

Demo Script

MICROSOFT® BUSINESS SOLUTIONS FOR DISTRIBUTION-NAVISON® 4.00

INTRODUCTION

The aim of this demo script is to assist the channel in demonstrating the key features of Microsoft® Business Solutions for Distribution-Navison® to customers.

The demo script provides instructions on how to demonstrate the benefits of the key functionality (inventory management, warehouse management, and supply planning & execution) within Microsoft Distribution.

MICROSOFT® BUSINESS SOLUTIONS FOR DISTRIBUTION-NAVISON®

Microsoft Distribution is an enterprise business solution that provides key inventory and warehouse management capabilities based on flexibility and efficiency for small to mid-size businesses.

Microsoft Distribution gives businesses a powerful way to satisfy their customers' needs because it:

- gives businesses the ability to reduce operational costs.
- enables businesses to gain deep visibility into their distribution processes.
- improves businesses customer responsiveness through better organization of distribution processes.
- helps businesses win customer loyalty by providing better service.

CONTENT

The demo script is built up using a backup file (FBK file) with demo data specifically created for this presentation:



Distribution Demo
Data.exe

The demo script should be presented using Microsoft® Business Solutions-Navison® 4.00. The employee names referred to in the demo script story can be changed and do not appear directly in any screen shots. Any similarity to real people, places, or things is coincidental.

The demo script is based on the assumption that the customer has some prior knowledge of inventory and warehouse management in general. It is, however, advisable to give the audience a brief introduction to Microsoft Distribution.

Please note that the screen shots used and the demo script story examples only correspond 100% if the demo script is shown in its full length in a new database (i.e. where no transactions have been made before). You should therefore be aware of minor changes in the screen shots and demo script story examples.

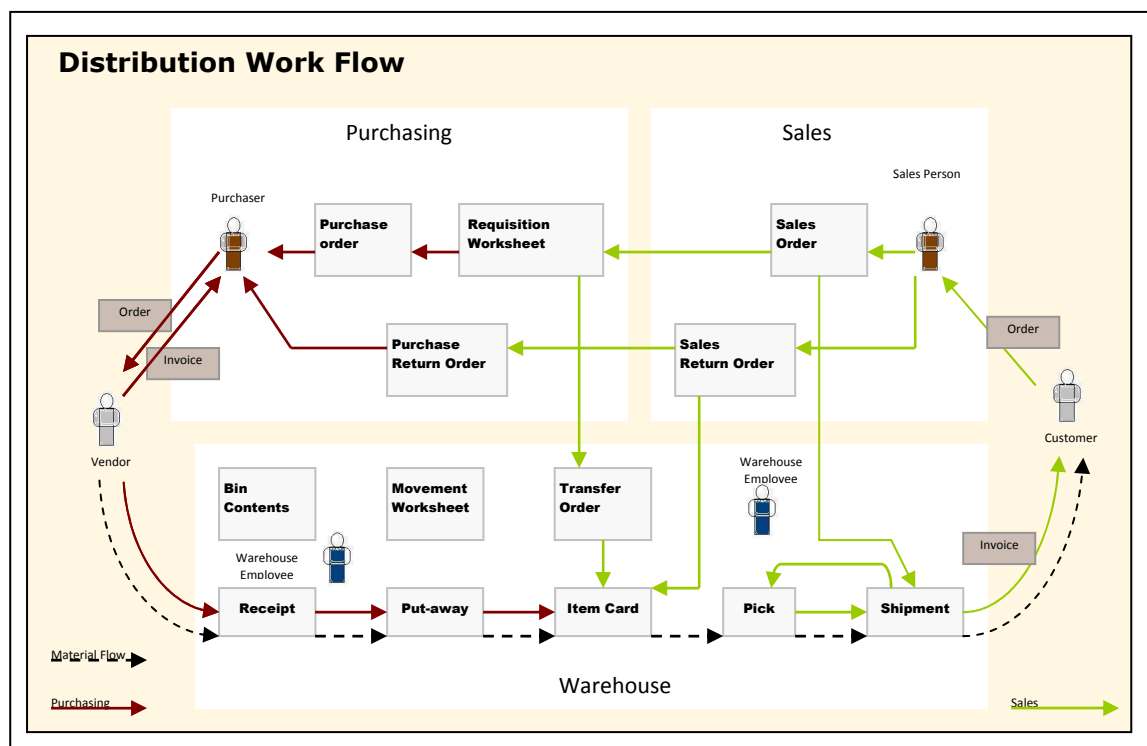
Preparation for the demonstration of the scenarios

- Unzip the attached self-extracting ZIP file to a known location on your hard disk drive.
- Make a backup of the current companies in the program (Tools, Backup...). This is just a security precaution.
- Consider expanding your database before restoring (File, Database, Expand...).
- The backup file has to be restored (Tools, Restore...) into Microsoft® Business Solutions-Navision® 4.00.
- Open the company 'CRONUS Furniture Ltd.' (File, Company, Open...).
- In the Sales Order window, make the Sales Price Exists field viewable (View, Show Column...).
- In the Warehouse Receipt window, make the Qty. to Cross-Dock field viewable (View, Show Column...).
- In the Phys. Inventory Journal window, make the Bin Code field viewable (View, Show Column...) and hide the Salespers./Purch. Code field (View, Hide Column...).
- On the Warehouse menu, click Planning & Execution, Setup Warehouse, Employees and add yourself (use computer username as User ID) as employee. Select location code WHITE and set as Default. Add another line with yourself as employee. Select location code YELLOW. Close the Warehouse Employees window.
- Set the work date to 25-01-01 (Tools, Work Date...).
- Consider expanding column and window sizes to show field names in advance. Please search for 'consider' to find all instances where it would be relevant to expand column/window sizes.

Demo script scenarios

The demo script scenarios are structured in demo scenario parts (Inventory Management, Warehouse Management, Supply Planning & Execution), where the Inventory Management and the Warehouse Management parts should be considered to be optional. All demo scenario parts are related in content, where the Supply Planning & Execution part is one generic distribution process starting from the sales order and ending at the fulfilment of the order.

Please refer to the following graphic illustration of a typical distribution work flow. The graphic illustration can be presented before the demonstration as an introduction to Microsoft Distribution, and also as an overview of a typical distribution work flow where the processes can be linked directly to the relevant areas in the demo script scenarios.



The Inventory Management part of the demo script consists of step-by-step instructions on how to use some key features within Microsoft Distribution to set up and handle items when going through normal distribution business processes. In the [Inventory Management Demo Scenario](#), the following distribution scenarios are addressed:

- #1 [How do I set up items to handle distribution processes? \(Page 6\)](#)
- #2 [How do I set up stockkeeping units to handle multiple locations? \(Page 12\)](#)
- #3 [How do I set up location transfers? \(Page 18\)](#)
- #4 [How do I perform physical inventory counting? \(Page 22\)](#)

The Warehouse Management part of the demo script consists of step-by-step instructions on how to use some key features within Microsoft Distribution to manage warehouse processes when going through normal distribution business processes. In the [Warehouse Management Demo Scenario](#), the following distribution scenarios are addressed:

- #5 [How do I set up my warehouse to perform receiving, put-away, picking and shipping of items? \(Page 29\)](#)
- #6 [How do I set up my warehouse to use warehouse management systems \(WMS\) to perform advanced distribution operations? \(Page 33\)](#)
- #7 [How do I set up the system to handle returns \(Returns Management\)? \(Page 37\)](#)

The Supply Planning & Execution part of the demo script consists of step-by-step instruction on how to use some key features within Microsoft Distribution to handle the planning and execution of demand when going through normal distribution business processes. In the [Supply Planning & Execution Demo Scenario](#), the following distribution demo scenarios are addressed:

- #8 [How do I find the best price for a customer? \(Page 39\)](#)
- #9 [How do I check for possible delivery dates \(CTP\)? \(Page 43\)](#)
- #10 [How do I process the planning of supply orders in the system? \(Page 45\)](#)
- #11 [How do I create a transfer order? \(Page 48\)](#)
- #12 [How do I ship an order using warehouse management systems \(WMS\)? \(Page 51\)](#)
- #13 [How do I receive an order using Warehouse receipt and put-away documents? \(Page 54\)](#)
- #14 [How do I process the shipment of an order directly from the sales order? \(Page 57\)](#)
- #15 [How do I use serial numbers on an item? \(Page 60\)](#)
- #16 [How do I process the planning and execution of an automatic stock replenishment? \(Page 62\)](#)
- #17 [How do I use cross-docking to perform fast order processing? \(Page 66\)](#)
- #18 [How do I handle return orders? \(Page 18\)](#)
- #19 [How do I use item substitution to fulfil a customer demand? \(Page 75\)](#)

Demo script story

All three demo scenario parts revolve around a distribution business scenario where the demo company, CRONUS Furniture Ltd., uses the main functionality within Microsoft Distribution (inventory management, warehouse management, and supply planning & execution) to go through normal and advanced distribution business processes. The demo story includes Mark Hanson, a newly hired warehouse employee, Peter Sadow, a sales assistant, John Roberts, a product planner, Timothy Sneath, a warehouse employee and Linda Martin, a warehouse manager, as well as other personas, to exemplify the scenarios.

In the **Inventory Management Demo Scenario**, Mark Hanson, a newly hired warehouse employee in CRONUS Furniture Ltd., gets an overview of the item setup for handling distribution processes by looking into the item setup of a desk (ATHENS Desk) the company is selling.

Second, Mark Hanson, verifies the setup of a stockkeeping unit in the YELLOW warehouse for a guest chair (ROME Guest Chair).

Third, Mark Hanson goes through the company's use of virtual locations for handling transfer of items and keeping track of in-transit inventory.

Finally, Linda Martin, warehouse manager in CRONUS Furniture Ltd., performs a physical inventory counting in the SILVER warehouse.

In the **Warehouse Management Demo Scenario**, Mark Hanson gets an overview of the warehouse setup for the SILVER warehouse and, next, he is asked to verify that warehouse management systems (WMS) has been set up for the WHITE location.

Next, Linda Martin goes through the setup of a newly implemented feature, the returns management feature, in the system.

In the **Supply Planning & Execution Demo Scenario**, Peter Sadow, sales assistant in CRONUS Furniture Ltd., creates a sales order for a customer, John Haddock Insurance Co., for 25 guest chairs and 15 whiteboards and uses the Pricing feature to offer the customer a best price for the guest chairs.

Second, Peter Sadow check for possible delivery dates of the two items that are shipped from two different warehouses: the WHITE warehouse and the YELLOW warehouse.

Third, John Roberts, product planner in CRONUS Furniture Ltd., plans the supply orders for the sales order demand and releases the created purchase order for 5 whiteboards.

Next, Timothy Sneath, warehouse employee in CRONUS Furniture Ltd., creates a transfer order for an expected demand in the YELLOW warehouse. Timothy wants to move 50 guest chairs from the WHITE warehouse to the YELLOW warehouse to be able to fulfil an expected demand from a customer.

Then, Mark Hanson, who works in the WHITE warehouse, creates a warehouse shipment and a pick document to pick the 50 guest chairs from inventory and ship the guest chairs to the YELLOW location. Following, Timothy Sneath receives the transfer order for the 50 guest chairs in the YELLOW location and registers the necessary receipt and put-away documents to finalize the transfer.

Next, Peter Sadow processes the shipment of 25 guest chairs and 15 whiteboards directly from the sales document created earlier and Mark Hanson creates the necessary warehouse shipment and pick documents to pick the 25 guest chairs from the WHITE warehouse and ship them to John Haddock Insurance Co. Mark Hanson uses the Item Tracking feature to assign serial numbers to the 25 guest chair items before shipping the guest chairs.

Following, John Roberts plans for a stock replenishment of 50 guest chairs in the WHITE warehouse.

Next, Timothy Sneath receives the 5 whiteboards from vendor number 01254796 (Progressive Home Furnishings) in the YELLOW location and performs a cross-docking activity in order to direct the whiteboards directly to the ship zone (where the remaining 10 whiteboards are going to be shipped from). Timothy Sneath creates the necessary warehouse shipment and pick documents to pick the now 15 whiteboards from the YELLOW location and ship them to John Haddock Insurance Co.

Then, Peter Sadow, receives a call from John Haddock Insurance Co. concerning 10 damaged items. Unfortunately, 10 of the shipped whiteboards were damaged when they arrived. Peter Sadow creates a sales return order as well as other necessary returns related documents to receive the 10 damaged whiteboards for repair.

Finally, Peter Sadow, creates another sales order for John Haddock Insurance Co. to fulfil the original demand for 10 whiteboards. Peter Sadow uses the Substitutes feature to fulfil the demand.

INVENTORY MANAGEMENT DEMO SCENARIO

#1 How do I set up items to handle distribution processes?

Mark Hanson, a newly hired warehouse employee in CRONUS Furniture Ltd., wants to get an overview of the item setup for handling distribution processes. Mark has been asked by his manager, Linda Martin, to go through the setup of item 1896-S, a desk that the company is selling. The demo gives a brief overview of some basic setup of items to handle distribution processes.

What to do	What to say	Screen shots
<p>1. On the Warehouse menu, click Planning & Execution, Items. The Item Card window appears.</p>	<p>Mark Hanson wants to get an overview of the company's item setup and verify the setup of item 1896-S, a desk that the company is selling.</p> <p>Mark opens the Item Card window.</p>	
<p>2. Press F5 to open the Item List window and scroll down to select item No. 1896-S.</p>	<p>The item is called ATHENS Desk.</p>	
<p>3. Click OK.</p>		
<p>4. In the Item Card window, on the General tab, point out the Inventory field, as well as the outstanding quantities on purchase orders and sales orders (e.g. the Qty. on Prod. Order field and the Qty. on Sales Order field) (for explanation, see Notes).</p>	<p>In the Item Card window, Mark can see the availability of the ATHENS Desk, as well as the outstanding quantities on purchase orders and sales orders.</p>	

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<p>5. Click Item, Items by Location. The Items by Location window appears (consider decreasing column sizes to show all locations as shown in the screen shot).</p>	<p>Mark opens the Items by Location window to see the stock of ATHENS Desk in the respective warehouses.</p>	<table border="1"> <thead> <tr> <th>No.</th> <th>Description</th> <th>BLUE</th> <th>GREEN</th> <th>RED</th> <th>REPAIR</th> <th>SILVER</th> <th>WHITE</th> <th>YELLOW</th> </tr> </thead> <tbody> <tr> <td>1896-S</td> <td>ATHENS Desk</td> <td>0</td> <td>49</td> <td>20</td> <td>0</td> <td>0</td> <td>0</td> <td>160</td> </tr> <tr> <td>1900-S</td> <td>PARIS Guest Chair, black</td> <td>52</td> <td>41</td> <td>46</td> <td>0</td> <td>356</td> <td>0</td> <td>160</td> </tr> <tr> <td>1906-S</td> <td>ATHENS Mobile Pedestal</td> <td>70</td> <td>88</td> <td>56</td> <td>0</td> <td>75</td> <td>0</td> <td>0</td> </tr> <tr> <td>1908-S</td> <td>LONDON Swivel Chair, blue</td> <td>234</td> <td>57</td> <td>14</td> <td>0</td> <td>215</td> <td>0</td> <td>0</td> </tr> <tr> <td>1920-S</td> <td>ANTWERP Conference Table</td> <td>38</td> <td>65</td> <td>3</td> <td>0</td> <td>0</td> <td>0</td> <td>0</td> </tr> <tr> <td>1924-W</td> <td>CHAMONIX Base Storage Unit</td> <td>1</td> <td>8</td> <td>2</td> <td>0</td> <td>98</td> <td>0</td> <td>15</td> </tr> <tr> <td>1928-S</td> <td>AMSTERDAM Lamp</td> <td>149</td> <td>-19</td> <td>55</td> <td>0</td> <td>0</td> <td>0</td> <td>97</td> </tr> <tr> <td>1928-W</td> <td>ST.MORITZ Storage Unit/Drawers</td> <td>4</td> <td>23</td> <td>-1</td> <td>0</td> <td>0</td> <td>0</td> <td>41</td> </tr> <tr> <td>1936-S</td> <td>BERLIN Guest Chair, yellow</td> <td>36</td> <td>46</td> <td>50</td> <td>0</td> <td>0</td> <td>0</td> <td>0</td> </tr> </tbody> </table>	No.	Description	BLUE	GREEN	RED	REPAIR	SILVER	WHITE	YELLOW	1896-S	ATHENS Desk	0	49	20	0	0	0	160	1900-S	PARIS Guest Chair, black	52	41	46	0	356	0	160	1906-S	ATHENS Mobile Pedestal	70	88	56	0	75	0	0	1908-S	LONDON Swivel Chair, blue	234	57	14	0	215	0	0	1920-S	ANTWERP Conference Table	38	65	3	0	0	0	0	1924-W	CHAMONIX Base Storage Unit	1	8	2	0	98	0	15	1928-S	AMSTERDAM Lamp	149	-19	55	0	0	0	97	1928-W	ST.MORITZ Storage Unit/Drawers	4	23	-1	0	0	0	41	1936-S	BERLIN Guest Chair, yellow	36	46	50	0	0	0	0
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What to do	What to say	Screen shots
<p>10. Close the Item Availability by Location window to return to the Item Card window.</p>		
<p>11. On the Invoicing tab, point out the Costing Method field as well as the other different cost fields and posting fields (for explanation, see Notes).</p>		
<p>12. On the Replenishment tab, point out the Replenishment System field and the Purchase fields (for explanation, see Notes).</p>	<p>On the Replenishment tab, Mark can see that the ATHENS Desk is an item to be purchased from vendor number 30000.</p>	
<p>13. On the Planning tab, point out the Reserve field and click the AssistButton to show the different options as shown in the screen shot (for explanation, see Notes).</p>	<p>On the Planning tab, Mark can see the reserve options in the program.</p>	
<p>14. On the Replenishment tab, point out the Manufacturing Policy field and click the AssistButton to show the different options as shown in the screen shot (for explanation, see Notes).</p>		

What to do	What to say	Screen shots
<p>15. On the Planning tab, point out the Order Tracking Policy field and click the AssistButton to shown different options as shown in the screen shot (for explanation, see Notes).</p>	<p>Next, Mark notices that no Order Trading Policy has been set up for the ATHENS Desk item.</p>	
<p>16. On the Item Tracking tab, point out the Item Tracking Code field and click the AssistButton to open the Item Tracking Codes window as shown in the screen shot (for explanation, see Notes).</p>	<p>On the Item Tracking tab, Mark can see that it is possible to set up serial and lot numbers for item tracking purposes.</p>	
<p>17. Close the Item Tracking Codes window to return to the Item Card window.</p>		
<p>18. Click Item and point out the Cross References option and the Substitutions option as shown in the screen shot (for explanation, see Notes).</p>	<p>Mark clicks the Item menu to see the different options. He notices that you can set up substitutions and cross-references for items.</p>	

What to do	What to say	Screen shots
<p>19. In the Item Card window, click Sales and point out the Prices option and the Line Discounts field.</p>	<p>Finally, Mark can see that it is possible to set up alternative prices for sales and purchases.</p>	
<p>20. Close the Item Card window to return to the Navigation Pane menu.</p>		
<p>Notes:</p> <p>Explain that keeping the inventory data – an item’s description in terms of cost/price information, accounting properties planning and replenishment parameters, etc. – logically structured and organized is an essential precondition for efficient inventory management. This demo scenario will focus on the item setup in terms of availability elements, reservations, order tracking, as well as sales and purchase prices & discounts, item tracking and substitutes.</p> <p>(4) Explain that the Inventory field shows the quantity at hand (sum of all item increases represented by receipts of inbound orders, minus all item decreases represented by shipments of outbound orders, at a given date. The quantity fields underneath the Inventory field additionally gives an overview of the quantities reserved for outbound orders as well as items reserved on inbound orders.</p> <p>(6) Note that the quantity at hand in the Inventory field is the total item available in the company and is calculated irrespective of the specific location. If you have more than one location and orders are received into different locations, you can see the item availability by location in the Items by Location window. (For more information about the Multiple Locations feature, see demo #2).</p> <p>(8-9) Explain that in the Item Availability by Location window, you can get an overview of the projected (expected) available quantity of an item. The total amount of the projected available balance (here 322) is relevant in situations where there is a need to know when the inventory at hand is supposed to increase.</p> <p>(9) Note that the total projected available balance equals the quantity at hand (254) minus quantity in transit (here 25), plus quantity on purchase orders (100), minus quantity on sales orders (7).</p> <p>(11) Explain that on the Invoicing tab, you fill in all data concerning cost, price, and posting groups. The costing method is a common term in the program for a combination of application methods and cost flow assumptions. By selecting a specific costing method, you determine both the flow of physical items in the company’s inventory and the financial treatment of that physical flow. Microsoft Navision supports the following five widely-recognized costing methods: FIFO (First-In-First-Out), LIFO (Last-In-First-Out), Average, Specific and Standard.</p> <p>(12) Explain that you set up the replenishment system for each item on the item card. The replenishment system can either be Purchase (the item is going to be purchased), Prod. Order (the item is going to be produced) or Transfer (the item has been set up as a stockkeeping unit and is going to be transferred from another location). The replenishment system of an item can then be changed manually when planning the replenishment of item in the Planning Worksheet window or the Order Planning window.</p>		

Notes continued:

(13) Explain that you use the reserve functionality to reserve inventory or inbound items for a specific sales order or to reserve components for firm planned production orders before they are released.

Alternative to the program principle that reservations should be applied manually (from the sales order), you can set up automatic reservation for an item by selecting the Always option in the Reserve field (this enables automatic reservation made against inventory, purchase orders and production orders for the demand).

(13) Note that if you have chosen the Optional option and you create production or purchase order planning lines directly from the sales order using the Order Promising feature, reservation entries are automatically created.

(14) Note that automatic reservation with no user involvement also occurs if you have set up the planning system to create orders using the Make-to-Order (M-T-O) manufacturing policy.

(15) Explain that you use the order tracking functionality to track the connection of supply to its corresponding demand. You can track from either a purchase order or a production order to find the sales order that causes the demand, and you can track from a sales order to find the purchase or production order that supplies the demand. You set up the order tracking policy in the Item Card window where you can additionally choose the more advanced feature of action messaging used in connection with production planning.

(16) Explain that the item tracking functionality is based on using serial and lot numbers and allows the user to receive and ship multiple quantities with serial and lot numbers from a single order line entry. Item tracking codes are set up in the Item Tracking Codes window and defines which item parameters (serial number, lot number, or both) the program will use to track the items and in which operational areas. (For more information about the Item Tracking feature, see demo #15).

(18) Note that by using the Substitutions option you can link items to one another in order to be able to easily offer an alternative item in case the requested item is not available or in case you want to offer your customers a lower-cost alternative.

(18) Note that by using the Cross References option you can link another company's item number with your company's item number.

(19) Note that you can set up pricing and discounts for items (and item discount groups) in order to be able to offer your customers the best price and to ensure that agreed prices or line discounts are actually granted by vendors. Pricing and discounts can also be set up for the individual customer or vendor on the customer or vendor card.

Benefits:

Microsoft Distribution enables you to couple demand with supply in such a manner that guarantees superior customer satisfaction without increasing inventory costs.

Microsoft Distribution offers an item setup that ensures reliable inventory availability figures and transparency of allocations and inventory level based on expected supplies.

#2 How do I set up stockkeeping units to handle multiple locations?

Mark Hanson, a newly hired warehouse employee in CRONUS Furniture Ltd., has been asked to verify the setup of a stockkeeping unit for item number 1960-S (ROME Guest Chair) in the YELLOW warehouse. The demo gives a brief overview of how stockkeeping units are set up for handling multiple locations.

What to do	What to say	Screen shots
<p>1. On the Warehouse menu, click Planning & Execution, Items, and then press F5 to open the Item List window.</p>	<p>Mark Hanson wants to verify the setup of a stockkeeping unit for item number 1960-S, a guest chair, in the YELLOW warehouse.</p> <p>Mark first opens the Item Card List window to search for the guest chair item.</p>	
<p>2. Scroll down to select item No. 1960-S and click OK.</p>	<p>The item is called ROME Guest Chair.</p>	
<p>3. In the Item Card window, on the Planning tab, point out the Stockkeeping Unit Exists field and click Item, Stockkeeping Units to open the Stockkeeping Unit List window.</p>	<p>On the Planning tab, Mark can see that a stockkeeping unit has been set up for the guest chair item.</p> <p>Mark opens the Stockkeeping Unit List to see the setup stockkeeping units.</p>	
<p>4. Select Item No. 1960-S at YELLOW location as shown in the screen shot and click SKU, Card. The Stockkeeping Unit Card window appears.</p>	<p>Mark opens the stockkeeping unit for the item in the YELLOW warehouse.</p>	

What to do	What to say	Screen shots
<p>5. Briefly show the Invoicing tab, the Replenishment tab and the Planning tab as shown in the screen shot (for explanation, see Notes).</p>	<p>Mark can see that each stockkeeping unit card contains similar information to the item card.</p>	
<p>6. On the Replenishment tab, point out the Replenishment System field (for explanation, see Notes).</p>	<p>On the Replenishment tab, Mark notices that the ROME Guest Chair item in the YELLOW warehouse have been set up with a transfer replenishment system, which is different from the item setup.</p>	
<p>7. On the Warehouse menu, click Setup, Locations. The Locations Card window appears.</p>	<p>Next, Mark opens the Location Card window to see more about the warehouse location setup.</p>	
<p>8. Press F5 to open the Location List window and point out the locations set up for the company (for explanation, see Notes).</p>	<p>Mark can see that CRONUS Furniture has 7 warehouses, (one for repair and 6 warehouse locations) and 2 in-transit locations.</p>	

What to do	What to say	Screen shots
<p>9. Select location Code YELLOW and click OK.</p>	<p>In the Location Card window, Mark can see that each individual warehouse is set up with its respective warehouse and bin policy.</p>	
<p>10. In the Location Card window, briefly show the Warehouse tab, the Bins tab and the Bin Policies tab as shown in the screen shot (for more explanation, see Notes).</p>		
<p>11. Close the Location Card window, the Stockkeeping Unit Card window and the Stockkeeping Unit List window to return to the Item Card window.</p>		

What to do	What to say	Screen shots
<p>12. On the Warehouse menu, click Orders & Contacts, Vendors, and then press F5 to open the Vendor List window (consider expanding column sizes to show field names as shown in the screen shot).</p>	<p>Next, Mark opens the Vendor List window to see how some vendors are setup to receive items from specific locations.</p>	
<p>13. Point out the Location Code field as shown in the screen shot (for explanation, see Notes).</p>		
<p>14. Close the Vendor List window and the Vendor Card window to return to the Item Card window.</p>		
<p>15. On the General tab, point out the Created From Nonstock Item field (for explanation, see Notes).</p>	<p>Then, Mark notices that the company also have nonstock items and that these can be converted into items.</p>	
<p>16. Close the Item Card window to return to the Navigation Pane menu.</p>		

What to do	What to say	Screen shots
<p>17. On the Administration menu, click Application Setup, General, Responsibility Centers. The Responsibility Center Card window appears.</p>	<p>Finally, Mark opens the Responsibility Center Card window to see that company also have setup responsibility centers to handle the multiple locations.</p>	
<p>18. Point out the Location Code field (for explanation, see Notes).</p>		
<p>19. Close the Responsibility Center Card to return to the Navigation Pane menu.</p>		
<p>Notes:</p> <p>Explain that if you need to handle many warehouse locations, and these warehouse locations need a certain degree of flexibility when it comes to individual replenishment plans based on the supply-demand pattern at a specific location, you use stockkeeping units to specify individual parameters for an item.</p> <p>(3) Explain that a stockkeeping unit (SKU) is an item with a particular variant and/or at a particular geographic location. The setup on the SKU card is very similar to the item card (see demo #1) and may include cost prices, replenishment and manufacturing information.</p> <p>(3) Note that the information held on the SKU cards is used by the program per definition whenever there is a SKU card setup for the item. This means that the SKU card has priority over the item card, but does not replace the item card.</p> <p>(5) Note that you can differentiate between items at different locations by, for example, their maximum inventory, their reorder policy and/or point, their replenishment system, etc.</p> <p>(6) Note that for item number 1960-S at YELLOW location, a different replenishment system has been setup from the replenishment system on the item card for item number 1960-S.</p> <p>(7) Explain that you use the Multiple Locations feature to manage your inventory in multiple locations as mentioned above. Stockkeeping units are important for setting up items to be handled in multiple locations, whereas location cards are important for setting up places to handle physical placement and quantities of items.</p> <p>(8) Note that CRONUS Furniture Ltd. has set up nine locations: seven warehouse locations and two in-transit locations used to track inventory in transit between the physical locations. (For more information about location transfers, see demo #3.)</p> <p>(9-10) Note that you use the Location Card window to record information about your locations (for example location code, address, and warehouse and bin policies. For more information about warehouse and bin policies, see the Warehouse Management Demo Scenario).</p> <p>(12-13) Note that you can link customer and vendors to locations to ensure fast deliveries to your customers or to optimize purchase processes with some vendors.</p>		

Notes continued:

(15) Mention that you can also set up nonstock items (items not regularly kept in inventory) in the system if, for example, the item is shipped from the vendor directly to the customer or if you purchase a special order from a vendor to a customer. A check mark in the Created From Nonstock Item field indicates that the item was created from a nonstock item.

(17-18) Explain that you can set up responsibility centers to administer the business; for example, a responsibility center could handle sales and purchases for one or more distribution centers. The Location Code field is used to link a responsibility center to a default warehouse location.

Benefits:

Microsoft Distribution provides multi-site companies with the possibility of managing their business operations in the most flexible, yet optimal way.

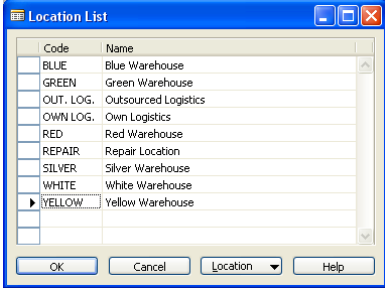
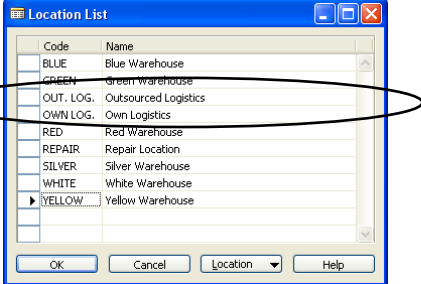
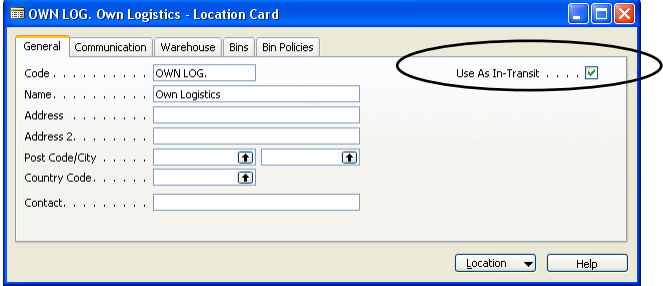
The Multiple Locations feature within Microsoft Distribution enables you to manage your multiple locations in one database. Distribution operations performed over large geographic areas are setup with each unit being managed independently.

The stockkeeping units functionality within Microsoft Distribution offers you the possibility of setting up variants of the same item for each location as well as to order items for each location on the basis of location-specific data.

The Responsibility Centers feature provides you with the possibility of handling administrative centers with user-specific views to enable showing, for example, only sales and purchase documents related to a particular responsibility center.

#3 How do I set up location transfers?

Mark Hanson, a newly hired warehouse employee in CRONUS Furniture Ltd., wants to get an overview of the company's use of virtual locations for handling transfer of items and keeping track of in-transit inventory. The demo shows how to setup the system to handle transfer orders and track in-transit inventory.

What to do	What to say	Screen shots
<p>1. On the Warehouse menu, click Setup, Locations, and then press F5 to open the Location List window.</p>	<p>Mark Hanson wants to get an overview of the company's in-transit location setup.</p> <p>Mark opens the Location List window.</p>	
<p>2. Point out the OUT. LOG. location and the OWN LOG. location (for explanation, see Notes).</p>	<p>Mark can see that two in-transit locations have been set up: one for outsourced logistics and one for internal logistics.</p>	
<p>3. Select the OWN LOG. location and click OK.</p>	<p>Mark want to see more specifically at the OWN Logistics location card.</p>	
<p>4. In the Location Card window, point out the Use as In-Transit field (for explanation, see Notes).</p>	<p>In the Location Card window, Mark can see that not much information is needed to set up a virtual location.</p>	
<p>5. Close the Location Card window to return to the Navigation Pane menu.</p>		

What to do	What to say	Screen shots
<p>6. On the Warehouse menu, click Planning & Execution, Setup Inventory, Transfer Routes. The Transfer Routes window appears.</p> <p>(Consider decreasing column sizes and expanding window sizes to show field names as shown in the screen shot.)</p>	<p>Next, Mark wants to see if the company has set up default transfer routes for the different warehouses.</p>	
<p>7. Point out the transfer routes setup for the company (for explanation, see Notes).</p>	<p>In the Transfer Routes window, Mark can see that 5 default transfer routes have been set up.</p>	
<p>8. Close the Transfer Routes window to return to the Navigation Pane menu.</p>		
<p>9. On the Warehouse menu, click Planning & Execution, Items, and then press F5 to open the Item List window.</p>	<p>Next, Mark wants to see the functionality used to actually track inventory in transit.</p>	
<p>10. Scroll up to select item No. 1896-S and click OK.</p>		

What to do	What to say	Screen shots																																																																																										
<p>11. In the Item Card window, click Item, Items by Location to open the Item by Location window.</p>	<p>In the Items by Location window, Mark selects the Show Items in Transit option and he can see that, for example, 25 ATHENS Desk items are currently in transit.</p>	<table border="1"> <thead> <tr> <th>No.</th> <th>Description</th> <th>BLUE</th> <th>GREEN</th> <th>RED</th> <th>REPAIR</th> <th>SILVER</th> <th>WHITE</th> <th>YELLOW</th> </tr> </thead> <tbody> <tr> <td>1896-S</td> <td>ATHENS Desk</td> <td>0</td> <td>49</td> <td>20</td> <td>0</td> <td>0</td> <td>0</td> <td>160</td> </tr> <tr> <td>1900-S</td> <td>PARIS Guest Chair, black</td> <td>52</td> <td>41</td> <td>46</td> <td>0</td> <td>356</td> <td>0</td> <td>160</td> </tr> <tr> <td>1906-S</td> <td>ATHENS Mobile Pedestal</td> <td>70</td> <td>88</td> <td>56</td> <td>0</td> <td>75</td> <td>0</td> <td>0</td> </tr> <tr> <td>1908-S</td> <td>LONDON Swivel Chair, blue</td> <td>234</td> <td>57</td> <td>14</td> <td>0</td> <td>215</td> <td>0</td> <td>0</td> </tr> <tr> <td>1920-S</td> <td>ANTWERP Conference Table</td> <td>38</td> <td>65</td> <td>3</td> <td>0</td> <td>0</td> <td>0</td> <td>0</td> </tr> <tr> <td>1924-W</td> <td>CHAMONIX Base Storage Unit</td> <td>1</td> <td>8</td> <td>2</td> <td>0</td> <td>98</td> <td>0</td> <td>15</td> </tr> <tr> <td>1928-S</td> <td>AMSTERDAM Lamp</td> <td>149</td> <td>-19</td> <td>55</td> <td>0</td> <td>0</td> <td>0</td> <td>97</td> </tr> <tr> <td>1928-W</td> <td>ST.MORITZ Storage Unit/Drawers</td> <td>4</td> <td>23</td> <td>-1</td> <td>0</td> <td>0</td> <td>0</td> <td>41</td> </tr> <tr> <td>1936-S</td> <td>BERLIN Guest Chair, yellow</td> <td>36</td> <td>46</td> <td>50</td> <td>0</td> <td>0</td> <td>0</td> <td>0</td> </tr> </tbody> </table>	No.	Description	BLUE	GREEN	RED	REPAIR	SILVER	WHITE	YELLOW	1896-S	ATHENS Desk	0	49	20	0	0	0	160	1900-S	PARIS Guest Chair, black	52	41	46	0	356	0	160	1906-S	ATHENS Mobile Pedestal	70	88	56	0	75	0	0	1908-S	LONDON Swivel Chair, blue	234	57	14	0	215	0	0	1920-S	ANTWERP Conference Table	38	65	3	0	0	0	0	1924-W	CHAMONIX Base Storage Unit	1	8	2	0	98	0	15	1928-S	AMSTERDAM Lamp	149	-19	55	0	0	0	97	1928-W	ST.MORITZ Storage Unit/Drawers	4	23	-1	0	0	0	41	1936-S	BERLIN Guest Chair, yellow	36	46	50	0	0	0	0
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<p>14. Close all windows to return to the Navigation Pane menu.</p>																																																																																												

Notes:

Explain that you use the Location Transfers feature to be able to accurately track the movement of inventory from one location to another.

(1) Explain that in order to track the movement of inventory from one location to another, you need to set up in-transit locations, i.e. virtual locations, to use between the source locations and the target location.

(2) Note that CRONUS Furniture Ltd. has set up two in-transit locations: Outsourced Logistics and Own Logistics.

(4) Note the Use as In-Transit field that indicates whether the location is used as an in transit location (as opposed to a warehouse location).

(6-7) Mention that you can also set up transfer routes to define default transfer locations, for example whether to use own logistic facilities or external carrier. The setup of transfer routes requires setup of shipping agents and agent services.

(7) Note that CRONUS Furniture Ltd. has set up five default transfer routes in the system:

- BLUE-RED: external carrier (OUT. LOG.)
- BLUE-YELLOW: external carrier (OUT. LOG.)
- GREEN-RED: internal logistics (OWN LOG.)
- GREEN- YELLOW: internal logistics (OWN LOG.)
- RED-BLUE: external carrier (OUT. LOG.)

(11-13) Note that in the Items by Location window, you can get an overview of item quantities per in-transit location code. As shown in demo #1, the total projected availability balance included the item quantity in transit (25) for item No. 1896-S.

Benefits:

The Location Transfers feature within Microsoft Distribution enables you to easily set up virtual locations to handle and track movement of inventory from one location to another. Default transfer routes can be set up to handle user-specific transfer of inventory between warehouse locations.

Inventory in transit is tracked based on the setup of in-transit locations and gives you the possibility of determining the accurate value of your inventory for both financial and logistic purposes.

#4 How do I perform physical inventory counting?

Linda Martin, warehouse manager in CRONUS Furniture Ltd., wants to perform a physical inventory counting in the SILVER warehouse. The demo shows how to perform physical counting.

What to do	What to say	Screen shots
<p>1. On the Warehouse menu, click Inventory, Phys. Inventory Journals. The Phys. Inventory Journal window appears.</p>	<p>CRONUS Furniture Ltd. is ready to perform their annual physical counting of the inventory in the SILVER warehouse.</p> <p>Linda Martin wants to make the program calculate the inventory in the SILVER warehouse before creating a physical inventory list report for the employees to use for the actual physical count of the inventory.</p>	
<p>2. Click Functions and point out the options (for explanation, see Notes),</p>	<p>In the Phys. Inventory Journal window, Linda makes the program calculate the inventory in the SILVER warehouse.</p>	
<p>3. Click Calculate Inventory. The Calculate Inventory window appears.</p>		
<p>4. Type SILVER in the Location Filter field as shown in the screen shot.</p>		

What to do	What to say	Screen shots																																																																						
<p>5. Click OK to run the calculate inventory batch job.</p>																																																																								
<p>6. In the Phys. Inventory Journal window, point out the new journal lines and the Qty. (Calculated) field (for explanation, see Notes). (Consider expanding column and window sizes to show field names as shown in the screen shot).</p>	<p>Linda can see that there is currently 4 items in stock in 5 different bins in the SILVER warehouse.</p>	<table border="1"> <thead> <tr> <th>Posting Date</th> <th>Entry Type</th> <th>Document No.</th> <th>Item No.</th> <th>Description</th> <th>Location Code</th> <th>Bin Code</th> <th>Qty. (Calculated)</th> <th>Qty. (Phys. Inventory)</th> <th>Quantity</th> </tr> </thead> <tbody> <tr> <td>25-01-01</td> <td>Positive Adjmt.</td> <td>T02001</td> <td>1900-S</td> <td>PARIS Guest Chair, black</td> <td>SILVER</td> <td>5-01-...</td> <td>56</td> <td>56</td> <td>0</td> </tr> <tr> <td>25-01-01</td> <td>Positive Adjmt.</td> <td>T02001</td> <td>1900-S</td> <td>PARIS Guest Chair, black</td> <td>SILVER</td> <td>5-02-...</td> <td>300</td> <td>300</td> <td>0</td> </tr> <tr> <td>25-01-01</td> <td>Positive Adjmt.</td> <td>T02001</td> <td>1906-S</td> <td>ATHENS Mobile Pedestal</td> <td>SILVER</td> <td>5-03-...</td> <td>75</td> <td>75</td> <td>0</td> </tr> <tr> <td>25-01-01</td> <td>Positive Adjmt.</td> <td>T02001</td> <td>1908-S</td> <td>LONDON Swivel Chair, ...</td> <td>SILVER</td> <td>5-04-...</td> <td>215</td> <td>215</td> <td>0</td> </tr> <tr> <td>25-01-01</td> <td>Positive Adjmt.</td> <td>T02001</td> <td>1924-W</td> <td>CHAMONIX Base Stora...</td> <td>SILVER</td> <td>5-01-...</td> <td>98</td> <td>98</td> <td>0</td> </tr> <tr> <td>25-01-01</td> <td>Positive Adjmt.</td> <td>T02001</td> <td></td> <td></td> <td></td> <td></td> <td>0</td> <td>0</td> <td>0</td> </tr> </tbody> </table>	Posting Date	Entry Type	Document No.	Item No.	Description	Location Code	Bin Code	Qty. (Calculated)	Qty. (Phys. Inventory)	Quantity	25-01-01	Positive Adjmt.	T02001	1900-S	PARIS Guest Chair, black	SILVER	5-01-...	56	56	0	25-01-01	Positive Adjmt.	T02001	1900-S	PARIS Guest Chair, black	SILVER	5-02-...	300	300	0	25-01-01	Positive Adjmt.	T02001	1906-S	ATHENS Mobile Pedestal	SILVER	5-03-...	75	75	0	25-01-01	Positive Adjmt.	T02001	1908-S	LONDON Swivel Chair, ...	SILVER	5-04-...	215	215	0	25-01-01	Positive Adjmt.	T02001	1924-W	CHAMONIX Base Stora...	SILVER	5-01-...	98	98	0	25-01-01	Positive Adjmt.	T02001					0	0	0
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<p>7. On the Financial Management menu, click Inventory, Reports, Physical Inventory List. The Phys. Inventory List window appears.</p>	<p>Linda is now ready to print the physical inventory lists to distribute to the employees for the counting. For this purpose, she creates a Phys. Inventory List report showing the calculated inventory for each item.</p>																																																																							
<p>8. On the Item Journal Line tab, fill out the window as shown in the screen shot.</p>																																																																								
<p>9. On the Options tab, click to select the Show Qty. (Calculated) field as shown in the screen shot.</p>																																																																								

What to do	What to say	Screen shots
<p>10. Click Preview to open a print preview version of the report.</p> <p>(Expand window size and percentage size of the preview.)</p>		
<p>11. Close the Print Preview window to return to the Phys. Inventory Journal window.</p>		
<p>12. Select the physical inventory journal line for Item No. 1906-S and type 71 in the Quantity (Phys. Inventory) field as shown in the screen shot).</p>	<p>Later that day, Linda receives the physical inventory count from a warehouse employee in the SILVER warehouse.</p> <p>The warehouse employee has indicated that 4 fewer units of item 1906-S were found in bin S-03-0002 than recorded in the program.</p> <p>Linda changes the physical inventory quantity from 75 to 71 for the item.</p>	
<p>13. Point out the changed Entry Type field for the journal line.</p>		

What to do	What to say	Screen shots
<p>14. Select the physical inventory journal line for Item No. 1900-S in bin S-02-0001 and type 0 in the in the Quantity (Phys. Inventory) field as shown in the screen shot).</p>	<p>The warehouse employee has also reported that the quantity of item 1900-S that is recorded to be in bin S-02-0001 is actually in bin S-01-0001.</p>	
<p>15. Select the physical inventory journal line for item 1900-S in bin S-01-0001 and type 356 in the Quantity (Phys. Inventory) field as shown in the screen shot).</p>	<p>Linda record the change in the physical inventory quantity and posts the journal lines.</p>	
<p>16. Press F11 to post the journal lines and accept the messages that follow.</p>		
<p>17. Close the Phys. Inventory Journal window to return to the Navigation Pane menu.</p>		
<p>18. On the Warehouse menu, click History, Registers, Registers to open the Warehouse Registers window.</p>	<p>Next, Linda wants to make sure the changes have been recorded in the warehouse registers.</p>	

What to do	What to say	Screen shots																																
<p>19. Select register entry No. 8 and click Register, Warehouse Entries. The Warehouse Entries window appears (consider expanding column sizes to show field names as shown in the screen shot).</p>	<p>In the Warehouse Entries window, Linda can see that 3 new entries have been created corresponding to the changes in the physical inventory counting for the SILVER warehouse.</p>	<table border="1"> <thead> <tr> <th>Entry Type</th> <th>Zone Code</th> <th>Bin Code</th> <th>Item No.</th> <th>Description</th> <th>Variant Code</th> <th>Quantity</th> <th>Unit of Measure...</th> </tr> </thead> <tbody> <tr> <td>Positive Adjmt.</td> <td></td> <td>5-01-0001</td> <td>1900-S</td> <td></td> <td></td> <td>300</td> <td>PCS</td> </tr> <tr> <td>Negative Adjmt.</td> <td></td> <td>5-02-0001</td> <td>1900-S</td> <td></td> <td></td> <td>-300</td> <td>PCS</td> </tr> <tr> <td>Negative Adjmt.</td> <td></td> <td>5-03-0002</td> <td>1906-S</td> <td></td> <td></td> <td>-4</td> <td>PCS</td> </tr> </tbody> </table>	Entry Type	Zone Code	Bin Code	Item No.	Description	Variant Code	Quantity	Unit of Measure...	Positive Adjmt.		5-01-0001	1900-S			300	PCS	Negative Adjmt.		5-02-0001	1900-S			-300	PCS	Negative Adjmt.		5-03-0002	1906-S			-4	PCS
Entry Type	Zone Code	Bin Code	Item No.	Description	Variant Code	Quantity	Unit of Measure...																											
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<p>20. Point out the three warehouse entries, and then close all windows to return to the Navigation Pane menu.</p>																																		
<p>21. On the Warehouse menu, click Planning & Execution, Items. The Item Card window appears.</p>	<p>Finally, Linda wants to implement a decision about setting up item number 1896-s for cycle counting.</p>																																	
<p>22. On the Warehouse tab, point out the Phys Invt Counting Period Code field and click the AssistButton to open the Phys. Counting Periods window as shown in the screen shot (for explanation, see Notes).</p>	<p>Linda selects the FAST physical inventory counting period to make the program suggest physical inventory counting 6 times per year.</p>	<table border="1"> <thead> <tr> <th>Code</th> <th>Description</th> <th>Count Fr...</th> </tr> </thead> <tbody> <tr> <td>FAST</td> <td>Fast movers or High value</td> <td>6</td> </tr> <tr> <td>NORMAL</td> <td>Normal sale or medium value</td> <td>2</td> </tr> <tr> <td>SLOW</td> <td>Slow movers or low value</td> <td>1</td> </tr> </tbody> </table>	Code	Description	Count Fr...	FAST	Fast movers or High value	6	NORMAL	Normal sale or medium value	2	SLOW	Slow movers or low value	1																				
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What to do	What to say	Screen shots
<p>23. Click OK to select the FAST counting period code and accept the message that follows.</p>		
<p>24. In the Item Card, on the Warehouse tab, point out Next Counting Period field and close the Item Card window to return to the Navigation Pane menu.</p>		
<p>Notes:</p> <p>Explain that you use the physical inventory counting functionality to keep an accurate record of inventory in the warehouse. Physical counts can be performed at the location level or at the bin level, depending on your warehouse setup. Additionally, warehouses using warehouse management systems (WMS) can also perform physical counts at the zone and/or bin level in order to divide warehouse areas into smaller pieces. (For more information about warehouse management systems, see demo #6.) This demo scenario will show physical counting at the bin level using the physical inventory journal.</p> <p>(1) Explain that you use the Phys. Inventory Journal register inventory counting of your inventory at different locations. The physical inventory counting is performed by comparing the actual quantity on hand, with the quantity on hand calculated by the program.</p> <p>(2) Note that the Calculate Inventory option gives you a list of all items in the specified location/bin/zone, whereas the Calculate Counting Period option only lists the items where a cycle counting period has been set up.</p> <p>(7-10) Note that you can print out a report of the physical inventory list for assigned warehouse employees to fill out when performing the physical inventory counts.</p> <p>(12-16) Explain that once the physical inventory count has been performed, you record any changes to the calculated quantity in the Phys. Inventory Journal window and then you post the changes. The program automatically changes the entry type depending on whether the entry type is a positive or negative adjustment.</p> <p>(19) Once the physical inventory journal lines have been posted, the program records the movement of the relevant items to the adjustment bin. Items are not available and cannot be picked from the adjustment bins, therefore, note that you need to post adjustment journal lines in the Item Journal window to remove the items from inventory.</p> <p>(21-23) Mention that cycle counting is a procedure used for scheduling physical counting of frequently counted items (for example, high value items, fast movers, low value items, or slow movers.) In order to perform cycle counting, a physical inventory cycle code is added to the item or SKU card, and the frequency of counting is determined per year. In this example, the FAST counting period code is applied with a frequency of 6 counting periods per year.</p> <p>(24) Note the filled in counting period in the Next Counting Periods field.</p>		

Benefits:

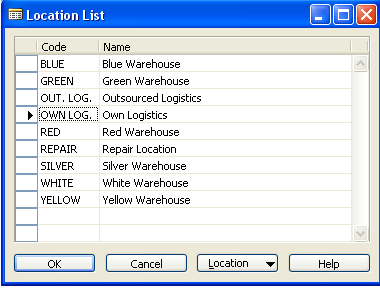
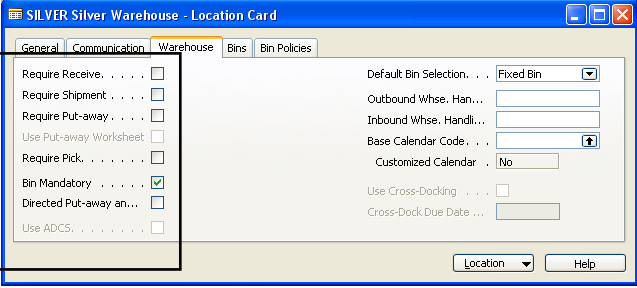
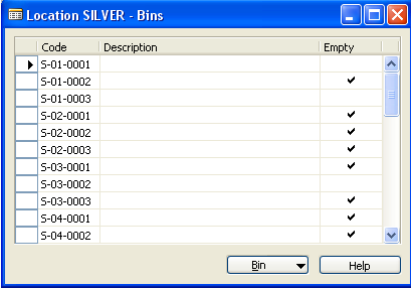
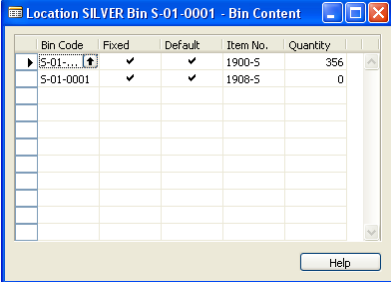
The physical inventory counting functionality within Microsoft Distribution enables you to ensure that the quantities of items that are recorded in the warehousing system are the same as what physically resides in the warehouse.

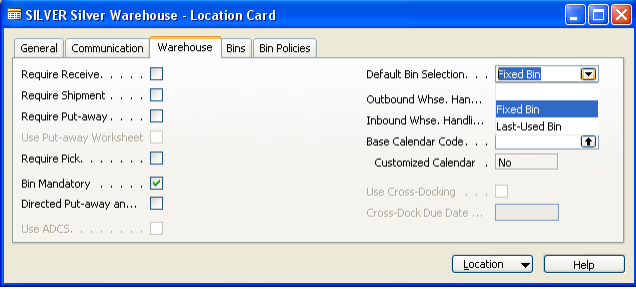
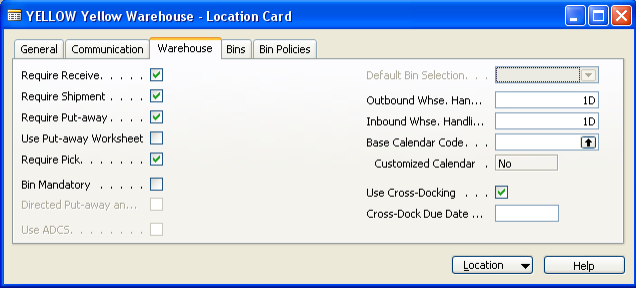
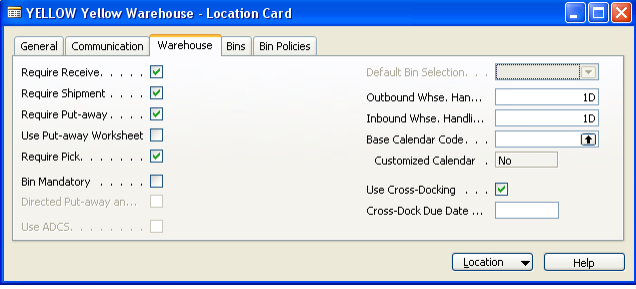
With Microsoft Distribution, physical inventory counting is easy and flexible allowing you to perform counting at different levels and setting up cycle counting periods for items.

WAREHOUSE MANAGEMENT DEMO SCENARIO

#5 How do I set up my warehouse to perform receiving, put-away, picking and shipping of items?

Mark Hanson, a newly hired warehouse employee in CRONUS Furniture Ltd., wants to get an overview of the warehouse setup for the SILVER warehouse. The demo shows how to set up warehouse locations to handle receiving, put-away, picking and shipping of items.

What to do	What to say	Screen shots															
<p>1. On the Warehouse menu, click Setup, Locations and then press F5 to open the Location List window.</p>	<p>Mark Hanson wants to get an overview of the warehouse setup of the SILVER warehouse.</p> <p>Mark opens the Location List window.</p>																
<p>2. Select location Code SILVER and click OK.</p>																	
<p>3. In the Location Card window, on the Warehouse tab, point out the fields at the left side of the window as shown in the screen shot (for explanation, see Notes).</p>	<p>In the Location Card, Mark can see that the SILVER warehouse is setup with the Bin Mandatory option and no requirements for receipts, shipments, etc.</p>																
<p>4. Click Location, Bins to open the Bins window and point out the bin codes setup for location SILVER.</p>	<p>In the Bins window, Mark can see all the bins set up for the SILVER warehouse and the contents, i.e. the items assigned to each bin.</p>																
<p>5. Click Bin, Contents. The Bin Content window appears (for explanation, see Notes).</p>		 <table border="1" data-bbox="737 1619 1129 1899"> <thead> <tr> <th>Bin Code</th> <th>Fixed</th> <th>Default</th> <th>Item No.</th> <th>Quantity</th> </tr> </thead> <tbody> <tr> <td>S-01-0001</td> <td>✓</td> <td>✓</td> <td>1900-5</td> <td>356</td> </tr> <tr> <td>S-01-0001</td> <td>✓</td> <td>✓</td> <td>1908-5</td> <td>0</td> </tr> </tbody> </table>	Bin Code	Fixed	Default	Item No.	Quantity	S-01-0001	✓	✓	1900-5	356	S-01-0001	✓	✓	1908-5	0
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What to do	What to say	Screen shots
<p>6. Close the Bin Content window and the Bins window to return to the Location Card window.</p>		
<p>7. On the Warehouse tab, point out the Default Bin Selection field and click the AssistButton to show the different options (for explanation, see Notes),</p>	<p>Mark notices that the SILVER warehouse has been set up with a fixed bin selection policy.</p>	
<p>8. Press F5 to open the Location List window and select location Code YELLOW, and then click OK.</p>		
<p>9. In the Location Card window, on the Warehouse tab, point out the warehouse setup for location BLUE.</p>	<p>Finally, Mark opens the YELLOW warehouse setup to see the warehouse management requirements for the YELLOW warehouse.</p>	
<p>10. Point out the Use Cross-Docking field (for explanation, see Notes).</p>	<p>Mark can see that the YELLOW warehouse requires receipt, shipment, put-away and picks, and also that the warehouse can perform cross-docking activity.</p>	
<p>11. Close the Location Card window to return to the Navigation Pane menu.</p>		

What to do	What to say	Screen shots
<p>12. On the Warehouse menu, click Planning & Execution to show the different warehouse documents and worksheets, and then click Goods Handling Multiple Orders on the Warehouse menu to show the different warehouse documents available there (for explanation, see Notes).</p>		
<p>Notes: Explain that you use the Warehouse Management feature for handling the basic warehouse processes: receiving and picking. Depending on which features your company need to manage your warehousing efficiently (the Bin feature, the Pick feature the Put-away feature, the Receipt feature and the Shipment feature) the Warehouse Management feature can be used to:</p> <ul style="list-style-type: none"> • perform picks and put-aways using bins on sales and purchase documents. • perform more complicated pick and put-away processes using pick and put-away documents. • process receiving and shipment information for multiple orders in one separate warehouse document. <p>(3) Explain that the warehouse setup consists of the location setup and the bin setup. In demo #2, the general setup of locations was shown, whereas the warehouse setup of locations concerns the extent to which you want your warehouse processes to be supported by the program.</p> <p>(3) Point out the different warehouse setup options with focus on the following:</p> <ul style="list-style-type: none"> • <u>Require Receive, Require Shipment, Require Put-away, Require Pick</u> – you use these options to define whether separate warehouse documents are to be used to handle the respective warehouse processes. • <u>Bin Mandatory</u> – you use this option if you want to define and record bin information for all movements that take place in the specific location. • <u>Directed Put-away and Pick</u> – this option applies to the Warehouse Management Systems (WMS) functionality for more advanced warehousing functionality. For more about WMS, see demo #6) <p>(4) Explain that a bin is the most basic storage unit in the warehouse. Bin codes for locations can be setup manually in the Bins window or automatically using the Bin Creation Worksheet window.</p> <p>(5) Note that for each bin code, you set up the content, that is, which items to be stored in the bin.</p> <p>(7) Explain that you use the Fixed Bin option you want the program to suggest the same bin for picking and putting the item away, whereas you use the Last-Used Bin option if you want the program to change the default bin assignment to the last bin in which the item was put away.</p> <p>(9-10) Note that location YELLOW has been set up to use cross-docking. Cross-docking is a mean of saving time and work, directing items for orders awaiting shipment directly to the ship zone. For more information about the use of cross-docking to perform faster order processing, see demo #18.</p>		

Notes continued:

(12) Note that Receipts, Put-away Worksheets, Shipments and Pick Worksheets are the more planning related features where the warehouse manager can plan what to receive and pick; whereas Put-aways, Picks and Movements are the more operational features that the warehouse employees use in their daily tasks. For more information about using the Warehouse Management feature for receiving, put-away, pick and shipment, see the Supply Planning & Execution Demo Scenario.

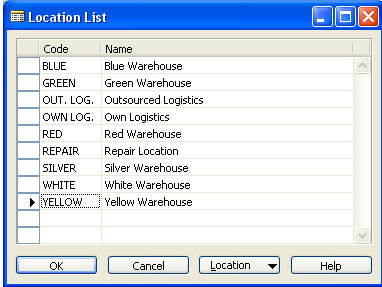
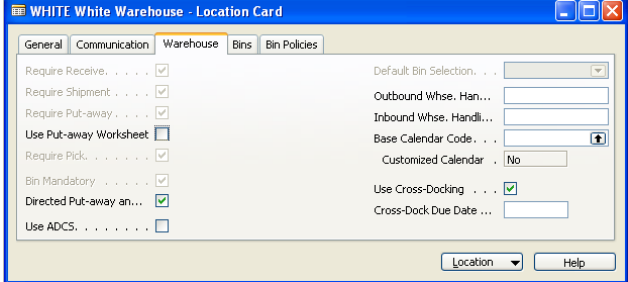
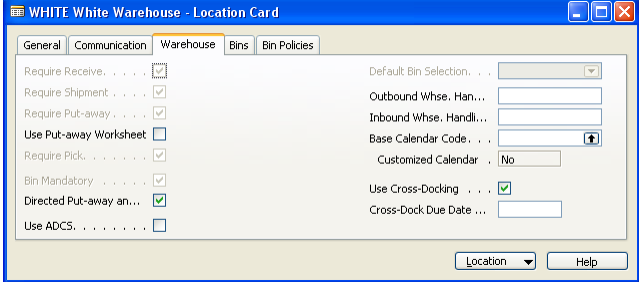
Benefits:

The Warehouse Management feature within Microsoft Distribution ensures maximum efficiency, data accuracy, and reliability in inventory management and warehousing operations. Dynamic bin suggestion, the ability of recording warehouse information directly on the order documents and the facility to handle warehousing tasks on separate documents enables you to sustain efficiency and short order handling time.

The Warehouse Management feature provides you with the tools to perform even the most simple warehouse processes in a reliable and easy-to-use environment, while allowing for increasing complexity as the company grows and processes change.

#6 How do I set up my warehouse to use warehouse management systems (WMS) to perform advanced distribution operations?

Mark Hanson, a newly hired warehouse employee in CRONUS Furniture Ltd., has been asked to verify the warehouse management systems setup for the WHITE warehouse. The demo shows how to set up warehouse management systems to handle advanced distribution operations.

What to do	What to say	Screen shots
<p>1. On the Warehouse menu, click Setup, Locations, and then press F5 to open the Location List window.</p>	<p>Mark Hanson wants to verify the setup of warehouse management systems (WMS) in the WHITE warehouse.</p> <p>Mark opens the Location List window to search for the WHITE warehouse.</p>	
<p>2. Select location Code WHITE and click OK.</p>	<p>In the Location Card window for the WHITE warehouse, Mark can see that a different setup has been applied than what he saw earlier for the SILVER warehouse and the YELLOW warehouse.</p>	
<p>3. In the Location Card window, on the Warehouse tab, point out the fields at the left side of the window as shown in the screen shot (for explanation, see Notes).</p>	<p>Mark notices that the warehouse management systems setup includes all of the greyed out options (that are selected) as well as directed put-away and pick of items.</p>	

What to do	What to say	Screen shots																																																																						
<p>4. Briefly show the Bins tab and the Bin Policies tab as shown in the screen shot (for explanation, see Notes).</p>	<p>The setup also includes a more advanced zone and bin setup than was seen for the SILVER warehouse.</p>																																																																							
<p>5. Click Location and point the Zones and the Bins options, and then click Zones to open the Zones window (consider expanding column sizes to show field names as shown in the screen shot).</p>	<p>In the Zones window, Mark can see that several user-defined zones are set up to handle different warehouse operations.</p>	<table border="1" data-bbox="740 891 1378 1099"> <thead> <tr> <th>Code</th> <th>Description</th> <th>Bin Type Code</th> <th>Warehouse Class Code</th> <th>Special Equipment Code</th> <th>Zone Ranking</th> <th>Cross-Dock Bin Zone</th> </tr> </thead> <tbody> <tr> <td>ADJUSTME</td> <td>Virtual for Adjustment</td> <td>QC</td> <td></td> <td></td> <td>0</td> <td></td> </tr> <tr> <td>BULK</td> <td>Storage Zone</td> <td>PUT A...</td> <td></td> <td>LIFT</td> <td>50</td> <td></td> </tr> <tr> <td>CROSS...</td> <td>Cross-Dock</td> <td>PUTPICK</td> <td></td> <td></td> <td>0</td> <td>✓</td> </tr> <tr> <td>PICK</td> <td>Picking Zone</td> <td>PUTPICK</td> <td></td> <td></td> <td>100</td> <td></td> </tr> <tr> <td>PRODU...</td> <td>Production</td> <td>QC</td> <td></td> <td>LIFT</td> <td>5</td> <td></td> </tr> <tr> <td>QC</td> <td>Quality Assurance Zone</td> <td>QC</td> <td></td> <td></td> <td>0</td> <td></td> </tr> <tr> <td>RECEIVE</td> <td>Receiving Zone</td> <td>RECEIVE</td> <td></td> <td>HT1</td> <td>10</td> <td></td> </tr> <tr> <td>SHIP</td> <td>Shipping Zone</td> <td>SHIP</td> <td></td> <td>HT2</td> <td>200</td> <td></td> </tr> <tr> <td>STAGE</td> <td>Staging Zone</td> <td>PICK</td> <td></td> <td></td> <td>5</td> <td></td> </tr> </tbody> </table>	Code	Description	Bin Type Code	Warehouse Class Code	Special Equipment Code	Zone Ranking	Cross-Dock Bin Zone	ADJUSTME	Virtual for Adjustment	QC			0		BULK	Storage Zone	PUT A...		LIFT	50		CROSS...	Cross-Dock	PUTPICK			0	✓	PICK	Picking Zone	PUTPICK			100		PRODU...	Production	QC		LIFT	5		QC	Quality Assurance Zone	QC			0		RECEIVE	Receiving Zone	RECEIVE		HT1	10		SHIP	Shipping Zone	SHIP		HT2	200		STAGE	Staging Zone	PICK			5	
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SHIP	Shipping Zone	SHIP		HT2	200																																																																			
STAGE	Staging Zone	PICK			5																																																																			
<p>6. Point out the location zone codes and the bin type codes (for explanation, see Notes),</p>																																																																								
<p>7. In the Warehouse Class Code field for location zone PICK, click the AssistButton to open the Warehouse Classes window (for explanation, see Notes).</p>	<p>Mark opens the Warehouse Classes window to see the different options for specifying the items.</p>																																																																							

What to do	What to say	Screen shots
<p>8. Close the Warehouse Classes window and the Zones window to return to the Location Card window.</p>		
<p>9. On the Bins tab, point out the bin setup for the WHITE location (for explanation, see Notes).</p>	<p>On the Bins tab, Mark notices that specific bin codes are used for different operations.</p>	
<p>10. On the Bin Policies tab, point out the bin policies setup for the WHITE location (for explanation, see Notes).</p>	<p>On the Bin Policies tab, Mark can see that a put-away template has been defined and break-bulk is allowed in the warehouse.</p>	
<p>11. On the Warehouse tab, point out the Use ADCS field and explain the concept behind the ADCS functionality (for explanation, see Notes).</p>	<p>Mark also notices that the program offers the possibility of using Automated Data Capture System.</p>	
<p>12. Close the Location Card window to return to the Navigation Pane menu.</p>		
<p>Notes: Explain that you use the Warehouse Management Systems (WMS) feature for handling more advanced warehouse processes: setting up the warehouse by zones and bins, directed pick and put-away and the development of radio frequency environment (Automated Data Capture System). Mention that the overall Warehouse Management Systems feature consists of the following features: Bin, Cycle Counting, Put-Away, Warehouse Receipt, Pick, Warehouse Shipment, Warehouse Management Systems, Bin Set Up and Internal Picks and Put-aways. This demo scenario will primarily focus on the above mentioned areas (setting up the warehouse by zones and bins, directed pick and put-away and the development of radio frequency environment (Automated Data Capture System). For more information about the remaining features, please refer to the demo script scenarios already presented (demo #1-6).</p>		

Notes continued:

Explain that flow of inventory can be divided into three basic processes that consists of a series of warehouse handling activities:

- Receiving items at the warehouse and making them available (receiving and putting away items)
- Handling items for internal distribution/movement/production (repacking and completing items for sale, inventory counting, supply production or simply moving for optimization of space)
- Picking and shipping items to customers or other locations (picking and shipping of items)

(3) Explain that the warehouse management systems setup is done in the Location Card window by defining different parameters for the individual location. All the warehouse requirements setup for warehouse management (see demo #5) are greyed out, due to the requirements of the WMS. The check mark in the Directed Put-away and Pick field is an indication that this location will use WMS and the greyed out requirement fields are as default selected.

(4) The warehouse management systems setup of locations concerns primarily bin and zones, and bin policies. Whenever the Directed Put-away and Pick field contains a check mark, the fields on the Bins tab and the Bin Policies tab become available.

(5-6) Explain that zones and bins are the basic structure of the warehouse. The zones are used to subdivide the warehouse into logical parts, and the zones are then divided into bins. Bin definitions are based on the bin types and bin ranking setup in the program and allow you to setup specific bin definitions with different ranking in different zones.

(7) Note that you can setup specific conditions controlling the way items are received, stored, picked and shipped in the Zones window by selecting a warehouse class code for a zone. These warehouse class codes are setup in the Warehouse Classes window.

(9) Explain that on the Bins tab, you define the bins that will be used as default when receiving, putting away, adjusting and shipping the items. Bin codes for locations can be setup manually in the Bins window or automatically using the Bin Creation Worksheet window.

(10) Explain that on the Bin Policies tab you define different bin policies:

- The Always Create Pick Line option and the Always Create Put-away Line option makes the program create a pick or put-away line automatically.
- The Allow Break-bulk option allows for breaking up, for example, pallets into smaller units when picking.

(10) Note that the Use Put-away Worksheet functionality directs all put-aways to the put-away worksheet where you are able modify the put-away. To use the Put-away Worksheet functionality, you need to set up a put-away worksheet template.

(11) Explain that if you wish to register electronically the placement of items within the warehouse and your warehouse is set up for directed put-away and pick, you can use the automatic data capture system, which is designed to operate with handheld devices. The design of the ADCS functionality is based on XML technology and can be adapted to any new XML standard on the market.

For more information about using the Warehouse Management Systems feature for receiving, put-away, pick and shipment, see the Supply Planning & Execution Demo Scenario.

Benefits:

The Warehouse Management Systems feature within Microsoft Distribution provides you with functionality for handling more advanced warehouse processes to ensure maximum efficiency, data accuracy, and reliability in inventory management and warehousing operations.

Warehouse processes are easily set up to handle items by zone and bin level and to handle directed pick and put-away processes.

The automated data capture system (ADCS) functionality allows you to register the movements of items as soon as they are made to enhance accurate and reliable inventory data and achieve significant cost savings.

#7 How do I set up the system to handle returns (Returns Management)?

Linda Martin, warehouse manager in CRONUS Furniture Ltd., wants to go through the setup of a newly implemented feature, the returns management feature, in the system. The demo shows how to set up returns management.

What to do	What to say	Screen shots																												
<p>1. On the Financial Management menu, click Receivables, Setup, Sales & Receivables Setup. The Sales & Receivables Setup window appears.</p>	<p>Linda Martin wants to go through the company's returns management setup including the returns reasons.</p> <p>Linda first opens the Sales & Receivables Setup window.</p>																													
<p>2. Point out the following returns related fields:</p> <ul style="list-style-type: none"> • Return Receipt on Credit Memo • Copy Cmts Ret. Ord. to Cr. Memo • Copy Cmts Ret. Ord. to Ret. Rcpt • Exact Cost Reversing Mandatory <p>(for explanation, see Notes).</p>	<p>In the Sales & Receivables Setup window, Linda verifies that all the relevant fields for returns management are selected.</p>																													
<p>3. On the Sales & Marketing menu, click Order Processing, Setup, Return Reasons. The Return Reasons window appears.</p>	<p>Next, Linda opens the Return Reasons window to make sure that all reasons for returning items have been set up correctly.</p>	<table border="1" data-bbox="740 1536 1161 1783"> <thead> <tr> <th>Code</th> <th>Description</th> <th>Default</th> <th>Inventor</th> </tr> </thead> <tbody> <tr> <td>DAMAGED</td> <td>Damaged in Shipment</td> <td></td> <td></td> </tr> <tr> <td>DEFECTIVE</td> <td>Defective Item</td> <td></td> <td></td> </tr> <tr> <td>NONNEED</td> <td>No Current Need</td> <td></td> <td></td> </tr> <tr> <td>P-REPAIR</td> <td>Repair Purchased Item</td> <td></td> <td></td> </tr> <tr> <td>S-REPAIR</td> <td>Repair Sold Item</td> <td><input checked="" type="checkbox"/></td> <td></td> </tr> <tr> <td>WRONG</td> <td>Wrong Item</td> <td></td> <td></td> </tr> </tbody> </table>	Code	Description	Default	Inventor	DAMAGED	Damaged in Shipment			DEFECTIVE	Defective Item			NONNEED	No Current Need			P-REPAIR	Repair Purchased Item			S-REPAIR	Repair Sold Item	<input checked="" type="checkbox"/>		WRONG	Wrong Item		
Code	Description	Default	Inventor																											
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What to do	What to say	Screen shots
<p>4. Click the AssistButton in the Default Location Code field for the DAMAGED return reason code as shown in the screen shot to open the Location List window and point out the Repair Location (for explanation, see Notes).</p>	<p>Finally, Linda verifies that a repair location has been set up to use for returns, although not selected as default return reasons.</p>	
<p>5. Close all windows to return to the Navigation Pane menu.</p>		
<p>Notes: Explain that you use the Returns Management feature to manage the complex and various tasks included when creating return credit memos, repairing/replacing damaged items, and replacing a wrong item. The setup of returns management includes setup of return management parameters within the Receivables and Payables application areas and setup of return reason codes to specify the reasons for returning items. This demo scenario will focus on the setup of returns management parameters in the Receivables application area, as well as the setup of return reason codes.</p> <p>(2) Explain the different returns management related fields from the Sales & Receivables setup with focus on the following:</p> <ul style="list-style-type: none"> • Return Receipt on Credit Memo – you use this option to make the program automatically create return receipt documents when a sales credit memo is posted. • Copy Cmts Ret. Ord. to Cr. Memo and Copy Cmts. Ret. Ord. to Ret. Rcpt – you use these options to make the program copy comments from/to the sales credit memo to/from the posted return receipt. • Exact Cost Reversing Mandatory – you use this option to define whether you want to apply an exact cost reversing policy when processing inventory increases represented by the sales returns. <p>(3) Explain that you can set up return reason codes in the Return Reasons window to distinguish return situations that you typically encounter when dealing with your customers or vendors; return reason codes can then further be linked to specific locations to ensure that the returned items are, by default, always received and shipped from this location.</p> <p>(4) Note that CRONUS Furniture Ltd. has setup six return reason codes, as well as a Repair location code that can be used for returned items. For more information about the handling of return order, see demo #18.</p>		
<p>Benefits: The Returns Management feature within Microsoft Distribution streamlines and simplifies the complex and various tasks included in creating return credit memos, repairing/replacing damaged items, and replacing a wrong item - improving your efficiency and responsiveness to your customers' queries and requests.</p>		

SUPPLY PLANNING & EXECUTION DEMO SCENARIO

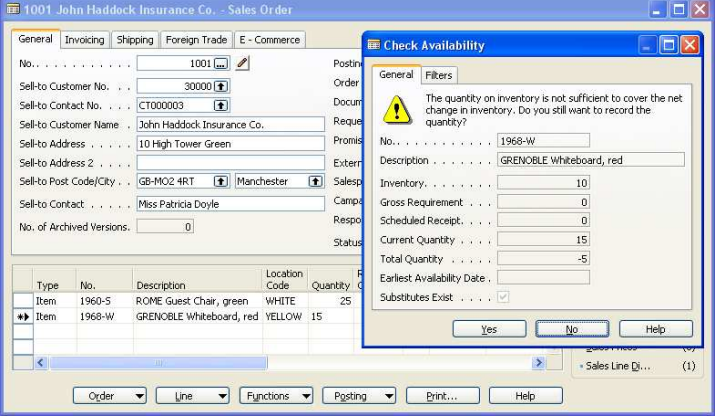
#8 How do I find the best price for a customer?

Peter Sadow, sales assistant in CRONUS Furniture Ltd., has received a call from a customer, John Haddock Insurance Co., who wants to order some guest chairs and whiteboards. Peter wants to create a sales order and use the Pricing feature to make sure he offers John Haddock Insurance Co. the best price for the requested items. The demo shows how to create a sales order and use the Pricing feature.

What to do	What to say	Screen shots
<p>6. On the Warehouse menu, click Orders & Contacts, Sales Orders. The Sales Order window appears.</p> <p>(Consider expanding column sizes to show field names as shown in the screen shot.)</p>	<p>Peter Sadow wants to create a sales order for John Haddock Insurance Co. and use the Pricing feature to offer the best price for the requested items.</p> <p>Peter opens the Sales Order window to create a new sales order.</p>	<p>The screenshot shows the '2001 The Cannon Group PLC - Sales Order' window. The 'General' tab is active, displaying fields for No. (2001), Sell-to Customer No. (10000), Sell-to Contact No. (CT000001), Sell-to Customer Name (The Cannon Group PLC), Sell-to Address (192 Market Square), Sell-to Post Code/City (GB-B27 4KT, Birmingham), Sell-to Contact (Mr. Andy Teal), and No. of Archived Versions (0). The 'Posting Date' is 17-01-01, 'Order Date' is 17-01-01, and 'Document Date' is 17-01-01. The 'Requested Delivery Date' and 'Promised Delivery Date' are blank. The 'External Document No.' is blank, 'Salesperson Code' is PS, and 'Campaign No.' is blank. The 'Responsibility Center' is BIRMINGHAM and the 'Status' is Open. The 'Item Information' section shows one item: 'LS-MAN-10 Manual for Loudspeakers' with a quantity of 4 and unit price of PCS. The 'Customer Information' section shows 'Sell-to Customer' (The Cannon Group PLC), 'Ship-to Addresses' (2), 'Contacts' (5), 'Sales History', 'Bill-to Customer', and 'Avail. Credit' (0).</p>
<p>7. Press F3, ENTER in the No. field to create a new order.</p>		<p>The screenshot shows the '1001 - Sales Order' window. The 'General' tab is active, displaying fields for No. (1001), Sell-to Customer No. (blank), Sell-to Contact No. (blank), Sell-to Customer Name (blank), Sell-to Address (blank), Sell-to Post Code/City (blank), Sell-to Contact (blank), and No. of Archived Versions (0). The 'Posting Date' is 25-01-01, 'Order Date' is 25-01-01, and 'Document Date' is 25-01-01. The 'Requested Delivery Date' and 'Promised Delivery Date' are blank. The 'External Document No.' is blank, 'Salesperson Code' is blank, and 'Campaign No.' is blank. The 'Responsibility Center' is blank and the 'Status' is Open. The 'Item Information' section is empty. The 'Customer Information' section shows 'Sell-to Customer' (blank), 'Ship-to Addresses' (0), 'Contacts' (0), 'Sales History', 'Bill-to Customer', and 'Avail. Credit' (0).</p>
<p>8. Type 30000 in the Sell-to Customer No. field and press ENTER (accept the Check Credit Limit message that follows).</p>	<p>John Haddock Insurance Co. has customer number 30000.</p>	<p>The screenshot shows the '1001 John Haddock Insurance Co. - Sales Order' window. The 'General' tab is active, displaying fields for No. (1001), Sell-to Customer No. (30000), Sell-to Contact No. (CT000003), Sell-to Customer Name (John Haddock Insurance Co.), Sell-to Address (10 High Tower Green), Sell-to Post Code/City (GB-MO2 4RT, Manchester), Sell-to Contact (Miss Patricia Doyle), and No. of Archived Versions (0). The 'Posting Date' is 25-01-01, 'Order Date' is 25-01-01, and 'Document Date' is 25-01-01. The 'Requested Delivery Date' and 'Promised Delivery Date' are blank. The 'External Document No.' is blank, 'Salesperson Code' is PS, and 'Campaign No.' is blank. The 'Responsibility Center' is blank and the 'Status' is Open. The 'Item Information' section is empty. The 'Customer Information' section shows 'Sell-to Customer' (John Haddock Insurance Co.), 'Ship-to Addresses' (0), 'Contacts' (3), 'Sales History', 'Bill-to Customer', and 'Avail. Credit' (0).</p>

What to do	What to say	Screen shots
<p>9. Type 27-01-01 in the Requested Delivery Date field, and then type 1960-S in the No. field on the sales order line as shown in the screen shot.</p>	<p>John Haddock Insurance Co. wants to receive that furniture two days later, January 27, 2001, if possible.</p> <p>Peter first creates a sales line for the requested guest chairs.</p>	
<p>10. Click Line, Item Availability by, Location. The Item Availability by Location window appears.</p>	<p>As John Haddock Insurance Co. has not been set up with a default shipping location, Peter can choose from any warehouse with enough available stock.</p>	
<p>11. Note the 85 available items in the WHITE warehouse, and then close the Item Availability by Location window.</p>	<p>Peter can see that there is plenty of the guest chair items in stock in the WHITE warehouse.</p>	
<p>12. In the Sales Order window, type WHITE in the Location Code field (as shown in the screen shot).</p>		

What to do	What to say	Screen shots																																																
<p>13. In the Sales Order window, note the Sales Price Exists field.</p>	<p>Next, Peter notices that sales price exists for the guest chair items, so he takes a look at the minimum quantities and corresponding unit prices.</p>	<p>The screenshot shows the 'Sales Order' window for 'John Haddock Insurance Co.'. The 'Item' table at the bottom has columns: Type, No., Description, Location Code, Reserved Quantity, Unit Quantity, Sales Price Exists, and Unit Price Excl. VAT. The first row shows item 1960-5, 'ROME Guest Chair, green', with 'Sales Price Exists' checked and a unit price of 125,10.</p>																																																
<p>14. Click Functions, Get Price to open the Get Sales Price window.</p>		<p>The 'Get Sales Price' dialog box displays a table with columns: S., Sales Code, Item No., Unit of M..., Minimum Qua..., Unit Price, Starting..., and Ending Date. The table lists several price points for item 1960-5 at different quantities.</p> <table border="1"> <thead> <tr> <th>S.</th> <th>Sales Code</th> <th>Item No.</th> <th>Unit of M...</th> <th>Minimum Qua...</th> <th>Unit Price</th> <th>Starting...</th> <th>Ending Date</th> </tr> </thead> <tbody> <tr> <td>C..</td> <td>30000</td> <td>1960-5</td> <td></td> <td>0,00</td> <td>125,10</td> <td></td> <td></td> </tr> <tr> <td>C..</td> <td>30000</td> <td>1960-5</td> <td></td> <td>10,00</td> <td>120,25</td> <td></td> <td></td> </tr> <tr> <td>C..</td> <td>30000</td> <td>1960-5</td> <td></td> <td>20,00</td> <td>118,50</td> <td></td> <td></td> </tr> <tr> <td>C..</td> <td>30000</td> <td>1960-5</td> <td></td> <td>25,00</td> <td>115,30</td> <td></td> <td></td> </tr> <tr> <td>C..</td> <td>30000</td> <td>1960-5</td> <td></td> <td>40,00</td> <td>112,50</td> <td></td> <td></td> </tr> </tbody> </table>	S.	Sales Code	Item No.	Unit of M...	Minimum Qua...	Unit Price	Starting...	Ending Date	C..	30000	1960-5		0,00	125,10			C..	30000	1960-5		10,00	120,25			C..	30000	1960-5		20,00	118,50			C..	30000	1960-5		25,00	115,30			C..	30000	1960-5		40,00	112,50		
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<p>15. Close the Get Sales Price window to return to the Sales Order window.</p>																																																		
<p>16. Type 20 in the Quantity field and point out the changed unit price (as shown in the screen shot).</p>	<p>Peter first enters 20 in the quantity field, as this is the quantity John Haddock Insurance Co. has requested.</p>	<p>The screenshot shows the 'Sales Order' window with the quantity field for item 1960-5 set to 20. The 'Sales Price Exists' field is checked, and the unit price has changed to 118,50.</p>																																																
<p>17. Change the quantity by typing 25 in the Quantity field and point out, again, the changed unit price.</p>	<p>Then, Peter enters 25 to tell the customer the change in unit price if they take five more units. John Haddock Insurance Co. accepts to order 25 guest chairs instead of 20.</p>	<p>The screenshot shows the 'Sales Order' window with the quantity field for item 1960-5 set to 25. The unit price has changed to 115,30.</p>																																																

What to do	What to say	Screen shots
<p>18. Fill out the second sales line as shown in the screen shot. A Check Availability message appears.</p>	<p>Next, Peter creates a second sales line for 15 whiteboard items from the WHITE warehouse.</p> <p>Peter gets notified instantly, that there is not enough available stock of whiteboards to fulfil the demand.</p>	
<p>19. Click Yes to accept the Check Availability message and leave the Sales Order window open for the next demo scenario.</p>		
<p>Notes:</p> <p>Explain that you use the pricing feature to offer your customers the best price and to ensure that agreed prices or line discounts are actually granted by vendors. Pricing and discounts can also be set up for the individual customer or vendor on the customer or vendor card. This demo scenario will show the example of a sales pricing set up for an item.</p> <p>(10-12) Explain that in the Item Availability by Location window, you can get an overview of the projected (expected) available quantity of an item per location. Note that no default location has been set up for customer number 30000 (John Haddock Insurance Co.), and the salesperson can chose the item from a warehouse location where the items are available.</p> <p>(13) Note that a check mark in the Sales Price Exists field on the sales order line indicates that sales prices have been set up for item number 1960-S.</p> <p>(14) Explain that in the Get Sales Price window, you can get an overview of the different sales prices for this item.</p> <p>(16-17) Note that the program automatically fills in the relevant price in the Unit Price Excl. VAT field according to the sales price setup.</p>		
<p>Benefits:</p> <p>The pricing functionality within Microsoft Distribution provides you with the tools to freely focus on increasing sales and minimize your purchasing costs. Alternative prices are easily set up for items, item groups, customer and vendors and the best price can be offered to your customers or vendors on an order by order basis to ensure that prices and line discounts follow the latest cost changes in your company.</p>		

#9 How do I check for possible delivery dates (CTP)?

Peter Sadow, sales assistant in CRONUS Furniture Ltd., has created a sales order for customer John Haddock Insurance Co. for 25 guest chairs and 15 whiteboards. Peter wants to use the Order Promising feature to check for possible delivery dates. The demo shows how to use the Order Promising feature to check for possible delivery dates.

What to do	What to say	Screen shots
<p>1. In the Sales Order window, click Order, click Order Promising. The Order Promising Lines window appears (consider expanding column sizes to show field names as shown in the screen shot).</p>	<p>Peter Sadow has created a sales order for John Haddock Insurance Co. for 25 guest chairs and 15 whiteboards, and now wants to use the Order Promising feature to check for possible delivery dates.</p> <p>Peter opens the Order Promising Lines window.</p>	
<p>2. Click Calculate, Capable-to-Promise. The system calculates possible delivery dates if the requisition started immediately.</p>	<p>Peter runs the Capable-to-Promise calculation to find out when it will be possible to deliver the whiteboards and the guest chairs.</p>	
<p>3. In the Order Promising Lines window, point out the filled in information in the Planned Delivery Date and Earliest Shipment Date field.</p>	<p>Peter informs John Haddock Insurance Co. that the guest chairs can be delivered on the requested delivery date, January 27, 2001, whereas the whiteboards can be delivered on January 29, 2001.</p>	
<p>4. Click Accept.</p>	<p>John Haddock Insurance Co. accepts the delivery dates.</p>	

What to do	What to say	Screen shots
<p>5. In the Sales Order window, press CTRL+F11 to release the sales order.</p>	<p>Next, Peter releases the sales order.</p>	
<p>6. Close the Sales Order window to return to the Navigation Pane menu.</p>		
<p>Notes: Explain that you use the Order Promising feature to calculate the earliest possible delivery date and/or shipping date for items on new or existing sales orders. ATP (Available-to-Promise) will check whether or not an order can be delivered based on the available stock (stock+planned receipts-already promised orders to customers). CTP (Capable-to-Promise) can be used if no available stock is found. CTP will look at when the order quantity could be delivered, if the requisition started immediately. (1) Note that in the Order Promising Lines window, you store and retrieve order promising calculations.</p>		
<p>Benefits: The Order Promising feature within Microsoft Distribution enables you to promise your customers the best possible shipping and/or delivery date for an order using different parameters (quantity, date) based on the customer's needs and requirements.</p>		

#10 How do I process the planning of supply orders in the system?

John Roberts, production planner in CRONUS Furniture Ltd., wants to plan for supply orders in the YELLOW warehouse. The demo shows how to plan supply orders using the requisition worksheet.

What to do	What to say	Screen shots
<p>1. On the Purchase menu, click Planning, Requisition Worksheets. The Req. Worksheet window appears. (Consider expanding column sizes to show field names as shown in the screen shot.)</p>	<p>John Roberts wants to plan the supply orders for the company's demand in the YELLOW warehouse. He opens the Req. Worksheet (requisition worksheet) window to calculate an item replenishment plan.</p>	
<p>2. Click Functions, Calculate Plan. The Calculate Plan – Req. Wksh. window appears.</p>		
<p>3. Fill out the Item tab as shown in the screen shot.</p>	<p>John is only to plan for the YELLOW warehouse.</p>	
<p>4. Fill out the Options tab as shown in the screen shot.</p>	<p>John fills in the order date (25-01-01) and the ending date (02-02-01) and then he runs the Calculate Plan – Req. Wksh. batch job.</p>	
<p>5. Click OK to run the Calculate Plan – Req. Wksh. batch job.</p>		

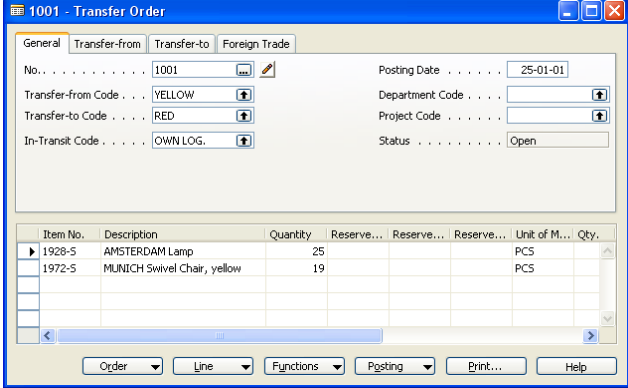
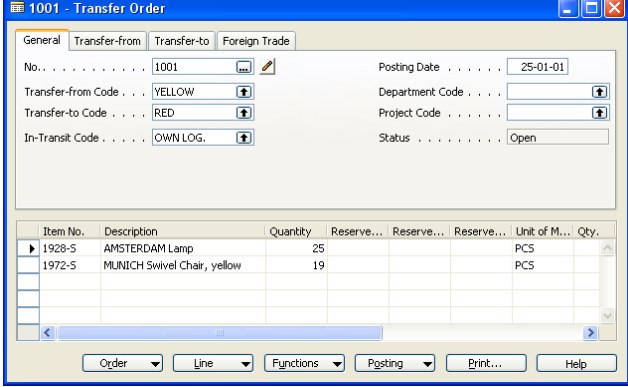
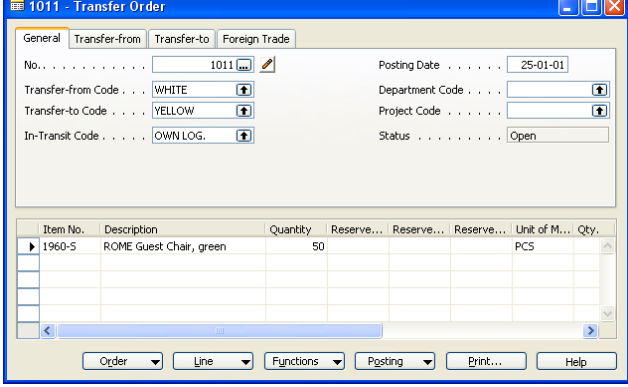
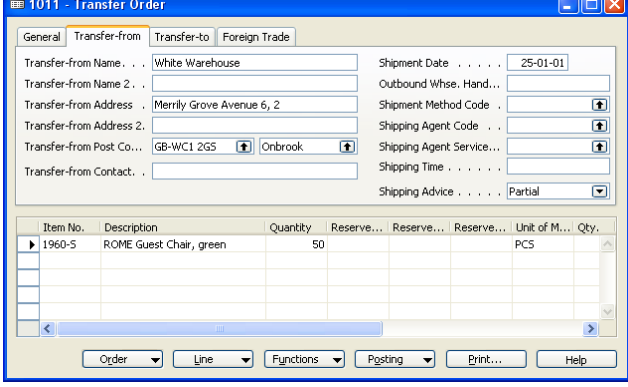
What to do	What to say	Screen shots
<p>6. Point out the new requisition worksheet lines and click the AssistButton in the Action Message field (as shown in the screen shot) to show the different options (for explanation, see Notes).</p>	<p>In the Req. Worksheet window, John can see that a purchase order for 5 units of whiteboards (number 1968-W) is proposed to be received in the YELLOW warehouse.</p>	
<p>7. Click FUNCTIONS, Carry Out Action Message and accept the pop-up window that follows.</p>	<p>Next, John runs the Carry Out Action Message batch job to create the purchase order.</p>	
<p>8. Close the Req. Worksheet window to return to the Navigation Pane menu.</p>		
<p>9. On the Warehouse menu, click Orders & Contacts, Purchase Orders. The Purchase Order window appears.</p>	<p>Then, John opens the purchase List to search for the new purchase order.</p>	
<p>10. Press F5 to open the Purchase List window.</p>		

What to do	What to say	Screen shots
<p>11. Scroll to the bottom of the window and select purchase order No. 106025 (as shown in the screen shot).</p>		
<p>12. Click OK.</p>		
<p>13. In the Purchase Order window, press CTRL+F11 to release the purchase order.</p>	<p>John can see that the items are set up to be purchased from vendor number 01254796 (Progressive Home Furnishings). John releases the order.</p>	
<p>14. Close the Purchase Order window to return to the Navigation Pane menu.</p>		
<p>Notes: Explain that you use the Requisition Worksheet feature to plan for supply orders. Mention that you can also plan supply orders directly from the sales order in the Sales Order Planning window. (2) Explain that you use the Calculate Plan batch job to make the program calculate a replenishment plan for items and stockkeeping units that have been setup with the 'Purchase' or 'Transfer' replenishment system. (6) Note that the proposed replenishments plan is presented in the Req. Worksheet window as order proposal lines that are accompanied by action messages, which suggest specific user actions in order to rebalance the current demand and supply situation (create a new order (New), change quantity on an existing order (Change Qty.), reschedule due date on an existing order (Reschedule), Resched. & Chg. Qty. and Cancel) (11-13) Note that the proposed purchase order for 5 GRENoble Whiteboards (item number 1968-W) from the requisition worksheet has been created for vendor number 01254796 (Progressive Home Furnishings) to be received in the YELLOW warehouse. (13) Note that you use the function 'Release' to release sales and purchase orders.</p>		
<p>Benefits: The Requisition Worksheet feature allows you to instantly plan for supply orders. You use the Requisition Worksheet feature as an instrument for processing action messages regarding the item replenishment of your demand.</p>		

#11 How do I create a transfer order?

Timothy Sneath, warehouse employee in CRONUS Furniture Ltd., wants to create a transfer order for 50 guest chairs from the WHITE warehouse to the YELLOW warehouse due to an expected demand from a customer. The demo shows how to create transfer orders.

What to do	What to say	Screen shots																																																								
<p>1. On the Warehouse menu, click Planning & Execution, Items, and then press F5 to open the Item List window.</p>	<p>Timothy Sneath wants to create a transfer order for an expected customer demand in the YELLOW warehouse.</p> <p>Timothy first wants to verify the company's item availability by location.</p>																																																									
<p>2. Select item No 1960-S and click OK.</p>																																																										
<p>3. In the Item Card window, click Item, Item Availability by, Location. The Item Availability by Location window appears.</p>	<p>Timothy can see that there is currently no stock of guest chairs (item number 1960-S) in the YELLOW warehouse as required.</p>	<table border="1"> <thead> <tr> <th>Code</th> <th>Name</th> <th>Gross Requirement</th> <th>Scheduled Receipt</th> <th>Planned Receipt</th> <th>Projected Available Balance</th> <th>Planned Order Releases</th> </tr> </thead> <tbody> <tr> <td>BLUE</td> <td>Blue Warehouse</td> <td>0</td> <td>0</td> <td>0</td> <td>153</td> <td>0</td> </tr> <tr> <td>GREEN</td> <td>Green Warehouse</td> <td>0</td> <td>0</td> <td>0</td> <td>0</td> <td>0</td> </tr> <tr> <td>RED</td> <td>Red Warehouse</td> <td>0</td> <td>0</td> <td>0</td> <td>24</td> <td>0</td> </tr> <tr> <td>REPAIR</td> <td>Repair Location</td> <td>0</td> <td>0</td> <td>0</td> <td>0</td> <td>0</td> </tr> <tr> <td>SILVER</td> <td>Silver Warehouse</td> <td>0</td> <td>0</td> <td>0</td> <td>0</td> <td>0</td> </tr> <tr> <td>WHITE</td> <td>White Warehouse</td> <td>0</td> <td>0</td> <td>0</td> <td>85</td> <td>0</td> </tr> <tr> <td>YELLOW</td> <td>Yellow Warehouse</td> <td>0</td> <td>0</td> <td>0</td> <td>0</td> <td>0</td> </tr> </tbody> </table>	Code	Name	Gross Requirement	Scheduled Receipt	Planned Receipt	Projected Available Balance	Planned Order Releases	BLUE	Blue Warehouse	0	0	0	153	0	GREEN	Green Warehouse	0	0	0	0	0	RED	Red Warehouse	0	0	0	24	0	REPAIR	Repair Location	0	0	0	0	0	SILVER	Silver Warehouse	0	0	0	0	0	WHITE	White Warehouse	0	0	0	85	0	YELLOW	Yellow Warehouse	0	0	0	0	0
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WHITE	White Warehouse	0	0	0	85	0																																																				
YELLOW	Yellow Warehouse	0	0	0	0	0																																																				
<p>4. Point out the projected availability in locations WHITE and YELLOW as shown in the screen shot.</p>																																																										
<p>5. Close the Item Availability by Location window and the Item Card window to return to the Navigation Pane menu.</p>																																																										

What to do	What to say	Screen shots
<p>6. On the Warehouse menu, click Planning & Execution, Transfer Orders. The Transfer Order window appears.</p>	<p>Timothy decides to make a transfer order for 50 units of the guest chair items from the WHITE warehouse to the YELLOW warehouse.</p>	
<p>7. Press F3, ENTER in the No. field to create a new transfer order.</p>	<p>Timothy creates a new transfer order and fills in the location codes for the WHITE and YELLOW warehouses. Next, he defines to use own logistics for the transfer.</p>	
<p>8. Fill out the window as shown in the screen shot.</p>		
<p>9. On the Transfer-from tab, point out the filled in information (for more explanation, see Notes).</p>	<p>Timothy verifies that the location information is correct and releases the transfer order for further processing.</p>	

What to do	What to say	Screen shots
<p>10. On the Transfer-to tab, point out the filled in information (for more explanation, see Notes).</p>		
<p>11. Press CTRL+F11 to release the transfer order and close the Transfer Order window to return to the Navigation Pane menu.</p>		
<p>Notes: Explain that you use transfer orders to transfer items between inventory locations. In this demo scenario, items are moved from one location to another to satisfy expected customer demand, whereas a company might choose to transfer items in order to minimize the total inventory level. For more information about the Location Transfers feature, please see demo #3.</p> <p>Note that you can setup default transfer routes to define default transfer locations, for example whether to use own logistic facilities or external carrier. In that case, the program would automatically fill out the In-Transit Code field with the default in-transit code.</p> <p>(10-11) Note that the program automatically fills in the name and address information for the WHITE and YELLOW locations in the corresponding fields on the Transfer-from and Transfer-to tabs respectively.</p> <p>(11) On the Transfer-to tab, note that the Receipt Date field has been filled out with information about when the items are to be received at the YELLOW location. This receipt data calculation is based on the outbound warehouse handling time at the WHITE location (0 days), the shipping time setup for this transfer route (0 days) and the inbound ware and the inbound warehouse handling time at the YELLOW location (1 day).</p>		
<p>Benefits: The transfer order functionality within the Location Transfers feature in Microsoft Distribution enables you to manage your inventory level while keeping track of all inventories in transit between inventory locations.</p>		

#12 How do I ship an order using warehouse management systems (WMS)?

Mark Hanson, warehouse employee in the WHITE warehouse in CRONUS Furniture Ltd., wants to ship the 50 guest chairs to the YELLOW warehouse. Mark therefore wants to create the necessary warehouse shipment and pick documents to pick the guest chairs from inventory and ship them. The demo shows how to process the shipment of an order using warehouse pick and shipment documents.

What to do	What to say	Screen shots
<p>1. On the Warehouse menu, click Planning & Execution, Shipments. The Warehouse Shipment window appears.</p>	<p>Mark Hanson, who works in the WHITE warehouse, wants to ship 50 guest chairs to the YELLOW warehouse.</p> <p>Mark opens to Warehouse Shipment window.</p>	
<p>2. Press F3, ENTER in the No. field to create a new shipment document.</p>	<p>Mark creates a new warehouse shipment document and verifies that the zone and bin field are automatically filled in.</p>	
<p>3. Type WHITE in the Location Code field and press ENTER, and then point out the Zone Code field and the Bin Code field.</p>		
<p>4. Click Functions, Get Source Documents. The Source Documents window appears.</p>	<p>Then, Mark uses the Get Source Documents functionality to find the transfer order document (Source No. 1011).</p>	

What to do	What to say	Screen shots																								
<p>5. Scroll down to select Source No. 1011 as shown in the screen shot.</p>																										
<p>6. Click OK.</p>																										
<p>7. In the Warehouse Shipment window, click Functions, Create Pick. The Create Pick window appears.</p>	<p>Once the shipment line for the transfer order has been created, Mark creates a pick document and registers the pick of the 50 guest chairs in inventory.</p>																									
<p>8. Click OK and accept the message that follows.</p>																										
<p>9. On the Warehouse menu, click Goods Handling Multiple Orders, Picks. The Warehouse Pick window appears.</p>		<table border="1" data-bbox="742 1265 1364 1400"> <thead> <tr> <th>S...</th> <th>Source No.</th> <th>Item No.</th> <th>Description</th> <th>Quantity</th> <th>Qty. to...</th> <th>Qty. Ha...</th> <th>Qty. Out...</th> </tr> </thead> <tbody> <tr> <td>O..</td> <td>1011</td> <td>1960-5</td> <td>ROME Guest Chair, green</td> <td>50</td> <td>50</td> <td>0</td> <td>50</td> </tr> <tr> <td>O..</td> <td>1011</td> <td>1960-5</td> <td>ROME Guest Chair, green</td> <td>50</td> <td>50</td> <td>0</td> <td>50</td> </tr> </tbody> </table>	S...	Source No.	Item No.	Description	Quantity	Qty. to...	Qty. Ha...	Qty. Out...	O..	1011	1960-5	ROME Guest Chair, green	50	50	0	50	O..	1011	1960-5	ROME Guest Chair, green	50	50	0	50
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<p>10. Click Registering, Register Pick to register the pick document and accept the message that follows.</p>																										
<p>11. Close the Warehouse Pick window.</p>																										

What to do	What to say	Screen shots
<p>12. In the Warehouse Shipment window, press F11 to post the shipment document and accept the messages that follow.</p>	<p>Then, Mark posts the shipment of the 50 guest chairs.</p>	
<p>13. Close the Warehouse Shipment window.</p>		
<p>Notes: Explain that you use the warehouse shipment processing and pick processing features to process the shipment and pick of items on the basis of released source documents (e.g. a sales order). Shipping and picking items using the Warehouse Management Systems (WMS) feature requires set up of zones and bins on the respective location cards. For more information about setting up your warehouse to use WMS, see demo #6.</p> <p>(3) Note that WMS has been setup of WHITE location and the Zone Code and Bin No. fields are filled in with default values according to the WMS setup on the location card.</p> <p>(4-12) Explain that first you retrieve data from the source document (the released sales order created in demo #8-9), then you create picking documents for the respective shipment lines, and then you post the shipment to finalize the shipment process.</p> <p>Mention that a Warehouse Shipment document can also be created directly from the source document and then processed further in the Warehouse application area.</p>		
<p>Benefits: The Warehouse Management Systems feature within Microsoft Distribution provides you with functionality for handling more advanced warehouse processes to ensure maximum efficiency, data accuracy, and reliability in inventory management and warehousing operations.</p> <p>The Warehouse Management Systems feature helps you organize the receiving and shipping processes, and to assist your warehouse employees in recording the receipt of goods, picking of items for shipping or production, and making shipments while optimizing space utilization using warehouse locations by zone and bin level.</p>		

#13 How do I receive an order using Warehouse receipt and put-away documents?

Timothy Sneath, warehouse employee in the YELLOW warehouse in CRONUS Furniture Ltd., has received the 50 guest chairs he requested on the transfer order on January 26, 2001. Timothy wants to register the necessary receipts and put-away documents to finalize the transfer. The demo shows how to process the receipt of a transfer order using warehouse receipt and put-away documents.

What to do	What to say	Screen shots
<p>1. Change the work date to 26-01-01 by clicking Tools, Work Date...</p>		
<p>2. On the Warehouse menu, click Planning & Execution, Receipts. The Warehouse Receipt window appears.</p>	<p>Timothy Sneath has received 50 guest chairs from the WHITE warehouse on January 26, 2001.</p> <p>Timothy opens the Warehouse Receipt window to create a new receipt.</p>	
<p>3. Press F3, ENTER in the No. field, to create a new receipt document.</p>		
<p>4. Type YELLOW in the Location Code field and press ENTER, and then point out that there is no data in the Zone Code field and the Bin Code field.</p>		

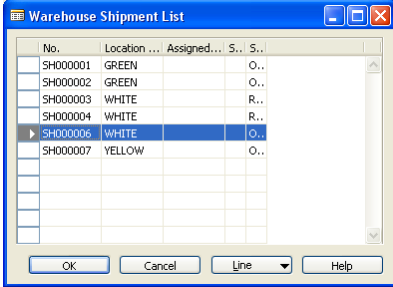
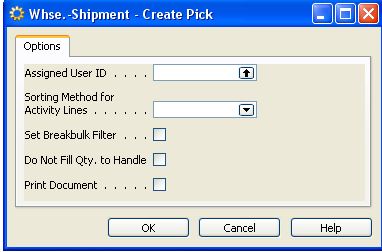
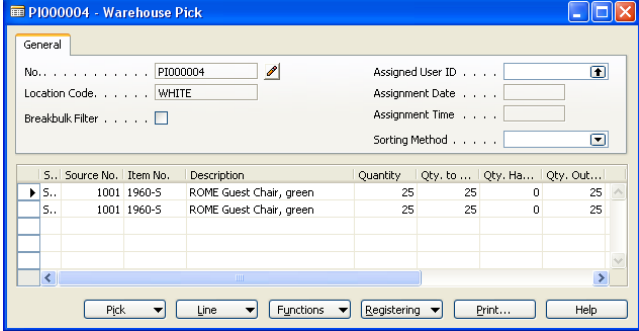
What to do	What to say	Screen shots
<p>5. Click Functions, Get Source Documents. The Source Documents window appears.</p>	<p>Timothy uses the Get Source Documents functionality to find the transfer order document (Source No. 1011).</p>	
<p>6. Select Source No. 1011 and click OK.</p>		
<p>7. In the Warehouse Receipt window, press F11 to post the receipt and accept the messages (3) that follow.</p>	<p>Then, Timothy posts the warehouse receipt for the 50 guest chairs.</p>	
<p>8. Close the Warehouse Receipt window to return to the Navigation Pane menu.</p>		
<p>9. On the Warehouse menu, click Goods Handling Multiple Orders, Put-aways. The Warehouse Put-away window appears.</p>	<p>Then, Timothy opens the Warehouse Put-away document to register a put-away document for the 50 guest chairs.</p>	
<p>10. Press F5 to open the Put-away List window and select put-away document No. PU000004 as shown in the screen shot.</p>		
<p>11. Click OK.</p>		

What to do	What to say	Screen shots
<p>12. In the Warehouse Put-away window, click Registering, Register Put-away and accept the message that follows.</p>		
<p>13. Close the Warehouse Put-away window.</p>		
<p>Notes: Explain that you use the warehouse receipt and put-away documents to register the receipt of items into the warehouse and to create put-away instructions for receipts. Receiving and putting away items using the Warehouse Management feature depends on the warehouse management setup on the respective location cards. For more information about setting up your warehouse to perform receiving, put-away, picking and shipping of items, see demo #5.</p> <p>(4) Note that there is no bin mandatory setup for the YELLOW location and the Zone Code and Bin No. fields are not filled in automatically by the program according to the warehouse setup on the location card.</p> <p>(6-12) Explain that you use the warehouse receipt document to receive items into the warehouse. First you retrieve data from the source document (the released transfer order created in demo #11), then you post the receipt, and then you create put-away documents for the respective receipt lines. An inventory put-away document is a copy of the order (but only displays the information relevant to the warehouse) and is used to register the item's physical placement in the warehouse.</p> <p>(12) Note that incorrectly entered quantity on receipts (not invoiced) can be undone using the Undo Receipt feature in the Posted Purchase Receipt window.</p> <p>Mention that warehouse receipts can be create directly from the purchase order and then processed further in the Warehouse application area.</p>		
<p>Benefits: The Warehouse Management feature within Microsoft Distribution ensures maximum efficiency, data accuracy, and reliability in inventory management and warehousing operations.</p> <p>The Warehouse Management feature provides you with the tools to perform even the most simple warehouse receiving and shipping processes in a reliable and easy-to-use environment to assist your warehouse employees in recording the receipt of goods and registering of items in the inventory.</p>		

#14 How do I process the shipment of an order directly from the sales order?

On January 27, 2001, Peter Sadow, sales assistant in CRONUS Furniture Ltd., wants to process the shipment of the sales order he created earlier for John Haddock Insurance Co. Mark Hanson, warehouse employee in the WHITE warehouse in CRONUS Furniture Ltd., wants to pick and ship the 25 guest chairs to John Haddock Insurance Co. from the WHITE warehouse. Mark therefore wants to create the necessary warehouse shipment and pick documents to pick the guest chairs from inventory and ship them. The demo shows how to create shipment documents directly from the sales order and further how to process the shipment of an order using warehouse pick and shipment documents.

What to do	What to say	Screen shots
<p>1. Change the work date to 27-01-01 by clicking Tools, Work Date...</p>		
<p>2. On the Warehouse menu, click Orders & Contacts, Sales Orders. The Sales Order window appears.</p>	<p>Peter Sadow wants to process the shipment of the sales order he created earlier for John Haddock Insurance Co. by creating warehouse shipment documents directly from the sales order.</p> <p>Peter opens the Sales Order window.</p>	
<p>3. Click Functions and point out the Create Whse. Shipment option and the Create Inventory Put-away/Pick option (for explanation, see Notes).</p>	<p>Then, Peter creates the necessary warehouse shipment documents for the WHITE and YELLOW warehouses to handle.</p>	
<p>4. Click Create Whse. Shipment and accept the message that follows. The Warehouse Shipment window appears.</p>		

What to do	What to say	Screen shots																								
<p>5. Press F5 to open the Warehouse Shipment List window and select warehouse shipment No. SH00006 as shown in the screen shot.</p>	<p>Mark Hanson wants to ship the 25 guest chairs from the WHITE warehouse to John Haddock Insurance Co.</p> <p>Mark opens the Warehouse Shipment List to search for the warehouse shipment document for the 25 guest chairs.</p>																									
<p>6. Click OK.</p>																										
<p>7. In the Warehouse Shipment window, click Functions, Create Pick. The Create Pick window appears.</p>	<p>Then, Mark creates a warehouse pick document to register the pick of the 25 guest chairs from inventory.</p>																									
<p>8. Click OK and accept the message that follows.</p>																										
<p>9. On the Warehouse menu, click Goods Handling Multiple Orders, Picks. The Warehouse Pick window appears.</p>	<p>In the Warehouse Pick window, Mark registers the warehouse pick document.</p>	 <table border="1" data-bbox="751 1368 1361 1496"> <thead> <tr> <th>S..</th> <th>Source No.</th> <th>Item No.</th> <th>Description</th> <th>Quantity</th> <th>Qty. to ...</th> <th>Qty. Ha...</th> <th>Qty. Out...</th> </tr> </thead> <tbody> <tr> <td>▶ S..</td> <td>1001</td> <td>1960-S</td> <td>ROME Guest Chair, green</td> <td>25</td> <td>25</td> <td>0</td> <td>25</td> </tr> <tr> <td>S..</td> <td>1001</td> <td>1960-S</td> <td>ROME Guest Chair, green</td> <td>25</td> <td>25</td> <td>0</td> <td>25</td> </tr> </tbody> </table>	S..	Source No.	Item No.	Description	Quantity	Qty. to ...	Qty. Ha...	Qty. Out...	▶ S..	1001	1960-S	ROME Guest Chair, green	25	25	0	25	S..	1001	1960-S	ROME Guest Chair, green	25	25	0	25
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<p>10. Click Registering, Register Pick to register the pick document and accept the message that follows.</p>																										
<p>11. Close the Warehouse Pick window and leave the other windows open for the next demo scenario.</p>																										

Notes:

Explain that the shipping and picking processes you use for handling picking and shipping of items depends on the warehouse setup and on how complex the picking process or warehouse organization is in your company. In an order-by-order warehousing environment, for a company with straightforward processes where the bin structure is simple, picking and shipping from the order line is appropriate. In this demo scenario, emphasis is on the ease-of-use of the feature and not as much on the warehouse processes to apply to the different warehouse locations.

Explain that picking and shipping directly on the order line is the simplest method of warehousing in the program. In this demo scenario, two warehouse shipment documents is created directly from the sales order created in demo #8-9, and then a picking activity similar to the one demonstrated in demo #12 is performed.


Benefits:

The picking and shipping functionality directly on the order line is the simplest method of warehousing and enables you to easily link sales and purchase processes to warehouse processes on an order by order basis.

#15 How do I use serial numbers on an item?

Mark Hanson, warehouse employee in CRONUS Furniture Ltd., is in the process of shipping the 25 guest chairs to John Haddock Insurance Co. Before shipping the items, he wants to assign serial numbers to the guest chairs for item tracking purposes. The demo shows how to assign serial numbers to items set up with item tracking functionality.

What to do	What to say	Screen shots
<p>1. In the Warehouse Shipment window, click Line, Item Tracking Lines. The Item Tracking Lines window appears.</p>	<p>Mark Hanson wants to assign serial numbers to the 25 guest chair items he is about to ship for John Haddock Insurance Co. from the WHITE warehouse.</p> <p>Mark opens the Item Tracking Lines window to assign the serial numbers to the items.</p>	
<p>2. Click Functions, Assign Serial No and accept the pop-up window that follows. The program assigns serial numbers to the items.</p>	<p>Mark uses the Assign Serial No function to make the program automatically assign serial numbers to the 25 items according item tracking setup for the guest chair items.</p>	
<p>3. In the Item Tracking Lines window, point out the created serial numbers.</p>		
<p>4. Close the Item Tracking Lines window to return to the Warehouse Shipment window.</p>		

What to do	What to say	Screen shots
<p>5. Press F11 to post the shipment document. A pop-up window follows.</p>	<p>Finally, Mark posts the shipment.</p>	
<p>6. Click to select the Ship and Invoice field, and then click OK (accept the message that follows).</p>		
<p>7. Close all windows to return to the Navigation Pane menu.</p>		
<p>Notes: Explain that the item tracking functionality is based on using serial and lot numbers and allows the user to receive and ship multiple quantities with serial and lot numbers from a single order line entry. Item tracking is set up on the respective item cards and defines which item parameters (serial number, lot number, or both) the program will use to track the items and in which operational areas. Explain that you manage the serial/lot numbers for the relevant items being handled on the document line in the Item Tracking Lines window. The program uses the item tracking setup from the item card to assign serial/lot numbers to the specified items.</p>		
<p>Benefits: The Item Tracking feature within Microsoft Distribution provides you with an easy-to-use tracking system, which can take into account each unique piece of merchandise: when it was received, where it was placed, what it cost, which customer bought it and when, etc. The Item Tracking feature allows you to receive and ship multiple quantities with serial and lot numbers from a single order line entry and allows you to handle all aspects of your item tracking system in a way that reflects your company specific practices.</p>		

#16 How do I process the planning and execution of an automatic stock replenishment?

John Roberts, production planner in CRONUS Furniture Ltd., wants to plan for supply orders in the WHITE warehouse. The demo shows how to plan and process a stock replenishment order in the requisition worksheet.

What to do	What to say	Screen shots
<p>1. On the Purchase menu, click Planning, Requisition Worksheets. The Req. Worksheet window appears.</p>	<p>John Roberts wants to plan the supply orders for the company's demand in the WHITE warehouse. He opens the Req. Worksheet (requisition worksheet) window to calculate an item replenishment plan.</p>	
<p>2. Click Functions, Calculate Plan. The Calculate Plan – Req. window appears.</p>		
<p>3. Type 1960-S in the No. field and delete the information in the Location Filter field as shown in the screen shot.</p>	<p>John enters a new item number filter in the No. field (1960-S) and runs the Calculate Plan – Req. Wksh. batch job.</p>	
<p>4. Click OK and point out the new requisition worksheet line in the Req. Worksheet window.</p>	<p>In the Req. Worksheet window, John can see that a purchase order for 50 guest chairs to be received in the WHITE warehouse has been suggested.</p>	
<p>5. Click Functions, Carry Out Action Message and accept the pop-up window that follows.</p>	<p>John runs to the Carry Out Action Message batch job to create the stock replenishment purchase order.</p>	

What to do	What to say	Screen shots
6. Close the Requisition Worksheet window.		
7. On the Warehouse menu, click Orders & Contacts, Purchase Orders . The Purchase Order window appears.	Next, John opens the Purchase Order window to search for the new purchase order and releases it.	
8. Press F5 to open the Purchase Order List window and scroll down to select purchase order No. 106026 as shown in the screen shot.		
9. Click OK .		
10. In the Purchase Order window, press CTRL+F11 to release the purchase order.		

What to do	What to say	Screen shots
<p>11. Click Functions, Create Whse. Receipt and accept the message that follows. The Warehouse Receipt window appears</p>	<p>In the WHITE warehouse, Mark Hanson has received 50 guest chairs for stock replenishment.</p> <p>Mark creates and posts a warehouse receipt directly from the purchase order and registers the necessary put-away documents.</p>	
<p>12. Press F11 to post the receipt document and accept the messages that follow.</p>		
<p>13. Close the Warehouse Receipt window and the Purchase Order window.</p>		
<p>14. On the Warehouse menu, click Goods Handling Multiple Orders, Put-aways. The Warehouse Put-away window appears.</p>		
<p>15. Press F5 to open the Warehouse Put-away List window and select put-away document No. PU00005 as shown in the screen shot.</p>		
<p>16. Click OK.</p>		

<p>17. In the Warehouse Put-away window, press F11 to register the put-away document and accept the message that follows.</p>		
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What to do	What to say	Screen shots
<p>18. Close the Warehouse Put-away window to return to the Navigation Pane menu.</p>		
<p>Notes: Explain that you use the reorder functionality within Microsoft Distribution to make the program automatically process stock replenishment of an item, once a need for replenishment is detected.</p> <p>Explain that you can use the Requisition Worksheet feature to plan for the stock replenishment order by using the Calculate Plan batch job to make the program calculate a replenishment plan for items and stockkeeping units.</p> <p>Note that you process the stock replenishment order using the same release, and receipt and put-away processes as demonstrated in demo #13. In this demo scenario, 50 units of item number 1960-S (ROME Guest Chair) are replenished in the WHITE location.</p>		
<p>Benefits: The reorder functionality allows you to setup automatic procedures for stock replenishment and enables you to meet your customers' needs and offer your customers a better service with no delivery delays due to empty stock of items.</p>		

#17 How do I use cross-docking to perform fast order processing?

Timothy Sneath, warehouse employee in the YELLOW warehouse in CRONUS Furniture Ltd., has received the 5 whiteboards from vendor Progressive Home Furnishings on January 28, 2001. Timothy wants to perform a cross-docking activity to direct the whiteboards directly to the ship zone (where the remaining 10 whiteboards for John Haddock Insurance Co. are awaiting for shipment). The demo shows how to use cross-docking functionality to direct items directly from one warehouse zone to another.

What to do	What to say	Screen shots
<p>1. Change the work date to 28-01-01 by clicking Tools, Work Date...</p>		
<p>2. On the Warehouse menu, click Planning & Execution, Receipts. The Warehouse Receipt window appears.</p>	<p>Timothy wants to perform a cross-docking activity on 5 whiteboards he has received in the YELLOW warehouse on January 28, 2001.</p> <p>Timothy opens the Warehouse Receipt window to create a new receipt.</p>	
<p>3. Press F3, ENTER in the No. field to create a new receipt document and type YELLOW in the Location Code field as shown in the screen shot.</p>		
<p>4. Click Functions, Get Source Documents to open the Source Documents window and select Source No. 106025 as shown in the screen shot.</p>	<p>Timothy uses the Get Source Documents functionality to find the purchase order document (Source No. 106025).</p>	
<p>5. Click OK.</p>		

What to do	What to say	Screen shots
<p>6. Expand row heights to show field names as shown in the screen shot and point out the Qty. to Cross-Dock field (for more explanation, see Notes).</p>	<p>Next, Timothy opens the Cross-Dock Opportunities window to retrieve the cross-docking opportunities.</p>	
<p>7. Click the AssistButton in the Qty. to Cross-Dock field. The Cross-Dock Opportunities window appears.</p>		
<p>8. Click Functions, Refresh Cross-Dock Opportunities and accept the message that follows.</p>	<p>Timothy uses the Refresh Cross-Dock Opportunities window to create a new cross-dock opportunity line</p>	
<p>9. In the Cross-Dock Opportunities window, point out the new cross-dock opportunity line.</p>		
<p>10. Click Functions, Autofill Qty. to cross-dock.</p>	<p>Then, Timothy makes the program fill in the cross-dock quantity of the 5 units of whiteboards item.</p>	

What to do	What to say	Screen shots
<p>11. Point out the filled in Qty. to Cross-Dock field as shown in the screen shot.</p>		
<p>12. Click OK.</p>		
<p>13. In the Warehouse Receipt window, press F11 to post the receipt document and accept the messages that follow.</p>	<p>Timothy posts the warehouse receipt to move the 5 whiteboards directly to the ship zone.</p>	
<p>14. Close the Warehouse Receipt window.</p>		
<p>15. On the Warehouse menu, click Goods Handling Multiple Orders, Put-aways and press F5 to open the Warehouse Put-away List window.</p>	<p>Then, Timothy registers the warehouse put-away document for the 5 whiteboards in inventory.</p>	
<p>16. Select put-away document No. PU000006 and click OK.</p>		
<p>17. In the Warehouse Put-away window, press F11 to register the put-away document and accept the message that follows.</p>		
<p>18. Close the Warehouse Put-away window.</p>		

What to do	What to say	Screen shots
<p>19. On the Warehouse menu, click Planning & Execution, Shipments to open the Warehouse Shipment window.</p>	<p>Finally, Timothy opens the Warehouse Shipment window to post the shipment of the 15 whiteboards to John Haddock Insurance Co.</p>	
<p>20. Click FUNCTIONS, Create Pick. The Create Pick window appears.</p>	<p>Timothy creates and registers the warehouse pick documents and posts the warehouse shipment document.</p>	
<p>21. Click OK and accept the message that appears.</p>		
<p>22. On the Warehouse menu, click Goods Handling Multiple Orders, Picks to open the Warehouse Pick window.</p>		
<p>23. Press F11 to register the pick document and accept the message that appears.</p>		
<p>24. Close the Warehouse Pick window.</p>		
<p>25. In the Warehouse Shipment window, press F11 to post the shipment document. A pop-up window follows.</p>		

What to do	What to say	Screen shots
26. Click to select the Ship and Invoice field, and then click OK (accept the message that follows).		
27. Close the Warehouse Shipment window.		
<p>Notes:</p> <p>Explain that cross-docking is a mean of saving time and work, directing items for orders awaiting shipment directly to the ship zone. The cross-docking functionality is set up for items on the respective item cards or for locations on the respective location cards.</p> <p>Explain that you define the quantity to cross-dock in the Warehouse Receipt window on the receipt line.</p> <p>Explain that the Cross-Dock Opportunities window is used to define the quantity to cross-dock. You use the Autofill Qty. to Cross-Dock function to make the program automatically fill in the quantity to cross-dock and then you confirm the quantity to cross-dock.</p> <p>Note that you use the same receipt and shipment processes as demonstrated in demo #12-13 to process the purchase order. In this demo scenario, 5 purchased units of item number 1968-W (GRENOBLE Whiteboard) are received and put-away in the YELLOW location, and then the 15 demanded units of item number 1968-W (GRENOBLE Whiteboard) from the sales order created in demo #8-9 are picked and shipped to the customer.</p>		
<p>Benefits:</p> <p>The cross-docking functionality within Microsoft Distribution saves you company time and work by allowing you to setup items awaiting shipment directly to the ship zone.</p>		

#18 How do I handle return orders?

On January 30, 2001, Peter Sadow, sales assistant in CRONUS Furniture Ltd., has received a call from John Haddock Insurance Co. concerning 10 damaged whiteboards. Unfortunately, 10 of the shipped whiteboards were damaged when they arrived. Peter wants to create a sales return order as well as other necessary returns related documents to handle the issue. The demo shows how to create and process sales return orders in the system.

What to do	What to say	Screen shots
<p>1. Change the work date to 30-01-01 by clicking Tools, Work Date...</p>		
<p>2. On the Warehouse menu, click Orders & Contacts, Sales Return Orders. The Sales Return Order window appears. (Consider expanding column sizes to show field names as shown in the screen shot.)</p>	<p>Peter Sadow wants to create a sales return order for John Haddock Insurance Co. for 10 damaged whiteboard items.</p> <p>Peter opens the Sales Return Order window.</p>	
<p>3. Press ENTER to create a new sales return order.</p>		

What to do	What to say	Screen shots
<p>4. Type 30000 in the Sell-to Customer No. field and press ENTER.</p>	<p>Peter creates a new sales return order for John Haddock Insurance Co.</p>	
<p>5. Fill out the first sales return order line as shown in the screen shot.</p>	<p>Peter creates a new sales line for the 10 items to be returned for repair and assigns the return reason code S-REPAIR to the incident.</p>	
<p>6. Point out the Return Reason Code field (for explanation, see Notes).</p>		
<p>7. Click Functions, Create Return-Related Documents. The Create Ret.-Related Documents window appears.</p>	<p>Then, Peter makes the program create the return related documents using the Create Ret.-Related Documents batch job.</p>	

What to do	What to say	Screen shots
<p>8. Type 20000 in the Vendor No. field as shown in the screen shot.</p>	<p>Peter specifies the vendor number of the vendor, to whom the damaged items should be returned and repaired.</p>	
<p>9. Click OK and accept the Check Credit Limit message that follows. The Returns-Related Documents window appears.</p>		
<p>10. Close the Returns-Related window and press CTRL+F11 in the Sales Return Order window to release the sales return order.</p>	<p>Finally, Peter releases the sales return order for further processing.</p>	
<p>11. Close the Sales Return Order window to return to the Navigation Pane menu.</p>		
<p>Notes: Explain that you use the Returns Management feature to manage the complex and various tasks included when creating return credit memos, repairing/replacing damaged items, and replacing a wrong item. A typical sales return process may include registering a compensation agreement (a return order), shipping a replacement item, crediting the customer, shipping a repaired item, shipping returned items to the vendor for repair, etc. In this demo scenario, the returns management process includes the registering of a compensation agreement, shipping of replacement items, shipping repaired items and shipping returned items to the vendor for repair. Note that some of these operations will not be performed until demo #19. (2) Explain that the sales return order is the central document that allows you to register a compensation agreement settled with a customer. From the Sales Return Order window, you can access other sales-related documents, and enter and maintain the return-related information concerning the customer, the method of compensation and the items in question.</p>		

Notes continued:

(6) Explain that for each return line, you can specify the reason for returning the item(s) by filling out the Return Reason field. For more information about return reasons, see demo #7.

(7-9) Note that you use the Create Return-Related Documents batch job to create other return-related documents. These include a replacement sales order and, where return to vendor is required, a purchase return order and a replacement purchase order.

Benefits:

The Returns Management feature within Microsoft Distribution streamlines and simplifies the complex and various tasks included in creating return credit memos, repairing/replacing damaged items, and replacing a wrong item - improving your efficiency and responsiveness to your customers' queries and requests.

#19 How do I use item substitution to fulfil a customer demand?

Peter Sadow, sales assistant in CRONUS Furniture Ltd., wants to create another sales order for John Haddock Insurance Co. to fulfil the original demand for 10 whiteboards. The demo shows how fulfil a customer demand using the Substitutes feature.

What to do	What to say	Screen shots
<p>1. On the Warehouse menu, click Orders & Contacts, Sales Orders. The Sales Order window appears.</p>	<p>Peter Sadow wants to create a new sales order for John Haddock Insurance Co. to fulfil the original demand for 10 whiteboards.</p> <p>Peter opens the Sales Order window.</p>	
<p>2. Point out the new sales order (No. 1002).</p>	<p>Peter can see that the sales return order he created earlier now shows in the Sales Order window for further processing.</p>	
<p>3. Click Line, Item Availability by, Location to open the Item Availability by Location window.</p>	<p>Then, Peter verifies that there is enough stock of the whiteboards to fulfil the demand from John Haddock Insurance Co.</p>	
<p>4. Point out that there are currently only 8 pieces of item No. 1968-W in stock.</p>	<p>Unfortunately, there is only 8 units of the whiteboards items in stock.</p>	

What to do	What to say	Screen shots
<p>5. Close the Item Availability by Location window to return to the Sales Order window.</p>		
<p>6. In the Sales Order window, point out the Substitutions field information in the right hand menu as shown in the screen shot.</p>	<p>As Peter can see that a substitute item has been setup for the whiteboards, Peter suggests that John Haddock Insurance Co. could receive 5 of item number 1968-W when they have been repaired and 5 of the substitute item number 1972-W.</p>	
<p>7. Change the Quantity field to '5' and then create a new sales order line as shown in the screen shot (accept the Check Availability Message that appears).</p>		
<p>8. Click Line, Select Item Substitution. The Item Substitution Entries window appears.</p>		
<p>9. Click OK and accept the Check Availability Message that appears.</p>		

What to do	What to say	Screen shots
<p>10. In the Sales Order window, type RED in the Location Code field of the second sales order line (as shown in the screen shot).</p>	<p>John Haddock Insurance Co. accepts the agreement.</p>	<p>The screenshot shows the 'Sales Order' window for '1002 John Haddock Insurance Co.'. The 'General' tab is active. The 'Posting Date' is 30-01-01. The 'Order Date' is 30-01-01. The 'Document Date' is 30-01-01. The 'Requested Delivery Date' is empty. The 'Promised Delivery Date' is empty. The 'External Document No.' is empty. The 'Salesperson Code' is 'PS'. The 'Campaign No.' is empty. The 'Responsibility Center' is empty. The 'Status' is 'Open'. The 'Customer Information' pane on the right shows 'Sell-to Customer', 'Ship-to Addresses (0)', 'Contacts (3)', 'Sales History', 'Bill-to Customer', and 'Avail. Credit 0'. The 'Item Information' pane on the right shows 'Item Card', 'Availability (0)', 'Substitutions (1)', 'Sales Prices (1)', and 'Sales Line D... (1)'. The main table has two lines: Line 1968-W 'GRENOBLE Whiteboard, red REPAIR' with Quantity 5, Unit Price 974,80, and Location Code 'REPAIR'; and Line 1972-W 'SAPPORO Whiteboard, bl... RED' with Quantity 5, Unit Price 974,80, and Location Code 'RED'.</p>
<p>11. Scroll to the right and change the Qty. to Ship field to '0' as shown in the screen shot.</p>	<p>Peter fills out '0' in the Qty. to Ship field, as the ROME Whiteboards have not returned from repair yet and, thus, cannot be shipped yet.</p>	<p>The screenshot is similar to the previous one, but the 'Qty. to Ship' field for the second line (1972-W) is now '0' and is circled in red. The 'Quantity Shipped' field for the same line is '5'. The 'Status' is still 'Open'.</p>
<p>12. Press CTRL+F11 to release the sales order.</p>	<p>Then, Peter releases the modified sales order and posts the sales order lines.</p>	<p>The screenshot shows the 'Sales Order' window with the 'Status' field now set to 'Released'. The 'Qty. to Ship' field for the second line remains '0'. The 'Quantity Shipped' field remains '5'. The 'Status' field is highlighted in blue.</p>
<p>13. Press F11 to post the sales order and accept the message that follows.</p>		
<p>14. Close the Sales Order window to return to the Navigation Pane menu.</p>		

What to do	What to say	Screen shots
<p>15. On the Warehouse menu, click Orders & Contacts, Purchase Orders. The Purchase Order window appears.</p>	<p>Next, Peter opens the purchase order (purchase return order) created in relation to the sales return order for the 10 damaged whiteboards.</p>	
<p>16. Press F5 to open the Purchase List window and scroll down to select purchase order No. 106027 as shown in the screen shot.</p>		
<p>17. Click OK.</p>		
<p>18. In the Purchase Order window, type 54 in the Vendor Invoice No. field and scroll to the right to show the Qty. to Receive field as shown in the screen shot.</p>	<p>In the Purchase Order window, Peter releases and posts the purchase order to receive the 10 repaired items directly in inventory.</p>	
<p>19. Press CTRL+F11 to release the purchase order, and then press F11 to post the purchase order.</p>		
<p>20. Close the Purchase Order window to return to the Navigation Pane menu.</p>		

What to do	What to say	Screen shots
<p>21. On the Warehouse menu, click Orders & Contacts, Sales Orders to open the Sales Order window and press F11 to post the remaining quantity on the sales order (accept the message that follows).</p>	<p>Finally, Peter posts the remaining quantity on the sales order he created earlier to compensate for the 10 damaged whiteboards.</p>	
<p>22. Close the Sales Order window to return to the Navigation Pane menu.</p>		
<p>Notes: Explain that you use the Substitutes feature to link items to one another in order to be able to easily offer an alternative item in case the requested item is not available or in case you want to offer your customers a lower-cost alternative.</p> <p>Explain that in order to create a replacement order for customer number 30000 (John Haddock Insurance Co.), the salesperson uses the availability functionality and the Substitutes feature to fulfil the customer demand.</p> <p>(8) Note that item number 1972-W has been set up as a substitute item for item number 1968-W.</p> <p>(18-19) Note that the 10 repaired items (1968-W) are put directly in stock since there is no requirement to receive and put-away in the REPAIR location.</p>		
<p>Benefits: The Substitutes feature within Microsoft Distribution enables you to offer your customers alternative items directly from the sales order and to offer you customers lower-cost alternatives. Substitute items are easily set up in advance to ensure that the salesperson does not have to search through the entire product list for an alternative item.</p>		