Dynamics 365 – Inventory Management

Revision 1

Revision History

Date	Revision	Description	Signature / Date	
13/10/2022	1	Initial draft of user manual: Dynamics 365 – Inventory Management	Prepared	Waseem Abbas
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1   About User Manual

This document describes the step-by-step guide of on hand and net requirements of a product or a list of sub-products (items). These actions are typically performed by a purchase user (employee) in a legal entity (legal organization). The user can view the on hand and net requirements of the selected item.

The step-by-step guide for on hand items and net requirements 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**.
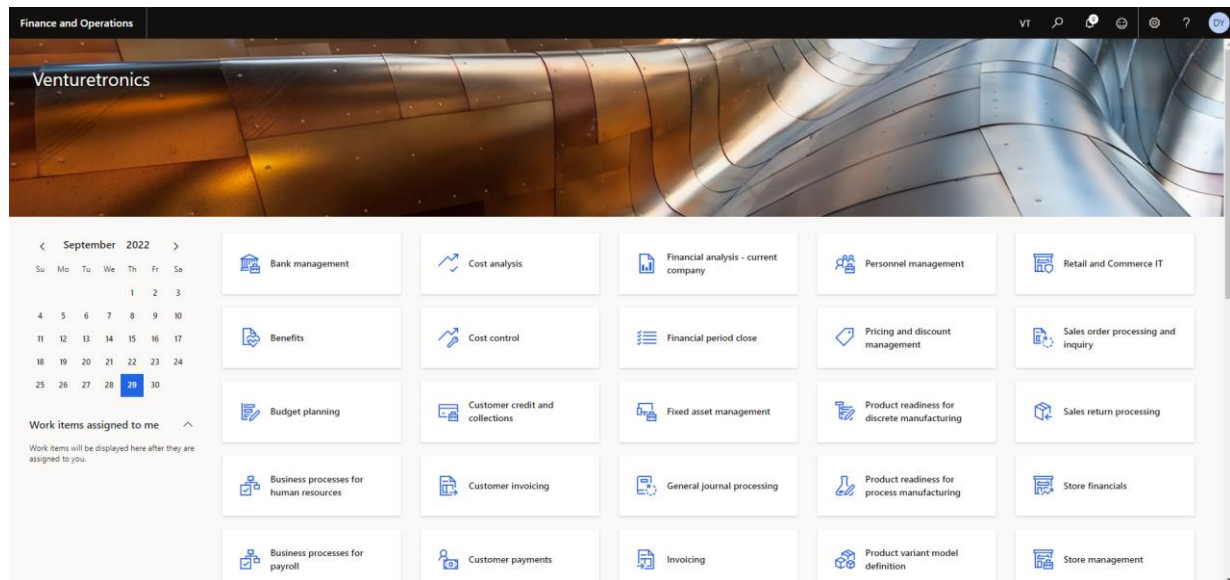

Figure 1. Dashboard Overview

2   On Hand

There are various ways to access the purchase order (PO) workspace.

Approach 1: From Released Products

If you want to view the one on hand item click on the **Released Products** from **Product Information Management** module, then click on the **On-Hand Inventory** from the manage inventory tab. These processes are already highlighted in the below Figures.

Approach 2: From Inventory Management

If you want to view the multiple on hand items click on the "**On Hand Items**" from **Product Information Management** module, then perform the action as per requirement to view the on-hand items. These processes are already highlighted in the below Figures.

2.1   On Hand from Released Products

2.1.1   Released Product

As a first step to open the released products by clicking on the module **Product Information Management**, which have been shown in **Figure 2**.
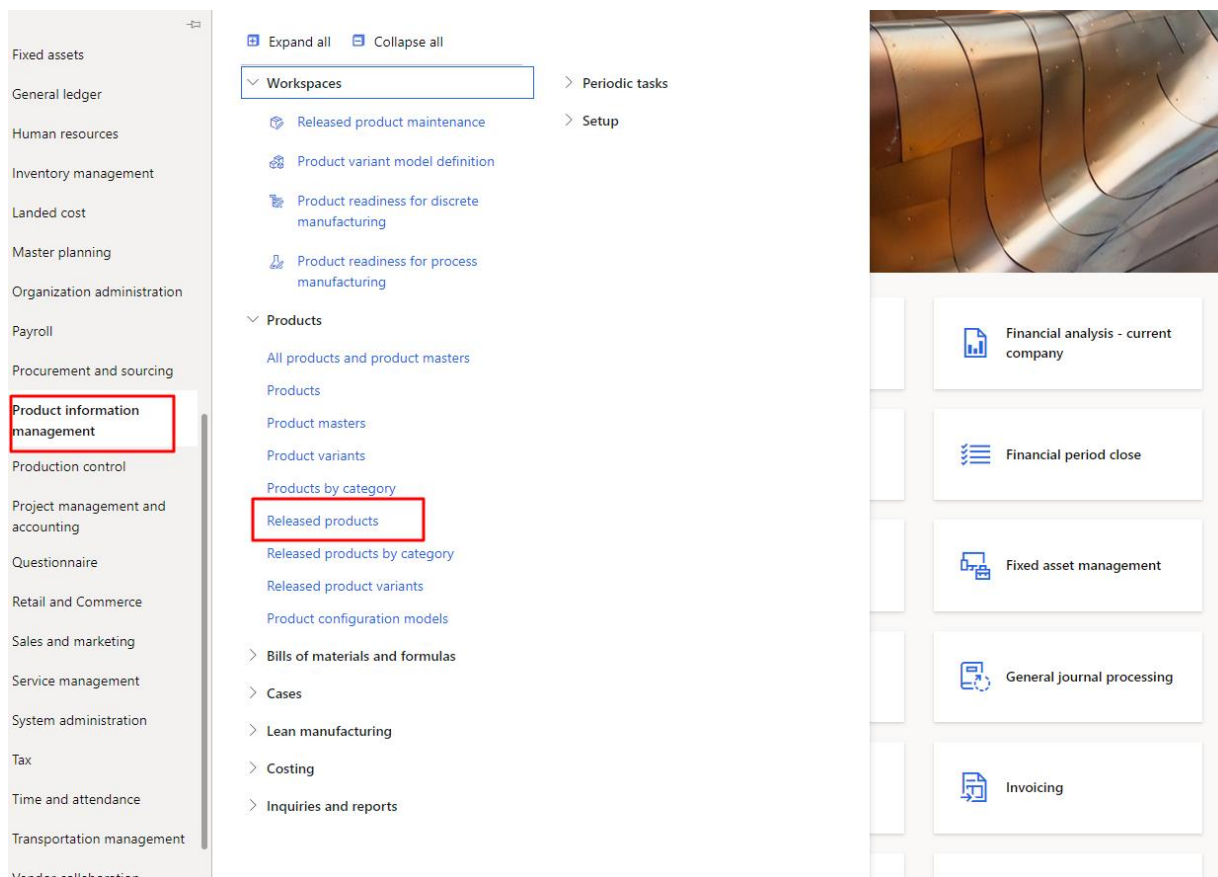
Figure 2 Released product

2.1.2   Select and open on Hand Inventory

As **step 1**, the purchase user can access the on-hand items by clicking on **Manage Inventory** button in tap bar. As the user click on **Manage Inventory** needs to perform the action on specific item to view it's on hand inventory. The process is also shown in the **Figure 3**.
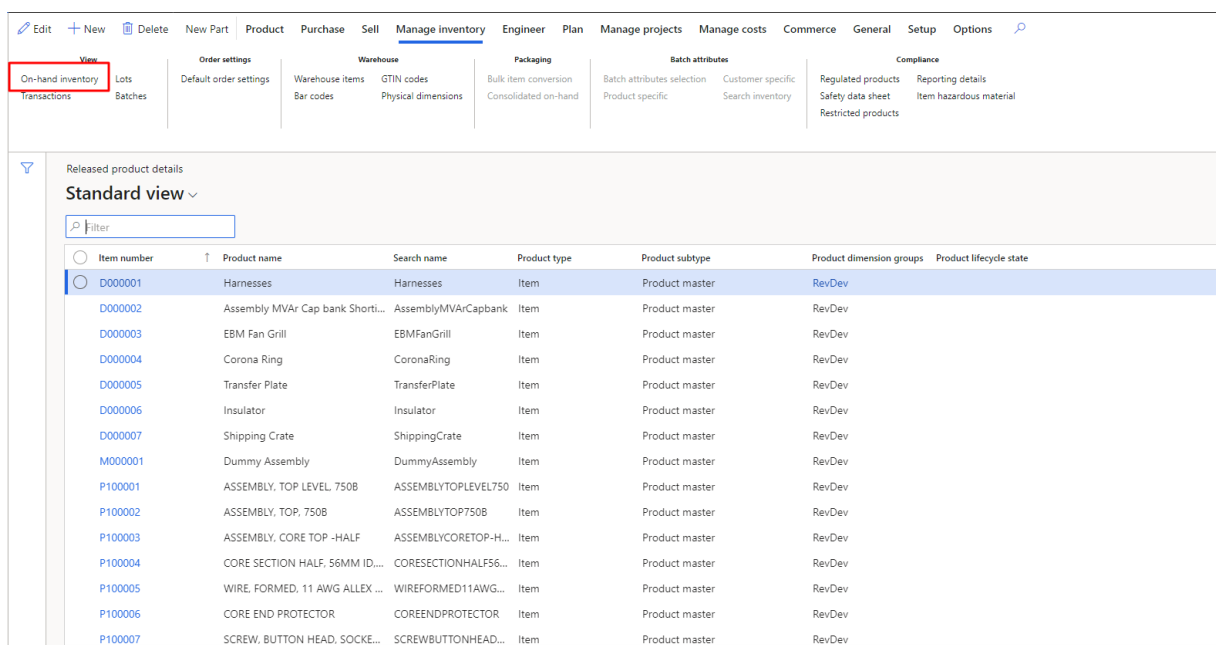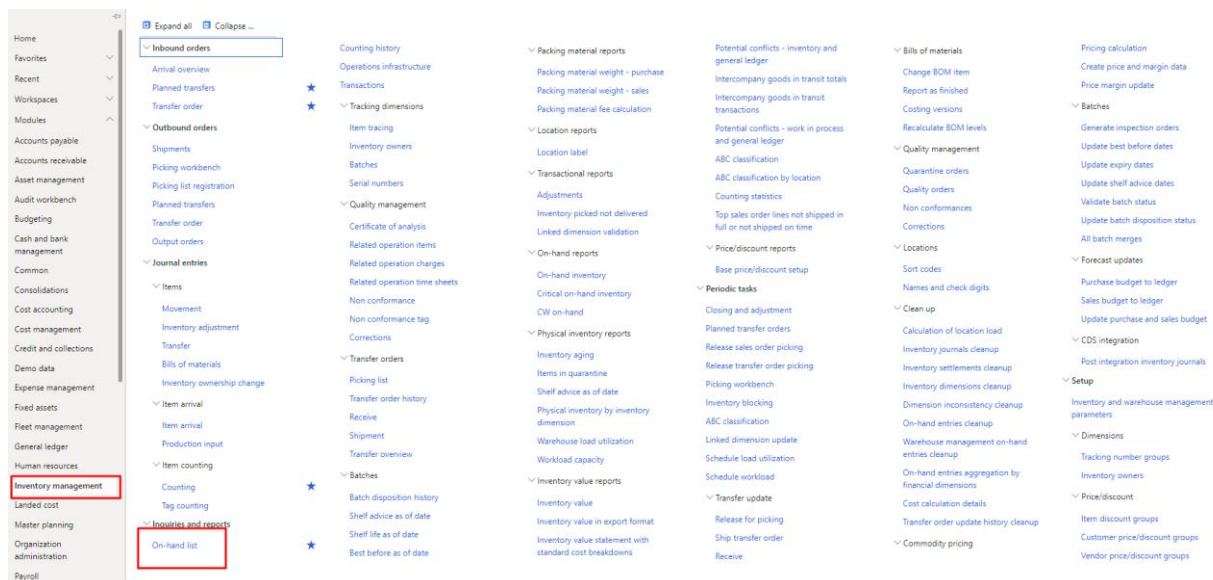

Figure 3 Select and open on Hand Inventory

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2.1.3   View on Hand Inventory

In **step 2**, the purchase user can access this tab by opening the specific item to view it's on hand inventory. As the user clicks on on-hand Inventory then this screen will show up. The user will be able to view the on-hand Inventory the selected item. The process is also shown in the **Figure 4**.

Figure 4 View on Hand Inventory

2.2   On hand from Inventory Management

2.2.1   Inventory Management

As a first step to open the on-hand item by clicking on the module **Inventory Management**, which have been shown in **Figure 5**.

Figure 5 Inventory Management

2.2.2   Select and open on Hand Inventory

As **step 1**, the purchase user can access the on-hand items by clicking on on-hand items button. As the user click on on-hand items need to perform the action by clicking on apply button to view the on-hand items. The process is also shown in the **Figure 6**.

Figure 6 Select and open on Hand Inventory

2.2.3   View All on Hand Inventories

In **step 2**, the purchase user can access this tab by performing the action on apply button to view the on-hand items. As the user click on apply then this screen will show up, there user will be able to view the on-hand inventories. The process is also shown in the **Figure 7**.

Figure 7 View All on Hand Inventories

3   Counting Journal Creation

3.1   Counting

As a first step to open the Counting Journal by clicking on the module Inventory Management then click on **Counting**, which have been shown in **Figure 8**.
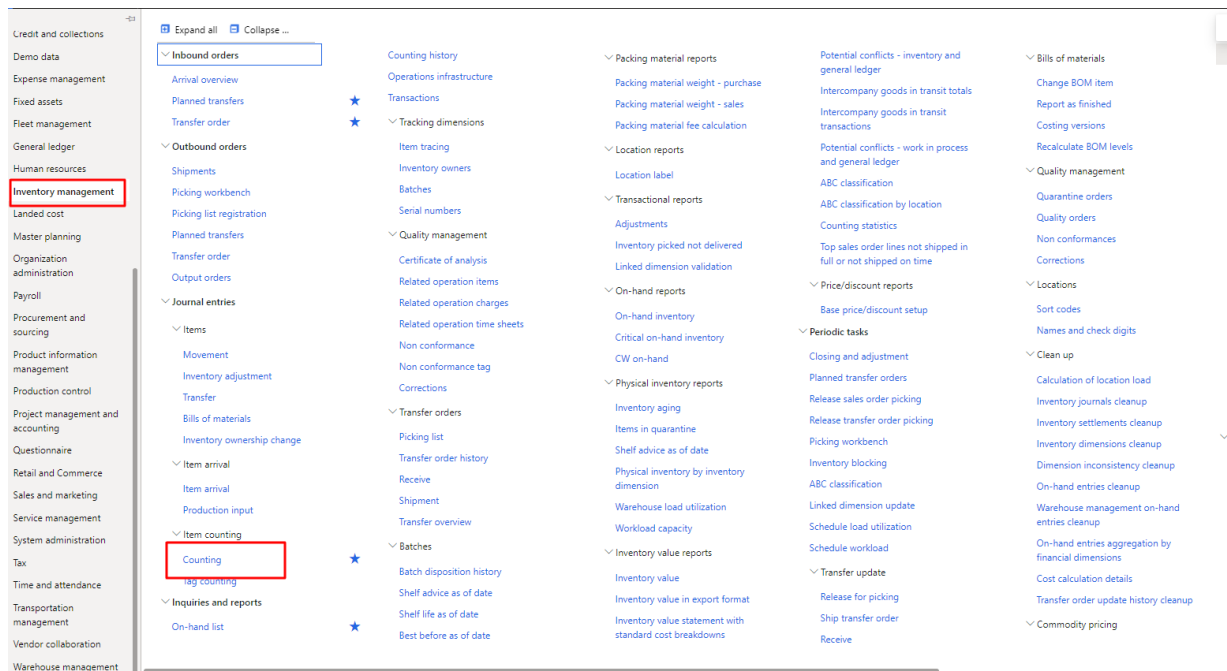
Figure 8 Counting

3.2   Create New Counting Journal

As **step 1**, the purchase user can access the counting journals by clicking on **Counting** button. User need to click on the New button from the tab to create the new one inventory journal. As the user click on New, this needs to fill the fields as per requirements and then press OK to create it. The process is also shown in the **Figure 9**.
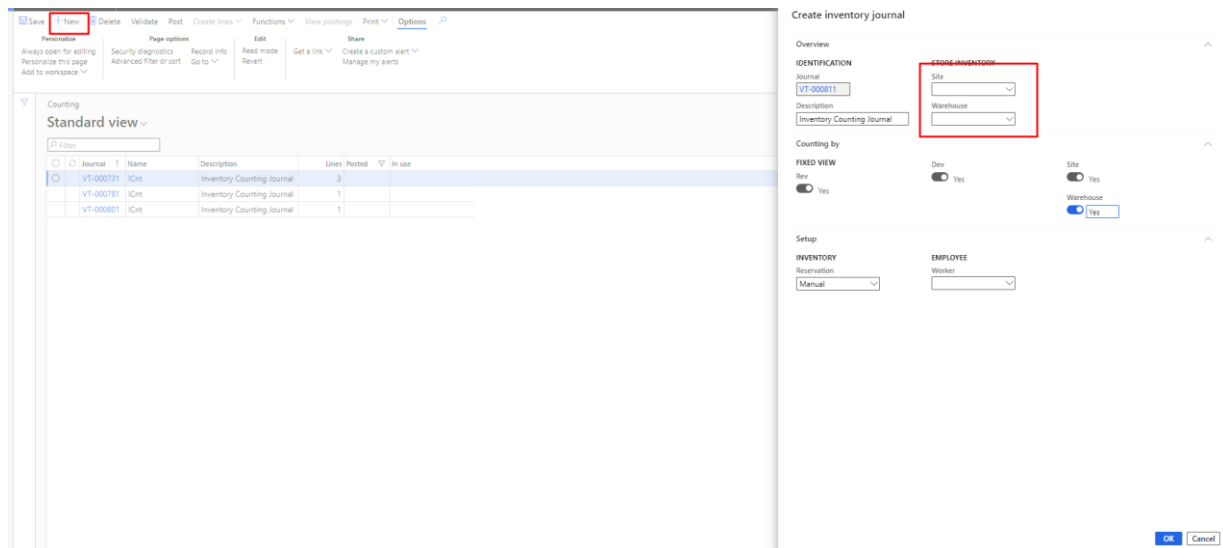

Figure 9 Create New Counting Journal

3.2.1   Add Line in the Journal

In **step 2**, the purchase user can access this tab after creating new Inventory Journal or opening the any available in the list. As the user open the any journal, there user need to add line and then fill the fields as per requirements. The process is also shown in the **Figure 10**.

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Figure 10 Add Line in the Journal

3.3 Fill the Fields in the Journal

In **step 3**, the purchase user can access this tab after creating new Inventory Journal or opening the any available in the list. As the user open the any journal, there user need to add Part Number, REV, DEV, Warehouse, Counted, Location, Cost Price and Price Quantity. The process is also shown in the **Figure 11**.

Figure 11 Fill the Fields in the Journal

4 Net Requirement

4.1 Select item and Open its Net Requirements

As **step 1**, the purchase user can access the **Net Requirements** by clicking on **Plan** button in tap bar. As the user click on Plan need to perform the action on specific item to view its Net Requirements. The process is also shown in the **Figure 12**.

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Figure 12 Select item and Open its Net Requirements

4.2   View Net Requirements of Item

In **step** the purchase user can access this tab by opening the specific item to view its Net Requirements. As the user click on **Net Requirement** then this screen will show up. The user will be able to view the Net Requirements of the selected item. The process is also shown in the **Figure 13**.

Figure 13 View Net Requirements of Item

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