



Dynamics 365 – Warehouse Management

Revision 1



Revision History

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1 About User Manual

This document describes the step-by-step guide of manually creation of a purchase order (PO) of a product or a list of sub-products (items). These purchase orders (POs) are, typically, created by a purchase user (employee) in a legal entity (legal organization). The purchase user creates and forwards the purchase order (PO) to a vendor, who has been chosen (selected) for that product through purchase requisition bidding process.

The step-by-step guide of a purchase order (PO) creation and then creation of invoice will be explained.

1.1 Dashboard Overview

After logging in, the you will see the main dashboard, which includes the grid of individual Workspaces (in the middle), which are represented in the **Figure 1**.

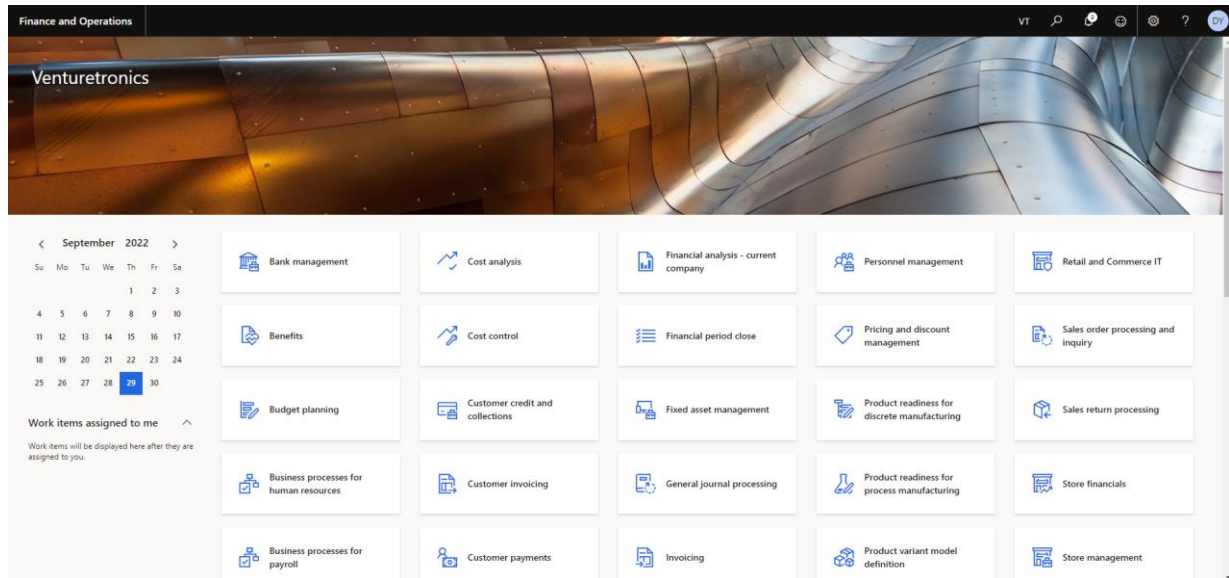


Figure 1. Dashboard Overview



2 Warehouse Management

As a first step to open the warehouse management user need to go to module and click on ‘Warehouse Management’ which have been shown in **Figure 2**.

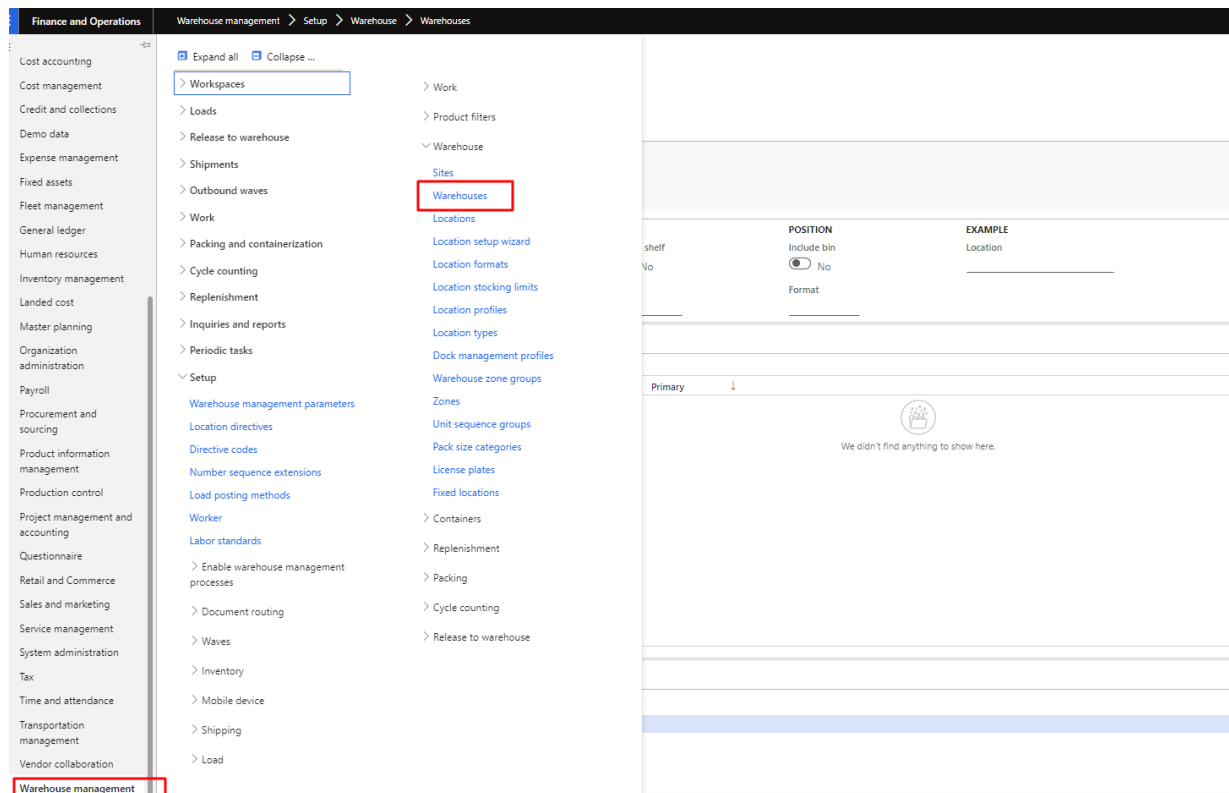


Figure 2 Warehouse





2.1 Warehouse Creation

As **step 1**, the purchase user can access the new warehouse creation form by clicking on **New** button in tap bar. As the user click on new need to fill the fields as per requirements and then click on **Save** to save the new warehouse. The process is also shown in the **Figure 3**.

Figure 3 Create Warehouse

2.2 Delete Warehouse

In **step 2**, the purchase user can access the delete warehouse form the list by clicking on Delete button in tap bar. As the user click on delete then popup will show up, there user need to click on **'Yes'** to delete the selected item. The process is also shown in the **Figure 4**.

Figure 4 Delete Warehouse





3 Location

As a first step to open the warehouse management user need to go to module and click on **Warehouse Management** then click on location. which have been shown in **Figure 5**.

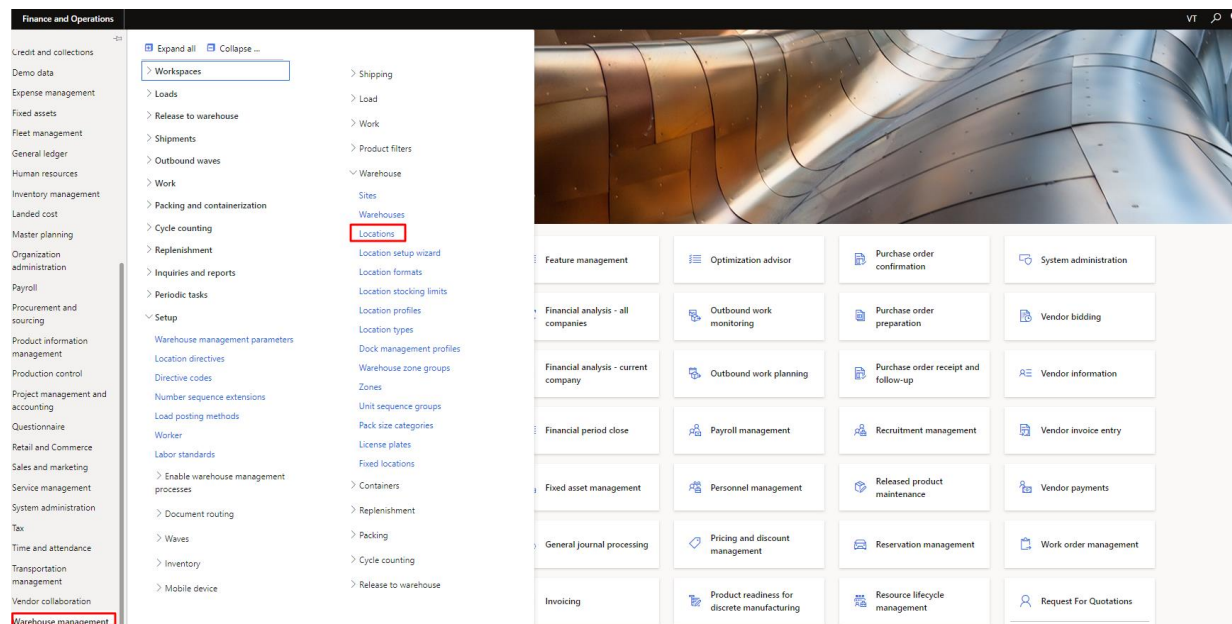


Figure 5 Location

3.1 Location Creation

As **step 1**, the purchase user can access the new location creation form by clicking on **New** button in tap bar. As the user click on new need to fill the fields as per requirements and then click on **Save** to save the new warehouse. The process is also shown in the **Figure 6**.

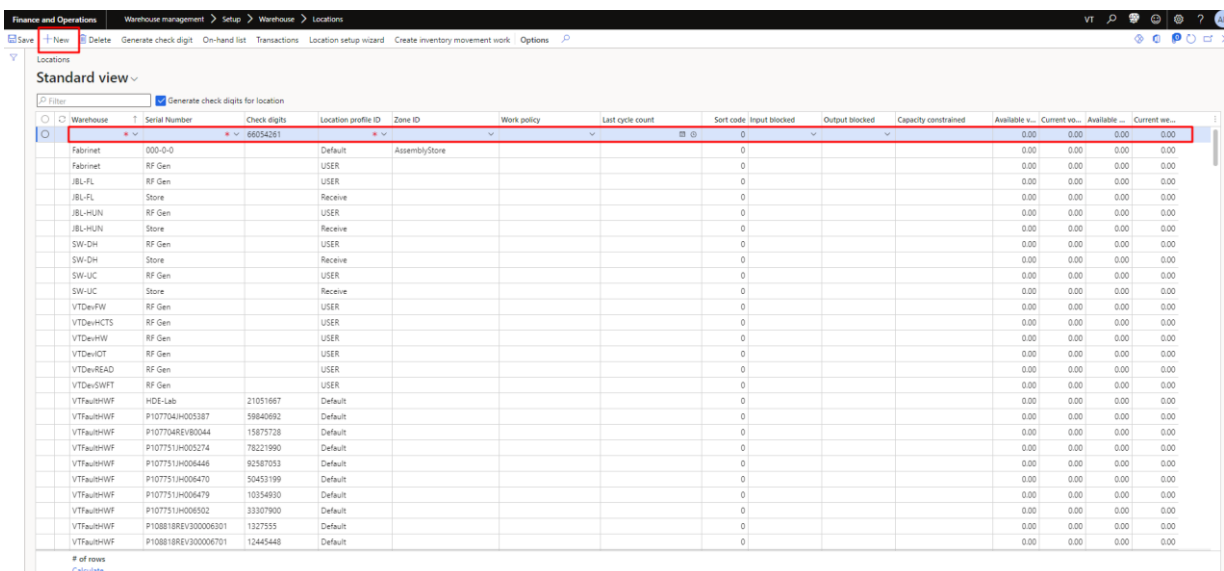


Figure 6 Location Creation



3.2 Delete Location

In **step 2**, the purchase user can access the delete location form the list by clicking on **Delete** button in tap bar. As the user click on delete then popup will show up, there user need to click on **Yes** to delete the selected item. The process is also shown in the **Figure 7**.

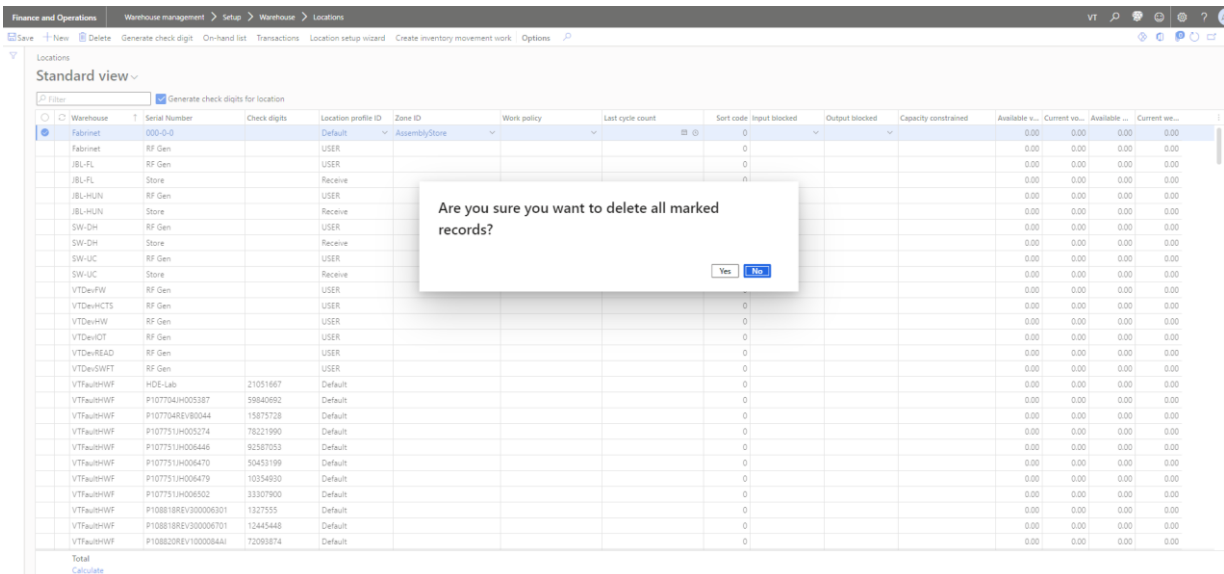


Figure 7 Delete Location

4 Location Wizard

As a first step to open the warehouse management user need to go to module and click on **Warehouse Management** then click on location Setup Wizard. which have been shown in **Figure 8**.

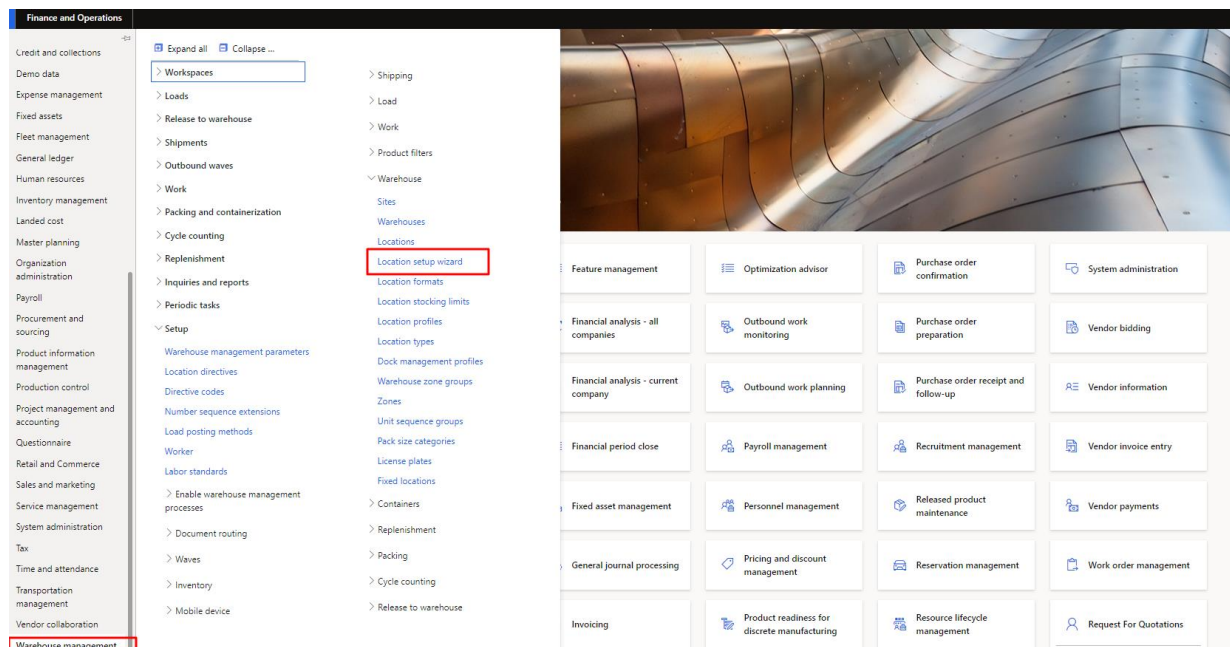


Figure 8 Location Wizard



4.1 Creation of Location Wizard

As **step 1**, the purchase user can access the new location creation wizard form by clicking on **Location wizard** setup from warehouse management. As the user click on new need to fill the fields as per requirements and then click on create to **Save** the new locations. The process is also shown in the **Figure 9**.

Location setup wizard

Warehouse Zone ID Location profile ID

Line number Segment description From num... To number Static text Length

We didn't find anything to show here.

Create Cancel

Figure 9 Creation of Location Wizard

