard Costing**.
6. In the **Block activation** field, select **No**.
7. Click **Save**.
8. Close the page.

6.4.2 Create item model group

1. Go to **Cost management > Inventory accounting policies setup > Item model groups**.
2. Click **New**.
3. In the **Item model group** field, type **STDN**.
4. In the **Name** field, type **Standard Cost**.
5. In the **Inventory model** field, select **Standard cost**.

6. Expand the **Inventory policies** section.
7. In the **Approved vendor check** method field, select **No check**.
8. Click **New**.
9. In the **Item model group** field, type **FIFO2**.
10. In the **Name** field, type **FIFO 2**.
11. Click **Save**.
12. Close the page.

6.4.3 Create tracking number group

1. Go to **Inventory management > Setup > Dimensions > Tracking number groups**.
2. Click **New**.
3. In the **Number group** field, type **ASer**.
4. In the **Name** field, type **Auto-Serial**.
5. Select No in the **Date** field.
6. Select No in the **Lot ID** field.
7. Select Yes in the **Number sequence No.** field.
8. Select Yes in the **Only for inventory transactions** field.
9. Select Yes in the **On physical update** field.
10. Click **New**.
11. In the **Number group** field, type **USer**.
12. In the **Name** field, type **Unique-Serial**.
13. Select No in the **Date** field.
14. Select No in the **Lot ID** field.
15. Select Yes in the **Number sequence No**. field.
16. In the **Number sequence code** field, choose any number sequence of your choice.
17. Select Yes in the **Only for inventory transactions** field.
18. Select Yes in the **On physical update** field.
19. Set **Per qty.** to **1**.
20. Click **New**.
21. In the **Number group** field, type **Batch**.
22. In the **Name** field, type **Auto Batch**.
23. Select No in the **Date** field.
24. Select No in the **Lot ID** field.
25. Select Yes in the **Number sequence No**. field.
26. In the **Number sequence code** field, choose any number sequence of your choice
27. Select Yes in the **Only for inventory transactions** field.
28. Select No in the **On physical update** field.
29. Close the page.

6.5 Exercise #3 Adding and releasing new products to a warehouse

Objective: Add new products with and without variants.

Some new products are introduced by USMF and must be added to the new warehouse. As supply chain manager, you will have to create 2 new products:

- A V-neck T-shirt with multiple variants that has different colors and sizes. This item will be available in size Small, Medium and Large and in colors: Black and Red.
- The product type should set to: Product with no variance for the cabinets

What would you do?

6.5.1 Create product masters

1. Navigate to **Product information management>Products>Released products**.
2. Click **New**.
3. In the **Product type** field, select **Item**.
4. In the **Product subtype** field, select **Product master**.
5. In the **Product number** field, type **GTLS001**.
6. In the **Product name** field, type **V Neck T-Shirt**.
7. In the **Search name** field, type **VNeckTShirt**.
8. In the **Retail category** field, select **Apparel and Footwear**.
9. In the **Product dimension group** field, select **ColorSize**.
10. In the **Configuration technology** field, select **Predefined variant**.
11. In the **Item model group** field, select **FIFO** (First In-First Out).
12. In the Item group field, select **Audio**.
13. In the **Storage dimension group** field, select **SiteWH**.
14. In the **Tracking dimension group** field, select **None**.
15. In the **Inventory unit** field, select **ea** (Each).
16. In the **Purchase unit** field, select **ea** (Each).
17. In the **Sales unit** field, select **ea** (Each).
18. In the **BOM unit** field, select **ea** (Each).
19. In the Sales Taxation, **Item sales tax group** field, select **ALL** (All sales tax codes).
20. In the Purchase Taxation, **Item sales tax group** field, select **ALL** (All sales tax codes).
21. Click **OK**.
22. Close all pages.
23. Navigate to **Product information management>Products>Released products**.
24. Using quick filter search by item number for **GTLS001**.
25. Click item **GTLS001** to open the product master record.
26. Click the **Product dimensions** button from the **Product** action pane.
27. Select the **Sizes** tab.
28. Click **New** in the **Define sizes for a product master** section.
29. In the **Size** field, enter **Small**.
30. In the **Name** field, enter **Small**.
31. In the **Description** field, enter **Small Size**.
32. Click **New**.

33. In the **Size** field, enter **Medium**.
34. In the **Name** field, enter **Medium**.
35. In the **Description** field, enter **Medium Size**.
36. Click **New**.
37. In the **Size** field, enter **Large**.
38. In the **Name** field, enter **Large**.
39. In the **Description** field, enter **Large Size**.
40. Select the **Colors** tab.
41. Click **New** in the **Define sizes for a product master** section.
42. In the **Color** field, enter **Black**.
43. In the **Name** field, enter **Black**.
44. In the **Description** field, enter **Black color**.
45. Click **New**.
46. In the **Color** field, enter **Red**.
47. In the **Name** field, enter **Red**.
48. In the **Description** field, enter **Red color**.
49. Click **Save**.
50. Close the form.
51. Click **Released Product variants** button from the **Product** action pane.
52. Click **Variant suggestions** from the **Product Variant** action pane.
53. Click **Select all**.
54. Click **Create**.

Close all pages.

6.6 Exercise #4 Using the inventory movement journal to initialize stock levels in a warehouse

Objective: Initialize stock levels in a warehouse by using movement journals.

USMF company has some inventory opening balance for one of its products and is it necessary to add to that stock. There are no specific purchase order references for the items, so the opening balance will have to be forced into the system.

The warehouse manager, will have to use the inventory movement journal to add the opening balance and use an offset account to balance the transaction in the general ledger.

In USMF, its possible to update the on-hand inventory manually using an Inventory movement journal.

It is also possible to update on-hand inventory by importing transactions in data entities.

What would you do to guide the warehouse manager?

6.6.1 Initialize stock levels in the warehouse using movement journals

1. Go to **Inventory management > Journal entries > Items > Movement**.
2. Click **New**.
3. In the **Name** field, click the drop-down button to open the lookup.
4. Select **Imov**. It is a good practice to use different journal name templates for the different business purposes.

5. In the **Offset account** field, specify the values **140200.** This is the offset account that will be the default account on the journal lines. It is possible to override the default to assign different offset accounts per line.
6. Click **OK**.
7. Click **New** in the **Journal lines** fast tab.
8. In the Item number field, click the drop-down button to open the lookup.
9. Select item **A0001**.
10. Click the **Inventory dimensions** tab.
11. In the **Site** field, click the drop-down button to open the lookup.
12. Select site **1**.
13. In the **Warehouse** field, click the drop-down button to open the lookup.
14. Select warehouse **13**.
15. In the **Location** field, click the drop-down button to open the lookup.
16. Select location **13**.
17. In the **Quantity** field, enter a number.
18. Click **Save**.
19. Click **Post**.
20. Check or uncheck the **Transfer all posting errors to a new journal** check box. If you enable this option, any lines that fail to post will be copied to a new journal. You can use the information in the log to correct the issues and then re-post the lines.
21. Click **OK**.
22. Close all pages.

6.7 Exercise #5 Using the inventory transfer journal to move items to a new location in the warehouse

Objective: Move items from a plate-controlled location to a location that is not license plate controlled.

6.7.1 Transfer physical inventory within the warehouse using transfer journals

1. Go to **Inventory management>Journal entries>Items>Transfer**.
2. Click **New**.
3. In the **Name** field, enter or select **ITrf**.
4. Click **OK**.
5. Click **New** in the **Journal lines** fast tab.
6. In the **Item number** field, enter or select **A0001**.
7. In the **From site** field, enter or select **2**.
8. In the **To site** field, enter or select **2**.
9. In the **From warehouse** field, enter or select **24**.
10. In the **To warehouse** field, enter or select **24**.
11. In the **From location** field, enter or select **FL-001**.
12. In the **To location** field, enter or select **BULK-001**.
13. In the **Quantity** field, enter a number.
14. Click the **Inventory dimensions** tab in the **Line details** fast tab.

15. In the **License plate** field, in both the **From inventory dimensions** and **To inventory dimensions** groups, enter or select **24**.
16. Click **Save**.
17. Click **Post**.
18. Click **OK**.
19. Click **Inventory** in the **Journal lines** fast tab.
20. Click **Transactions** to see the transfer.
21. Close all pages.

6.8 Exercise #6 Adjusting stock levels using the inventory adjustment journal

Objective: Adjust stock levels after an error by using the inventory adjustment journal.

During the transfer journal processing a user recorded the wrong number of items moved to the new location.

You were asked to use the inventory adjustment journal to fix quantity.

You will also need to adjust the stock levels of products in the warehouse.

How would you perform this?

6.8.1 Adjust stock levels in the warehouse

1. Go to **Inventory management > Journal entries > Items > Inventory adjustment**.
2. Click **New**.
3. In the **Name** field, click the drop-down button to open the lookup.
4. In the list, click on the inventory adjustment journal name you want to use. Some other fields will be populated based on the setup of the inventory adjustment journal name you select.
5. Click **OK**.
6. Click **New** in the **Journal lines** fast tab.
7. In the **Item number** field, select **D0001**.
8. In the **Site** field, click the drop-down button to open the lookup.
9. In the list, select a site 1.
10. In the **Warehouse** field, click the drop-down button to open the lookup.
11. In the list, select warehouse 13. If you have selected an item with Location as a mandatory dimension, you would have to specify the location here.
12. In the **Quantity** field, enter a number. The cost price field specifies the cost per unit for inventory receipts. If the cost is not specified for the item number or if you wanted to change it manually, you would do this here.
13. Click **Validate**.
14. Click **OK**.
15. Note that the Journal is OK, and click **Post**. When you post this kind of journal, an inventory receipt or issue is posted, the inventory level and value are changed, and ledger transactions are generated.
16. Click **OK**.
17. Close all pages.

6.9 Exercise #7 Using the inventory counting journal to compare D365 inventory amounts to manually counted quantities

Objective: Use the inventory counting journal to compare manually counted amounts to the on hand recorded amounts in D365 supply chain and post the transaction.

A few days after you have adjusted stock levels, the warehouse manager decide to manually count the items in that specific area of the warehouse.

The warehouse manager wants to enter the manually counted quantity and not sure what to use.

how would you help?

6.9.1 Use counting journals

1. Go to **Inventory management > Journal entries > Item counting > Counting**.
2. Click **New**.
3. In the **Name** field, click the drop-down button to open the lookup.
4. In the list, click on the inventory counting journal **Icnt**. Some other fields will be populated based on the setup of the inventory counting journal name that you select.
5. In the **Worker** field, click the drop-down button to open the lookup.
6. In the list, select the worker you want to use.
7. Click **Select**.
8. Click **OK**.
9. Click **New** in the **Journal lines** fast tab.
10. In the **Item number** field, click the drop-down button to open the lookup.
11. In the list, find and select **A0001**.
12. In the **Site** field, click the drop-down button to open the lookup.
13. In the list, find and select site **2**.
14. In the **Warehouse** field, click the drop-down button to open the lookup.
15. In the list, find and select warehouse **24**.
16. In the **Location** field, click the drop-down button to open the lookup.
17. In the list, find and select location **BULK-001**.
18. In the **Counted** field, enter a number.
19. If you enter a counted number that's different than the number shown in the **On-hand** field, the **Quantity** field is updated to show the discrepancy.
20. Click **Save**.
21. Click **Post**. When you post an inventory counting journal, if the counted amount differs from the amount that's reported in the **On-hand** field, an inventory receipt or issue is posted, the inventory level and value are changed, and ledger transactions are generated.
22. Click **OK**.
23. Close all pages.

6.10 Exercise #8 Creating a BOM in the BOM designer (Bonus)

Objective: Create a BOM in the BOM designer with a title, item group, site and quantities.

The designer at USMF has received a new specification for the enclosure side of a cabinet. and she has requested your assistance. You see that an item is not set up for this specification, so you only need to create a simple BOM with component lines. Use employee 000020, Julia Funderburk, to approve the BOM.

Create a BOM titled "High Quality Speaker" and assign it to the Audio item group at site 1. Use the BOM designer to add items with warehouse 11 and the following quantities:

- 1 qty of M0008 / High End Cabinet / Black
- 2 qty of M0002 / Mid-Range Speaker Unit
- 1 qty of M0009 / Protective Corners

You will:

6.10.1 Create a BOM in the BOM designer.

1. Go to **Product information management > Bills of materials and formulas > Bills of materials**.
2. Click **New**.
3. In the **Name** field, type **High Quality Speaker**.
4. In the **Site** field, type **1**.
5. In the **Item group** field, enter or select **Audio**.
6. Click **Designer**.
7. Click **BOM lines**.
8. Click **Add to component BOM**.
9. In the list, find and select **M0008 / High End Cabinet / Black** (the checkbox on the left should be checked).
10. Click **OK**.
11. Click **BOM lines**.
12. Click **Add after line.**
13. In the list, find and select **M0009 / Protective Corners**.
14. Click **OK**.
15. Click **BOM lines**.
16. Click **Add before line**.
17. In the list, find and select **M0002 / Mid-Range Speaker Unit**.
18. Click **OK**.
19. Close the page.
20. Refresh the page.
21. In the list of Bill of materials lines, find and select the row for **M0002 / Mid-Range Speaker Unit**.
22. Set **Quantity** to **2.0000**.
23. Click **Approval at the top**. Select **000020**, Julia Funderburk.
24. Click **OK**.
25. Close all pages.

6.11 lab: title: 'Case study 2A Procurement and sourcing ' module: 'Module 3: Implement and manage supply chain processes '

7 Case study 2A Procurement and sourcing

7.1 Objectives

- *Create a purchase requisition using a procurement category and then submit and approve the purchase requisition*
- *Create a request for quotation, reply and accept a vendor's reply.*

- *Create a purchase requisition permission policy with a new requester name and create an office supplies purchasing policy.*
- *Create a purchase order for two different items, each to be delivered to a different site.*
- *Create a charge code for vendor transport charges on various items.*
- *Create a vendor charge group and assign it to two vendors.*
- *Create an item charges group and use it to create an automatic charge.*
- *Set up change management so purchase orders are approved prior to confirmation.*
- *Create a purchase order from on a trade agreement based on value or quantity.*
- *Create a trade agreement for domestic vendors that specifies a fixed price for a certain item.*
- *Create a guest user for a supplier so they can access the system.*

7.2 Exercise #1 Create, submit, and approve a purchase requisition

Objective: Create a purchase requisition using a procurement category and then submit and approve the purchase requisition.

An employee of the IT department of USMF wants a longer HDMI cables for the new office and meeting rooms. a purchase requisition will have to go through the internal approval process before the items are purchased.

The employee must identify a vendor for the request and the quantity required. The employee do not know the actual part number, so you will use a procurement category instead.

The IT employee asked you to help. What system features you would show and help her to use?

7.2.1 Create and process a purchase requisition

1. Go to **Procurement and sourcing**, then to **Purchase requisitions**, and then to **All purchase requisitions**.
2. Click **New**.
3. Name: Enter **New HDMI Cables**.
4. Click **OK**.
5. Reason: Select **General** (General supplies).
6. Details: Enter **New, longer HDMI cables**.

7.2.2 Add an item to the purchase requisition.

1. Click **Add products** in the **Purchase requisition lines** FastTab.
2. Select the **Computers** procurement category (a subcategory of Office Machines).
3. Click **Add unlisted product to lines**.
4. Product name: Enter **24in HDMI Cable**.
5. Unit: Enter **ea**.
6. Click **OK**.
7. Change to the **Line details** tab.
8. Product name: enter **24-inch HDMI cable**.
9. Quantity: Enter **5**.
10. Unit price: Enter **41.49**.
11. Vendor Account: Select **1001** (Acme Office Supplies).
12. Click **OK**.
13. Click **Save**.

7.2.3 Submit the purchase requisition created in the previous practice for approval, and perform the approval process.

1. Go to **Procurement and sourcing**, then to **Purchase requisitions**, and then to **All purchase requisitions**.
2. Open the draft purchase requisition created in the previous practice.
3. Click **Workflow** at the top, and then click **Submit**.
4. Comment: Enter **Request for longer HDMI cables.**
5. Click **Submit**.
6. Click **Workflow>Workflow history**
7. Click **Refresh a** few times and wait until the work items shows records.
8. Click **Reassign** button.
9. Select **Admin** in the **User field.**
10. Click **Reassign**.
11. Click **Refresh.**
12. Close the **Workflow history** page.

7.2.4 Approve the purchase requisition.

1. Click **Workflow** at the top, and then click **Approve**.
2. Comment: Enter **Approved.**
3. Click **Approve**

7.3 Exercise #2 Create, reply and accept a request for quotation (Bonus)

Objective: Create a request for quotation, reply and accept a vendor's reply.

After the Purchase requestion was approved, the Procurement department found that there were a lot of other requests for the same type of cables, so they have decided to buy a larger quantity to benefit from bulk pricing.

The purchase clerk must create and process a request for quotation for a quantity of 500 of A0001 HDMI 6 foot cables that will be sent to two different vendors, US-111 (Contoso Office Supply) and US-103 (Rain Projectors), and it should be set to update vendor replays in order to choose the best offer.

You will have to do the following:

- Create the request for quotation and send to the appropriate suppliers
- Add a line to the request for quotation.
- Reply to a request for quotation.
- Accept a vendor's reply.

7.3.1 Create the request for quotation and send to the appropriate suppliers.

1. Go to **Procurement and sourcing**, then to **Requests for quotations**, and then to **All requests for quotations**.
2. Click **New**.
3. Purchase type: Select **Purchase order**.
4. Document title: Enter **HDMI Cables**.
5. Site: Select **1** (Home speakers production).
6. Warehouse: Select **13** (Site 1 – Finished Goods).
7. Click **OK**.

7.3.2 Add a line to the request for quotation.

1. If necessary, click **Add line** to add a line to the list.
2. Line type: Select **Item**.
3. Item number: Select **A0001** (HDMI 6' Cables).
4. Quantity: Enter **500**.
5. Click **Save**.
6. Send the request for quotation to the vendors.
7. Click **Options** at the top, click **Change view**, and then select **Header view**.
8. Open the **Vendor** FastTab.
9. If necessary, click **Add** to add a line to the list.
10. Vendor account: Select **US-111** (Contoso office supply).
11. Click **Add**.
12. Vendor account: Select **US-103** (Rain Projectors).
13. Click **Save**.
14. Click **Quotation** at the top, and then select **Send** under the **Process** section.
15. Make sure both vendors appear.
16. Click **OK**.

7.3.3 Reply to a Request for Quotation

Update the request for the quotation created in the previous practice with the vendor responses.

7.3.4 Process the quotation for US-103. Enter the vendors' replies to the request for quotation.

1. Go to the **Procurement and sourcing** module, then to **Requests for quotations**, and then to **All requests for quotations**.
2. Open the request for quotations created in the previous practice.
3. Click **Options** at the top, click **Change view**, and then select **Header view**.
4. Click the **Vendor** FastTab.
5. Click the **Request for quotation** number for **US-111** (Contoso office supply).
6. Quantity: Enter **500**.
7. Unit: Enter **ea**.
8. Unit price: Enter **10.00**.
9. Click **Save**.
10. Close the **Request for Quotation Reply** form.
11. Click the **Request for quotation** number for **US-103** (Rain Projectors).
12. Quantity: Enter **500**.
13. Unit: Enter **ea**.
14. Unit price: Enter **8.00**.
15. Click **Save**.
16. Close the **Request for Quotation Reply** form.

7.3.5 Accept a vendor's reply.

1. Click the **Request for quotation** number for **US-103** (Rain Projectors).
2. Click **Reply** at the top, and then select **Accept** under the **Process** section.
3. Click **OK**.

7.4 Exercise #3 Create purchase requisition and purchasing policies (Bonus)

Objective: Create a purchase requisition permission policy with a new requester name and create an office supplies purchasing policy.

The purchasing manager decided to make some updates.

He wants to update the requisitions permission policy with a new requester name and create a new purchasing policy for office supplies with an additional category.

He reached out for help and you will have to do the following:

- Create a purchase requisition permission policy.
- Create a purchasing policy.

7.4.1 Create a purchase requisition permission policy.

1. Go to **Procurement and sourcing**, then to **Setup**, then to **Policies**, and then to **Purchase requisition permissions**.
2. Select **Mike Danseglio** in the list of workers.
3. Change to the **Requester** FastTab.
4. Click **Add**.
5. Name: Select **Susan Burk**.
6. Click **Save**.

7.4.2 Create a purchasing policy

1. Go to the **Procurement and sourcing** module, then to **Setup**, then to **Policies**, and then to **Purchasing policies**.
2. Click **Procurement Policy USMF**.
3. Click the **Policy rules** FastTab.
4. Click **New**, then **Policy**.
5. Name: Enter **Office Supplies**.
6. Description: Enter **Office supplies policies**.
7. Policy rule type: Select **Category access policy rule**.
8. Click **Create policy rule** in the **Policy rules** section on the right.
9. Select **Office and Desk Accessories** in the **Available Categories** list.
10. Click the right arrow button.
11. Click **OK**.
12. Click **Save**.

7.5 Exercise #4 Create a purchase order for delivery to multiple sites

Objective: Create a purchase order for two different items, each to be delivered to a different site.

The purchasing clerk at USMF wants to create one purchase order for a quantity of 5 of item T0003 (surround sound receiver) from Acme Office Supplies, to be delivered today to Site 1, and a quantity of 5 of item M1101 (foam reacting agent) to be delivered to the Quality Testing Center, 123 W. Cherry Street, zip code 83642.

He is not clear how to perform this using the system and asking your help

What would you do?

7.5.1 Create a purchase order

1. Go to the **Procurement and sourcing** module, then to **Purchase orders**, and then to **All purchase orders**.
2. Click **New**.
3. Vendor account: Select **1001** (Acme Office Supplies).
4. Delivery date: Verify the current date in the **Delivery date** field (this should be the default value).
5. Click **OK**.
6. Add items to the purchase order:
    1. Item number: Select **T0003** (SurroundSoundReceive).
    2. Quantity: Enter **5**.
    3. Unit: Enter **ea**.
    4. Click **Add line**.
    5. Item number: Select **M1101** (Foam reacting agent).
    6. Quantity: Enter **5**.
    7. Unit: Enter **PL**.
7. Select delivery addresses for the items:
    1. Select the line for item **T0003** (SurroundSoundReceive) in the **Purchase order lines** FastTab.
    2. Open the **Line details** FastTab.
    3. Change to the **Address** tab.
    4. Delivery address: Select **Contoso Entertainment System USA**.
    5. Select the line for item **M1101** (Foam reacting agent) in the **Purchase order lines** FastTab.
    6. Change to the **Line details** FastTab.
    7. Click the **Add address** button (+) to the right of the Delivery address field.
    8. Name or description: Enter **Quality Testing Center**.
    9. Zip/postal code: Enter **83642**.
    10. Street: Enter **123 W. Cherry Street**.
    11. Click **OK**.
8. Click **Save**.
9. On the Action Pane, click **Receive**.
10. Click Generate > **Product receipt**.
11. Change Quantity to Registered quantity.
12. In the **Product receipt** field, enter the product receipt number. For example, enter **PR123**.
13. Click **OK** to post the product receipt.
14. Close all pages.

7.6 Exercise #5 Create a charges code

Objective: Create a charge code for vendor transport charges on various items.

The accounts payable coordinator at Contoso Entertainment Systems USA must complete some setups for transport charges added to various items by the vendor.

She can do this in the system by creating a charges code with the following specifications:

- Name of the charges code: TRANSTO
- Description: Transportation Fee to our sites
- Account: 411400
- This fee does not require an item sales tax group.

  She asked for your help to show her how this charges can be configured. What would you do?

7.6.1 Create a charges code

1. Go to the **Accounts payable** module, then to **Charges setup**, and then to **Charges code**.
2. Click **New**.
3. Charges code: Enter **TRANSTO**.
4. Description: Enter **Transportation Fee to our sites**.
5. Change to the Debit section.
6. Type: Select **Ledger account**.
7. Posting: Select **Payment fee**.
8. Account: Select **411400**.
9. Change to the Credit section.
10. Type: Select **Customer/Vendor**.
11. Click **Save**.

7.7 Exercise #6 Create a vendor charges group and assign to vendors (Bouns)

Objective: Create a vendor charge group and assign it to two vendors.

The accounts payable administrator at Contoso Entertainment Systems USA, wants to make updates for Fabrikam supplier, that has two vendor accounts from which Contoso purchases items.

Fabrikam recently imposed an additional 15 percent freight charges for all purchase orders.

He is not sure how to set up a new charges and not quite sure how to assign to the supplier accounts.

You will have to do the following:

- Create a vendor charges group.
- Update vendors to use the new vendor charges group

7.7.1 Create a Vendor Charges Group

1. Go to the **Accounts payable** module, then to **Charges setup**, and then to **Vendor charges group**.
2. Click **New**.
3. Charges group: Enter **06**.
4. Description: Enter **Freight 15%**.
5. Click **Save**.

7.7.2 Update vendors to use the new vendor charges group.

1. Go to the **Accounts payable** module, then to **Vendors**, and then to **All vendors**.
2. Open the vendor record for vendor **US-101** (Fabrikam Electronics).
3. Click **Edit**.
4. Open the **Purchase order defaults** FastTab.
5. Charges group: Select **06** (Freight 15%).
6. Click **Save**.
7. Close the vendor record.
8. Open the vendor record for vendor **US-104** (Fabrikam Supplier).
9. Click **Edit**.
10. Open the **Purchase order defaults** FastTab.
11. Charges group: Select **06** (Freight 15%).
12. Click **Save**.
13. Close the vendor record

7.8 Exercise #7 Create an automatic charge (Bonus)

Objective: Create an item charges group and use it to create an automatic charge.

The accounts payable coordinator at Contoso Entertainment Systems USA, wants to make updates to vendor charges.

Datum Receivers (US-105) applies a 15 percent freight charge for all orders due to the large quantity and weight of items we buy.

Since this charge only applies to US-105 and it will apply to every order, you need to help the coordinator to set up an automatic charge for vendor group (06) and the item charges group (123).

You will have to do the following:

- Create an item charges group.
- Create an automatic charge.

7.8.1 Create an item charges group

1. Go to the **Accounts payable** module, then to **Charges setup**, and then to **Item charge groups**.
2. Click **New**.
3. Charges group: Enter **123**.
4. Description: Enter **15% Freight Charge**.
5. Click **Save**.

7.8.2 Create an automatic charge

1. Go to the **Accounts payable** module, then to **Charges setup**, and then to **Automatic charges**.
2. Level: Select **Line**.
3. Click **New**.
4. Account code: Select **Group**.
5. Vendor relation: Select **06** (Freight 15%).
6. Item code: Select **Group**.
7. Item Relation: Select **123** (15% Freight Charge).
8. Click **Save**.

9. Click **Add** in the **Lines** FastTab.
10. Charges code: Select **TRANSTO** (Transportation Fee).
11. Category: Select **Percent**.
12. Charges value: Enter **15.00**.
13. Click **Save**.

7.9 Exercise #8 Approve purchase orders prior to confirmation (Bonus)

Objective: Set up change management so purchase orders are approved prior to confirmation.

Contoso has decided that all office supply purchase orders from supplier 1001 should be approved prior to confirmation. They asked you to activate the change management feature for Supplier 1001.

You will have to do the following:

- Set up change management against Supplier 1001 only.
- Configure change management for a vendor.

7.9.1 Set up change management against Supplier 1001 only

1. Go to **Procurement and sourcing**, then to **Setup**, and then to **Procurement and sourcing parameters**.
2. Select the **General** tab on the left.
3. Change to the **Change Management for Purchase Orders** section.
4. Allow override of settings per vendor: Select **Yes**.
5. Click **Save**.

7.9.2 Configure change management for a vendor

1. Go to **Procurement and sourcing**, then to **Vendors**, and then to **All vendors**.
2. Open the vendor record for vendor **1001** (Acme Office Supplies).
3. Open the **Purchase order defaults** FastTab.
4. Click **Edit**.
5. Go to the **Change Management for Purchase Orders** section.
6. Override settings: Select **Yes**.
7. Activate change management: Select **Yes**.
8. Click **Save**.

7.10 Exercise #9 Create trade agreements for vendors

Objective: Create a trade agreement for domestic vendors that specifies a fixed price for a certain item.

The company managed to standardize the purchase price for item A0001 with all domestic vendors to be $8.26. You needto help the purchase manager to record this purchase price using a trade agreement journal, so that whenever a purchase order is created for item A0001 and the vendor is from the domestic vendors, the price will default to $8.26.

7.10.1 Create a Trade agreement for a vendor.

1. Go to **Procurement and sourcing**, then to **Prices and discounts**, and then to **Trade agreement journals**.
2. Click **New**.
3. Name: Select **S__Price** for Sales price adjustment
4. Click the **Lines** button to open the journal.

5. Relation: Select **Price (purch.)**.
6. Account code or Party code type: Select **Group**.
7. Account selection: Select **Domestic** vendors.
8. Item code/Product code type: Select **Table**.
9. Item Relation: Select **A0001, HDMI 6' Cables**.
10. Site: Enter **1**.
11. Warehouse: Enter **13**.
12. From: Enter **1**.
13. Amount in currency: Enter **8.26**.
14. Change to the **Details** tab.
15. From date: Select **February 15, 2017**.
16. Select **Validate** > **Validate all lines**.
17. Click **OK**.
18. After successful validation, **post** the journal.
19. Close all pages.

7.11 Exercise #10 Create a purchase order based on a trade agreement

Objective: Create a purchase order from on a trade agreement based on value or quantity.

The purchasing manager always try to negotiate with vendors and create an agreed-upon purchasing price list, discounts, and agreements for products that are frequently purchased from a specific vendor.

Often contracts with vendors can be created to get the best prices for a specific commitment either based on value or quantity.

In this case the purchase manager made an agreement on a price for 100 of item number D0002 and would like to use the system to record this agreement.

You were asked to help the purchase manager and show how this can be recorded. What would you do?

7.11.1 Create a purchase agreement

1. Go to the **Procurement and sourcing** module, then to **Purchase agreements**, and then to **Purchase agreements**.
2. Click **New**.
3. Vendor account: Select **US-104** (Fabrikam Supplier).
4. Purchase agreement classification: Select **General purchases**.
5. Open the **General** FastTab.
6. Document title: Enter **General Purchase**.
7. Default commitment: Select **Product quantity commitment**.
8. Click **OK**.

7.11.2 Add an item to the purchase agreement

1. Click **Add line** in the **Purchase agreement lines** FastTab to create a line.
2. Item number: Select **D0002** (Cabinet).
3. Site: Select **1** (Home speakers production).
4. Warehouse: Select **13** (Finished Goods).
5. Quantity: Enter **100**.

6. Unit price: Enter **145.50**.
7. Expiration date: Select the end of the next month.
8. Click **Save**.

7.11.3 Confirm the purchase agreement

1. Click **Purchase Agreement** at the top, and then select **Confirmation** under the **Generate** section.
2. Select **Yes** in the **Print report** field.
3. Click **OK**.
4. Close all pages

7.12 lab: title: 'Case study 2B Sales and marketing' module: 'Module 3: Implement and manage supply chain processes '

8 Case study 2B Sales and marketing

8.1 Objectives

- *Enter a sales order, review the order totals, and confirm the sale*
- *Create a sales order with commission, and then check the registered sales commission on the sales order.*
- *Create a customer trade agreement for specific customers, a specific item and for a certain date range.*
- *Generate rebates and process rebate claims for payment.*

8.2 Exercise #1 Enter and confirm sales order

Objective: Enter a sales order, review the order totals, and confirm the sale.

A sales clerk at USMF who is responsible for receiving and recording sales orders in the system so that customer requests are fulfilled.

She received a request form Customer US-004, who wants to buy 1 of Item T0004 ("Television M120 37") with a color of black.

She is not sure on the steps enter and confirm the sales order.

You are called to provide assistant. What would you do?

8.2.1 Enter sales order header details

1. Go to **Sales and marketing > Sales orders > All sales orders**.
2. Click **New**.
3. In the **Customer account** field, click the drop-down button to open the lookup.
4. In the list, find and select the customer **US-004**.
5. Click **OK**.
6. Click **Sales order line**.
7. Click **Dimensions**.
8. For this example, select the Color, Site and Warehouse dimensions. The dimensions you select here will appear in the sales order grid. If you want your selections to persist, set the **Save setup** option to **Yes**.
9. Click **OK**.
10. In the **Item number** field, click the drop-down button to open the lookup.
11. For this example, select item number **T0004**.
12. In the **Color** field, click the drop-down button to open the lookup.

13. In the list, find and select **Black**
14. In the **Quantity** field, enter **1**.

8.2.2 Review the order totals

1. On the Action Pane, click **Sales order**.
2. Click **View > totals**.
3. The Totals page displays details about the entire order. This includes the subtotal amount, which is a sum of all line net amounts adjusted for eventual line discounts, the total invoice amount, which is a subtotal amount adjusted for eventual order-level discount, charges, and sales tax, the customer credit limit situation, and more. The invoice amount is the amount that will appear on the customer's invoice document.
4. Click **OK**.

8.2.3 Confirm Sales order

1. On the Action Pane, click **Sell**.
2. Click **General> confirm Sale Order**.
3. This will prompt you with a screen where you will check the **Posting** flag is set to Yes and **Print confirmation** is set to Yes.
4. Click **OK**.
5. This will print the Sale order Confirmation on the screen

8.3 Exercise #2 Create and review a sales order for commission

Objective: Create a sales order with commission, and then check the registered sales commission on the sales order.

The sales manager is required to manage the sales commissions for the sales representative team. Part of this process is to extend the commission calculation rule that expired. She will need to set up the necessary commission to ensure the commission for customer US-013 is being calculated for all items.

You will need to help her to create a sales order for customer US-013, who is requesting 2 units of item D0001. You will proceed with all of the sales order process until the invoicing step. Then you will check the registered sales commission on the sales order.

You will have to do the following:

- Invoice a sales order that qualifies a salesperson for a commission.
- Review the registered sales commission.

8.3.1 Invoice a sales order that qualifies a salesperson for a commission

1. Go to **Sales and marketing > Commissions > Commission calculation**
2. Click **Edit**.
3. In the To field select **12/31/2020**
4. Click **Save.**
5. Close the page.
6. Go to **Sales and marketing > Sales orders > All sales orders**.
7. Click **New**.
8. In the **Customer account** field, click the drop-down button to open the lookup.
9. In the list, find and select **US-013**.
10. Click **OK**.
11. On the Action Pane, click **Options**.

12. Click **Change view**.
13. Click **Header view**.
14. Expand the **Setup** section.
15. The value in the **Sales group** field represents a group with one or more sales representatives assigned to it. The people in the group are the ones who will receive commissions when the order is invoiced, as per predefined rates and distribution. The value is copied from the Customer card, but you can change it if you wish. The Sales group is also copied to the sales order line. You can change it so that it can differ from the one in the header and/or between lines.
16. The value in the **Commission group** field represents a group that you have created for one or more customers with the purpose of tracking commissions. The value is copied from the Customer card, but you can change it if you wish.
17. On the Action Pane, click **Options**.
18. Click **Change view**.
19. Click **Line view**.
20. In the **Item number** field, click the drop-down button to open the lookup.
21. In the list, select **D0001**.
22. In the Quantity field, enter **2**.
23. Take note of the net amount. It represents the sales revenue, which in this example is the basis for commission.
24. Click **Save**.
25. On the Action Pane, click **Sell**.
26. Click **General> confirm Sale Order**.
27. This will prompt you with a screen where you will check the **Posting** flag is set to Yes and **Print confirmation** is set to Yes.
28. Click **OK**.
29. This will print the Sale order Confirmation on the screen
30. On the Action Pane, click **Pick and Pack**.
31. Click **General> Post packing Slip**.
32. This will prompt you with a screen where you will check that the Parameter **Quantity** Field is set to **ALL** and the **Posting** flag is set to **Yes**.
33. Click **OK**.
34. On the Action Pane, click **Invoice**.
35. Under **Generate** field group, click **Invoice**.
36. Expand the **Parameters** section.
37. In the **Quantity** field, select **All**.
38. Select **Yes** in the **Posting** field.
39. Click **OK**.
40. Click **OK**. It may take a minute or so to post the transaction. Allow the processing to complete and don't close the page until it's done.

8.3.2 Review the registered sales commissions

1. On the Action Pane, click **Invoice**.
2. Under **Journals** field group, click **Invoice**.
3. On the Action Pane, click **Invoice**.

4. Click **Details > Commission transactions**.
5. The **Overview** tab displays lines representing the commission amounts payable to sales representatives who are associated with the invoiced sales order. Review the details.
6. Close the page.
7. Click **Voucher**. You can review the voucher transactions for the commission amounts that have been posted to the predefined commission expense and commission payable accounts.
8. Close all pages.

8.4 Exercise #3 Create a customer trade agreement

Objective: Create a customer trade agreement for specific customers, a specific item and for a certain date range.

The sales managers always try to standardize the sales price list and discounts (trade agreements) for products. Sometimes they create special price lists and discounts for special customers.

The sales manager you are working with decided to create sales price trade agreement for item A0001 for all retail customers accounts and to set that price at $20. she also want to add a validity date for that price.

In order to record this sales price in the system she will use the trade agreement journal, so that whenever a sales order is created for item A0001 and the customer is from the retail accounts group, the price will default to $20.

What would you do to guide her thru this entry?

8.4.1 Create a trade agreement named "Sales price adjustment

1. Go to **Sales and marketing**, then to **Prices and discounts**, and then to **Trade agreement journals**.
2. Click **New**.
3. Name: Select **S__Price**, **Sales price adjustment**.
4. Click the **Lines** button to open the journal.
5. Relation: Select **Price (sales)**.
6. Account code or Party code type: Select **Group**.
7. Account selection: Select **03**, **Retail accounts**.
8. Item code or Product code type: Select **Table**.
9. Item Relation: Select **A0001, HDMI 6' Cables**.
10. From: Enter **1**.
11. Amount in currency: Enter **20.00**.
12. Change to the **Details** tab.
13. From date: Select **February 15, 2017**.
14. Lead time: Enter **2**.
15. Select **Validate > Validate all lines**.
16. Click **OK**.
17. After successful validation, **post** the journal
18. Close all pages

Exercise #4 Generate and process customer rebates

Objective: Generate rebates and process rebate claims for payment.

Sales manager build better relationships with customers and encourage them to be loyal to the company's products and services by offering them rebates based on the order volumes or quantities.

Customers can receive balance deductions, trade spending, invoices deductions, or get paid directly.

The sales manager you are working with asked you to show how this works using existing rebates for item T0020 and process a claim.

You will have to do the following:

- Generate and process customer rebates.
- Generate rebate claims.
- Process rebate claims.
- Process rebates for payment.

8.4.2 Generate and process customer rebates

1. In **USMF** navigate to the **Accounts Receivable > Setup > Accounts receivable parameters** page, click the **Prices** tab and expand the **Price details** tab, and check that the **Enable price** details option is set to **Yes**.
2. Navigate to the **Sales and marketing>Customer rebates>Rebate agreements** page and select the **customer rebate agreement**: USMF-000001.
3. If the Workflow approval status field is not set to **Approved**, you need to click **Validation** on the Action pane to approve it.
4. Review a customer rebate agreement

- The agreement is for an individual customer, in this example customer US-009.
- Rebates are given to the customer when they purchase a specific product. In this case, the product has item number T0020.
- The customer's sales performance, against which the rebate amounts are estimated, is to be accumulated on a weekly basis.
  - The setting for **Price taken from** is **Gross**, which means that line's sales amount on which basis the claim is estimated is not reduced by the line discount.
  - The **Rebate line break type** field shows the method for calculating rebates. In this case, the sales target against which the rebates are to be estimated is set to Quantity.
  - The agreement's lines specify the rebate amount type, the actual rebate value, and the thresholds. In this example, the customer will qualify for a rebate of 20 USD per unit sold, if their weekly purchases of the product fall within 1 to 50 units; and a rebate of 40 USD per unit sold, if they purchase above 50 units.

8.4.3 Generate rebate claims

1. Navigate to **Sales and marketing > Sales orders > All sales orders**.
2. Click **New**.
3. In the Customer account field, enter or select **US-009**.
4. Click **OK**.
5. In the Item number field, enter or select **T0020**.
6. Set **Quantity** to '40'.
7. Click **Sales order line**.
8. Click **Price details**.
9. Expand the **Rebates** section. The Rebates tab lists all the rebate agreements that are applicable to the current order line and shows the estimated rebate amount. Note that the displayed amounts are only indications of what future rebate claims may be. The actual rebate amounts may be different depending on: the total sales volume achieved by the customer under a periodic rebate agreement; whether the customer had returned all or partial quantities; and whether the applicable sales order was invoiced.
10. Close the page.
11. Click **Save**.

12. On the Action Pane, click **Invoice**.
13. Click **Invoice > Generate > Invoice**.
14. Expand the **Parameters** section.
15. In the Quantity field, select **'All'**.
16. Click **OK**.
17. Click **OK**.
18. Close all pages.

8.4.4 Process rebate claims

The Rebates page acts a workbench in which you can review, approve, and process rebate claims. You'll now process the claims that were created as a result of invoicing a sales order for customer US-009, who is the subject of the rebate agreement USMF-000001.

The line represents a rebate claim for 800 USD, which is based on the sales of 40 units of product T0020, calculated at 20 USD per unit. This matches the conditions of the first quantity break in the rebate agreement.

The claim is in the **To be calculated** state. This means that it is associated with an agreement that tracks the customer's sales performance on periodic basis and it must be re-calculated to account for the total sales volume within the respective period.

1. Navigate to **Sales and marketing > Customer rebates > Rebates**.
2. Click **Cumulate**.
3. In the Customer field, enter or select **US-009**.
4. In the Start date field, select today's date.
5. Click **OK**.
6. Click **Approve**.
7. Click **Process**.
8. In the Customer field, enter or select **US-009**.
9. Click **OK**.

If you get a message that it cannot create a record in Ledger journal table, it is because the demo data is out of sync; perform these steps:

1. Click **Close**.
2. Reset the number sequence:
    1. Navigate to **General Ledger > Ledger setup > General ledger parameters**.
    2. Select **Number sequences** tab
    3. Click the hyperlink for Number sequence code field for Journal batch number
    4. In the General fast tab, change the Next number higher
    5. Set Continuous to No
    6. Click Yes
3. Navigate to **Sales and marketing > Customer rebates > Rebates**.
4. Resume with step 7 of Process rebate claims.

A message shows that the rebate was processed successfully, and the status of the claims has been changed to Mark. This means that as a result of a Rebate accrual journal being posted:

- the claims have now been transferred to the temporary customer balance as deductions;
- the Rebate accrual account has been credited to represent the future liability towards the customer; and
- the Rebate expense account has been debited, in recognition of the cost incurred in connection with the sales.

8.4.5 Process rebates for payment

The Rebate page lists the rebate claims that you have processed in the customer rebate workbench and that are in status **Mark**. When you create a credit note, a message appears to inform you that a journal has been posted.

This is the Accounts receivable consumption journal, as specified in the Accounts receivable parameters page. This causes the real liability (credit) amount to be moved to the customer balance. This means that the customer's account has been credited, and the Rebate accrual account has been debited.

1. Navigate to **Accounts receivable>Customers>All customers**.
2. In the list, find and select **US-009**.
3. On the Action Pane, click **Collect**.
4. Click **Settle > Settle transactions**.
5. Click **Functions**.
6. Click **Rebate program**.
7. Click **Edit**. Set checkmarks in the **Mark** field for the claims that you want to include into credit note.
8. Click **Functions**.
9. Click **Create credit note**.
10. Close the page.
11. Click **Cancel**. This refreshes the page so that you can see the updates.
12. On the Action Pane, click **Collect**.
13. Click **Settle transactions**. Note that a transaction for negative amount, representing the total rebate amount, without invoice reference has been added to the customer balance.
14. Click **Cancel**.
15. Close all pages.

8.5 lab: title: 'Case study 3 Warehouse management and transportation management' module: 'Module 4: Implement warehouse management and transportation management '

9 Case study 3 Warehouse management and transportation management

9.1 Objectives

1. Configure warehouse management
2. Perform warehouse management processes
3. Implement transportation management

9.2 Exercise #1 Configure warehouse management

Objective: Create and define the components of warehouse management and configure inventory statuses using unit sequence groups and reservation hierarchies.

You were asked to help the warehouse manager for SRHQ Seahorse Retailers. He is responsible for building and designing the structure for the warehouse management system.

You will need to guide him on performing some setup and configuration activities before being able to use the warehouse management systems.

- Configure warehouse management setup.
- Create a storage dimension group.
- Create a tracking dimension group.
- Create a unit sequence group.
- Create a warehouse.
- Create location types.
- Create location formats.
- Create a dock management profile.
- Create new location profiles.

9.2.1 Create a Storage Dimension Group

As a warehouse manager in Seahorse Retailers, you have to create a new storage dimension group to use with Warehouse Management.

Create a new storage dimension group.

1. Open **Product information management > Setup > Dimension and variant groups > Storage dimension groups**.
2. Click **New** to create a new storage dimension group.
3. Type **LASD** in the **Name** field.
4. Type **Los Angeles storage dimension** in the **Description** field.
5. Enable the **Use warehouse management processes** option to enable Warehouse management.
6. Click **Save** in the action pane and verify that the Site, Warehouse, Location, Inventory status, and License plate dimensions are active.
7. Close the form.

9.2.2 Create a Tracking Dimension Group

As a warehouse manager in Seahorse Retailers, you have to create a new tracking dimension group that will not track serial numbers or batch numbers.

Create a new tracking dimension group.

1. Open **Product information management > Setup > Dimension and variant groups > Tracking dimension groups**.
2. Click **New** to create a new Tracking dimension group.
3. Type **LANT** in the **Name** field.
4. Type **Los Angeles no tracking** in the **Description** field.
5. Select **None** in the **Capture serial** field.
6. Click **Save.**
7. Make sure the **Active** check box is not selected for any dimensions.
8. Close the form.

9.2.3 Create a Unit Sequence Group

As a warehouse manager in Seahorse Retailers, you have to create a new unit sequence group for each, box, and pallet (EA, BOX, PL), which will have license plate grouping.

Create a new unit sequence group.

1. Open **Warehouse management > Setup > Warehouse > Unit sequence groups**.
2. Click **New** to create a unit sequence group.
3. Type **EBP** in the **Unit sequence group ID** field.
4. Type **EachBoxPallet** in the **Name** field.
5. In the **Unit** field, select **ea**.
6. Select the **License plate grouping** check box.
7. Select the **Default unit for purchase and transfer** check box.
8. Click **New** on the **Line details** FastTab to add a line.
9. In the **Unit** field, select **Box**.
10. Select the **License plate grouping** check box.
11. Click **New** on the **Line details** FastTab to add a line.
12. In the **Unit** field, select **PL**.
13. Select the **License plate grouping** check box.
14. Click **Save** and close the form.

9.2.4 Create a Warehouse

As a warehouse manager in Seahorse Retailers, you have to configure a new warehouse named "MainDC" in Site "1" for use within company USP2.

Create a new warehouse and assign a name and site.

1. Open **Warehouse management > Setup > Warehouse > Warehouses**.
2. Click **New** to create a new warehouse.
3. Type **MAINDC** for the warehouse and Name.
4. Select Site **1** to relate the warehouse to.

9.2.5 Assign warehouse management attributes.

1. Expand the **Master planning** FastTab and select the **24hr** Calendar for the warehouse.
2. Expand the **Warehouse** FastTab.
3. Select the **Use warehouse management processes** check box.
4. Select the **Allow license plate moves during cycle counting** check box.
5. Select the **Decrement load line** check box.
6. Close the forms.

9.2.6 Create Location Types

As a warehouse manager in Seahorse Retailers, you have to create new location types for the warehouse, which you will name "RCV," "PICKING," and "FRESH."

Create three new location types.

1. Open **Warehouse management > Setup > Warehouse > Location types**.
2. Click **New** to create a new location type.
3. Type **PICKING** as the identifier in the **Location type** field.

4. Type **Picking** in the **Description** field.
5. Click **New** to create another new location type.
6. Type **RCV** as the identifier in the **Location type** field.
7. Type **Receiving** in the **Description** field.
8. Click **New** to create another new location type.
9. Type **FRESH** as the identifier in the **Location type** field.
10. Type **Fresh** in the **Description** field.
11. Close the forms.

9.2.7 Create Location Formats

As a warehouse manager in Seahorse Retailers, you have to create a new location format for Aisle-Rack-Shelf, Aisle-Shelf, and Bay door

9.2.8 Create the new location format.

1. Open **Warehouse management > Setup > Warehouse > Location formats**.
2. Click **New** to create a new location format.
3. Type **ARS** in the **Location format** field.
4. Type **Aisle – Rack – Shelf** in the **Name** field.

9.2.9 Add segments to the location format

1. On the **Details** FastTab, click **New** to create a new line.
2. In the **Segment description** field, type **Aisle Prefix**.
3. Type **1** in the **Length** field.
4. On the **Details** FastTab, click **New** to create a new line.
5. In the **Segment description** field, type **Aisle Number**.
6. Type **2** in the **Length** field.
7. On the **Details** FastTab, click **New** to create a new line.
8. In the **Segment description** field, type **Rack Number**.
9. Type **2** in the **Length** field.
10. On the **Details** FastTab, click **New** to create a new line.
11. In the **Segment description** field, type **Shelf Prefix**.
12. Type **1** in the **Length** field.
13. On the **Details** FastTab, click **New** to create a new line.
14. In the **Segment description** field, type **Shelf Number**.
15. Type **2** in the **Length** field.
16. Create another location format.
17. Click **New** at the top to create a new location format.
18. Type **RS** in the **Location format** field.
19. Type **Rack - Shel**f in the Name field.
20. Add segments to the second location format.
21. On the **Details** FastTab, click **New** to create a new line.
22. In the **Segment description** field, type **Rack Prefix**.
23. Type **1** in the **Length** field.

24. On the **Details** FastTab, click **New** to create a new line.
25. In the **Segment description** field, type **Rack Number**.
26. Type **2** in the **Length** field.
27. On the **Details** FastTab, click **New** to create a new line.
28. In the **Segment description** field, type **Shelf Prefix**.
29. Type **1** in the **Length** field.
30. On the **Details** FastTab, click **New** to create a new line.
31. In the **Segment description** field, type **Shelf Number**.
32. Type **2** in the **Length** field.
33. Create a third location format:
34. Click **New** at the top to create a new location format.
35. Type **BaydoorOnly** in the **Location format** field.
36. Type **Baydoor Only** in the **Name** field.
37. Add segments to the third location format.
38. On the **Details** FastTab, click **New** to create a new line.
39. In the **Segment description** field, type **Baydoor Prefix**.
40. Type **1** in the **Length** field.
41. On the **Details** FastTab, click **New** to create a new line.
42. In the **Segment description** field, type **Baydoor Number**.
43. Type **2** in the **Length** field.
44. Close the forms.

9.2.10 Create a Dock Management Profile

As a warehouse manager in Seahorse Retailers, you have to set up a new dock management profile.

1. Open **Warehouse management > Setup > Warehouse > Dock management profiles**.
2. Click **New** to create a dock management profile.
3. Type **SHIPSTAGE** in the **Dock management profile ID** field.
4. Type **Staging locations unique per shipment** in the **Description** field.
5. Select **Shipment ID** in the **Inventory types that should not be mixed** field.
6. Select the **Assume empty location** check box to ensure that the location is empty before adding new items to the location.
7. Close the forms.

9.2.11 Create New Location Profiles

As a warehouse manager in Seahorse Retailers, you have to create new location profiles for Picking, Staging, Receiving, Bulk, and Fresh.

1. Open **Warehouse management > Setup > Warehouse > Location profiles**.
2. Click **New** to create a new Location profile.
3. In the **Location profile ID**, enter **PICKING.**
4. In the **Name** field, enter **Picking Locations**.
5. On the **General** FastTab select **ARS** in the **Location format** field.
6. On the **General** FastTab select **Picking** from the **Location type** field.

7. Select the **Use license plate tracking** check box.
8. Select the **Allow mixed items** check box.
9. Select the **Allow cycle counting** check box.

9.2.12 Create a new location profile for Staging

1. Click **New** to create a new Location profile.
2. In the L**ocation profile ID** enter **STAGING.**
3. In the **Name** field, enter **Staging locations**.
4. On the **General** FastTab select **Baydoor** in the **Location format** field.
5. On the **General** FastTab select **Staging STAGE** in the **Location type** field.
6. Select the **Use license plate tracking** check box.
7. Select the **Allow mixed items** check box.

9.2.13 Create a new location profile for Receiving:

1. Click **New** to create a new Location profile.
2. In the **Location profile ID** field, enter **RECEIVING.**
3. In the **Name** field, enter **Receiving locations**.
4. On the **General** FastTab select **Baydoor** in the **Location format** field.
5. On the **General** FastTab select **Recv** in the **Location type** field.
6. Select the **Use license plate tracking** check box.
7. Select the **Allow mixed items** check box.

9.2.14 Create a new location profile for Bulk:

1. Click **New** to create a new Location profile.
2. In the **Location profile ID** field enter **BULKLOCATIONS**.
3. In the **Name** field, enter **Bulk Locations**.
4. On the **General** FastTab select **RS** in the **Location format** field.
5. Select the **Use license plate tracking** check box.
6. Select the **Allow mixed items** check box.

9.2.15 Create a new location profile for Fresh

1. Click **New** to create a new Location profile.
2. In the **Location profile ID** field, enter **FRESH**.
3. In the **Name** field, enter **Fresh locations**.
4. On the **General** FastTab select **ARS** in the **Location format** field.
5. On the **General** FastTab select **Fresh** from the **Location type** field.
6. Select the **Use license plate tracking** check box.
7. Select the **Allow mixed items** check box.
8. Close the forms.

9.3 Exercise #2 Create a reservation hierarchy (Bonus)

Objective: Create a reservation hierarchy and use it to manage a product.

A warehouse manager at SRHQ requested to be a member of the Microsoft Dynamics 365 for Finance and Supply chain project team for Contoso Orange Juice Company, one of Seahorse Retailers sister companies.

He wants to create a new reservation hierarchy to manage the oranges.

The oranges will be tracked using site, warehouse, location, and batch numbers.

He is not sure how to create the new reservation hierarchy and to create a new product that uses the new hierarchy.

9.3.1 Create a reservation hierarchy.

1. In **USP2**, Open **Warehouse management** > **Setup** > **Inventory** > **Reservation hierarchy**.
2. Click **New** to create a new reservation hierarchy.
3. Enter **Oranges** in the **Name** field.
4. Enter **Orange reservations** in the **Description** field.

9.3.2 Select dimensions for the reservation hierarchy.

1. In the **Selected** pane, select the **Serial number** check box.
2. Click the left directional button to move the dimensions to the Available pane.
3. Repeat steps a-b for **Owner.**
4. Click **OK**.
5. Close the forms.

9.3.3 Create a new product and link it to the new reservation hierarchy

As a member of the Microsoft Dynamics 365 for Finance and Operations project team for Contoso Orange Juice Company, you need to create a new product in company USP2 called Low Sugar Orange Juice, number B0004. The new item will track Site, Warehouse, Location, and Batch numbers. The costing for the product will use the FEFO methodology and the posting will use the standard orange juice postings. Use the information provided to create a new item.

9.3.4 Create a product.

1. In **USP2**, Open **Product information management > Products > Released products.**
2. Click **New** to create a new product.
3. Enter the following information in the entry fields:
   - **Product number** – B0004
   - **Product name** – Low Sugar Orange Juice
   - **Item model group** – FEFO
   - **Item group** – OrgJuice
   - **Storage dimension group** – Ware
   - **Tracking dimension group** – Batch-Phy
   - **Reservation hierarchy** – Oranges
4. Click **OK**.

9.3.5 Configure advanced warehousing settings.

1. Expand the **Warehouse** FastTab on the Released product details form.
2. Select **GAL** in the **Unit sequence group ID** field.
3. Click **Validate** in the **Maintain** group of the action pane.
4. Close the forms.

9.4 Exercise #3 Create disposition codes and inbound location directives

Objective: Create and use disposition codes and inbound location directives.

You have been assigned to assist one of the sister company's USP2 teams in the setup and implementation of a warehouse management system.

You must set up two new **disposition codes**. The first will be called "Ready," which will be Available, and the second will be called "Not Ready," which will be blocked for use with warehouse management. Next, you will configure a new inbound location directive that will receive goods to the warehouse, and another one that will put away goods in bulk locations.

You will need to do the following:

- Create new disposition codes.
- Create an inbound location directive.

9.4.1 Create disposition codes

1. In USP2, Open **Warehouse management > Setup > Mobile device > Disposition codes**.
2. Click **New** to create a disposition code.
3. In the **Disposition code** field, enter **Ready**.
4. In the **Inventory status** field, select **Available**.
5. Click **New** to create a disposition code.
6. In the **Disposition code** field, enter **Not Ready**.
7. In the **Inventory status** field, select **Blocked**.
8. Close the forms.

Notes:

- In the Work template code field, you can select a work template code that is associated with a work order type, return order, or purchase order. You assign a work template to a disposition code only when you want to override the work template.
- In the Return disposition code field, you can select a return disposition code for a sales return order. After you select a return disposition code, the disposition code is only applicable for the sales order return process.

9.4.2 Create an inbound location directive

Create a new purchase order put location directive

1. Open **Warehouse management > Setup > Location directives**.
2. Select **Purchase orders** in the **Work order type** field.
3. Click **New** in the action pane to create a new location directive.
4. Type **MAIN DC** in the **Name** field.
5. Select **Put** in the Work type field. This is because we want to put the received items on purchase orders away.
6. Select **3** in the **Site** field.
7. Select **30** in the **Warehouse** field.

8. Select **Stage** in the **Directive code** field.
9. Click **Save**.

9.4.3 Add lines to the location directive

1. Click **New** in the **Lines** FastTab.
2. Verify the Sequence number is 1.
3. Type **200** in the **To quantity** field.
4. Type **ea** in the **Unit** field.
5. Select **None** in the **Locate quantity** field.
6. Click **Save** in the action pane.
7. Click **New** in the **Location directive actions** FastTab.
8. Type **Fresh** in the **Name** field.
9. Click **Save** in the action pane.

9.4.4 Add location directive actions to the location directive.

1. Click **Edit query** in the action pane.
2. Click **Add** on the Query form.
3. Select **Purchase Orders** in the **Table** column.
4. Select **Location** in the **Field** column.
5. Select **30** in the **Criteria** column.
6. Click **OK**.
7. Close the Location directives form.

9.5 Exercise #4 Configure mobile devices

Objective: Configure mobile devices for warehouse workers.

You must configure the mobile device menus that the warehouse workers will view and use during their day to day activities. You are assisting in the setup of the menus for the mobile devices for companies **USMF** and **SRHQ**.

You will need to do the following:

- Configure the mobile devices.
- Create a mobile device menu item and menu.
- Create mobile device users.
- Set up a mobile device menu item for completing work of type Purchase order.

9.5.1 Configure mobile devices

In preparation for setting up the mobile device for your warehouse, you are asked to first set up a work class, which you will name Purch-Orders. It will have the put location types of Bay-door, Bulk, and Pick.

9.5.2 Add a work class

1. In company **USMF**, open **Warehouse management > Setup > Work > Work classes**.
2. Click **New** to create a work class.
3. In the **Work class ID** field, enter **P-Orders.**
4. For **Description**, enter **Purchase Orders.**
5. For **Work order type**, select **Purchase orders.**

6. On the **Valid put location types** FastTab, click **New.**
7. Enter **Baydoor.**
8. Click **New** again.
9. Enter **Bulk**.
10. Click **New** again.
11. Enter **Pack**.

9.5.3 Create a mobile device menu item and menu

You will be setting up two functions: Purchase order receive and Purchase order put away. You will then add them to your mobile device menu.

9.5.4 Set up mobile device menu items

1. Open **Warehouse management > Setup > Mobile device > Mobile device menu items**.
2. Click on **New.**
3. For **Menu item name**, enter **PO Receive.**
4. For **Title**, enter **PO Receive.**
5. For **Mode**, select **Work.**
6. Set the **Use existing work** slider to **No**.
7. On the **General** FastTab, on **Work creation process**, select **Purchase order line receiving.**
8. Set the **License plate grouping policy option** to **License plate grouping**.
9. Set the **Generate license plate** slider to **Yes.**
10. Set all other sliders to No.
11. Click **Save** in the action pane.
12. Click **New** in the action pane.
13. For **Menu item name**, enter **PO Putaway.**
14. For **Title**, enter **PO Putaway.**
15. For **Mode**, select **Work.**
16. Set the **Use existing work** slider to **Yes**.
17. On the **General** FastTab, for Directed by, select User grouping.
18. Set the **Group put away** slider to Yes.
19. Set all remaining sliders to **No**.
20. On **Work classes** FastTab, click **New.**
21. For **Work class ID**, select **P-Orders.**
22. Click **Save** in the action pane.
23. Close the page.

9.5.5 Set up a mobile device menu

1. Open **Warehouse management > Setup > Mobile device > Mobile device menu**.
2. Select **Inbound** in the left menu bar and click **Edit** in the action pane.
3. In the **AVAILABLE MENU AND MENU ITEMS** pane, select **PO Receive** and click the right directional arrow.
4. In the **AVAILABLE MENU AND MENU ITEMS**, select **PO Putaway** and click the right directional arrow.

5. Click **Save** in the action pane.
6. Close the form.

9.5.6 Set up a work user for the mobile device.

1. Open **Warehouse management > Setup > Worker**.
2. Click **New**.
3. In the **Worker** field, select **Ted Howard**.
4. On the **Users** FastTab, click **New**.
5. For **User ID**, enter **thoward**.
6. For **User name**, enter **thoward**.
7. For default warehouse, select **62.**
8. For **Menu name**, select **Main**.
9. Click **Save** in the action pane.
10. For **Password**, enter **1234**.
11. For **Confirm password**, enter **1234**.
12. Click **Set password**.
13. Close the form.

9.5.7 Set up a mobile device menu item for completing work of type Purchase order

Create a menu item that is used for performing work of type Purchase order. The work class that is associated with the menu item determines which work is valid.

9.5.8 Create a mobile device menu item

1. **Go** to **Warehouse management > Setup > Mobile device > Mobile device menu items.**
2. Click **New**.
3. In the **Menu item name** field, enter a unique value. For example, you could type POMove. Remember the value; you'll need it later.
4. In the **Title** field, type PO Move. This is the title which will be displayed on the mobile device.
5. In the **Mode** field, select 'Work'.
6. Select **Yes** in the **Use existing work** field.
7. The **Display inventory status** field determines whether the inventory status of the on-hand inventory will be displayed to the warehouse worker on the mobile device. Select **Yes**.
8. In the **Directed by** field, select **System grouping**. When you select something in the **Directed by** field, additional fields appear in the **General** section on this page. The fields that appear depend on what you selected. When you select **System grouping**, two new fields are added.
9. In the **System grouping** field, select **WorkPoolId**. When warehouse workers open this menu item, they'll be asked to scan a work pool ID. All work orders with this work pool ID and open work order lines with one of the work classes added to this menu item will be pushed to the user.
10. In the **System grouping label** field, type **Work pool**. This is the text displayed to the user on the mobile device.
11. Select **Yes** in the **Override license plate during put** field. This option allows warehouse workers to override the target license plate when items are put down on a license plate-controlled location.
12. Select **Yes** in the **Group put away** field. If all the Put lines on the work order share the same location, the user will receive one combined Put instruction for all lines.
13. Expand the **Work classes** section.
14. Click **New**.

15. In the **Work class ID** field, type 'Purchase' and tab off. The work pool restricts the work that the menu item can be used for. In this case it will be used for open work order lines that have the Purchase work class ID.
16. Click **Save**.

9.5.9 Set up work confirmation

1. Click **Work confirmation setup** in the action pane.
2. In the **Work type** field, select 'Pick'.
3. Select the **Auto confirm** check box. The work instruction with work type Pick will be auto-confirmed. This instruction will not be presented to the user.
4. Click **New**.
5. In the **Work type** field, select 'Put'.
6. Select the **Location confirmation** check box. The warehouse worker will be asked to perform a confirmation scan of the location when the item is put down.
7. Click **Save**.
8. Close the work confirmation page.
9. Close the Mobile menu item page.

9.5.10 Add the menu item to a mobile device menu

1. Go to the **Mobile device** menu.
2. Click **Edit**.
3. Use the Quick Filter to find records. For example, filter on the Name field with a value of 'inbound'. You want to find the menu you use for inbound menu items. In **USMF** this is called Inbound.
4. In the tree, select 'a value' POMove.
5. Click on the arrow that points to the right.
6. Click **Save**.
7. Close the mobile device menu page.

9.6 Exercise #5 Configure purchase orders

Objective: Create and process a purchase order.

The warehouse manager for Contoso Orange Juice wants to process a purchase order receipt using a mobile device.

He ordered 1 box of the Grapefruit juice.

These will be from Vendor US-112 and shipped to Warehouse 62.

The unit price will be $2.50 per box.

He is not sure how to record this and asked you to help.

You will need to do the following:

- Create a purchase order.
- Create a purchase order receipt using the mobile device.

9.6.1 Create a purchase order

1. In **USP2**, open **Accounts payable > Purchase orders > All purchase orders.**
2. Click **New** in the action pane.
3. Select **Vendor US-112**.
4. On the **General** FastTab, enter storage dimensions of Site **3** and Warehouse **30**.

5. Click **OK**.
6. On the **Purchase order lines** FastTab, select item **P9500**. Ignore any warnings.
7. Enter a quantity of **10**.
8. Enter a unit price of **$2.50**.
9. On the Purchase tab of the action pane, in the **Actions** group, click **Confirm**.
10. Note your purchase order number.
11. Close the form.

9.6.2 Create a purchase order receipt using the mobile device

1. Log in to the mobile device with the user you have enabled.
2. Click **Inbound**.
3. Click **Purchase receive**.
4. Enter the purchase order number in the **PONUM** field.
5. Click the green checkmark.
6. Enter Item number **P9500**.
7. Click the green checkmark.
8. Enter a quantity of **1** in the **Qty** field.
9. Click the green checkmark.
10. Click the green checkmark again.
11. Enter LP number **LP951**.
12. Click the green checkmark.
13. Enter today's date as the vendor batch date.
14. Click the green checkmark.
15. Enter a date six months from the current date as the Expiry date.
16. Select the green check mark.
17. Select the **Use as expiration date** arrow.
18. Select **No** and select the green check mark.
19. For **Country/Region of Origin 1**, enter **USA**.
20. Select the green check mark.
21. Select the green check mark again to bypass the second Country/region entry.
22. Note the work completed notification.

9.7 Exercise #6 Configure wave processing (Bonus)

Objective: Set up templates and queries that specify how waves should be processed.

You want to configure wave processing by setting up the criteria that determine what work is generated for a warehouse when a wave is processed, and whether waves are processed manually or automatically.

You will specify the criteria by setting up wave templates and queries that match a wave with released lines in sales orders, production orders, or kanban orders.

When you set up a wave template, you specify the sequence in which the templates will be matched to released lines on sales orders, production orders, or kanban.

When a line is released to the warehouse or to production, it uses the first wave template that it meets the criteria for.

Its recommended that you put templates with the most specific criteria at the top of the list. The broader the criteria, the more likely it is for a line to meet the criteria, and this could lead to lines being assigned to the wrong wave. You will set up the wave templates for **USMF**.

You will need to do the following:

Configure wave processing.

9.7.1 Configure wave processing

1. In **USMF**, go to **Warehouse management > Setup > Waves > Wave templates**.
2. Click **New**.
3. In the **Wave template name** field, type **GTL-Wave**.
4. In the **Wave template description** field, type **GTL Wave**.
5. In the **Site** field, enter or select site **2**.
6. In the **Warehouse** field, enter **24**.
7. Set the **Automate wave creation** field to **Yes**. Select this option to automatically create a wave when a sales order, production order, or kanban is released to the warehouse.
8. Set the **Process wave at release to warehouse** option to **Yes**. Select this option to automatically process the wave and create work when a line is released to the warehouse.
9. Set the **Automate wave release** option to **Yes**. Select this option to automatically release the wave. The picking work is created and made available on mobile devices.
10. Set the **Assign to open waves** option to **Yes**. Lines are assigned to waves based on the query filter for the wave template.
11. Set the **Process wave automatically at threshold** option to **Yes**. Select this option to automatically process the wave when its values reach the thresholds for weight, shipment, and lines specified in the **Wave thresholds** field group. This option is available only if **Shipping** is selected in the **Wave template type** field.
12. Set the **Automate replenishment work release** option to **Yes**. Select this option to create demand-based replenishment work and release it automatically. You must add the replenishment wave method to the wave template and create a replenishment template of the type **Wave demand**.
13. Expand the **Methods** section. Wave template methods allow you to control the sequence of activities that each wave is going through when it is processed. For example, you might have a method for wave replenishment. When you add a method, it is automatically listed in the appropriate location in the sequence of steps. If you have set the **Automate replenishment work release** option to **Yes**, you need to add the replenish method here. Wave attributes act as filters, to restrict the kind of items that can use the wave. For example, you could specify an item group.
14. Click **Save**.
15. Close the wave templates page.
16. Go to **Warehouse management > Setup > Warehouse management parameters**.
17. Expand the **Wave processing** section.
18. In the **Wave processing batch group** field, enter or select a value.
19. Set the **Process waves in batch** option to Yes.
20. In the Wait for lock (ms) field, enter the time, in milliseconds, that an allocation step will wait for a system resource that is locked by another allocation step. When this time is exceeded, the wave is not processed and an error message is displayed.
21. Click **Save**.
22. Close the parameters page.
23. Go to **Production control > Setup > Production control parameters**.

24. In the **Release to warehouse** Production line release field, select an option. For sales orders and kanban orders, inventory must be reserved before the order is released to the warehouse. Otherwise, the items or allocation lines cannot be processed in a wave. For production orders, you also have the option of choosing Allow partial reservation. For example, this is useful if you have the materials that you need to start production, and can then wait until the additional materials become available to finish the process. If you select this option, you must manually repeat the release to warehouse process when the additional materials become available.
25. Close the parameters page.

9.8 Exercise #7 Configure cycle counting (Bonus)

Objective: Set up cycle counting and add a cycle count to the mobile device.

To be able to create cycle counting for **USP2**, you need to set up a cycle count for the mobile device.

You will need to do the following:

- Set up the cycle counting adjustment type.
- Set up warehouse parameters for cycle counting.
- Set up a spot cycle counting menu item.
- Add the spot count menu item to the mobile device menu.

9.8.1 Set up a cycle counting adjustment type

1. In USP2, open **Warehouse management > Setup > Inventory > Adjustment types**.
2. Click **New** on the action pane.
3. In the **Inventory adjustment type** field, enter **New Cycle Count**.
4. In the **Description** field, enter **New Cycle Count.**
5. In the **Name** field, select **Counting**
6. Select the **Remove reservations** check box.

9.8.2 Set up warehouse management parameters for cycle counting

1. Open **Warehouse management > Setup > Warehouse management parameters**.
2. Click the **Cycle counting** tab on the left pane.
3. In the **Default cycle counting adjustment type code** field, select **New Cycle Count**.
4. In the **Default cycle count work class ID** field, make a selection.
5. In the **Default cycle count work priority** field, enter **1**.

9.8.3 Set up a spot cycle counting menu item

1. Open **Warehouse management > Setup > Mobile device > Mobile device menu items**.
2. Click **New** in the action pane.
3. In the **Menu item name** field, enter **Spot Cycle Count**.
4. In the **Title** field, enter **Spot Cycle Count**.
5. Select **Work** in the **Mode** field.
6. Set the **Use existing work** slider to **Yes**.
7. Click **Save** in the action pane.
8. Set the **Display inventory status** slider to **Yes**.
9. Select **System directed** in the **Directed by** field.
10. Expand the **Work classes** FastTab.
11. Click **New** in the FastTab.

12. Make a selection in the **Work class ID** field.
13. Click **Cycle Counting** in the action pane.
14. On the **Mobile device cycle counting** form, enter **2** in the **Number of attempts** field.
15. Click **OK** to close the form.
16. Click **Save** in the action pane.

9.8.4 Add the spot count menu item to the mobile device menu

1. Open **Warehouse management > Setup > Mobile device > Mobile device menu**.
2. Select **Inbound** in the left-hand pane.
3. Click **Edit** in the action pane.
4. In the **Mobile device menus** section, select **Spot Cycle Count** from the **Available menus and menu items** list.
5. Click the right directional arrow to add the menu item to the **Menu structure** list.
6. Click **Save** in the action pane.

9.9 Exercise #8 Define cycle counting (Bonus)

Objective: Define cycle counting parameters for mobile devices.

Cycle counting is a warehouse process that you can use to audit on-hand inventory items. Typically, This task is performed by a warehouse manager. You will go through this procedure for the **USMF** company to do the cycle counting setups as well.

You will need to do the following:

- Set the priority of counting work.
- Enable the mobile device.
- Create a counting threshold.
- Create a cycle count plan.

9.9.1 Set the priority of counting work

1. Go to **Warehouse management > Setup > Warehouse management parameters**.
2. Click the **Cycle counting** tab.
3. In the **Default cycle count work priority** field, enter a number. This step changes the priority of cycle counting work compared to other types of work in the warehouse. By entering a number that is lower than the number for other types of work, you raise the priority of the cycle counting work.
4. Click **Save**.
5. Close the page.

9.9.2 Enable the mobile device

1. Go to **Warehouse management > Setup > Mobile device > Mobile device menu items**.
2. Click **New**.
3. In the **Menu item name** field, type a value.
4. In the **Title** field, type a value.
5. In the **Mode** field, select **Work**.
6. Set the **Use existing work** option to **Yes**. When you set this option to Yes, the system will look for existing work when the mobile device menu item is used.

7. In the **Directed by** field, select 'System directed'. When "System directed" is selected, the warehouse worker will be directed to open work that is in defined work classes. (You will create these work classes next.)
8. Expand or collapse the **Work classes** section.

Next, you will create two work classes that will be used with this mobile device menu item. When the menu item is used, these work classes will be queried, and the work that has the highest priority will be shown to the user.

1. Click **New**.
2. In the **Work class ID** field, select a value.
3. Click **New**.
4. In the **Work class ID** field, select a value.
5. Click **Save**.
6. Close the page.
7. Go to **Warehouse management > Setup > Mobile device > Mobile device menu**.
8. In the tree, select the menu item that you just created.
9. Click **Edit**.
10. Click the arrow to add the menu item to the menu.
11. Click **Save**.

9.9.3 Create a counting threshold

1. Go to **Warehouse management > Setup > Cycle counting > Cycle count thresholds**.
2. Click **New**.
3. In the **Cycle counting threshold ID** field, type a value.
4. Set the **Process cycle counting immediately** option to **Yes**.
5. In the **Description** field, type a value.
6. Click **Save**.
7. Click **Select locations**.
8. In the **Criteria** field, select a value.
9. Click **OK**.
10. Close the page.

9.9.4 Create a cycle count plan

1. Go to **Warehouse management > Setup > Cycle counting > Cycle count plans**.
2. Click **New**.
3. In the **Cycle counting plan ID** field, type a value.
4. In the **Description** field, type a value.
5. In the **Maximum number of cycle counts** field, enter a number.
6. Click **Save**.
7. Click **Select locations**.
8. In the **Criteria** field, select a value.
9. Click **OK**.

10. In the **Days between cycle counting** field, enter a number. For example, if the Days between cycle counting field is set to 5, cycle counting work will be created every five days. However, if cycle counting work is processed on day three, the next cycle counting work will be created five days after the last cycle counting was processed, on day 8.
11. Click **Save**.
12. In the Cycle count plan product selections area, click **New**.
13. In the **Sequence number** field, enter a number. The sort is from the smallest number to the largest number. The value must be more than 0 (zero).
14. In the **Description** field, type a value.
15. Click **Save**.
16. Click **Define product query**.
17. In the **Criteria** field, enter or select a value.
18. Click **OK**.
19. Close the page.

9.10 Exercise #9 Define a partial location cycle counting process (Bonus)

Objective: Create a work pool, cycle counting work template, and cycle counting plan.

When you use cycle count plans to create counting work, you can guide the actual counting operations by requesting that only specific products and product variants be counted instead of all on-hand inventory at the location.

By filtering on specific products, the warehouse manager can reduce review overhead, help prevent consolidation mistakes, and save time.

Typically, a warehouse manager performs the setup tasks. You will perform this procedure for the **USMF** company.

You will need to do the following:

- Create a work pool.
- Create a cycle counting work template.
- Create a cycle counting plan.

9.10.1 Create a work pool

1. In USP2, Go to **Warehouse Management > Setup > Work > Work pools**.
2. Click **New**.
3. For Work Pool ID, enter **WP001.**
4. For description, enter **Work pool 001.**
5. Click **Save**.

9.10.2 Create a cycle counting work template

1. In USMF, go to **Warehouse management > Setup > Work > Work templates**.
2. In the **Work order type** field, select 'Cycle counting'.
3. Click **New**.
4. In the **Sequence number** field, enter a number. The sort order is from the smallest number to the largest number. The value must be more than 0 (zero).
5. In the **Work template** field, type a value.
6. In the **Work template description** field, type a value.
7. In the **Work pool ID** field, enter or select a value.

8. In the **Work priority** field, enter a number.
9. Click **Save**. Ignore any warnings.
10. Under Work Template Details, click **New**.
11. In the **Work type** field, select 'Counting'.
12. In the **Work class ID** field, enter or select a value.
13. Click **Save**.
14. Click **Work line breaks**.
15. Click **New**.
16. In the **Sequence number** field, enter a number. The sort order is from the smallest number to the largest number. The value must be more than 0 (zero).
17. Click **Save**.
18. Close all pages.

9.10.3 Create a cycle counting plan

1. Go to **Warehouse management > Setup > Cycle counting > Cycle count plans**.
2. Click **New**.
3. In the **Cycle counting plan ID** field, type a value.
4. In the **Description** field, type a value.
5. In the **Maximum number of cycle counts** field, enter a number.
6. In the **Work template** field, enter or select a value.
7. In the Cycle count plan product selections area, click **New**.
8. In the **Sequence number** field, enter a number. The sort order is from the smallest number to the largest number. The value must be more than 0 (zero).
9. In the **Description** field, type a value.
10. Click **Save**.
11. Click **Define product query**.
12. In the **Criteria** field, enter or select a value.
13. Click **OK**.
14. Close the page.

Exercise #10 Transfer orders and replenishments

Objective: Set up a warehouse, create a location directive, and create work templates.

As a functional consultant assisting the warehouse manager assisting during the implementation for **USP2**, you have been asked to perform setup for transfer orders.

You will need to do the following:

- Create and link transit and production warehouses.
- Set up a location directive.
- Set up work classes.
- Create transfer issues.
- Create transfer receipts.

9.10.4 Create transit and production warehouses

1. Go to entity **USP2**.
2. Open **Warehouse management** > **Setup** > **Warehouse** > **Warehouses**.
3. Select **New** to create a new warehouse.
4. In the **Warehouse** field, enter **31**.
5. In the **Name** field, enter **Site 3 - Transit Warehouse**.
6. On the **General** FastTab, select **3** in the **Site** field.
7. In the **Type** field, select **Transit**.
8. Expand the **Warehouse** FastTab.
9. Set the **Use warehouse management processes** slider to **Yes**.
10. Select **Save**.
11. Select **New** to create a new warehouse.
12. In the **Warehouse** field, enter **32**.
13. In the **Name** field, enter **Site 3 - Prod Warehouse**.
14. On the **General** FastTab, select **3** in the **Site** field.
15. Expand the **Warehouse** FastTab.
16. Set the **Use warehouse management processes** slider to **Yes**.
17. Select **Save**.

9.10.5 Set up a location directive

1. Open **Warehouse management** > **Setup** > **Location directives**.
2. Select **Transfer issue** in the **Work order type** field.
3. Select **New** in the **Location directives** FastTab.
4. Enter **Transfer Issue** in the **Name** field.
5. On the **Location directives** FastTab, select **Pick** in the **Work type** field.
6. In the **Site** field, select **3**.
7. In the **Warehouse** field, select **30**.
8. Click **Save**.
9. Select **New** on the **Lines** FastTab.
10. Verify that the **Sequence number** field is **1**.
11. Enter **1000** in the **To quantity** field.
12. Select **None** in the **Locate quantity** field.
13. Click **Save**.
14. Expand the **Location Directive Actions** FastTab.
15. Select **New**.
16. Type **Bulk** in the **Name** field.
17. Select **Save**.
18. Select **New**.
19. Enter **Transfer Issue-Put** in the **Name** field.
20. Select **Put** in the **Work type** field.
21. In the **Site** field, select **3**.

22. In the **Warehouse** field, select **31**.
23. Select **New** on the **Lines** FastTab.
24. Verify that the **Sequence number** field is **1**.
25. Enter **1000** in the **To quantity** field.
26. Select **None** in the **Locate quantity** field.
27. Expand the **Location Directive Actions** FastTab.
28. Select **New**.
29. Type **Bulk** in the **Name** field.
30. Select **Save**.
31. In the left-hand pane, select **Transfer Receipt** in the **Work order type** field.
32. Select **New** in the action pane.
33. Enter **Transfer Issue** in the **Name** field.
34. Select **Pick** in the **Work type** field.
35. In the **Site** field, select **3**.
36. In the **Warehouse** field, select **31**.
37. Click **Save**.
38. Select **New** on the **Lines** FastTab.
39. Verify that the **Sequence number** field is **1**.
40. Enter **1000** in the **To quantity** field.
41. Select **None** in the **Locate quantity** field.
42. Click **Save**.
43. Expand the **Location Directive Actions** FastTab.
44. Select **New**.
45. Type **Bulk** in the **Name** field.
46. Select **Save**.
47. Select **New**.
48. Type **Transfer Issue-Put** in the **Name** field.
49. Select **Put** in the **Work type** field.
50. In the **Site** field, select **3**.
51. In the **Warehouse** field, select **32**.
52. Click **Save**.
53. Select **New** in the **Lines** FastTab.
54. Verify that the **Sequence number** field is **1**.
55. Type **1000** in the **To quantity** field.
56. Select **None** in the **Locate quantity** field.
57. Click **Save**.
58. Expand the **Location Directive Actions** FastTab.
59. Select **New**.
60. Type **Bulk** in the **Name** field.
61. Select **Save**.

9.10.6 Setup Work classes

1. Open **Warehouse management > Setup > Work > Work classes**.
2. Click **New**.
3. In the **Work** class ID field, type **'Transfer2'**.
4. In the Description field, type **'Transfer'**.
5. In the Work order type field, select **'Transfer issue'**.
6. Click **Save**.
7. Close the page.

9.10.7 Set up a work template

9.10.8 Create transfer issues

1. Open **Warehouse management > Setup > Work > Work templates**.
2. In the **Work order type** field, select **Transfer issue**.
3. Select **New**.
4. Type **Transfer Order Issue** in the **Work template** field.
5. Type **Transfer Issue** in the **Work template description** field.
6. Select **Save**.
7. Select **New** in the **Work Template Details** area.
8. Select **Pick** in the **Work type** field.
9. Select the **Mandatory** check box.
10. Select **Transfer2** in the **Work class ID** field.
11. Select **New** in the **Work Template Details** area.
12. Select **Put** in the **Work type** field.
13. Select the **Mandatory** check box.
14. Select **Transfer2** in the **Work class ID** field.
15. Select **Save**.
16. Verify that the **Valid** check box on the **Overview** tab is now selected.

9.10.9 Create transfer receipts

1. In the **Work order type** field, select **Transfer receipt**.
2. Select **New** in the Action Pane.
3. Type **32 TO Receipt** in the **Work template** field.
4. Type **Transfer Receipt** in the **Work template description** field.
5. Select **Save**.
6. Select **New** in the **Work Template Details** area.
7. Select **Pick** in the **Work type** field.
8. Select the **Mandatory** check box.
9. Select **Transfer** in the **Work class ID** field.
10. Select **New** in the **Work Template Details** area.
11. Select **Put** in the **Work type** field.
12. Select the **Mandatory** check box.
13. Select **Transfer** in the **Work class ID** field.

14. Select **Save**.
15. Verify that the **Valid** check box is now selected.
16. Close the pages.

9.11 Exercise #11 Setup replenishment (Bonus)

Objective: Configure replenishment to run once a day every workday for the next six weeks.

you have been asked to perform the replenishment setup for Warehouse 30. under **USP2** company.

You will need to do the following:

- Set up mobile device menu items and menu.
- Set up a work template for replenishment.
- Set up a location directive for replenishment.
- Set up a wave template.
- Set up a replenishment template.
- Run replenishment for a load demand.

9.11.1 Set up mobile device menu items and menu

1. Open **Warehouse management > Setup > Mobile device > Mobile device menu items**.
2. Select **New**.
3. Type **Replenishment** in the **Menu item name** field.
4. Type **Replenishment** in the **Title** field.
5. Select **Work** in the **Mode** field.
6. Set the **Use existing work** slider to **Yes**.
7. Select **New** on the **Work classes** FastTab.
8. Select a Work class ID from the list.
9. Close the page.
10. Open **Warehouse management > Setup > Mobile device > Mobile device menu** and select the menu where you would like to add replenishment.
11. Select the **Replenishment** menu item from the **Available menus and menu items** pane.
12. Select the right directional arrow to move **Replenishment** to the **Menu structure** pane.
13. Close the page.

9.11.2 Set up a work template

1. Open **Warehouse management > Setup > Work > Work templates**.
2. In the **Work order type** field, select **Replenishment**.
3. Select **New**.
4. Type **Replenish** the **Work template** field.
5. Type **Replenish** in the **Work template description** field.
6. Click **Save**.
7. Select **New** in the **Work Template Details** section.
8. Select **Pick** in the **Work type** field.
9. Select the **Mandatory** check box.
10. Select **Replenish** in the **Work class ID** field. (If it doesn't exist, create it by right clicking and choose view details.)

11. Select **New** in the **Work Template Details** section.
12. Select **Put** in the **Work type** field.
13. Select the **Mandatory** check box.
14. Select **Replenish** in the **Work class ID** field.
15. Close the page.

9.11.3 Set up a location directive

1. Open **Warehouse management > Setup > Location directives**.
2. Select **Replenishment** in the **Work order type** field.
3. Select **New**.
4. Type **Replenish** in the **Name** field.
5. Select **Pick** in the **Work type** field.
6. Select **3** in the **Site** field.
7. Select **32** in the **Warehouse** field.
8. Click **Save**.
9. Select **New** on the **Lines** FastTab.
10. Verify that the **Sequence number** is **1**.
11. Type **500** in the **To quantity** field.
12. Type **ea** in the **Unit** field.
13. Refresh the screen.
14. Select **New** on the **Location directive actions** FastTab.
15. Type **Replenish** in the **Name** field.
16. Refresh the screen.
17. Select **Edit query**.
18. Select **Add** on the **Query** page.
19. Select **Locations** in the **Table** column.
20. Select **Location profile ID** in the **Field** column.
21. Select **BULK** in the **Criteria** column.
22. Select **OK**.
23. Select **New** in the action pane.
24. Type **Replenish Put** in the **Name** field.
25. Select **Put** in the **Work type** field.
26. Select **3** in the **Site** field.
27. Select **32** in the **Warehouse** field.
28. Click **Save**.
29. Select **New** on the **Lines** FastTab.
30. Verify that the **Sequence number** is **1**.
31. Type **500** in the **To quantity** field.
32. Type **ea** in the **Unit** field.
33. Refresh the screen.
34. Select **New** on the **Location Directive Actions** FastTab.

35. Type **Replenish Put** in the **Name** field.
36. Refresh the screen.
37. Select **Edit query**.
38. Select **Add** on the **Query** page.
39. Select **Locations** in the **Derived table** column.
40. Select **Location profile ID** in the **Field** column.
41. Select **PRODIN** in the **Criteria** column.
42. Select **OK**.
43. Close the **Location directives** page.

9.11.4 Set up a wave template

1. Open **Warehouse management > Setup > Waves > Wave templates**.
2. Select **Shipping** in the **Wave template type** field.
3. Select **New**.
4. Type **30 Replenish** in the **Wave template name** field.
5. Type **30 Replenish** in the **Wave template description** field.
6. Select **3** in the **Site** field.
7. Select **30** in the **Warehouse** field.
8. Set the **Automate wave creation**, **Process wave at release to warehouse**, **Automate wave release**, and **Automate replenishment work release** sliders to **Yes**.
9. Expand the **Methods** FastTab and verify that the **createLoads**, **allocateWave**, and **createWork** methods are selected.
10. Select **Replenish** from the **Remaining methods** pane.
11. Select the right directional arrow to move **Replenish** to the **Selected methods** pane.
12. Wave step code can be 4.
13. Close the page.

9.11.5 Set up a replenishment template

1. Open **Warehouse management > Setup > Replenishment > Replenishment templates**.
2. Select **New**.
3. Enter **Rep Demand** in the **Replenish template** field.
4. Enter **Replenish Demand** in the **Description** field.
5. In the **Replenishment type** field, select **Wave demand**.
6. In the **Wave step code** field, enter **200**.
7. In the **Replenishment template details** section, select **New**.
8. In the **Sequence number** field, enter **1**.
9. In the **Description** field, type **Demand**.
10. In the **Replenishment unit** field, type **ea**.
11. In the **Work template** field, select **Replenish**.
12. Refresh the screen.
13. Select **Select products**.
14. On the **Product query** page, enter **P9500** in the **Criteria** field.

15. Click **OK**.
16. Click **Save**.
17. Open **Warehouse management > Setup > Waves > Wave template**.
18. Select **30 Replenish** from the list of wave templates.
19. Select **Edit**.
20. In the **Selected Methods** pane, select the replenish method and enter **200** in the **Wave step code** field.
21. Select **Save**.
22. Close the page.

9.11.6 Run replenishment for a load demand

1. You have been asked to run replenishment for a load demand for Contoso Orange Juice, once a day on every workday for the next six weeks. Set up the recurring replenishment.
2. Open **Warehouse management > Replenishment > Load demand replenishment**.
3. On the **Load demand replenishment** page, select **Rep Demand** in the **Replenish template** field.
4. Expand the **Run in the background** FastTab.
5. Set the **Batch processing** slider to **Yes**.
6. Select the **Recurrence** tab.
7. On the **Define recurrence** page, enter today's date in the **Start date** field.
8. In the **Start time** field, enter **7:00 PM**.
9. Select the **End by** button and enter a date six weeks from today's date.
10. In the **Recurrence Pattern** area, select the **Days** button.
11. Select the **Every weekday** button.
12. Select **OK**.
13. Select **OK**.

9.12 Exercise #12 Configure outbound processing

Objective: Create an outbound location directive and a work template.

you have been asked to help with the outbound processing setups for sales order.

To test the setups, you will create a sales order and release to the warehouse for shipping.

You will need to do the following:

- Create an outbound location directive to ship items sold to a customer.
- Create an outbound work template.
- Create a sales order and release it to the warehouse.

9.12.1 Create an outbound location directive

1. Open **Warehouse management > Setup > Location directives.**
2. In the **Work order type** field, select **Sales orders**.
3. Click **New.**
4. Enter **30 Pick2** in the **Name** field.
5. Select **Pick** in the **Work type** field.
6. Select **3** in the **Site** field.
7. Select **30** in the **Warehouse** field.

8. Click **Save** on the action pane.
9. In the **Lines** FastTab, click **New**.
10. In the **From quantity** field, enter **0**.
11. In the **To quantity** field, enter **9999**.
12. Leave the Unit field blank.
13. Select **None** in the **Locate quantity** field.
14. Click **Save** in the action pane.
15. In the **Location directive actions** FastTab, click **New**.
16. In the **Name** field, enter **Pick**.
17. In the **Fixed location usage** field, select **Fixed and non-fixed locations.**
18. Click **Save** on the action pane.

9.12.2 Create an Outbound Work Template

Set up a work template for a sales order.

9.12.3 Create an outbound work template.

1. Open **Warehouse management > Setup > Work > Work templates**.
2. Select **Sales order** in the **Work template type** field.
3. Click **New** in the action pane.
4. Enter **SO Pick** 2 in the **Work template** field.
5. Enter **SO Pick** 2 in the **Work template description** field.
6. Click **Save.**
7. In the **Work Template Details** section, click **New**.
8. Select **Pick** in the **Work type** field.
9. Select the **Mandatory** check box.
10. In the **Work class ID** field, select **SO Pick**.
11. In the **Work Template Details** section, click **New** again.
12. Select **Put** in the **Work type** field.
13. Select the **Mandatory** check box.
14. In the **Work class ID** field, select **SO Pick**.
15. Click **Save** in the action pane.

9.12.4 Create a Sales Order and Release it to the Warehouse

You must create a sales order for four bottles of grapefruit juice and release it to the warehouse.

9.12.5 Create a sales order

1. Open **Sales and marketing > Sales orders > All sales orders**.
2. Click the **New** button to create a new sales order.
3. In the **Customer account** drop-down list, select **US-027**.
4. Expand the **General** FastTab.
5. Select **3** in the **Site** drop-down list.
6. Select **30** in the **Warehouse** drop-down list.
7. Click **OK**.

8. In the **Item number** field, select **P9500**.
9. Enter **4** in the **Quantity** field.
10. Expand the **Line Details** FastTab.
11. Click the **Setup** tab.
12. Select **Manual** in the **Reservation** drop-down list.
13. On the **Sales order lines** FastTab, select **Inventory** > **Reservation**.
14. Enter **4** in the **Reservation** field.
15. Select the **Inventory status** check box.
16. Click **Reserve lot**.
17. Close the reservation form.

9.12.6 Release the order to the warehouse.

1. Select the **Warehouse** tab on the action pane.
2. Click **Release to warehouse** in the **Actions** group.
3. An information bar confirms that the shipment is created (or not).
4. Close the information bar.
5. Close the Sales order details form.

9.13 Exercise #13 Configure cluster picking

Objective: enable mobile devices to group picking into clusters

You were asked to setup cluster picking to enable workers to use their mobile devices to group picking work into clusters.

This will allow them to pick items from a single location for multiple work orders at the same time.

This should be enabled for **USP2**

You will need to do the following:

- Create a cluster profile.
- Create the cluster picking menu item.
- Add the menu item to the mobile device.

9.13.1 Create a cluster profile

1. Open **Warehouse management** > **Setup** > **Mobile device** > **Cluster profiles**.
2. Click **New** in the action pane.
3. In the **Cluster profile ID** field, enter **Picking Cluster Profile.**
4. In the **Name** field, enter **Picking Cluster Profile**.
5. Expand the **General** FastTab.
6. Set the **Generate cluster ID** slider to **Yes**.
7. Set the **Activate positions** slider to **Yes**.
8. Enter **2** in the **Number of positions** field.
9. Click **Save** in the action pane.

9.13.2 Create the Cluster Picking menu item

1. Open **Warehouse management > Setup > Mobile device > Mobile device menu items**.
2. Click **New** in the action pane.
3. Enter **Cluster Picking** in the **Menu item name** field.
4. Enter **Cluster Picking** in the **Title** field.
5. Select **Work** in the **Mode** field.
6. Select the **Use Existing Work** slider to **Yes**.
7. Select **Cluster picking** in the **Directed by** field.
8. In the **Cluster profile ID** field, select **Picking Cluster Prof**
9. Click **New** in the **Work classes** FastTab.
10. Select **Sales** in the **Work class ID** field.
11. Click **New** in the **Work classes** FastTab again.
12. Select **SO Load** in the **Work class ID** field.
13. Click **New** in the **Work classes** FastTab again.
14. Select **SO Pick** in the **Work class ID** field.
15. Click **Save** in the action pane.

9.13.3 Add the menu item to the mobile device

1. Open **Warehouse management > Setup > Mobile device > Mobile device menu**.
2. Select **Main** in the left-hand pane.
3. Click **Edit**.
4. Select **Cluster Picking** from the **Available menus and menu items** pane.
5. Click the directional arrow to move the selection to the **Menu structure** pane.
6. Click **Save** in the action pane.

9.14 Exercise #14 Setup manual packing (Bonus)

Objective: Set up manual packing by configuring packing types, packing profiles, and wave templates.

You have been asked to set up manual packing for **USP2**.

You need to create a container type and packing profile.

You will then link the packing profile to Julia Funderburk.

You will need to do the following:

- Create container types.
- Create a packaging profile.
- Link the profile to a work user.
- Set up a wave template.

9.14.1 Create container types

1. Open **Warehouse management > Setup > Containers > Container types**.
2. Click **New** in the action pane.
3. In the **Container type code** field, enter **PackingBox**.
4. In the **Description** field, enter **PackingBox**.
5. In the **Tare weight** field, enter **0.5**.

6. In the **Maximum net weight** field, enter **15.00**.
7. In the **Container length** field, enter **12.00**.
8. In the **Container width** field, enter **16.00**.
9. In the **Container height** field, enter **10.00**.
10. Click **Save** in the action pane.

9.14.2 Create a packing profile

1. Open **Warehouse management > Setup > Packing > Packing profiles**.
2. Click **New** to create a new profile.
3. Type **PACK2** in the **Packing profile ID** field.
4. Type **Packing station 2** in the **Description** field.
5. Select **Number 1** in the **Container packing policy** field, or create it.
6. Select **Auto** in the **Container ID mode** field.
7. In the **Container type** field, select **PackingBox**.
8. Select the **Autocreate container at container close** check box.
9. Click **Save** in the action pane.

9.14.3 Link the profile to a work user

1. Open **Warehouse management > Setup > Worker**.
2. Select **Julia Funderburk** from the left-hand pane.
3. Click **Edit** in the action pane.
4. Update the **Packing profile ID** field to **PACK2**.
5. Click **Save** in the action pane.

9.14.4 Set up a wave template

1. Go to **Warehouse management > Setup > Waves > Wave templates**.
2. Click **New**.
3. In the **Wave template** name field, type a value.
4. In the **Wave template description** field, type a value.
5. In the **Site** field, enter or select a value.
6. In the **Warehouse** field, enter or select a value.
7. Click **Save**.
8. Expand the **Methods** section. The **Selected methods** pane lists the methods for the selected wave template type. The wave template must include the containerize method.
9. In the list, find and select the desired record.
10. In the **Wave step code** field, type a value. Enter a Wave step code for the added method, which can be any code. It's possible to add the method more than once and assign different wave step codes. To do this, select **Repeatable** for this method in the **Wave process methods** page.
11. Click **Save**.
12. Close the page.

9.15 Exercise #15 Configure carriers

Objective: Set up a new carrier and add a carrier service.

USMF in the United States has a new customer located in Europe.

The Transportation coordinator at Contoso Entertainment, has determined that a new company will be used for transporting the products to this customer.

You will need to do the following:

- Set up a new ocean carrier.
- Add a carrier service to the carrier.

9.15.1 Set up a new carrier

Open **Transportation management** > **Setup** > **Carriers** > **Shipping carriers**.

1. In the action pane, click **New** to create a new shipping carrier.
2. In the **Shipping carrier** field, type **Ocean Carrier 2**.
3. In the **Name** field, type **Secondary ocean carrier**.
4. In the **Mode** field, select **Ocean**.
5. Expand the **Overview** FastTab.
6. Set the **Activate shipping carrier** slider to **Yes**.
7. Select vendor account **1002** from the **Vendor** drop-down menu.
8. In the **SCAC** field, type **2005.**
9. Set the **Activate carrier rating** slider to **Yes.**
10. On the **Addresses** FastTab, click **New**.
11. In the **New address** form, type **Ocean carrier location** in the **Name** field.
12. Select **Business** from the **Purpose** drop-down list.
13. Select USA in the Country/region drop-down list.
14. In the **ZIP/postal code** field, type **11251**.
15. In the **Street** field, type **1577 Madison Blvd**.
16. Set the **Primary** slider to **Yes**.
17. Click **OK.**
18. Close the **Shipping carriers** form.

9.15.2 Add a carrier service to the carrier

1. Open **Transportation management** > **Setup** > **Carriers** > **Shipping carriers.**
2. Select **Ocean Carrier 2** in the left-hand pane.
3. Expand the **Services** FastTab.
4. Click **New.**
5. In the **Carrier service** field, type **Ocean**.
6. In the **Name** field, type **Ocean**.
7. In the **Transportation method** field, select **Ocean**.
8. Select **Freight** from the **Billing group ID** drop-down menu.
9. Close the form.

9.16 Exercise #16 Configure rate masters

Objective: Configure a rate master and base.

To support the logistics & transportation manager for **USMF**, you were asked to record the rates for an air carrier.

This is done by setting up the rate masters according to the contracts signed with the carriers

You will need to do the following:

- Setup the rate master.
- Set up the rate base.
- Assign the rate base.

9.16.1 Set up rate master

1. Go to **Transportation management > Setup > Rating > Rate master.**
2. Click **New**.
3. In the Rate master field, type **AtlantaMaster**.
4. In the Name field, type **Atlanta rate master**.
5. In the Rating metadata ID field, click the drop-down button to open the lookup.
    - The rating metadata ID will determine the data needed for the rate master, as it defines the metadata expected by the TMS engine using this rate master.
6. For this example, select the **P2P** option.
7. Click Save.

9.16.2 Set up rate base

1. Click **Rate base**.
    - The rate base determines the rate of the carrier and can be used to set up a tariff structure as it structures the rates in the breakpoints defined in the break master.
2. Click **New**.
3. In the **Rate base** field, type **AtlantaBase**.
4. In the **Name field**, type **Atlanta rate base**.
5. In the **Break master** field, click the drop-down button to open the lookup.
    - Break masters are used to define the pricing structure and its breakpoints. The pricing structure uses tiered pricing that is based on physical dimensions.

For this example, use **weight.**

1. Toggle the expansion of the **Details** section.
2. Click **New**.
3. In the **Drop-off Postal Code From** field, type **30301**.
4. In the **Drop-off Postal Code To** field, type **30318**.
5. In the **Drop-off Country Region** field, type **USA**.
6. In the **<1.00 Lbs** field, type **100**.
    - Insert the rate per lbs if the total weight of the load is less than 1 pound.
7. In the **<5.00 Lbs** field, type **300**.
    - Insert the rate per lbs if the total weight of the load is less than 5 pounds.
8. In the **<20.00 Lbs** field, type **500**.
    - Insert the rate per lbs if the total weight of the load is less than 20 pounds.

9. In the **<100.00** Lbs field, type **1000**.
    - Insert the rate per lbs if the total weight of the load is less than 100 pounds.
10. In the **<1,000.00** Lbs field, type **3000**.
    - Insert the rate per lbs if the total weight of the load is less than 1000 pounds.
11. Click **Save**.
12. Close the page.

9.16.3 Assign rate base

1. Toggle the expansion of the **Rate base assignments** section.
2. Click **New**.
    - You can have several rate base assignments for each rate master. This makes it possible to create several different price points for each carrier depending on destinations, services, or different rate bases. In this procedure you will only create one rate base assignment.
3. In the Name field, type **AtlantaRateAssignment**.
4. In the Rate base field, click the drop-down button to open the lookup.
5. In the list, select **AtlantaBase**.
6. In the Service field, click the drop-down button to open the lookup.
7. In the list, find and select **Truck**.
8. In the Pick-up Postal Code field, type **98052**.
    - Specify which postal code this rate base assignment should be valid from.
9. In the **Pick-up Country Region** field, type **USA**.
10. Click **Save**.

9.17 Exercise #17 Setup route plans and route guides (Bonus)

Objective: Configure a route pan, hub, and route guide.

You were asked to help the logistics manager at **USMF** to setup route plans and route guides.

You will need to do the following:

- Configure a new route plan for Georgia to Los Angeles.
- Create a new hub for the warehouses at Georgia and Los Angeles.
- Add details to the route plan.
- Create a route guide for Georgia to Los Angeles.

9.17.1 Create a new route plan named "GA to LA"

1. Open **USMF > Transportation management > Setup > Routing > Route plans.**
2. Click **New**.
3. In the **Route plan** field, enter **GA to LA**.
4. In the **Name** field, enter **Georgia to Los Angeles**.
5. Close the form.

9.17.2 Create a new hub for Georgia and one for Los Angeles

1. Open **Transportation management > Setup > Routing > Hub masters**.
2. Click **New**.
3. In the **Hub** field, enter **Georgia 3**.

4. In the **Name** field, enter **Savannah GA**.
5. Expand the **Codes** FastTab.
6. In the **Hub type** field, select Hub.
7. In the **Rate master** field, select **TruckRateMaster**.
8. Expand the **Effective dates** FastTab.
9. In the **Effective start date and time** field, select **Today**.
10. In the **Effective end date and time** field, select **12/31/2025**.
11. Expand the **Address** FastTab.
12. Click **Add**.
13. In the **Name or description** field, enter **Georgia 3**.
14. In the **Zip/postal code** field, enter **31302**.
15. In the **Street** field, enter **123 ABC Street**.
16. Click **OK**.
17. Click **New**.
18. In the **Hub** field, enter **Los Angeles 2**.
19. In the **Name** field, enter **Los Angeles CA 2**.
20. Expand the **Codes** FastTab.
21. In the **Hub type** field, select Hub.
22. In the **Rate master** field, select **TruckRateMaster**.
23. Expand the **Effective dates** FastTab.
24. In the **Effective start date and time** field, select **Today**.
25. In the **Effective end date and time** field, select **12/31/2025**.
26. Expand the **Address** FastTab.
27. Click **Add**.
28. In the **Name or description** field, enter **Los Angeles 2**.
29. In the **Zip/postal code** field, enter **90001**.
30. In the **Street** field, enter **987 XYZ Avenue**.
31. Click **OK**.
32. Close the form.

9.17.3 Add details to the route plan.

1. Open **Transportation management > Setup > Routing > Route plans.**
2. Select the **GA to LA** route plan.
3. On the **Details** FastTab, click **New**.
4. In the **Origin hub** field, select **Georgia 3**.
5. In the **Destination hub** field, select **Los Angeles 2**.
6. In the **Shipping carrier** field, select **TruckCarrier**.
7. In the **Carrier service** field, select **Truck**.
8. Close the form.

9.17.4 Create a route guide

You must configure a new routing guide for Georgia to Los Angeles. The routing guide should use a particular shipping carrier, TruckCarrier, with the carrier service Truck.

9.17.5 Create a new routing guide named "GA to LA".

1. Open **USMF > Transportation management > Setup > Routing > Route guides.**
2. Click **New**.
3. In the **Routing guide** field, enter **GA to LA**.
4. In the **Name** field, enter **Georgia to Los Angeles**.

9.17.6 Add Information, Origin, Destination, and Result entities to the routing guide.

1. Expand the **Information** FastTab.
2. In the **Direction** field, select **Outbound**.
3. Set the **Active** slider to the **Yes** position.
4. In the **Effective start date and time** field, select **Today**.
5. In the **Effect end date and time** field, enter **12/31/2025**.
6. Expand the **Origin** FastTab.
7. In the **Zip/postal code** field, enter **31302**.
8. In the **Hub** field, select **Los Angeles 2**.
9. In the **Country/region** field, enter **USA**.
10. Expand the **Destination** FastTab.
11. In the **Zip/postal code from** field, enter **31302**.
12. In the **Zip/postal code to** field, enter **90001**.
13. In the **Hub** field, select **Georgia 3**.
14. In the **Country/region** field, enter **USA**.
15. Expand the **Result** FastTab.
16. In the **Shipping carrier** field, select **TruckCarrier**.
17. In the **Carrier service** field, select **Truck**.
18. Click **Save**.

9.18 Exercise #18 Process inbound shipments (Bonus)

Objective: Configure a route and manage inbound shipments.

You were asked to help the logistics manager at USMF, to manage the inbound shipments from Ade Supply Company.

You will need to do the following:

- Complete the prerequisite steps.
- Create a hub, route plan, and route guide.
- Initiate an inbound shipment.
- Process an inbound shipment.
- Confirm an inbound shipment.

9.18.1 Add a vendor address for the Ade Supply Company.

1. Open **Accounts payable > Vendors > All vendors**.
2. Select vendor **1003** from the list of vendors.
3. In the action pane, click **Edit**.
4. In the **Addresses** FastTab, click **Add**.
5. In the **Name or description** field, type **Ade Supply Main Location**.
6. In the **Zip/postal code** field, enter **00210**.
7. In the **Street** field, enter **123 Main Street**.
8. Set the **Primary** slider to **Yes**.
9. Click **OK**.
10. In the **Invoice and delivery** FastTab, in the **Mode of delivery** field, select **Parce-STD**.
11. Close the forms.

9.18.2 Modify the CFR terms of delivery.

1. Open **Accounts payable > Setup > Terms of delivery**.
2. Select **CFR** from the left-hand panel.
3. Click **Edit** in the action pane.
4. In the **Transportation** FastTab, set the **Add transportation charges to retail sales orders** slider to **Yes**.
5. Close the form.

9.18.3 Create a Hub, Route Plan, and Route Guide

You have been asked to set up a hub for the Ade Supply Company and create a route plan and guide between the Ade Supply Company and USMF's Warehouse 61.

9.18.4 Create a hub for the Ade Supply Company.

1. Open **Transportation management > Setup > Routing > Hub masters**.
2. Click **New** in the action pane.
3. In the **Hub** field, enter **Ade Supply.**
4. In the **Name** field, enter **Ade Supply NH**.
5. In the **Codes** FastTab, in the **Hub type** field, select **Hub**.
6. In the **Rate master** field, select **ParcelRateMaster**.
7. In the **Address** FastTab, click **Add**.
8. In the **New address** form, in the **Name or description** field, enter **Ade Supply NH**.
9. In the **ZIP/postal code** field, enter **00210**.
10. In the **Street** field, enter **123 Main Street**.
11. Click **OK**.
12. Close the form.

9.18.5 Create a route plan from New Hampshire to Washington.

1. Open **Transportation management > Setup > routing > Route plans**.
2. Click **New** in the action pane.
3. In the **Route plan** field, enter **NH to WA**.
4. In the **Name** field, enter **New Hampshire to Washington**.
5. In the **Details** FastTab, click **New**.
6. In the **Origin hub** field, select **Ade Supply**.
7. In the **Destination hub** field, select **Own WHS**.
8. In the **Shipping carrier** field, select **ParcelCarrier**.
9. In the **Carrier service** field, select **STD**.
10. In the **Vendor** field, select **1003**.
11. Close the form.

9.18.6 Create a route guide from New Hampshire to Washington.

1. Open **Transportation management > Setup > Routing > Route guides**.
2. Click **New** in the action pane.
3. In the **Routing guide** field, enter **NH to WA**.
4. In the **Name** field, enter **New Hampshire to Washington**.
5. In the **Origin** FastTab, in the **ZIP/postal code** field, enter **00210**.
6. In the **Destination** FastTab, in the **ZIP/postal code** field, enter **98052**.
7. In the **Result** FastTab, in the **Route plan** field, select **NH to WA**.
8. Close the form.

9.18.7 Initiate an Inbound Shipment

You have been asked to create a new purchase order for 10 mini-speakers from the Ade Supply Company. After creating the purchase order, you will need to create an inbound shipment and then rate shop for the inbound load to find the cheapest transportation rate.

9.18.8 Create a new purchase order.

1. Open **Accounts payable > Purchase orders > All purchase orders**.
2. Click **New** in the action pane.
3. On the **Create purchase order** form, in the **Vendor account** field, select **1003**.
4. In the **General** FastTab, in the **Site** field, select **6**.
5. In the **Warehouse** field, select **61**.
6. Click **OK**.
7. In the **Purchase order lines** FastTab, in the **Item number** field, enter **L0101**.
8. In the **Quantity** field, enter **10**.
9. In the **Unit price** field, enter **50**.
10. In the **Purchase** tab on the action pane, click **Confirm**.

9.18.9 Create an inbound shipment.

1. In the **Warehouse** tab on the action pane, click **Load planning workbench**.
2. Select the check mark column for the purchase order line.
3. In the **Supply and demand** tab on the action pane, click **To new load**.
4. In the **Load template assignment** form, in the **Load template ID** field, select **Stnd Load template**.
5. Click **OK**.

9.18.10 Rate shop for the inbound load.

1. In the **Loads** tab of the Load planning workbench, select **Rate route workbench** from the **Rating and routing** drop-down menu.
2. In the action pane of the Rate route workbench, click **Rate shop**.
3. In the Route results FastTab, clear the **Hide exceptions** check box.
4. Select the **Route result** line for the route guide.
5. Click **Assign**.

9.18.11 Process an Inbound Shipment

Now that the inbound shipment has been created and rated, you need to schedule an appointment for the mini-speaker shipment. You've also been asked to schedule driver Tim Smith in and out of the appointment.

9.18.12 Schedule an appointment.

1. Open **Transportation management > Planning > Load planning workbench**.
2. In the **Loads** tab, select the load ID for the purchase order created in the earlier practice.
3. Select **Appointment scheduling** from the **Transportation** drop-down menu.
4. In the **Appointment scheduling** form, click **New** in the action pane.
5. In the **Appointment details** FastTab, in the **Appointment rule** field, select **Inbound docks 61**.
6. Click **Save**.
7. In the action pane, click the **Update status** drop-down arrow and select **Firm**.

9.18.13 Check the driver in

1. In the action pane, click the **Update status** drop-down arrow and select **Driver check-in**.
2. In the **Driver check-in details** form, in the **Driver name** field, enter **Tim Smith**.
3. In the **Driver license** field, enter **123**.
4. Click **OK**.
5. Close the **Appointment scheduling** form.

9.18.14 Check the driver out

1. Select **Appointment scheduling** in the **Transportation** drop-down menu.
2. In the **Appointment scheduling** form, in the action pane, click the **Update status** drop-down arrow and select **Driver check-out**.
3. In the **The driver's information** form, click **OK** to accept the default information.
4. Close the form.

9.18.15 Confirm an Inbound Shipment

You now need to confirm the inbound load.

9.18.16 Confirm the inbound load.

1. Open **Transportation management > Planning > Load planning workbench**.
2. In the **Loads** tab, clear the **Hide shipped and received** check box.
3. Click the load ID.
4. In the **Load details** form, click the **Ship and receive** tab in the action pane, and then select **Inbound shipment** in the **Confirm** area.
5. Close the form.

9.19 Exercise #19 Process outbound shipments

Objective: Manage an outbound shipment and a consolidated shipment

The logistics manager at USMF, would like to process an outbound shipment for Desert Wholesales.

This involves receiving and confirming the sales order, reserving stock for the order, and creating an outbound transportation load.

In addition, Desert Wholesales wants to add another line to their sales order.

They requested that both sales order lines arrive in one consolidated load.

You have been asked to help creating the consolidated load and confirming it.

You need do the following:

- Initiate an outbound shipment.
- Create a consolidated shipment.

9.19.1 Initiating an Outbound Shipment

You have been asked to confirm a sales order for Desert Wholesales, reserve stock for the order, and create an outbound transportation load.

9.19.2 Receive and confirm the sales order.

1. Open **Sales and marketing > Customers > All customers**.
2. In the list of customers, select the line for account **US-007**.
3. In the action pane, click the **Sell** tab.
4. In the **New** area, click **Sales order**.
5. In the **Sales order** form, expand the **Sales order lines** FastTab, if not expanded already.
6. In the existing sales order line, in the **Item number** field, enter **A0001**.
7. In the **Quantity** field, enter **5**.
8. In the **Site** field, enter **6**.
9. In the **Warehouse** field, enter **62**.
10. In the **Unit price** field, enter **15**.
11. In the action pane, click **Save**.
12. In the action pane, click the **Sell** tab.
13. In the **Generate** area, click **Confirm sales order**.
14. Confirm the information on the **Confirm sales order** form and click **OK**.
15. Click **OK** to post without printing.

9.19.3 Reserve stock for the order.

1. In the **Sales order details** form, select the order line in the **Sales order lines** FastTab.
2. Click the **Inventory** drop-down arrow and select **Reservation**.
3. In the **Reservation** form, in the **Reservation** field, enter **5**.
4. In the action pane, click **Reserve lot**.
5. Close the form.

9.19.4 Create an outbound transportation load.

1. In the **Sales order details** form, click the **Warehouse** tab in the action pane.
2. In the **Loads** area, click **Load planning workbench**.
3. In the **Sales lines** tab, select the line for your current sales order.
4. In the action pane, click **Supply and demand**.
5. In the **Add** area, click **To new load**.
6. In the **Load template assignment** form, select **Stnd Load Template** from the **Load template ID** drop-down menu.
7. Click **OK**.
8. Click **OK** to confirm exceeding capacity.

9.19.5 Creating a Consolidated Shipment

Desert Wholesales wants to add another line to their sales order. They request that both sales order lines arrive in one consolidated load. You have been tasked with creating the consolidated load and confirming it.

9.19.6 Set up parameters for consolidated shipments.

1. Open **Transportation management > Setup > Transportation management parameters**.
2. Click the **General** tab.
3. In the **In transit planning** FastTab, set the **In transit planning** slider to **Yes**.
4. Close the form.

9.19.7 Add a new line to a sales order.

1. Open **Accounts receivable > Orders > All sales orders**.
2. Select the current sales order for Desert Wholesales.
3. In the **Sales order details** form, in the **Sales order lines** FastTab, click **Add line**.
4. In the **Item number** field, enter **A0002**.
5. In the **Quantity** field, enter **5**.
6. For **Site**, select **5**.
7. In the action pane, click the **Sell** tab.
8. In the **Generate** area, click **Confirm sales order**.
9. Confirm the information on the Confirm sales order form and click **OK**.
10. Click **OK** to post without printing.

9.19.8 Reserve stock for the order.

1. In the **Sales order details** form, select one of the order lines in the **Sales order lines** FastTab.
2. Click the **Inventory** drop-down arrow and select **Reservation**.
3. In the **Reservation** form, in the **Reservation** field, enter **5**.
4. In the action pane, click **Reserve lot**.
5. Close the form.

9.19.9 Create and confirm a new outbound load.

1. In the **Sales order details** form, click the **Warehouse** tab in the action pane.
2. In the **Loads** area, click **Load planning workbench**.
3. In the **Sales lines** tab, select a line for your current sales order.
4. In the action pane, click **Supply and demand**.
5. In the **Add** area, click **To new load**.
6. In the **Load template assignment** form, select **Stnd Load Template** from the **Load template ID** drop-down menu.
7. Click **OK**.
8. Click **OK** to confirm exceeding capacity.

9.19.10 Add hub consolidation and rate both loads.

1. In the **Load planning workbench**, select the first load you created in the **Loads** tab.
2. Select **Hub consolidation** in the **Transportation** drop-down menu.
3. In the **Override location** form, click the **Hub** drop-down arrow and select **Los Angeles**.
4. Click **OK**.
5. Select the load line in the **Loads** tab.
6. Select **Rate route workbench** from the **Rating and routing** drop-down menu.
7. In the **Rate route workbench**, click **Route with rate** in the action pane.
8. In the **Route Results** FastTab, select route guide **Wh 61 to Cust 003 004 019**.
9. Click **Assign**.
10. Close the **Routes** form and the **Rate route workbench**.
11. Repeat steps **1**–**10** for the second load.

9.19.11 Create the consolidated load.

1. In the **Transportation request lines** tab, select both lines.
2. In the action pane, click the **Supply and demand** tab.
3. In the **Add** area, click **To new load**.
4. In the **Load template assignment** form, select **Stnd Load Template** from the **Load template ID** drop-down menu.
5. Click **OK**.
6. Click **OK** to confirm exceeding capacity.

Note: The consolidated load may take several minutes to appear in the Loads tab.

9.19.12 Rate the consolidated load.

1. In the **Loads** tab, select the consolidated load line.
2. Select **Rate route workbench** from the **Rating and routing** drop-down menu.
3. In the **Rate route workbench**, click **Route with rate** in the action pane.
4. In the **Route Results** FastTab, select route guide **Wh 61 to Cust 003 004 019**.
5. Click **Assign**.
6. Close the **Routes** form and the **Rate route workbench**.

9.19.13 Confirm the consolidated load shipment.

1. On the **Loan planning workbench**, in the **Loads** tab, select the consolidated load line.
2. Select **Outbound load** in the **Ship and receive** drop-down menu.

9.20 Exercise #20 Configure freight reconciliation (Bonus)

Objective: Configure and manage freight reconciliation.

You were asked to help the logistics manager at **USMF**, to setup the system for Desert Wholesales for freight reconciliation.

You will need to do the following:

- Create the freight reconciliation reason code for overtime.
- Verify that the fright bill type is configured.
- Create a freight bill type assignment for the truck carrier service.
- Create a billing group named Duties.
- Create an audit master for overtime.

9.20.1 Create a freight reconciliation reason code for Overtime

1. Open **Transportation management > Setup > Freight reconciliation > Reconciliation reasons**.
2. Click **New**.
3. Type **OT** in the **Reconciliation reason code** field.
4. Type **Overtime** in the **Description** field.
5. Type **211650** in the **Debit account** field.
6. Select the **Pay the freight vendor** check box.
7. Close the form.

9.20.2 Verify the Freight bill type is configured

1. Open **Transportation management > Setup > Freight reconciliation > Freight bill type**.
2. Select the TL **Freight bill type**.
3. Verify the **Engine assembly** field is populated.
4. Verify that two records exist, one for Billing group ID and one for External code.
5. Close the form.

9.20.3 Create a freight bill type assignment for the Truck Carrier service.

1. Open **Transportation management > Setup > Freight reconciliation > Freight bill type assignments**.
2. Click **New**.
3. Select **None** in the **Direction** field.

4. Select **Ground** in the **Mode** field.
5. Select **TruckCarrier** in the **Shipping carrier** field.
6. Select **TL** in the **Freight bill type** field.
7. Close the form.

9.20.4 Create a billing group named Duties.

1. Open **Transportation management > Setup > Freight reconciliation > Billing Group**.
2. Click **New**.
3. Type **Duties** in the **Billing group** field.
4. Type **Duties** in the **Name** field.
5. Close the form.

9.20.5 Create an audit master for overtime.

1. Open **Transportation management > Setup > Freight reconciliation > Audit master**.
2. Click **New**.
3. Enter **Overtime** in the **Audit master ID** field.
4. Select **TruckCarrier** in the **Shipping carrier** field.
5. Select **TL** in the **Freight bill type** field.
6. In the **Result** FastTab, select **OT** in the **Overpayment reason code** field.
7. Select **Damage claim** in the **Underpayment reason code** field.
8. Close the form.

9.21 lab: title: 'Case study 4 Quality control and quality management' module: 'Module 5: Configure and manage quality control and quality management '

10 Case study 4 Quality control and quality management

10.1 Objectives

1. *Enable quality management; create tests, item sampling, definitions and process of the quality management process.*
2. *Create a manual quality order with a specification.*
3. *Work with non-conformance issues like faulty items by defining several required specifications. *
4. *Create and process a non-conformance order to have an item repaired and to adjust a faulty machine.*
5. *Run a non-conformance report, a non-conformance tag report, and a corrections report*

10.2 Exercise #1 Enable quality management process that specifies items to be inspected at the time of picking

Objective: Enable quality management; create tests, item sampling, definitions and process of the quality management process.

The quality manager in USMF wants to know how to enable a quality management process requiring that incoming inventory for all TV products be inspected immediately at the time of picking.

When she create a sales order for item T0002 and during the picking step, a quality order will be automatically created.

To be able to proceed with picking and packing the sales order she will have to process the quality order.

Can you assess her to do the following?

- Enable quality management in Inventory management parameters.
- Create tests.
- Create test variables to define the test results are recorded.
- Set up item sampling.
- Create quality and item groups.
- Create a test group.
- Define when quality orders will be created.
- Process quality orders.

10.2.1 Enable quality management

1. Go to **Inventory management** > **Setup** > **Inventory and warehouse management parameters**.
2. Click the **Quality management** tab.
3. Set the **Use quality management** option to **Yes**.
4. Click **Report setup**. In USMF, the report setup for quality management is already defined. If this wasn't done, you'd add new lines here for the different report types, and select the type of document to be used for each report.
5. Close all pages.

10.2.2 Create a test

1. Go to **Inventory management** > **Setup** > **Quality control** > **Tests**.
2. Click **New**.
3. In the **Test** field, type **eBookTest**.
4. In the **Description** field, type **Test eBook**.
5. In the **Type** field, select **Option** to assign the test results based on pre-defined values.
6. Click **Save**.
7. Close all pages.

10.2.3 Create Test variables to define the way test results are recorded

1. Go to **Inventory management** > **Setup** > **Quality control** > **Test variables**.
2. Click **New**.
3. In the **Variable** field, type **Power**.
4. In the **Description** field, type **Power up**.
5. Click **Save**.
6. Click **Outcomes**.
7. Click **New**.
8. In the **Outcome** field, type **ON**.
9. In the **Description** field, type **Device starts normally**.
10. In the **Outcome** status field, select **Pass**.
11. Click **Save**.
12. Click **New**.
13. In the **Outcome** field, type **OFF**.
14. In the **Description** field, type **Device does not power up**.
15. In the **Outcome** status field, select **Fail**.

16. Click **Save**.
17. Close all pages.

10.2.4 Set up item sampling

1. Go to **Inventory management** > **Setup** > **Quality control** > **Item sampling**.
2. Click **New**.
3. In the **Item sampling** field, type **One**.
4. In the **Description** field, type one sample.
5. In the **Quantity** specification field select **Fixed quantity**.
6. In the **Value** field, enter **1**. This value relates to the Quantity specification that's selected in the adjacent field.
7. Expand or collapse the **Process** section.
8. Select or clear the **Full blocking** option. If you select this option, the whole lot or order line quantity is blocked if a test is failed. If you don't select it, only the items in the quality order are blocked.
9. Click **Save**.
10. Close all pages.

10.2.5 Create a quality and item group

1. Go to **Inventory management** > **Setup** > **Quality control** > **Quality groups**.
2. Click **New**.
3. In the **Quality group** field, type **eBookQG**. Use a descriptive name to help you identify which kind of items the group will contain (your sampling criteria).
4. In the **Description** field, type **Quality group for TVs**.
5. Click **Save**.
6. Click **Add items**.
7. Select the **Item number** row. In this example the filtering will be run based on the item number.
8. In the **Criteria** field, type **T*** to filter on the item numbers that start with T.
9. Click **OK**.
10. Click **OK**.
11. Close all pages.

10.2.6 Create a test group

1. Go to **Inventory management** > **Setup** > **Quality control** > **Test groups**.
2. Click **New**.
3. In the **Test group** field, type **eBookTG**. Give the test group a name that will help you remember what kind of tests are being run, and which quality group it should be associated with.
4. In the **Description** field, type **Test group for TVs**.
5. In the **Item sampling** field, select **One**.
6. Under the **Overview** tab, click **Add**.
7. In the **Sequence** number field, enter **1**.
8. In the **Test** field, select **eBookTest**.
9. Click the **Test** tab.
10. In the **Variable** field, select **Power**.
11. In the **Default outcome** field, click the drop-down button to open the lookup.

12. Select **ON**.
13. Click **Save**.
14. Close all pages.

10.2.7 Define when quality orders will be created

1. Go to **Inventory management** > **Setup** > **Quality control** > **Quality associations**.
2. Click **New**.
3. In the **Reference** type field, select **Sales**.
4. In the Item code field, select **Group**.
5. In the Item field, enter or select **eBookQG**.
6. Expand the **Process** section.
7. In the **Event** type field, select **Picking process is scheduled**.
8. Expand the **Quality order process** section.
9. In the **Event blocking** field, enter or select **Picking process**.
10. Expand the **Specifications** section.
11. In the **Test group** field, enter or select **eBookTG**.
12. Click **Save**.
13. Close all pages.

10.2.8 Process quality orders

1. Go to **Sales and marketing** > **Sales orders** > **All sales orders**.
2. Click **New**.
3. In the **Customer account** field, select **US-013**.
4. Click **OK**.
5. In the **Item number** field, enter or select **T0002**.
6. On the Action Pane, click **Pick and pack**.
7. Click **Quality orders**. Note that currently there is no quality order.
8. Close the page.
9. Click **Generate picking list**.
10. Click **OK**.
11. Click **OK**.
12. Read the error message generated preventing you from continuing the process of picking and packing because you have now a quality order .
13. Click **Quality orders**. Note the quality order automatically is generated.
14. Review the tests.
15. Click **Results**.
16. Set Result quantity to **1**.
17. Set **Test result** to **ON**.
18. Click **Validate**.
19. Close the page.
20. Click **Validate**.
21. Click **OK**.

22. Close the quality order page.
23. Click **Generate picking list**.
24. Click **OK**.
25. Click **OK**.
26. Once back on the **Sales order** page, clear the messages via the X.
27. Note that there is no error because you have passed the quality order test.
28. Click **Picking list registration**.
29. Click **Updates**.
30. Click **Update all**.
31. Close the form.
32. Click **Post packing slip**.
33. Click **OK**.
34. Click **OK**.
35. Close all pages.

10.3 Exercise #2 Create a manual quality order with a specification

Objective: Create a manual quality order with a specification.

The quality manager must deal with non conformance and quality issues and track the cause of any problems.

He wants make sure that the shipped products have a quality expected by USMF so he asked an employee in sales, to make an additional selection for the HDMI cable item A0002 for impedance by creating a manual quality order with a specification.

The sales employee is new and not sure what to do. You were called to help the sales employee. What features you will be using to perform the above tasks?

You will need to do the following:

10.3.1 Create a manual quality order.

1. Open **Inventory management > Periodic tasks > Quality management > Quality orders**.
2. Click **New**.
3. Select **Inventory** as the **Reference type**.
4. Select **Item number A0002.**
5. Select **APPAREL** eBookTG as the **Test group.**
6. Type ”1.00” in the **Quantity** field.
7. Select **2** in the **Site** field.
8. Select **24** in the **Warehouse** field.
9. Select **Available** in the **Inventory status** field.
10. Click **OK**.
11. In the bottom pane, select the line where Sequence is 10 (Length), and then click **Results**.
12. In the **Result quantity** field, type ”1.00”.
13. In the **Test result** field, type ”100.00”.
14. Click **Validate** and close the form.
15. Select the line where Sequence is 20 (Rub and Scratch), and then click **Results**.
16. In the **Result quantity** field, type ”1.00”.
17. Click **Validate** and close the form.

10.4 Exercise #3 Define conditions to work with non-conformance issues

*Objective: Work with non-conformance issues like faulty items by defining several required specifications. *

Due to recent issues with customers returning faulty computers, you want to setup some processes to deal with faulty items in the system.

You will need to define several conditions to work with non-conformance: problems and diagnostic types, operations, quality charges, and quarantine zones.

You will need to do the following:

Add diagnostic types.

Add a quarantine zone.

10.4.1 Work with nonconformance

1. Open **Inventory management > Setup > Quality management > Problem types.**
2. Click **New**.
3. Enter **Temperature** in both **Problem type** and **Description** fields.
4. Click **Save**.

10.4.2 Add diagnostic types

1. Open **Inventory management > Setup > Quality management > Diagnostic types.**
2. Click **New**.
3. Enter **Machine temperature** in both **Diagnostic** and **Description** fields.
4. Click **Save**.
5. Open **Inventory management > Setup > Quality management > Operations.**
6. Click **New**.
7. Enter **Adjustment temp** in both **Operation** and **Description** fields.
8. Select **Purchase order** in the **type** field.
9. Click **Save**.
10. Open **Inventory management > Setup > Quality management > Quality charges.**
11. Click **New**.
12. Enter **Repair** in both **Problem type** and **Description** fields.
13. Click **Save**.

10.4.3 Add a quarantine zone

1. Open **Inventory management > Setup > Quality management > Quarantine zones.**
2. Click **New**.
3. Enter **Repair** in both **Quarantine zone** and **Description** fields.
4. Click **Save**.

10.5 Exercise #4 Use non-conformance order to repair an item and a faulty machine (Bonus)

Objective: Create and process a non-conformance order to have an item repaired and to adjust a faulty machine.

The company discovered a faulty computer in the inventory, and you will need to raise a non-conformance order to get it fixed.

The item you found will need to be to be taken out of stock and repaired.

A machine has caused this fault and will need to be adjusted to prevent more items to be faulty.

You will need to do the following:

10.5.1 Create and process a non-conformance order.

1. Open **Inventory management > Periodic tasks > Quality management > Non Conformances**.
2. Click **New**.
3. Select **Internal** in **Non conformance** field.
4. Enter **1000** in the **Item number** field.
5. Enter **Enclosure** as the problem type.
6. Enter **5.00** in the **Defective quantity** field.
7. Enter **1** in the **Site** field.
8. Enter **13** in the **Warehouse** field.
9. Click **OK.**
10. Click the **Function** button (you may need to click the ellipsis toward the top right of the screen) and select **Approve non conformance.**
11. Click **Yes.**
12. Click the **Related operations** button.
13. Click **New.**
14. Select **Enclosure** in the **Operation** field.
15. Enter **Damaged** in the **Reason** field.
16. Click **Save**.
17. Click the **Items** button.
18. Click **New.**
19. Select **A0001** as the item number.
20. Enter **1.00** in the **Quantity** field.
21. Click **Save** and close form.
22. Click **Quality Charges** button.
23. Click **New.**
24. Select **Rework** in the **Charges code** field.
25. Enter **Rework** in the **Description** field.
26. Enter **100.00** in the **Charges value** field.
27. Click **Save** and exit form.
28. Click **Timesheet** button.
29. Click **New.**
30. Enter **5.0** in the **Operation hours** field.
31. Click **Save** and exit form.
32. Close the **Related operations** form.
33. Click the **Corrections** button.
34. Click **New.**
35. Select **Machine adjustment** in the **Diagnostic** field.
36. Select **000002 (Charlie Carson)** in the **Worker** field. Press **Select**.
37. Select **High** in the **Correction priority** field.

38. Click the **Save** button.
39. Click the **Mark Complete** button.
40. Click **OK** and close the form.
41. Click the **Functions** button and select **Close non conformance**.
42. Click **Yes.**

10.6 Exercise #5 Run non-conformance reports

Objective: Run a non-conformance report, a non-conformance tag report, and a corrections report.

The quality manager must review conformance items created during the month as well as any corrections made that are related to conformance.

At the end of each month, he will need to run the reports and validate the output.

The quality manager is not sure where or how to do so. You were called to help.

You will need to do the following:

- Run a non-conformance report.
- Run a non-conformance tag report.
- Run a correction report.

10.6.1 Run a non-conformance report

1. Open **Inventory management > Inquiries and reports > Quality management > Non Conformance**.
2. Click **OK**.

10.6.2 Run a non-conformance tag report

1. Open **Inventory management > Inquiries and reports > Quality management > Non Conformance tag**.
2. Click **OK**.

10.6.3 Run a correction report

1. Open **Inventory management > Inquiries and reports > Quality management > Corrections**.
2. Click **OK**.

10.7 lab: title: 'Case study 5 Master planning' module: 'Module 6: Implement master planning '

11 Case study 5 Master planning

11.1 Objectives

- *Firm and review a planned purchase order, change it to production, and verify the change.*
- *Create a planning group, assign an item allocation key, and run the intercompany master plan.*

11.2 Exercise #1 Process and view planned orders

Objective: Firm and review a planned purchase order, change it to production, and verify the change.

The planning manager in USMF wants to know how to setup, manage, and use the master planning module, as well as how to process planned orders.

To firm planned orders, He will need to be sure that the master planning is running correctly, or there are some planned orders in the form that you can use.

You were called to help the planning manager to perform the above tasks

You will need to use the following:

- Firm a planned purchase order.
- Review the purchase order.
- Change the planned purchase order type.
- Review the planned order and verify the change

11.2.1 Firm a planned order

1. Open **Master planning > Master planning > Planned orders**.
2. On the **Planned orders** page, select the line for order number **004261**.
3. Click the **Firm** button in the action pane.
4. On the **Firming** page, in the **Update marking** field, select **Standard**.
5. Click **OK**.

11.2.2 Review the purchase order

1. Open **Procurement and sourcing > Purchase orders > All purchase orders**.
2. On the **All purchase orders** page, sort the list by the **Delivery date** field.
3. Verify the firmed order is now listed with a status of **Open order**.
4. Close the pages.

11.2.3 Change a planned order type

You need to change the planned order type for an order.

1. Open **Master planning > Master planning > Planned orders**.
2. On the **Planned orders** page, select the line for order number **004262**.
3. Select the **Planned order** tab in the action pane.
4. Click the **Change to ...** drop-down arrow in the **Maintain** area.
5. Select **Planned production order**.
6. On the **Change to planned production order** page, click **OK**.

11.2.4 Review the planned order and verify the change

1. On the **Planned orders** list page, verify that the **Reference** field has been updated to **Planned production orders** for order number **004262**.
2. Close the pages.

11.3 Exercise #2 Create and run intercompany master plans

Objective: Create a planning group, assign an item allocation key, and run the intercompany master plan.

You were called to help the materials and production scheduling manager, to develop a new intercompany planning group.

Assemblies are shipped from DEMF to USMF.

While at USMF they are painted and finished with the North American logo.

Then they are transferred to the USRT operation for sale.

He wants to use the Plans 20, DynPlan, and MasterPlan respectively to accomplish this goal.

He would like to validate the Intercompany master planning parameters and perform some setups before running the intercompany master plan.

Then he would need to run the intercompany plan using the planning group that he will create. Finally he would want to view the results in the intercompany supply and demand form.

Would you assist the planning manager in doing the following?

- Create an intercompany planning group.
- Assign an item allocation key.
- Run an intercompany master plan.

11.3.1 Create an intercompany planning group

1. In the USMF Company, click **Show navigation pane**.
2. Open **Master planning > Setup > Intercompany planning groups.**
3. Click **New** on the Action pane.
4. Enter Intercompany Extended Group in the **Name** field.
5. Click **Save**.
6. Click **New** on the tool bar for Intercompany planning group members tab.
7. Select DEMF in the **Legal entity** field.
8. Enter 0 in the **Scheduling sequence** field.
9. Click **New** on the tool bar for Intercompany planning group members tab.
10. Select **Legal entity - DEMF**, **Scheduling sequence - 0, Master plan – 20.**
11. Leave **Automatic Copy to Static Plan** and **Automatic Copy to Dynamic Plan** checkboxes blank.
12. Click **Save**.

11.3.2 Assign item allocation key

1. Select **Master Planning > Demand Forecasting > Item Allocation Keys.**
2. Select **Wizard**.
3. Select **Apples** from **Item Group** drop-down menu.
4. Type **Apples Group** in **Name** box.
5. Click **Next**.
6. Click **Next** on the **Overview** page after verifying information is correct.
7. Click **Finish** on the **Completed** page after verifying information is correct.
8. Select **Demand Forecasting > Intercompany Planning Groups.**
9. Select **Item Allocation Keys.**
10. Select **Apples** under the **Unassigned Item Allocation Keys** box, then select > to move it to the **Assigned Allocation Keys** box.

11.3.3 Run an intercompany master plan

1. As the materials and production manager, you will need run the intercompany plan utilizing the intercompany planning group that you created earlier. View the results in the intercompany supply and demand form.
2. In the USMF company, click **Show navigation pane**.
3. Open **Master planning** > **Run** > **Intercompany master planning**.
4. Select **60** for **Intercompany planning group**.
5. Select **2** for **Number of intercompany planning iterations**.
6. Select **Regeneration** for **First iteration**.
7. Select **Net change** for **Subsequent iteration**.

8. Select **Track processing time** setting slider to **No**.
9. Set **Number of threads** to **0**.
10. Click **Run in the background.**
11. Click **OK**.
12. Open **Master planning > Inquiries and reports > Intercompany master planning > Intercompany supply and demand.**