



Dynamics 365 – Fair and CoC 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 FAIR and CoC management of a product or a list of sub-products (items). This FAIR and CoC requirement are typically set by a purchase user (employee) in a legal entity (legal organization). The purchase user 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 FAIR and CoC management will be explained.

1.1 Dashboard Overview

After logging in, you will see the main dashboard which includes the grid of individual Workspaces (in the middle), which are represented in the **Figure 1**. The purchase user can see a list of important processes related to FAIR and CoC management in the vendor section under procurement and sourcing in the Modules.

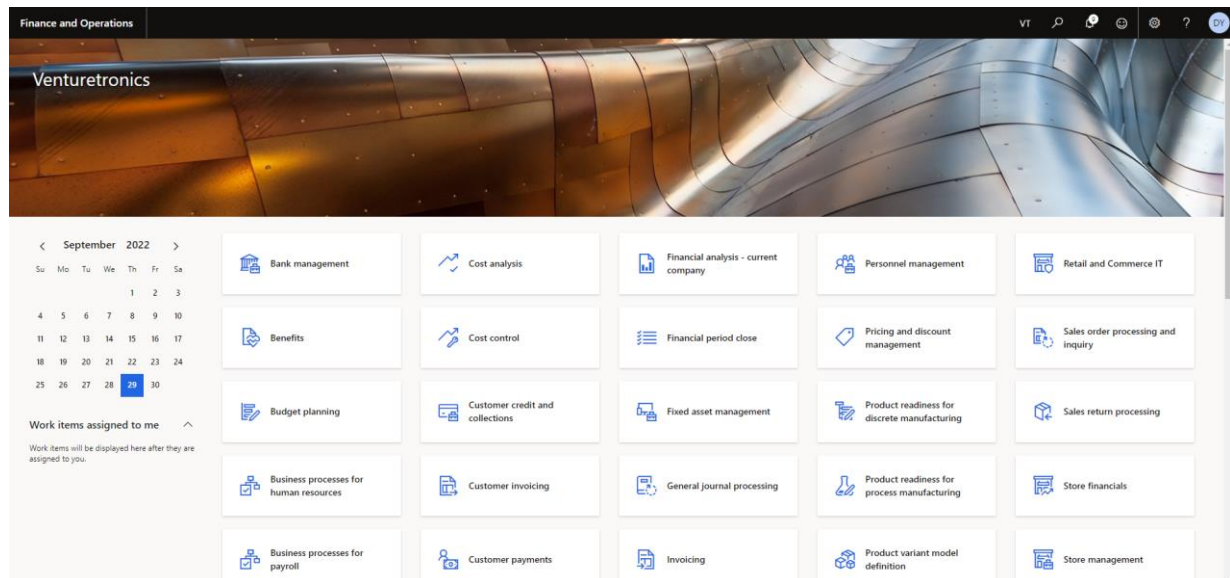


Figure 1. Important in Dashboard

1.2 FAIR, CoC Management Workspace

There are various ways to access the fair from workspace.

Approach: From Modules Icon

The user can also access the vendors page(s) by clicking the **Modules**, select **Procurement and Sourcing** and then **Purchase Orders** group. After clicking the **All Vendors** link in vendors group, following information will appear which is shown in the **Figure 2**.



FAX	WEB
1 412-967-5868	www
+41 43 317 4420	http:
41 64974130	www
	www
224-521-8555	www
	www
(626) 962-7729	www
	http:

Figure 2. FAIR, and CoC Management Workspace

1.3 Click on Vendor Specific FAIR and COC

The users can see all the vendors in this section. User need to select any vendor under standard view then click on “Vendor Specific FAIR and COC”. Process is also shown in the below Figure 3.

Vendor account	Name	Vendor hold	Phone	Extension	Primary contact	Group	Currency	FAX	WEB
55 Components	55 Components	No	1 412-967-5858		Kenny Stephenson	Intl	USD	1 412-967-5868	www.55C
ABB Automation	ABB Automation Company	No	41 58 585 77 77		Asea Brown Boveri	Part	USD	+41 43 317 4420	https://gl
Accuenergy Inc.	Accuenergy Inc.	No	41 64974100		Dawn Ahlquist	Intl	USD	41 64974130	www.acce
Access Spring	Access Spring	No				Intl	USD		
Allegheny Coati	Allegheny Coatings	No	814-772-3850		Matt Santaniello	Intl	USD		www.alle
AlliedElectron-00087	Allied Electronics	No				Part	USD		
Amber Traders	Amber Traders	No	+923234442173			Part	PKR		
Amphenol Custom Cabi	Amphenol Custom Cable	No	813-612-5057		Barbara Prettyman	Part	USD		
Anixter	Anixter	No	1-888-264-9874		Colin Sendiak	Intl	USD	224-521-8555	www.anix
AOS Prototypes	AOS Prototypes Technology Lim...	No	86 - 0755 - 27068941		Joan Zhao	Part	USD		www.aosq
AOSChina-00107	AOS China	No	+8615018520271			Part	USD		
ApexFasteners-00143	Apex Fasteners	No	(626) 962-2219		Andrew Gleason	Part	USD	(626) 962-7729	www.apex
Arrow Electronics	Arrow Electronics	No				Intl	USD		
ASE/Kalitech7-00048	ASE / Kalitech 7 USA	No				Part	USD		

Figure 3 Click on Vendor Specific FAIR COC



1.4 Vendor Specific FAIR and COC Management

When you click on the vendor specific FAIR COC then you will be able to view this page. In this section, user can create new **Vendor Specific FAIR and COC** and delete it by clicking on it. The user can refresh each row by clicking on the **Refresh Grid** button. Here, user will add the vendor account in the '**Vendor Account No**' field. Process is also shown in the below **Figure 4**.

Vendor Account NO	FAIR Needed Items	Date	FAIR Received	FAIR Verified	FAIR PO Number	FAIR Verified By	Verify COC	COC PO Number	COC Verified By
MCMaster-CARR-0			<input type="checkbox"/>	<input type="checkbox"/>			<input type="checkbox"/>		

Figure 4 Vendor Specific FAIR COC Calculations

1.5 Add Vendor Account

The user can also access the FAIR Calculation page by clicking on the **Vendor Specific FAIR COC** from vendors. The user can add the specific vendor in the vendor account fields. In the first time, **FAIR Verified** and **COC PO Number** will be disable. The user needs to enable it in the **Product Variant** module. Process is also shown in the below **Figure 4**.

Vendor Account NO	FAIR Needed Items	Date	FAIR Received	FAIR Verified	FAIR PO Number	FAIR Verified By	Verify COC	COC PO Number	COC Verified By
MCMaster-CARR-0	P112726 : 1 : 1 :-		<input type="checkbox"/>	<input type="checkbox"/>			<input type="checkbox"/>		

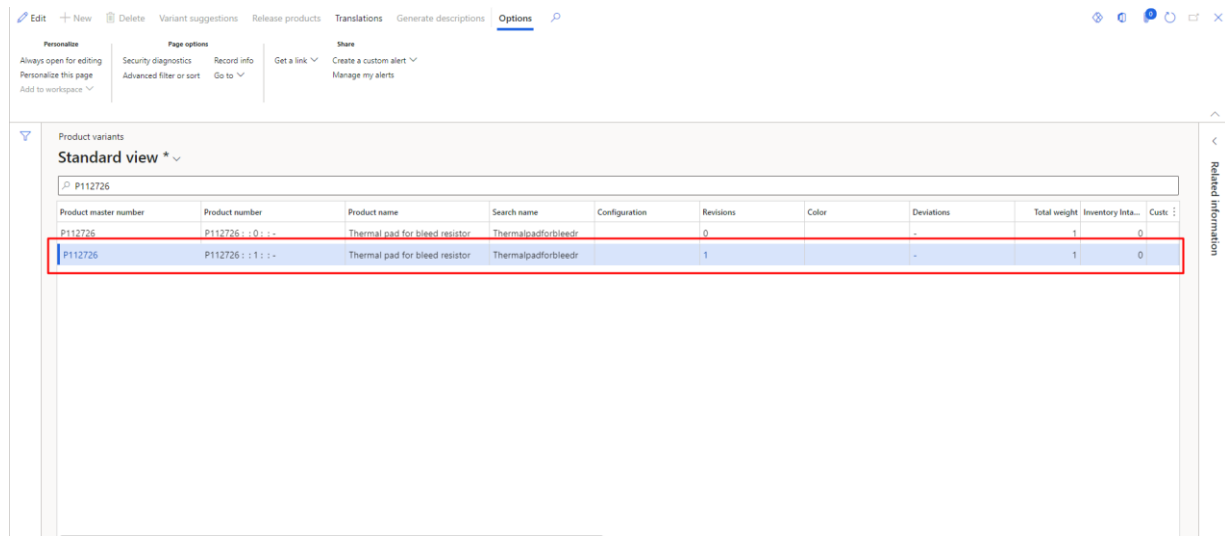
Figure 5 Add Vendor Account





1.6 Select Vendor Specific Product Variant

The user can also access the Product page by clicking the ‘**Product Information Management**’ module. The user needs to search the specific vendor related product in the search fields. Process is also shown in the below **Figure 6**.



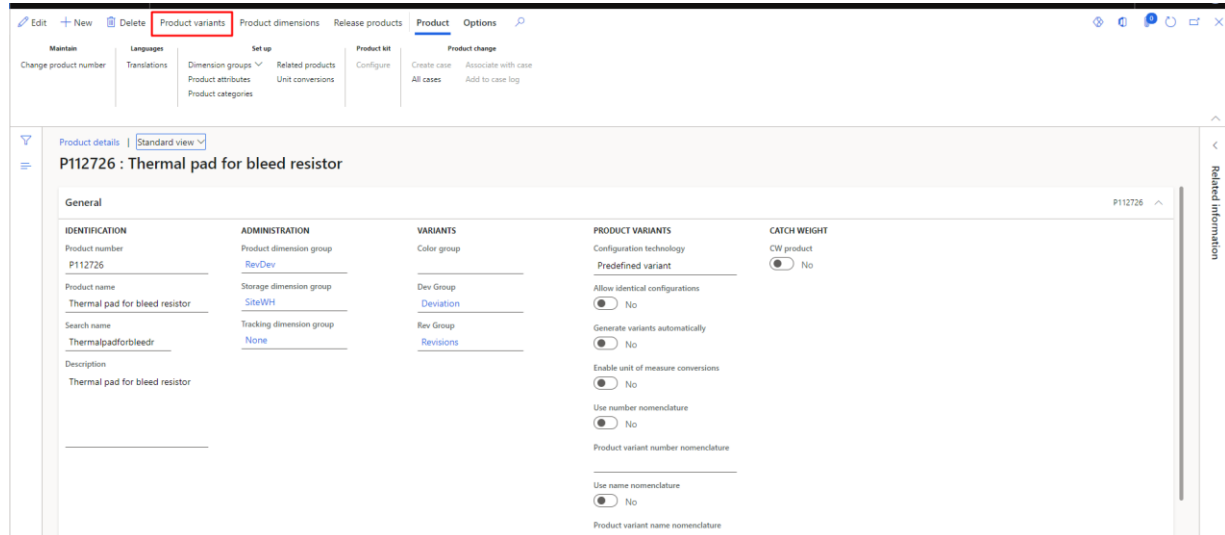
The screenshot shows the 'Product variants' table in Dynamics 365. The table is titled 'Standard view *'. It has a search bar at the top with 'P112726' entered. The table columns are: Product master number, Product number, Product name, Search name, Configuration, Revisions, Color, Deviations, Total weight, Inventory Inta..., and Cust... The first row is highlighted with a red border. The data in the first row is: Product master number: P112726, Product number: P112726 : 0 : 1, Product name: Thermal pad for bleed resistor, Search name: Thermalpadforbleedr, Configuration: 0, Revisions: 1, Color: , Deviations: -, Total weight: 1, Inventory Inta...: 0, Cust...: .

Product master number	Product number	Product name	Search name	Configuration	Revisions	Color	Deviations	Total weight	Inventory Inta...	Cust...
P112726	P112726 : 0 : 1	Thermal pad for bleed resistor	Thermalpadforbleedr	0	1		-	1	0	

Figure 6 Select Vendor Specific Product Variant

1.7 Open the Product Variant

The user can also access the ‘**Product Variant**’ page by clicking on the specific vendor related product. The user needs to click on the product variant from top header. Process is also shown in the below **Figure 7**.



The screenshot shows the 'Product Variant' page in Dynamics 365. The page title is 'P112726 : Thermal pad for bleed resistor'. The page is divided into several sections: General, IDENTIFICATION, ADMINISTRATION, VARIANTS, PRODUCT VARIANTS, and CATCH WEIGHT. The 'General' section contains fields for Product number, Product name, Search name, and Description. The 'IDENTIFICATION' section contains fields for Product number, Product name, Search name, and Description. The 'ADMINISTRATION' section contains fields for Product dimension group, Storage dimension group, and Tracking dimension group. The 'VARIANTS' section contains fields for Color group, Dev Group, Rev Group, and Revisions. The 'PRODUCT VARIANTS' section contains fields for Configuration technology, Predefined variant, Allow identical configurations, Generate variants automatically, Enable unit of measure conversions, Use number nomenclature, Product variant number nomenclature, Use name nomenclature, and Product variant name nomenclature. The 'CATCH WEIGHT' section contains fields for CW product and No.

General	IDENTIFICATION	ADMINISTRATION	VARIANTS	PRODUCT VARIANTS	CATCH WEIGHT
Product number P112726	Product name Thermal pad for bleed resistor	Product dimension group RevDev	Color group	Configuration technology Predefined variant	CW product No
Search name Thermalpadforbleedr	Storage dimension group SiteWH	Dev Group Deviation	Allow identical configurations No	Generate variants automatically No	
Description Thermal pad for bleed resistor	Tracking dimension group None	Rev Group Revisions	Enable unit of measure conversions No	Use number nomenclature No	
			Product variant number nomenclature	Use name nomenclature No	
			Product variant name nomenclature		

Figure 7 Open the Product Variant





1.8 Product Variant Detail section

The user can also access the ‘Product Variant Detail’ page by clicking on the ‘Product Variant’. The user needs to click on the specific vendor related product after selecting product variant. The user needs to enable the **FAIR Verified** and **COC PO Number** from the general section. Process is also shown in the below **Figure 8**.

Product variants | P112726: THERMALPADFORBLEEDR | Standard view

P112726 :: 1 :: -

General

Product name: Thermal pad for bleed resistor

Search name: Thermalpadforbleedr

Size: 1

Style: -

Major Parts: Mounting

EcoNumbers: ECO-002209

PartTypesEnum: BUY

Notes: Ordered P105603.A for thermal ...

Category: -

Sub Category: -

Vendor Category: -

Commodities: -

Agile Status: -

Materials: -

Nature Of Parts: -

Drawing Status: -

Depth: 0.00

Height: 0.00

Width: 0.00

Weight: 0.00

Volumetric Weight: 0.00

Description: Thermal pad for bleed resistor

Conflict Minerals: No

Country of Origin: No

Hazardous Substances: No

Materials Declaration: No

Request COC: Yes

Fair Received: Yes

Vendor Fair Needed: Yes

RESPRODVARTRACKINGTIMEDetails

Inventory Intake Time: 0

Transit Time: 0

Custom Clearance Time: 0

Manufacturing Time: 0

Pre-Payment Processing Time: 0

Quotation Days: 0

Figure 8 Product Variant Detail section

1.9 Final Calculation of Vendor Specific FAIR and COC

The user can also access the FAIR Calculation page by clicking the **vendor Specific FAIR and COC** from **vendors**. The user can add the specific vendor in the vendor account fields. In the first time, ‘**FAIR Verified** and **COC PO Number**’ will be disable. In the ‘**FAIR Needed Items**’ user can only see the approved item from the selected vendor account. As the user enabled these fields from product variant then user can view these check boxes. Process is also shown in the below **Figure 9**.

Standard view

Vendor Specific FAIR COC

Refresh Grid

Vendor Account NO	FAIR Needed Items	Date	FAIR Recei...	FAIR Verified	FAIR PO N...	FAIR Verified By	Verify COC	COC PO N...	COC Verified By
MCMaster-CARR...	P112726 :: 1 :: -			Yes		FRServiceUser	Yes		FRServiceUser

Figure 9 Final Calculation of Vendor Specific FAIR and COC