

DYNAMICS 365 FINANCE AND OPERATIONS:  
PRODUCT INFORMATION MANAGEMENT  
USER GUIDE





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Dynamics 365 Finance and Operations: Product Information User Guide

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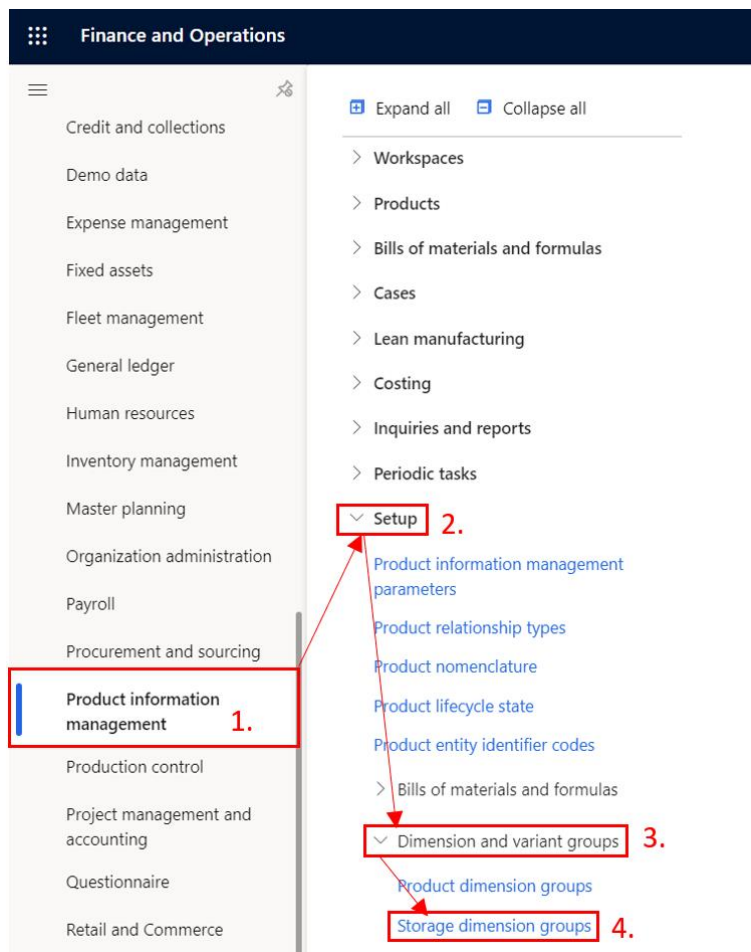
INTRODUCTION

The Product Information Management module in Dynamics 365 Finance and Operations contains many setups and features to facilitate the creation and maintenance of products. It supports larger organizations in a centralized, structured approach in creating and maintaining core master data such as product definitions. Smaller organizations that require a more decentralized approach can, with some restrictions, create and maintain their respective products while their products are automatically added to the shared products repository.

The purpose of this user guide is to get you through all the core concepts, setups and configuration needed for you to not only create your first product in Dynamics 365 Finance and Operations, but to understand what you're doing and be able to train others in your organization. This user guide is a no fluff, no frills document that includes only what you need to get you up and out of the gates as quickly as possible.

Throughout the user guide there will be references to setups, configurations, or various other forms in the application through the use of click paths or navigation paths. The following is an example of one. These are intended to give the user a click by click way to reach the form referenced in the user guide.

Product information management > Setup > Dimension and variant groups > storage dimension groups.





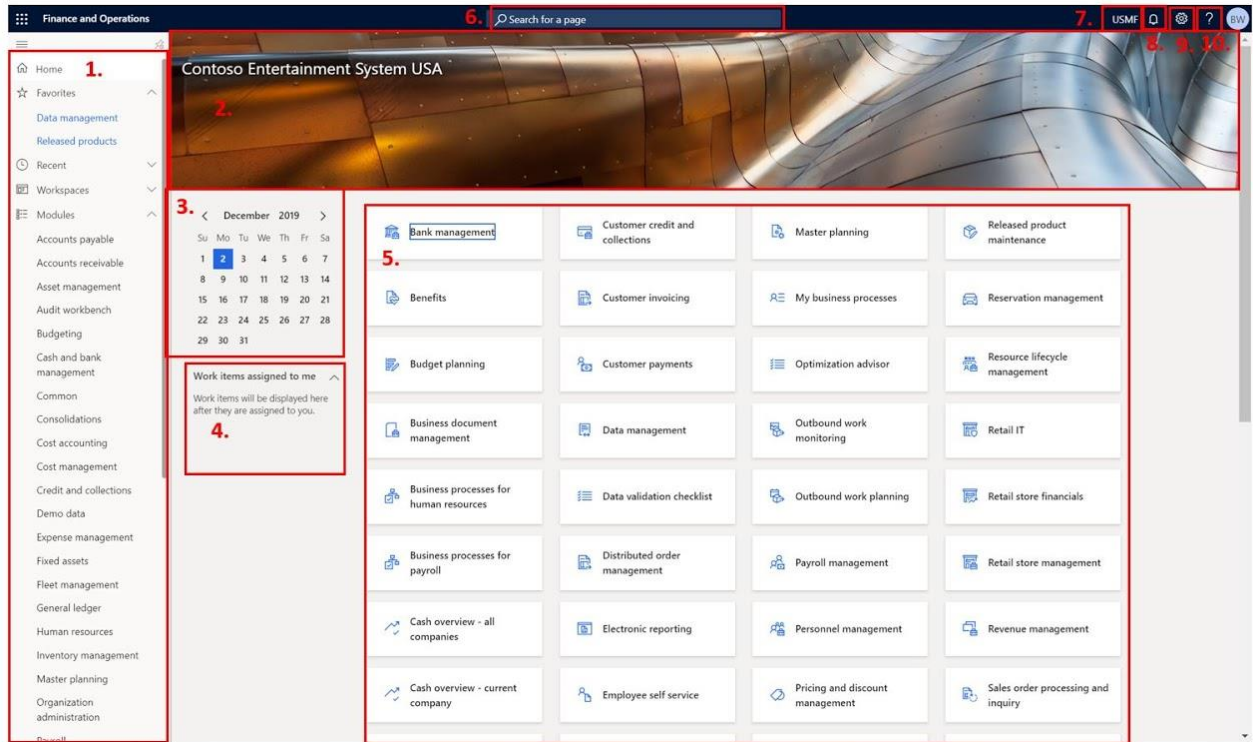
## BASICS AND NAVIGATION

The basics and navigation section is for users who are unfamiliar with the layout, basic user interaction features, and forms within the application. If you are a user who has some familiarity with this content you can skip to the “Core Concepts” section. This section is meant to be a helpful introduction to the application but is not required for the business processes we will be covering later in the guide.

## LANDING PAGE

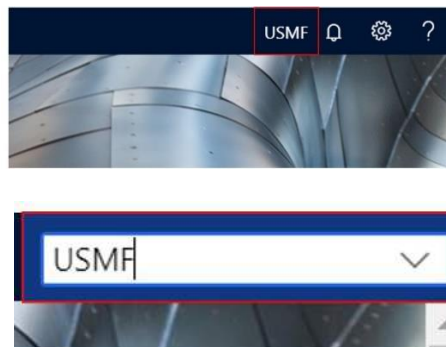
Once you have logged in you reach the landing page. The page anatomy is broken down into the following pieces.

- Navigation Pane – On the left side of the screen you will see the navigation pane where all the modules are located.
- Company Logo – If the company has a logo image set in the legal entity the image will display here.
- Calendar – This is just a helpful calendar on the landing page.
- Work items assigned to me – This is where the user can see any workflow approvals or other work items currently assigned to you.
- Workspaces – These are designed to have all the relevant menu items, links, lists, and tiles, that a certain user might need in his or day to day job for a given role within the organization.
- Search bar – The search bar is way you can search for different forms and inquiries in the application.
- Company – This lets you know which legal entity you are currently in.
- Action Center – The action center will contain error, warning, alert notifications, or information messages from the application.
- Settings – This is where you can set user specific settings to improve the personal user experience.
- Help – The help menu is contextual and can link to Microsoft help content or company specific help content from LCS.



## COMPANIES

Companies are distinct legal entities with financial reporting requirements. If you have access to multiple legal entities, you can flip back and forth between different legal entities to complete transactions in each respective entity.

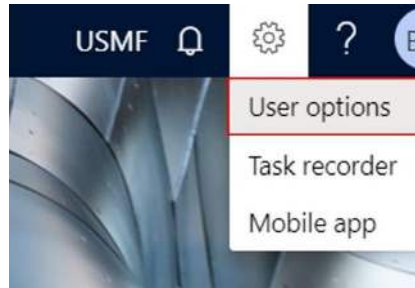


## USER OPTIONS

The user defaults are specific to each user and can be set to help with the user experience and look and feel of the application.

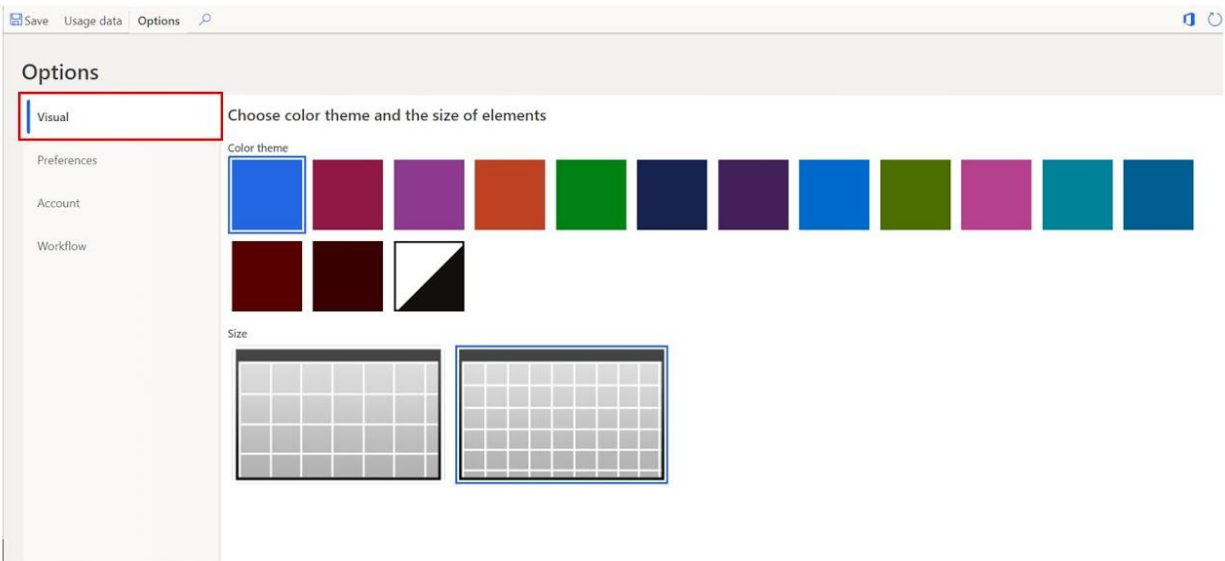
To set the user defaults click the “Settings” button which looks like a gear icon.





## VISUAL

In the “Visual” tab the user can set the desired color pallet as well as a larger screen rendering or a smaller screen rendering. I would recommend the smaller screen rendering because the majority of forms render data better with the smaller setting.



## PREFERENCES

In the “Preferences” tab the user can set the following:

- Company – The user can set the company that they will default to when they log in initially.
- Initial page – This is where the user can identify which page they would like to initially land on when the user logs in. The options are:
  - Default dashboard
  - System administration
  - Feature management
  - Essentials dashboard
  - Employee self service
  - Prospective vendor registration



- Default view/edit mode – This will be the mode that the forms initially open in when you open a form. I would suggest setting this to “Edit” so that you don’t need to click the “Edit” button to edit data in forms.
- Language – This is the language that D365 will render in. If you have users with foreign language requirements this can be set by individual user.
- Date, time, and number format – This will change the date, time, and number format specific to the user language.
- Time zone – This is the time zone specific to the user. This is important because this will be used when the user schedules batch jobs. The times will be relative to the user time zone regardless of the time zone of the database servers.
- Country/region – This is the default address format for the user. So, when the user enters an address this is the default address format that will be defaulted.
- Enable document handling – This enables document management for the specific user. If the user has no need to create attachments this can be disabled.
- Automatically update query parameter – If this is enabled, when the user queries a page the URL will be updated to include that query. If the user wants to add the page to her favorites, the query will be embedded in the URL and the page will open with the data already filtered.
- Enhanced tab sequence – Some users prefer the speed of the keyboard when entering data and the tab sequence is important. This option allows all the elements on the form to be tab sequenced so the user can tab through the relevant fields for data entry.

**Options**

- Visual
- Preferences**
- Account
- Workflow

**Set up default preference**

**Startup**

Company: USMF | Initial page: Default dashboard | Default view/edit mode: Edit

**Language and country/region preferences**

Language: en-us | Date, time, and number format: | Time zone: (GMT-06:00) Central Time (... | Country/region: |

**Miscellaneous**

**DOCUMENT HANDLING**  
Enable document handling:  Yes

**URL MANIPULATIONS**  
Automatically update query p...:  No

**Accessibility**

Enhanced tab sequence:  No

## ACCOUNT

In the “Account” tab the user can set the following:

- User ID – This is the user ID associated with the user. Anywhere in the system the user ID is captured will reference this ID.
- Name – This is the name of the user.

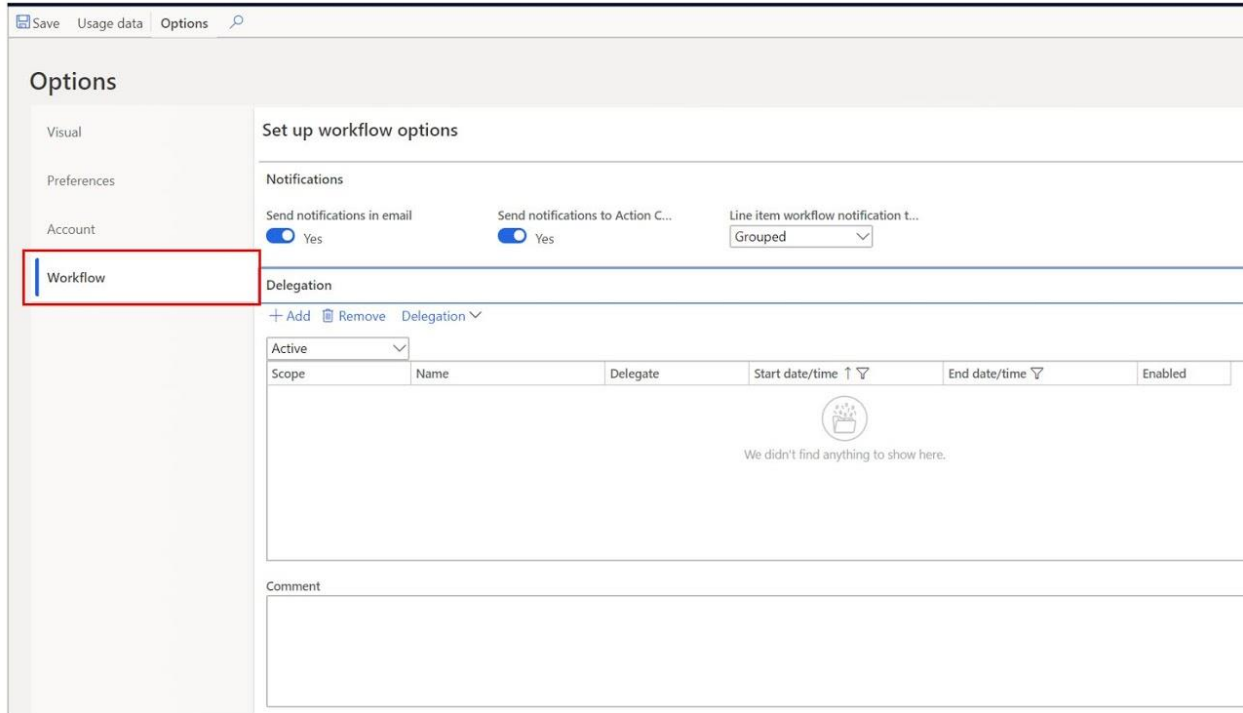


- Email provider selection – When an email is sent this is the email provider that will be called.
- Sender email – If an email is sent from the system by the user, the sender email will be the email displayed as the sender.
- Signature enabled – This is the user enabled for electronic signature.
- Valid certificate – This indicates that the user has a valid certificate for electronic signing.

## WORKFLOW

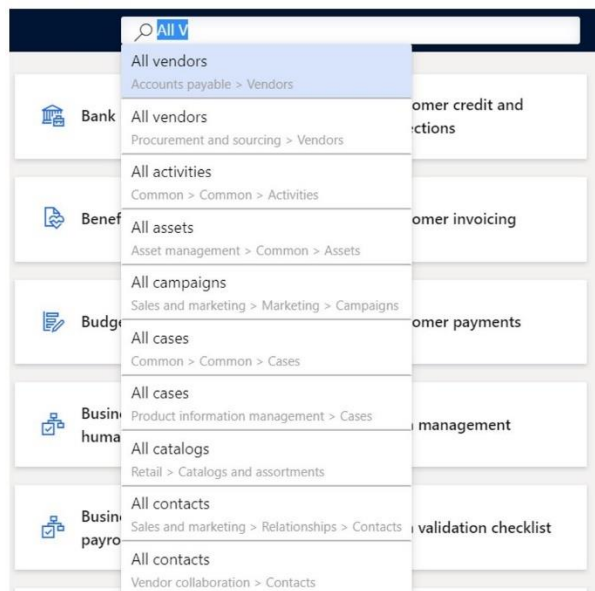
In the “Workflow” tab the user can set the following:

- Send notifications in email – This enables workflow notifications through email.
- Send to notifications to action center – This allows workflow notifications to be seen in the action center.
- Line item workflow notification type – This will indicate if you want line item workflow notifications to be grouped together or sent as individual notifications.
- Delegation – The delegation section is where you can assign delegates for specific workflows or modules.



SEARCH BAR

The search functionality in Dynamics 365 Finance and Operations is one of the most powerful user experience improvements from Dynamics AX 2012 to Dynamics 365 Finance and Operations. This feature allows you to search for a particular menu item link and navigate directly to it without having to know the module, folder, and subfolder where the menu item link resides. The search will also show the path to the menu item link so if you need to navigate to it you have it there as a reference.

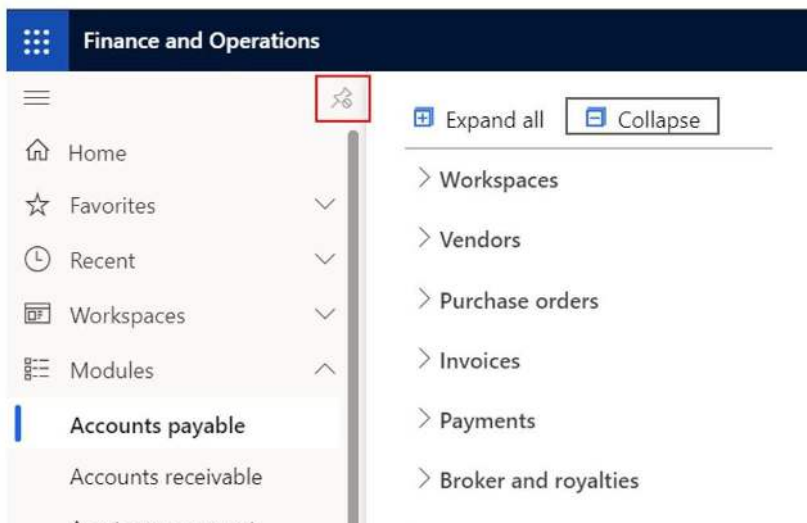




NAVIGATION PANE

The first time you log into Dynamics 365 Finance and Operations the navigation pane may be collapsed. To open the navigation pane, click the hamburger menu. It's called a hamburger menu because of the three dashes (I did not come up with this name, but it is very commonly used).

Once you have the navigation pane open you can click the pin button to keep the navigation pane open.



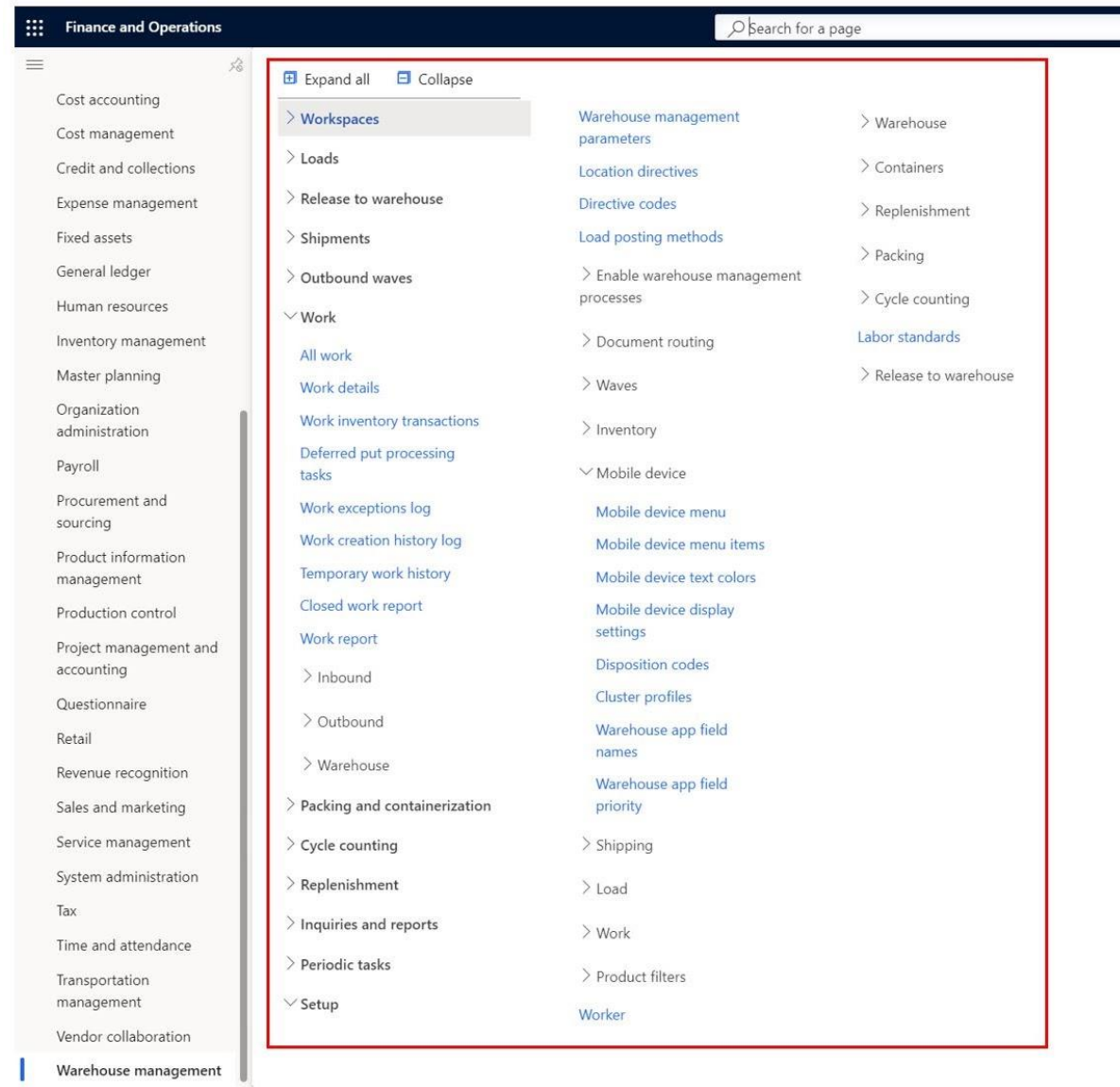
1. The first button is the home button. This will just take you back to the default landing page.
2. The second menu called "Favorites" will list of user defined favorites for commonly used menu items. The user can favorite a menu item by clicking the star icon to the right of the menu item link.
3. The third menu is the "Recent" menu. This will capture all the menu links that the user has recently navigated to.
4. The fourth menu is the "Workspaces" menu. This is a listing of all the workspaces that the user has access to.



- The fifth menu is the “Modules” menu. This is a list of each module in the application in alphabetical order.

AREA PAGE

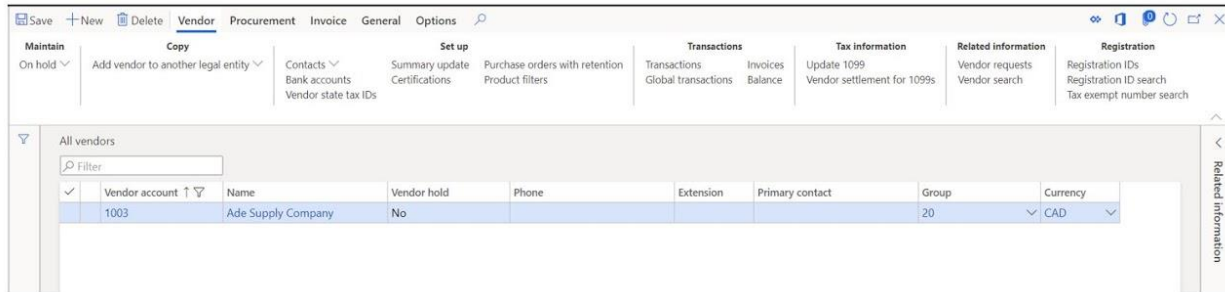
Within each module there is an area page. The area page contains a listing of each folder and sub folder with the lowest level links are called “Menu item links” that open different forms, list pages, reports, batch jobs, and inquiries.



LIST PAGE

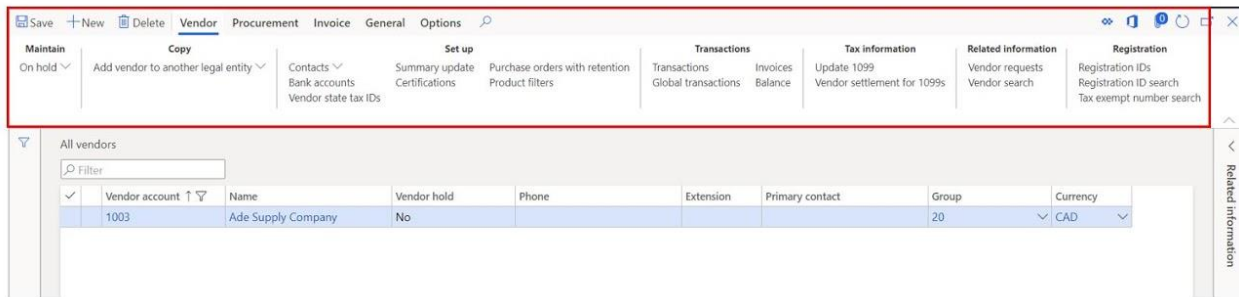


A list page is a page that typically contains master data that can be created, read, updated, and deleted. An example of a list page is the “All Vendors” list page. This page contains all vendor master data. This data will be referenced throughout the application where vendors are used.



## RIBBON

In the majority of list pages and forms you will find a pane at the top of the form that contains different buttons to perform different tasks and actions. This pane is called the “Ribbon”. Users familiar with Microsoft office products will probably already be familiar with this.



## FAST TABS

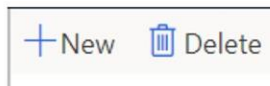
On master data, and setup forms you will find expandable tabs that contain more data and fields related to the form. You can expand and collapse each one individually or right click on the tab and select the “Expand all” or “Collapse all” option if you want to open or close all the fast tabs. Fast tabs are also referred to sections within the form.



The screenshot shows a Dynamics 365 form with the following sections: General, Addresses, Contact information, Miscellaneous details, Vendor profile, Purchasing demographics, Invoice and delivery, Purchase order defaults, Payment, Tax 1099, Retail, and Financial dimensions. A context menu is open over the 'Contact information' section, listing options: Form information, Personalize: Contact information, Collapse all (highlighted in red), Expand all (highlighted in red), Collapse, Expand, and View shortcuts.

### CREATE AND DELETE

Throughout the application in the left corner of any form where you can create data you will find a create button. The create button is typically labeled “New”. The delete button is labeled “Delete” and depending on if the user has access to delete, the button may be hidden. Also, if there are dependent data somewhere else in the system the user may be prompted with an error message preventing them from deleting the record.



### VIEW DETAILS

One of the core functionalities of integrated ERP systems is the ability drill down into related records directly in the same application. In Dynamics 365 Finance and Operations you can do this two ways. The first is by clicking the hyperlink. This will take you to the related record in the related underlying table. The second way is to right click on the drop-down selection and click “View details” this will also take you to the related record in the related table.





All vendors  
1003 : Ade Supply Company

General

Change party association

**IDENTIFICATION**

Vendor account: 1003

Type: Organization

Payment priority:

Name: Ade Supply Company

Search name: Ade Supply Company

Group: 20

**ORGANIZATION DETAIL**

Number of employees: 0

Organization number:

Form information (highlighted)

View shortcuts

View details (highlighted)

**FILTER AND SORT**

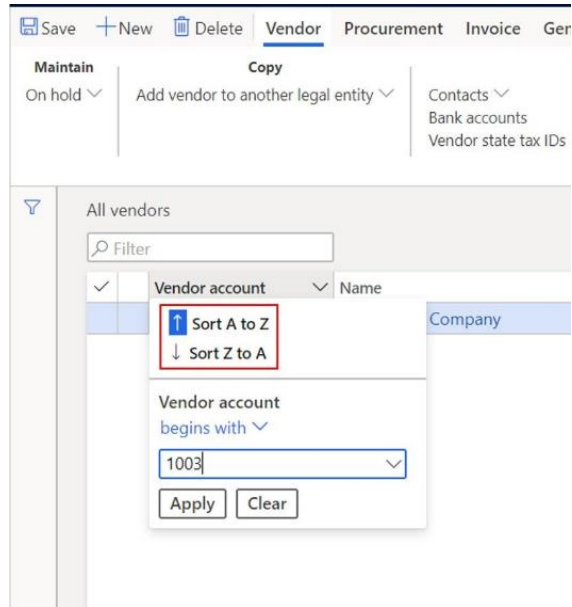
Each field, with the exception of a small number of calculated fields, are filterable and sortable. The user can filter by a field by clicking the field header and entering their filter criteria and clicking “Apply”.

The user can also define the search options to any one of the options shown below. If you don’t have the field you are looking for, you can right click and click “Insert columns” to add the field and then filter using the column header. You can also apply filters to multiple fields at the same time to refine your query.

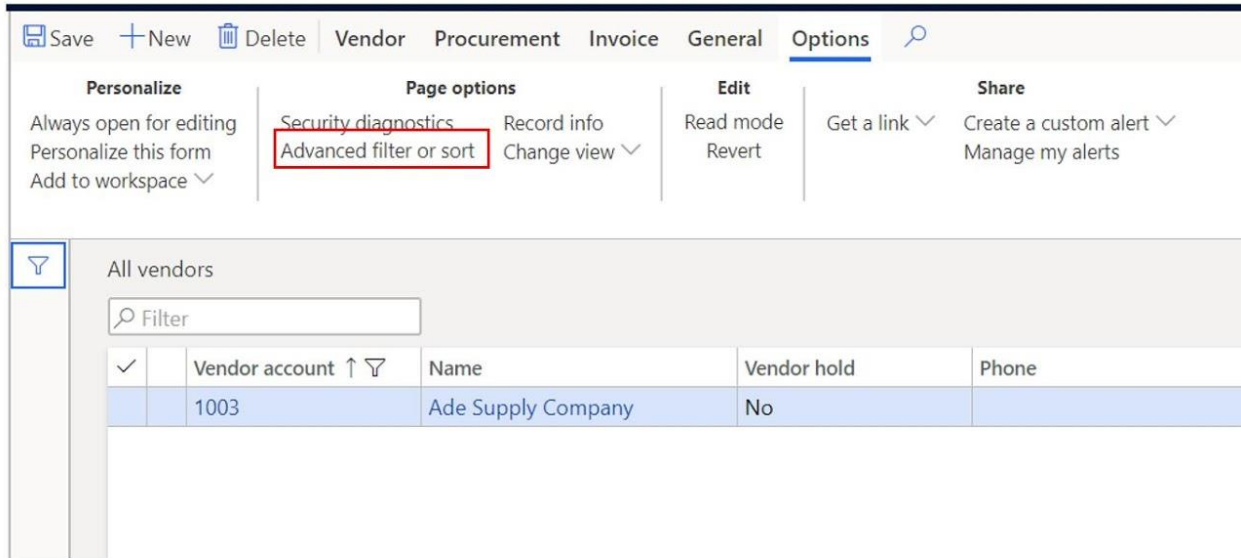
The left screenshot shows a vendor grid with a context menu open over the 'Vendor account' header. The menu options include 'Sort A to Z', 'Sort Z to A', and 'Vendor account begins with'. The 'begins with' option is selected, and a filter box contains the value '1003'. 'Apply' and 'Clear' buttons are visible at the bottom of the menu.

The right screenshot shows a similar vendor grid with a context menu open over the 'Vendor account' header. The menu options include 'Sort A to Z', 'Sort Z to A', and a list of filter operators: 'begins with', 'is exactly', 'is not', 'contains', 'does not contain', 'begins with', 'is one of', 'after', 'before', and 'matches'. The 'begins with' option is selected.

The user can also sort any field in the grid by clicking the field header and clicking on the ascending or descending sort option.



If you are not able to get the query you are looking for using the fields available on the grid, you can use the advanced filter to join other related tables to your query and use fields from those tables to create the exact query you need.





**Inquiry - Vendors**

Select query  
 Query used | Modify...

Range | Sorting | Date options | Joins

+ Add | Remove

Table	Derived table	Field	Criteria
Vendors	Vendors	Main contact	
Vendors	Vendors	Name	
Vendors	Vendors	1099 box	
Vendors	Vendors	Vendor account	1003*

Replace the criteria value on lookup

OK | Reset | Cancel

## EXPORT TO EXCEL

If you're more comfortable with data in Excel, you also have the option to export your list page to Excel and manipulate the data in Excel using all the power and functionality Excel offers. The difference between "Open in Excel" and "Export to Excel" is the former will open an excel workbook linked to the data entity related to the form you are currently on. The latter will only export a static excel file for the data in the current form.

The screenshot shows the Dynamics 365 interface for the 'Vendors' entity. The top navigation bar includes 'Save', '+ New', 'Delete', 'Vendor', 'Procurement', 'Invoice', 'General', and 'Options'. The 'Options' menu is open, showing 'OPEN IN EXCEL' (with sub-options for 'Vendors V2 (usmf)' and '[Obsolete] Vendors (usmf)') and 'EXPORT TO EXCEL' (with sub-option 'Vendors'). Below the menu, the 'All vendors' list is visible with a filter box and a table containing one record for 'Ade Supply Company'.

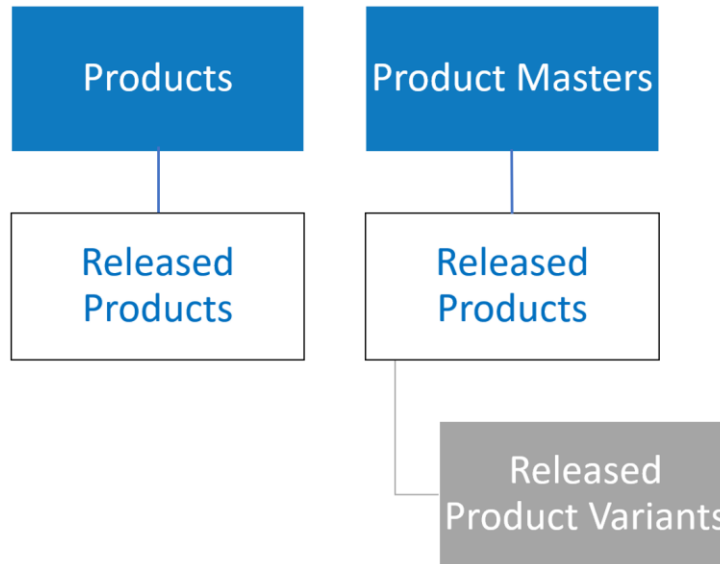
Vendor account	Name	Vendor hold	Phone	Extension	Primary contact	Group	Currency
1003	Ade Supply Company	No				20	CAD



CORE CONCEPTS

In Dynamic 365 Finance and Operations products initially exist at a global level and then can be released to specific legal entities or all legal entities. Things like product name and product ID are shared across all legal entities. There are three core concepts in Dynamic 365 Finance and Operations to understand before getting started.

Term	Definition
Product	A uniquely identifiable product. It serves as a core product that does not vary. Therefore, no product dimensions can be associated with the definition.
Product master	A standard or functional product representation that is the basis for configuring product variants. The variations are configured by selecting a configuration technology. This can be either a set of predefined product dimensions or by using product configurations in sales scenarios.
Product variant	The configuration of a product master. Based on the choice of the configuration technology, the variant can be either predefined by using the product dimensions of its master or configured by using a configurator tool.

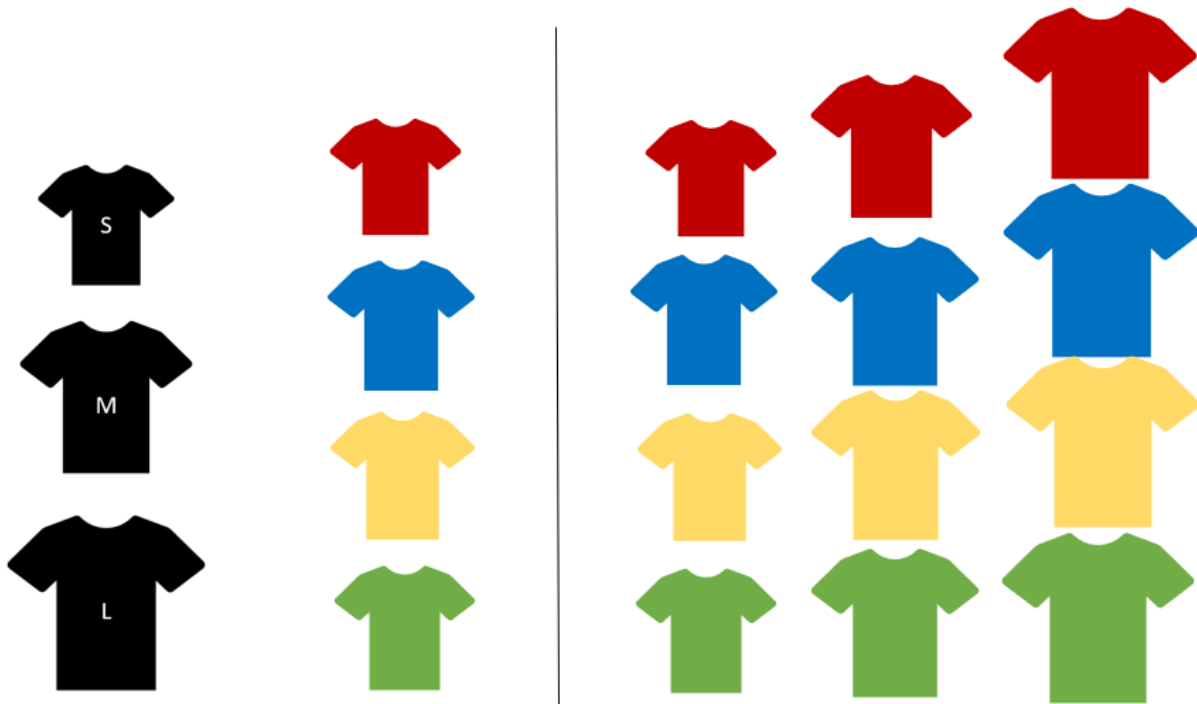


Most people fully understand the idea of a product, but a product master is a little less understood initially so let's take a closer look at that.

Let's imagine that I am a retailer and I am selling a shirt. The shirt comes in sizes small, medium, and large as well as four different colors red, blue, green, and yellow. So instead of creating 12 different products to represent each variation of the product I need only to create a single product master for that shirt and then activate the size and color product dimensions for the product. Then once I have defined my sizes and colors, I can use the variant



suggestion feature to have the system automatically create the variants for me which I can then release to each legal entity.



*Note: Dynamics 365 Finance and Operations comes with four product dimensions: Size, Style, Color, and Configuration.*

## CORE SETUPS

In this section we will go through all the core setups required for creating and using products in various business processes in Dynamics 365 Finance and Operations. Not all these core setups are required depending on the functionality you intend to use. Regardless of whether you end up using the functionality, knowledge of these setups will help your overall understanding of this module.

## ITEM GROUPS

Item groups are a **required** setup for all products. Item groups are used for two main purposes. The first is for ledger posting for various sales, purchase, inventory, production, and costing transactions throughout the system. The second is a way to logically group different types of items on the enterprise product list. There are also reports throughout the system that utilize item groups.

To create an item group, navigate to Inventory management > Setup > Inventory > Item groups.



Save + New Delete Forecasting Posting Related items Options

Filter

Item groups

Item group Name  
Audio Audio Products

**Sales order**

Account type	Main account
Cost of units, delivered	140200
Cost of goods sold, delivered	500150
Cost of units, invoiced	140200
Cost of goods sold, invoiced	500100
Revenue	401100
Discount	
Commission	602150

**Purchase order**

Account type	Main account
Cost of purchased materials r...	140200
Purchase expenditure, un-inv...	600180
Cost of purchased materials i...	140200
Purchase expenditure for pro...	600180
Discount	
Fixed receipt price profit	
Fixed receipt price loss	

**Inventory**

Account type	Main account
Fixed receipt price profit	
Fixed receipt price loss	
Inventory issue	140200
Inventory expenditure, loss	510500
Inventory receipt	140200
Inventory expenditure, profit	510500
Inventory cost revaluation	510330

**Production**

To create an item group, click the “New” button. In the “Item group” field enter your item group ID. In the “Description” field enter the full name of the item group.

In the main part of the page you will see four fast tabs:

- **Sales order** – In this fast tab you will see fields to specify main accounts that specific sales order transaction types should hit.

Event: Sales Order Packing Slip Posting			
Posting Type	Debit	Credit	Main Account Type
Cost of Goods Sold , Delivered	Debit		Asset
Cost of Units , Delivered		Credit	Asset



Event: Sales Order Invoice Posting			
Posting Type	Debit	Credit	Main Account Type
Cost of units, delivered	Debit		Asset
Cost of units, invoiced		Credit	Asset
Cost of goods sold, invoiced	Debit		Expense
Cost of goods sold, delivered		Credit	Asset
Customer balance	Debit		Asset
Sales order revenue		Credit	Revenue
Commission	Debit		Expense
Commission Offset		Credit	Liability
Discount	Debit		Expense

- **Purchase order** – In this fast tab you will see fields to specify main accounts that specific purchase order transaction types should hit.

Event: Purchase Order Receipt			
Posting Type	Debit	Credit	Main Account Type
Purchase Expenditure Un-invoiced	Debit		
Purchase Accrual		Credit	
Cost of purchased materials received	Debit		
Purchase Expenditure – Un-invoiced		Credit	

Event: Purchase Order Invoice Posting			
Posting Type	Debit	Credit	Main Account Type
Purchase, accrual	Debit		Liability
Purchase expenditure, un-invoiced		Credit	Liability
Purchase expenditure for product	Debit		Expense
Vendor balance		Credit	Liability
Purchase expenditure, un-invoiced	Debit		Liability
Cost of purchased materials received		Credit	Asset
Cost of purchased materials invoiced	Debit		Asset
Purchase expenditure for product		Credit	Expense

- **Inventory** – In this fast tab you will see fields to specify main accounts that specific inventory transaction types should hit. Inventory accounts can come from several events. Below is listing of each Main Account Type for the associated Posting Type.



Inventory	
Fixed receipt price profit	Expense
Fixed receipt price loss	Expense
Inventory issue	Asset
Inventory expenditure, loss	Expense
Inventory receipt	Asset
Inventory expenditure, profit	Expense
Inventory cost revaluation	Expense
Inter-unit payable	Liability
Inter-unit receivable	Asset
Cost change variance	Expense
Rounding variance	Expense
Issue	Asset
Receipt	Asset
Unrealized gain	Asset
Unrealized loss	Expense
Goods in transit	Asset
Scrap	Profit and loss
Interim Transit	Asset
Price difference for moving average	Expense
Cost revaluation for moving average	Expense
Catch weight loss account	Expense
Catch weight profit account	Asset
Rounding – Loss	Expense
Rounding – Profit	Asset

- **Production** – In this fast tab you will see fields to specify main accounts that specific production order transaction types should hit.

Event: Product Pick List Posting			
Posting Type	Debit	Credit	Main Account Type
Estimated cost of materials consumed		Credit	Asset
Estimated cost of materials consumed, WIP	Debit		Expense

Event: Production Order Report as Finished			
Posting Type	Debit	Credit	Main Account Type
Estimated manufactured cost	Debit		Expense
Estimated manufactured cost, WIP		Credit	Asset

Event: Production Order Ended			
Posting Type	Debit	Credit	Main Account Type
Cost of materials consumed		Credit	Asset
Cost of materials consumed, WIP	Debit		Asset
Manufactured cost	Debit		Asset
Manufactured cost, WIP		Credit	Asset

Further down in the form you will see a “**Setup**” fast tab.





- **Default item allocation key** – Is used to default the item allocation key to the product based on the item group selection. The item allocation key is used to group sets of items for forecast generation.
- **Item sales tax group (Purchase)** – This is the default purchase item sales tax group that should default based on the selected item group.
- **Item sales tax group (Sales)** - This is the default sales item sales tax group that should default based on the selected item group.

Setup			
<b>FORECAST</b>	<b>PURCHASE TAX</b>	<b>SALES TAX</b>	
Default item allocation key	Item sales tax group	Item sales tax group	
<input type="text"/>	<input type="text"/>	<input type="text"/>	
Warehouse			
<b>FILTER REQUIRED</b>	<input type="checkbox"/> Use filter code 3	<b>ITEM GROUP FILTER</b>	<input type="checkbox"/> Assign filter code 2 for item group
<input type="checkbox"/> Use filter code 1	<input type="checkbox"/> Use filter code 4	<input type="checkbox"/> Assign filter code 1 for item group	<input type="checkbox"/> Assign filter code 3 for item group
<input type="checkbox"/> Use filter code 2			<input type="checkbox"/> Assign filter code 4 for item group

In the “Warehouse” fast tab you can select a filter code that should be required. You can also use the item group filter to enable product restrictions for customers and vendors using filter codes. For more on filter codes see the Warehouse Management User Guide.

## ITEM MODEL GROUPS

Item model group controls several settings about how the item is handled in inventory, how the item is posted to the ledger, and how the item is costed. Item model group is a **required** setup that must be selected upon creation of any item.

To create a new item model group, navigate to Inventory management > Setup > Inventory. Click the “New” button to create a new model group. Give the model group an ID and a meaningful description.



In this section we will discuss the functions and uses for the most important fields on the form.

- Stocked product** – If this checkbox is checked, any non-service product associated with this item model group will generate inventory transactions and be “stocked” in inventory. Stocked service items are occasionally used to model service items that must be added to bills of material (BOM) such as outsourcing operations where an external vendor applies additional value add steps in the production process like painting, grinding, packaging, labeling etc. In most cases physically stocked inventory will have this checkbox checked.
- Include physical value** – This asking if you want to include the physical value into the cost calculation for an item. Physical value is posted on things like product receipts and sales order packing slip postings.
- Fixed receipt price** - This option allows you to have a fixed receipt price for a non-standard cost product. When selected, the system will adjust issues and receipts to a fixed receipt price. The fixed receipt price sets the price of receipts to the active planned cost or basic cost of a product set in the “Price” field of the “Manage costs” fast tab on the released product form. In the case of Purchase receipts, posting occurs at the actual cost. For purchase invoices, the price difference between the actual cost and the fixed receipt price is posted to the general ledger as a variance; the amount is posted to the loss or profit account for the fixed receipt price. Inventory is updated based on the fixed receipt price. For sales order packing slips and sales invoices, posting occurs at the estimated cost. When you run an inventory close or a recalculation, the value of issue transactions is adjusted according to the “Price” field of the “Manage costs” fast tab on the released product form.
- Post physical inventory** – This option controls whether or not posting should occur during a physical inventory transaction. In D365 there is a distinction between physical and financial postings. Examples of physical inventory transactions are purchase order receipt, sales order packing slip posting, production order report as finished.
- Post financial inventory** – This option controls whether or not posting should occur during a financial inventory transaction. In D365 there is a distinction between physical and financial postings. Examples of financial inventory transactions are purchase order invoice, sales order invoice, production order end.



- **Post to deferred revenue account on sales delivery** – This option allows you to accrue the estimated revenue for the delivered goods. The accrued revenue is offset when the customer is invoiced for the delivery.
- **Accrue liability on product receipt** – If you select this checkbox the system will post a purchase accrual based on the estimated expense when product is received against a purchase order.
- **Physical negative inventory** – This option allows you to have physical negative inventory. For example, if you select this option, you could still process a sales order and ship out the product even if you did not have physical on hand inventory. If this option is selected, you could see negative inventory balances. Typically, this option is not selected and is only enabled in special cases.
- **Financial negative inventory** – If this option is selected the system will allow financial inventory to go negative. For example, if I receive a quantity of 10 physically of a product and but do not post the purchase invoice, I only have 10 physical inventory and the system will still allow me to ship out the 10 pieces of inventory even though I have not financially updated the invoice via purchase order invoice. For most stocked products this option is selected.
- **Quarantine management** – This item enables the quarantine management functionality associated with the WMS I features. If you are using the advanced warehousing (AWMS) features this option is not applicable.
- **Registration requirements** – If you select this option the system will require a registration transaction before a receipt can be physically posted.
- **Receiving requirements** – If you select this option the system will require you to post a physical receipt before you are able to post a financial receipt (ex. Purchase order invoice).
- **Picking requirements** – If you select this option, all issues will require a pick transaction before the physical issue update from inventory.
- **Deduction requirements** – If you enable this option, the system will require a physical issue before a financial issue. For example, the system will require a sales order packing slip to be posted prior to a sales order invoice posting.
- **FIFO Date controlled** - Reservation occurs according to the FIFO principle. This means the complete sales order line quantity or the quantity that is unavailable as on-hand inventory, is reserved against the oldest purchase order with the status Ordered with the delivery date falling before the delivery date of the sales order line.
- **Backward from ship date** - Reservations are processed according to the LIFO principle. This means that the receipt with the most recent date is reserved.
- **Item sales reservation** – This option determines the reservation strategy employed on sales order lines.
  - **Default** – This option will use the default item reservation set on the sales order reservation strategy defined on the accounts receivable parameters.
  - **Automatic** – This option will automatically reserve inventory against the sales order line as soon as the line is saved.
  - **Explosion** – This option will reserve inventory for the items on the bill of material associated with the item on the sales order line not on for the item on the sales order line.
  - **Manual** – This option will not reserve inventory. The user will need to manually reserve inventory against the sales order line.
- **Same batch selection** – Reserves the sales order line quantity against a single batch. If the entire quantity cannot be reserved against a single batch the same batch reservation conflict page will appear.



- **Consolidate requirement** – This option is only enabled when the “Same batch selection” option is selected. This option will consolidate sales order lines into a single requirement for inventory to be reserved against.
- **FEFO date controlled** – This option is used if you want batch reservations to use the first expiry first out principle to reserve batches against inventory. This option is also used in conjunction with the master plan parameter “Use shelf life dates” to perform requirement pegging based on batch expiration.
- **Pick criteria** – This option is only available if “FEFO date controlled” is enabled. This selection determines which batch date should be used in the FEFO calculation, “Expiration date” or “Best before date”.
- **Batch disposition code** – If you are using batch disposition codes, you can use this field to determine the default batch disposition that should be assigned to batches when they are created.
- **Vendor batch (purchase registration)** – This selection enables the vendor batch fields to be captured during the purchase registration process. Vendor batch fields include the fields shown below.

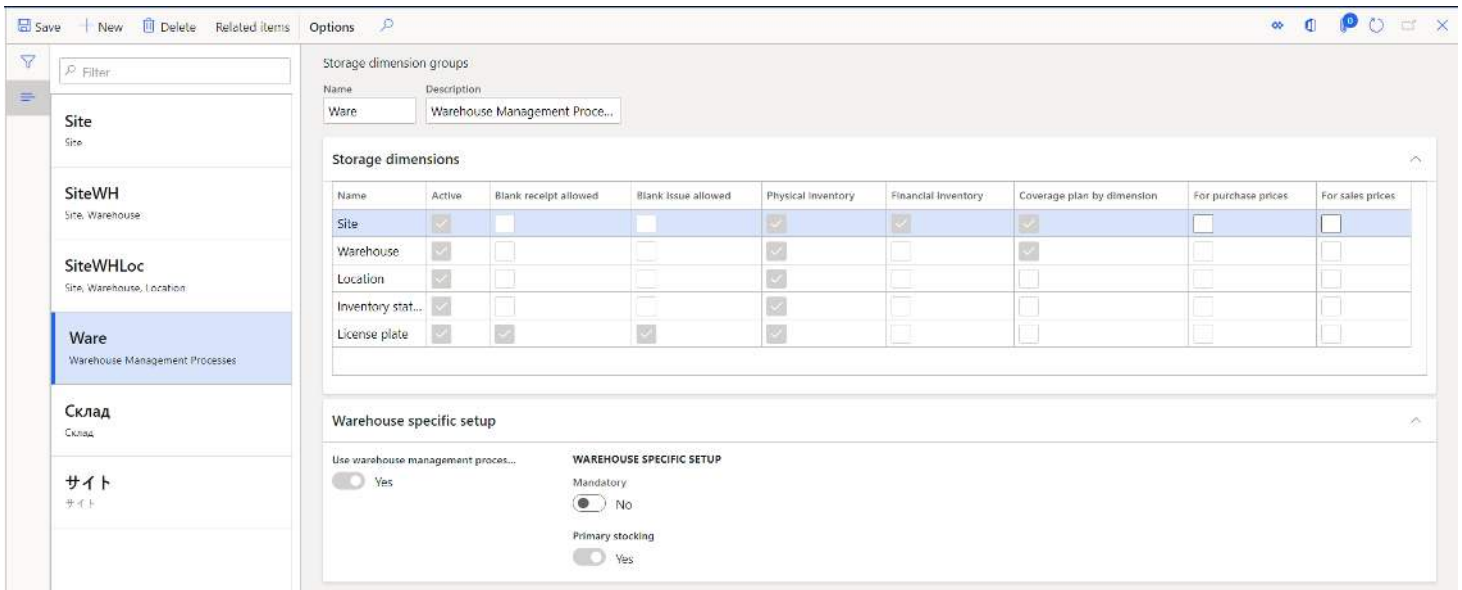
Vendor batch				
Vendor batch date 6/15/2020	Use as manufacturing date <input checked="" type="checkbox"/> Yes	Vendor expiry date 6/15/2021	Use as expiration date <input checked="" type="checkbox"/> Yes	Country/region of Origin 1
				Country/region of Origin 2
				Vendor batch number

- **Approved vendor check method** – This is the default approved vendor check method that will default to the released product. This option can be overridden at each individual item level.
  - **No check** – This option will disable the approved vendor validation meaning any vendor can be used to purchase this product.
  - **Warning only** – This option will enable the approved vendor validation and if a user tries to purchase something from an unapproved vendor, they will receive a warning, but they will be able to proceed.
  - **Not allowed** – This option will not allow any purchases from unapproved vendors.

## STORAGE DIMENSION GROUPS

The storage dimension group determines the inventory dimensions that will be in use for the product. These inventory dimensions will be used in all inventory related transactions throughout the system. These will also be the inventory dimensions that can be used to view on hand inventory balances. The storage dimension group is a **required** setup for all products.

To create a storage dimension group, navigate to Product information management > Setup > Dimensions and variant groups > Storage dimension groups. Click the “New” button and give the storage dimension group an ID and a meaningful “Description”.



The storage dimension fast tab consists of a set of checkboxes that will determine the behavior of the different dimensions.

- **Name** – This column displays the name of the inventory dimension.
- **Active** – This checkbox enables the inventory dimension.
- **Blank receipt allowed** – This flag determines if the dimension is required for receipt (inventory in) transactions. There may be cases if you are not using the advanced warehousing functionality in D365, where certain inventory dimensions are not required on receipt or issue transactions but allowing this can cause unbalanced inventory on hand quantities.
- **Blank issue allowed** – This flag determines if the dimension is required for issue (inventory out) transactions.
- **Physical inventory** – Selecting this option indicates the inventory dimensions that will create physical inventory transactions.
- **Coverage plan by dimension** – This flag determines the granularity of inventory dimensions that will be used by master planning to net supply with demand. Typically planning is done only by the site and warehouse level.
- **For purchase prices** – This flag enables inventory dimensions to be selected and used to determine purchase prices on trade agreements. For example, if a product is purchased from one site or warehouse, we get one price and from another we get a different price, this flag can be enabled on the “Site” and “Warehouse” dimensions to meet this requirement.
- **For sales prices** – This flag enables inventory dimensions to be selected and used to determine sales prices on trade agreements. For example if we sell product to the same customer at one price from a “Site” or “Warehouse” in the USA at a different price from a “Site” or “Warehouse” in Germany we can enable the “Site” and “Warehouse” dimensions in this column.
- **Use warehouse management processes** – This flag enables the advanced warehouse management functionality. Enabling this flag will automatically check the required inventory dimensions used in advanced warehouse management processes. This flag on the storage dimension form along with the “Use warehouse management processes” flag on the warehouse form will enable the advanced warehouse features.



- **Mandatory** – This flag sets the “Warehouse” inventory dimension as a mandatory dimension for items that are associated with the dimension group.
- **Primary stocking** – This option will make the warehouse dimension a locked inventory dimension for inventory reservations. All reservations will occur at least at the warehouse dimension.

TRACKING DIMENSION GROUPS

Tracking dimensions are used to enable one or multiple tracking inventory dimensions. Tracking dimensions consist of the following dimensions: serial number, batch numbers (otherwise known as lot numbers), and owner (used to identify the owner for vendor consignment). The tracking dimension field is a **required** field. If you are using an item that does not have any tracking dimensions you can create a tracking dimension called “None” with none of the tracking dimension boxes selected.

To create a tracking dimension, navigate to Product information management > Setup > Dimension and variant groups > Tracking dimension groups. Click the “New” button, give the tracking dimension group an ID and a meaningful description.

The screenshot shows the 'Tracking dimension groups' form for a group named 'Batch-Phy' with the description 'Batch - Physical inventory'. The 'Tracking dimensions' table is as follows:

Name	Active	Active in sales process	Primary stocking	Blank receipt allowed	Blank issue allowed	Physical Inventory	Financial Inventory	Coverage plan by dimension
Batch number	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Serial number	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Owner	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Below the table, the 'Serial numbers' section shows 'Capture serial number' set to 'None', 'Register serials before consumption' set to 'No', and 'Serial number control' set to 'No'.

The screenshot shows the 'Tracking dimension groups' form for a group named 'Batch-Phy' with the description 'Batch - Physical inventory'. The 'Tracking dimensions' table is as follows:

Primary stocking	Blank receipt allowed	Blank issue allowed	Physical inventory	Financial inventory	Coverage plan by dimension	For purchase prices	For sales prices	Transfer
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Below the table, the 'Serial numbers' section shows 'Capture serial number' set to 'None', 'Register serials before consumption' set to 'No', and 'Serial number control' set to 'No'.



The tracking dimension is similar to the storage dimension group form in that there are a set of checkboxes that will enable or disable different aspects of the tracking dimension functionality for each tracking dimension.

- **Name** – This field identifies the tracking dimension for the row. The checkboxes for the row are for the tracking dimension listed in this column.
- **Active** – This checkbox enables the tracking dimension.
- **Active in sales process** – This checkbox is specific to the serial number tracking dimension. This flag enables functionality where you do not need to track the serial number dimension within the four walls of the warehouse. The serial number is only captured during the outbound shipping process. During packing slip posting the user will be asked to register the serial numbers going out on the order. This option limits the system overhead with tracking serial numbers.
- **Primary stocking** – If this flag is enabled the tracking dimension will be required for all physical updates. Selecting this flag also means that the tracking dimension will be required for reservation.
- **Blank receipt allowed** – If this checkbox is selected the tracking dimension can be left blank on all receipt transactions.
- **Blank issue allowed** – If this checkbox is selected the tracking dimension can be left blank on all issue transactions.
- **Physical inventory** – Checking this checkbox will tell the system to create inventory transactions for the dimension. For example, if you want to be able to track batch numbers in inventory and have full traceability, you need to enable this checkbox.
- **Financial inventory** – Checking this checkbox tells the system that you want to track costs down to a specific tracking dimension.
- **Coverage plan by dimension** – Checking this checkbox tells the system you want MRP to plan down to a specific tracking dimension. This is a very rare requirement.
- **For purchase prices** – Selecting this checkbox will enable you to select this dimension on a trade agreement for tracking dimension specific pricing. For example, if you are selling diamonds and you needed to set purchase prices for each specific diamond by serial number you would need to enable this flag for the serial number tracking dimension.
- **For sales prices** – Selecting this checkbox will enable you to select this dimension on a trade agreement for tracking dimension specific pricing. The same example applies here on the sales side. If you are selling diamonds and you needed to set the sales prices for each specific diamond by serial number, you would need to enable this flag for the serial number dimension.
- **Transfer** – The transfer column is only applicable for the vendor consignment tracking dimension for “Owner”.
- **Capture serial number** – The capture serial number option allows you to define when you should be prompted to capture serial numbers.
  - **Picking** – This option will prompt the user on the warehouse mobile application to scan or manually type in the serial number for picked items during the picking process either for a production pick or a sales pick.
  - **Packing** – This option will prompt the user to scan or manually type in serial numbers at the packing station which is configured in the Warehouse Management module.
- **Register serials before consumption** – This flag works together with the “Capture serial number” selection and allows you to defer the serial number registration until you post the product pick list journal.
- **Serial number control** – This flag ensures that you can never have a quantity greater than one for any serial number. This flag is used to prevent duplication of serial numbers.



RESERVATION HIERARCHY

Reservation hierarchy models different levels on which reservations can be made. Each level represents a physical storage or tracking dimension in inventory. Reservation hierarchy is a **required** setup for warehouse enabled products. The advanced warehousing reservation functionality allows items enabled for advanced warehousing (AWMS) the ability to use flexible warehouse operations, postponement of reservation of specific inventory dimensions until allocation is complete and gives clear separation of which inventory dimensions can be specified, and when they can be specified.

To create a new reservation hierarchy, navigate to Warehouse management > Setup > Inventory > Reservation hierarchy. Click the “New” button and give the reservation hierarchy an ID and meaningful description. Any dimensions that you will not be using for your products can be moved over the “Available” pane to the left using the left arrow button un the middle of the form. For example, if your products do not use serial numbers, vendor consignment, or batch number (lot numbers) you can select the “Batch number”, “Serial number”, and “Owner” dimensions and click the left arrow button. Then click the “Ok” button to create the reservation hierarchy.

?

### New reservation hierarchy

Name

Description

**AVAILABLE**

We didn't find anything to show here.

→

←

**SELECTED**

Site
Warehouse
Inventory status
Location
License plate
Batch number
Serial number
Owner

↑

↓

OK

Cancel





Name	Reservation hierarchy level	Allow reservation on demand order
Site	1	<input checked="" type="checkbox"/>
Warehouse	2	<input checked="" type="checkbox"/>
Inventory status	3	<input checked="" type="checkbox"/>
Location	4	<input checked="" type="checkbox"/>
License plate	5	<input checked="" type="checkbox"/>
Batch number	6	<input checked="" type="checkbox"/>

The reservation hierarchy setup allows you to reserve inventory at different levels without providing details about where to reserve and what dimensions to reserve on. This lets you postpone specific details, such as the location or license plate to make the reservation on. The location to reserve items on can be determined later by the location directive at the time the order is released for picking.

For example, in the figure above, any dimension below the location dimension in the reservation hierarchy will not be specifically reserved until the order is allocated to the warehouse and warehouse work is generated for the warehouse worker to complete on the warehouse mobile application. Any dimension above the location dimension will be specifically reserved at the order level prior to warehouse release.

To drive the point home, if in our example above, the batch number dimension was above the location in the reservation hierarchy, we would need to reserve a specific batch number against an order line before releasing it to the warehouse for picking. The system would require the user to pick that exact batch number reserved against the order line.

**Allow reservation on demand order** – This feature allows flexibility in the way that dimensions below the location dimension are reserved. For example, in the figure shown above the batch dimension is below location and the “Allow reservation on demand order” is checked for the batch dimension. This means that on a sales order I can either reserve down to a specific batch or I can let the system reserve a batch based on location directive settings. This feature can allow you to get the best of both worlds so to speak.

## UNIT SEQUENCE GROUP

The unit sequence group defines the handling structure for products in the warehouse. For example, a product may come in inner case packs, then several inner case packs may be packaged within a case, and then several cases may make up a pallet. The unit sequence group is used along with product specific unit conversions to define not only the handling structure of the product but also the different numerical conversions between each unit of measure in the unit sequence group. The unit sequence group is a **required** setup for advanced warehouse enabled items.

To create a unit sequence group, navigate to Warehouse management > Setup > Warehouse > Unit sequence group. Click the “New” button and give the unit sequence group an ID and a meaningful description.



Line number	Unit	License plate packing type	License plate grouping	Use unit for cycle counting	Default unit for purchase and transfer	Default unit for production	Default container type	Default unit for material consumption	Wave label type
1.0000000000	ea	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2.0000000000	Case	0	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3.0000000000	PL	0	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

In the line details fast tab of the form we will, from smallest handling unit to largest handling unit, define the handling structure of the product.

Click the “New” button in the line details fast tab and select the lowest unit of measure in the “Unit” field. Repeat this and select the next highest level unit of measure until all the handling units for the product have been listed. The remaining fields in the form are described below.

- **License plate packing type** – This ID is added to the generated license plate based on the unit of measure. This is used to generate GS1 compliant license plate labels for the appropriate handling unit.
- **License plate grouping** – This checkbox tells the system that you want to group license plate IDs for this unit of measure. On the other hand, if you leave this field blank the system will create a license plate for each quantity of the unit received. Typically, this flag is enabled for all units except the pallet unit of measure.
- **Unit for cycle counting** – This field allows you to choose which units of measure should be used during cycle counts. The selected units of measure will appear on the warehouse mobile device.
- **Default unit for purchase and transfer** – This selection indicates the default unit of measure that should be used on purchase order receipts and transfer order receipts. Only one unit of measure can be selected.
- **Default unit for production** – This selection indicates the default unit of measure for product receipts when reporting production orders as finished.
- **Default container type** – This defines the default container type associated with a license plate generated for the unit. Container types are used to define the physical characteristics of a tangible carrying unit, such as cage, box, pallet, or a shipping container.
- **Default unit for material consumption** – This defines the default unit to be used for material consumption from the warehouse mobile application against a production order.

## PRODUCT DIMENSION GROUPS

Product dimension groups are used to streamline the creation of product masters using a standard set of product dimension values that can be assigned to the product. Let’s take the example of a shirt that has a color and size dimension. If there are certain shirts that always have the sizes Small, Medium, and Large and colors Blue, Green, and Red, we can create a size dimension group and a color dimension group with those colors and sizes and instead of re-creating those dimensions over and over for each new product we can assign the size and color dimension groups to the product and they will inherit those sets of sizes and colors.

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### SIZES, COLORS, STYLES AND SIZE, COLOR, STYLE GROUPS



The size, color and style forms are used in the same way. That is to define the values for all the sizes, styles, and color dimension values. In this section we will look at the size and size groups as the example, but the setup and concepts are the same for color and style forms and dimensions group forms.

The sizes form allows to pre-create all the sizes you would need when defining product dimensions for a product master.

To create size product dimensions, navigate to Product information management > Setup > Dimensions and variant groups > Sizes.

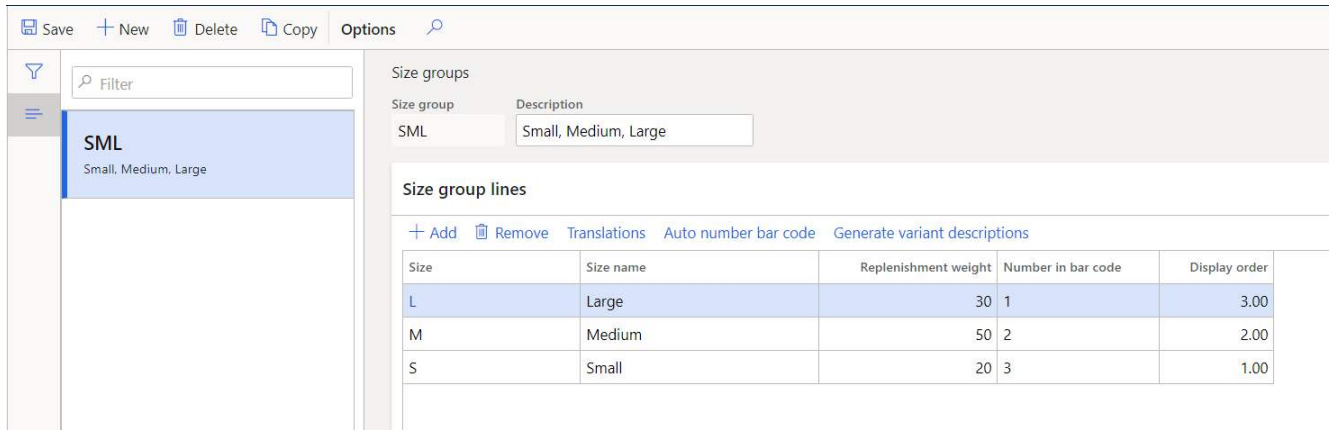
Click the “New” button and give the size an ID. The global display order is a way of sorting the appearance of the size dimensions. For example, if you wanted small to appear first followed by medium, and then large you could set the value for small to be “1”, medium to be “2”, and Large to be “3”.

Size ↑ ▾	Global display order
L	0.00
M	0.00
S	0.00

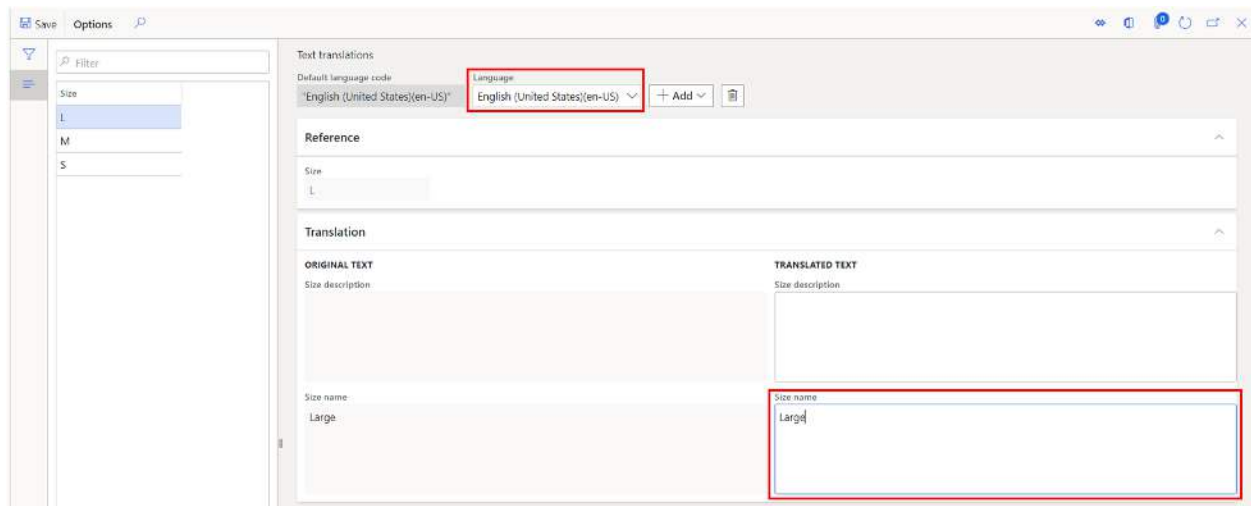
The size group setup allows you to define a set of sizes that apply to a specific product master. This will default the standard set of sizes to the product rather than creating the dimensions over and over again. This will be illustrated in the product creation section further in this user guide.

To create a size group, navigate to Product information management > Setup > Dimensions and variant groups > Size group.

Click the “New” button give the size group a meaningful ID and description. In the “Size group lines” fast tab click the “Add” button to create the size group line. Here we will select our three sizes we want to be part of the size group.



- **Size** – Select the sizes you want to include in the size group. These will be the pre-defined sizes you created in the size form.
- **Size name** – This is the name of the size dimension. The field is non-editable from the size group form. You need to click the “Translations” button and for each language that you need the size to appear in, enter the size name.



- **Replenishment weight** – Replenishment weight refers to the quantity that should be replenished to the store relative to the other sizes. The replenishment weight is used in the D365 retail replenishment rules to define how stores should be replenished.
- **Number in bar code** – This is the numeric value in the barcode that represents the dimension.
- **Display order** – This is the display order that the sizes will be shown in at the point of sale, ecommerce site or other retail related displays.

## CATEGORY HIERARCHIES

Category hierarchies are used to classify products for reporting and analysis purposes. Each category hierarchy consists of a hierarchical structure of categories and subcategories. An organization can create more than one category hierarchy. For example, your organization might create one category hierarchy for classifying purchased products and another hierarchy for classifying products they that sell. Category hierarchies can also be used to

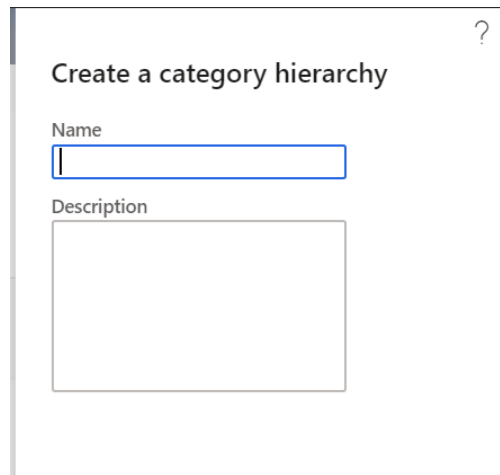
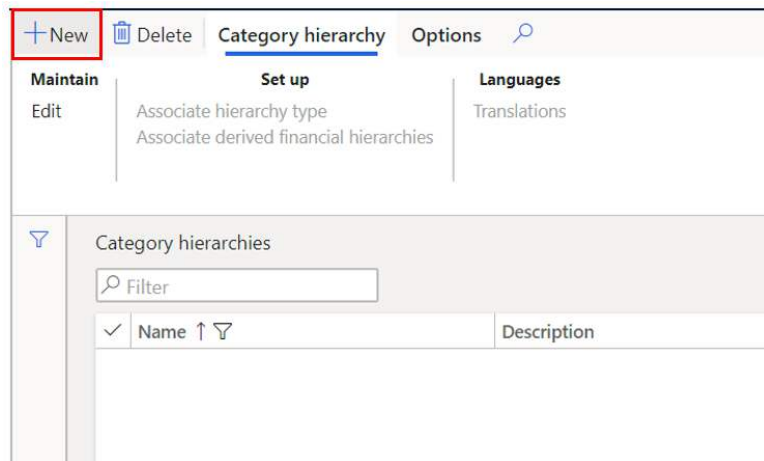


define a retail category hierarchy which is the basis for many of the retail related functionalities in Dynamics 365 for Commerce.

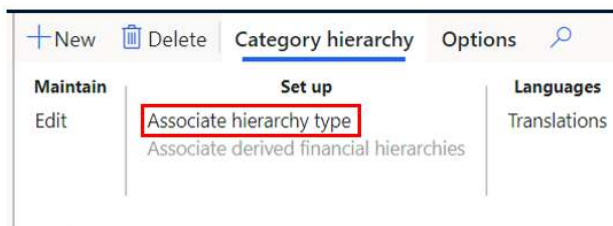
### CATEGORY HIERARCHY SETUP

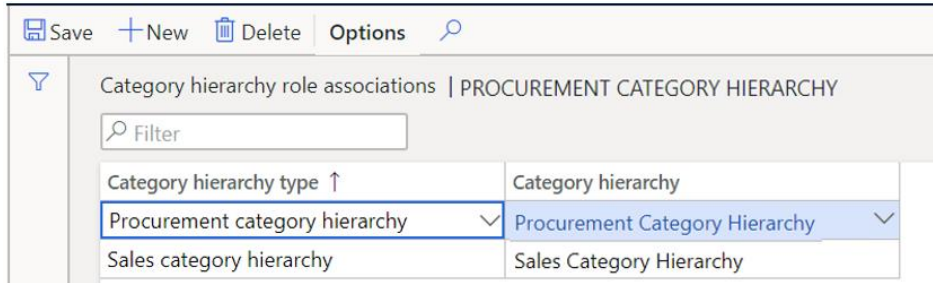
Before the categories and subcategories can be assigned to any hierarchy, we must first set up the category hierarchy and associate a hierarchy type which indicates what type of hierarchy we are working with.

To create a category hierarchy, navigate to Product information management > Setup > Category hierarchies. Click the “New” button and give the hierarchy a meaningful name, description, and click “Create”



Click the “Associate hierarchy type” button.



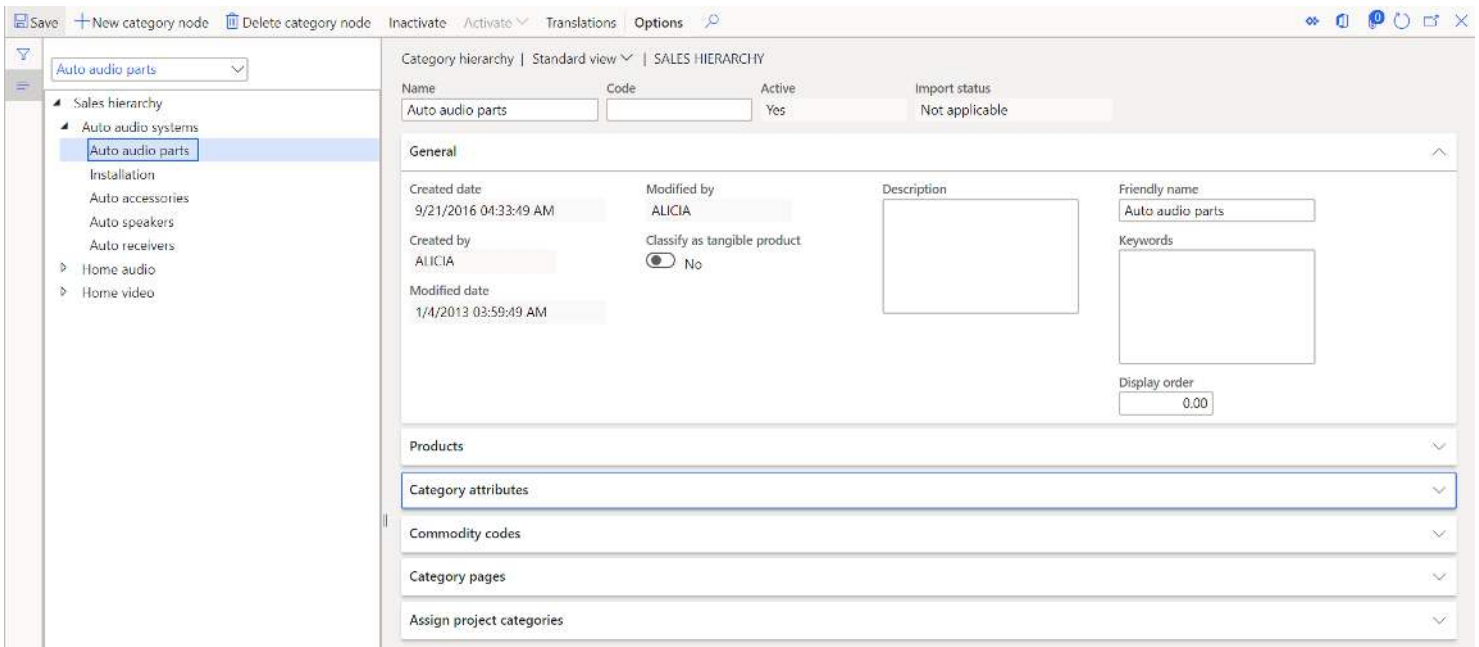


- **Category hierarchy type** – Select the hierarchy type for which this category hierarchy is intended.
- **Category hierarchy** – Select the category hierarchy, that you created in the step above, which will associate the hierarchy with the type.

### SALES CATEGORY HIERARCHY

The sales category can be used to create a hierarchical structure to define products that are sold within an organization. When a product is assigned to a sales category node and the product is added to the sales order, that category will default to the sales order line. This foundation sets the stage for business intelligence and analytics to be run against sales for these categories within the overall hierarchy.

To setup the sales category hierarchy, navigate to Sales and Marketing > Setup > Categories > Sales categories. Click the “Edit category hierarchy” button.



To create the first parent category node, click the “New category node” button.

- **Name** – This is the name for the category node.
- **Code** – This is a shorter unique code that represents the category node.
- **Description** – This is a long description that allows the user to give more detail about this specific category node.



- **Friendly name** – This friendly name appears in parenthesis next to the “Name” when the user interacts with the category selection in most forms. The intent of this field is to give the user a more user friendly or meaningful name.
- **Keywords** – This is used to enhance the search feature during category selection on forms like the sales order lines or released product form where the user can select a sales category.
- **Display order** – This defines the display order that the category node will appear the lowest number will appear first.

In the “**Products**” fast tab you can select all the products that should be assigned to this specific category node. You can also do this during the product creation process which will be shown in the product creation section below.

*Note: Best practice is to assign products to the lowest level category node possible.*

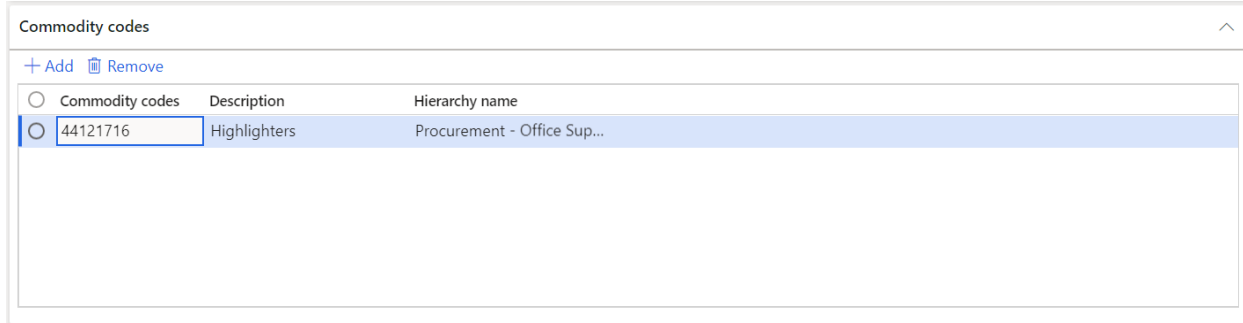
Products				
+ Add Remove Product attributes				
	Product number	Product name	Displa... ↑	
<input checked="" type="radio"/>	M0010	Car Audio Unit	9.00	

To add products to the currently selected category node click the “Add” button. This will open a product selection form where you can multi-select products and move them over from the “Available” section to the “Selected” section.

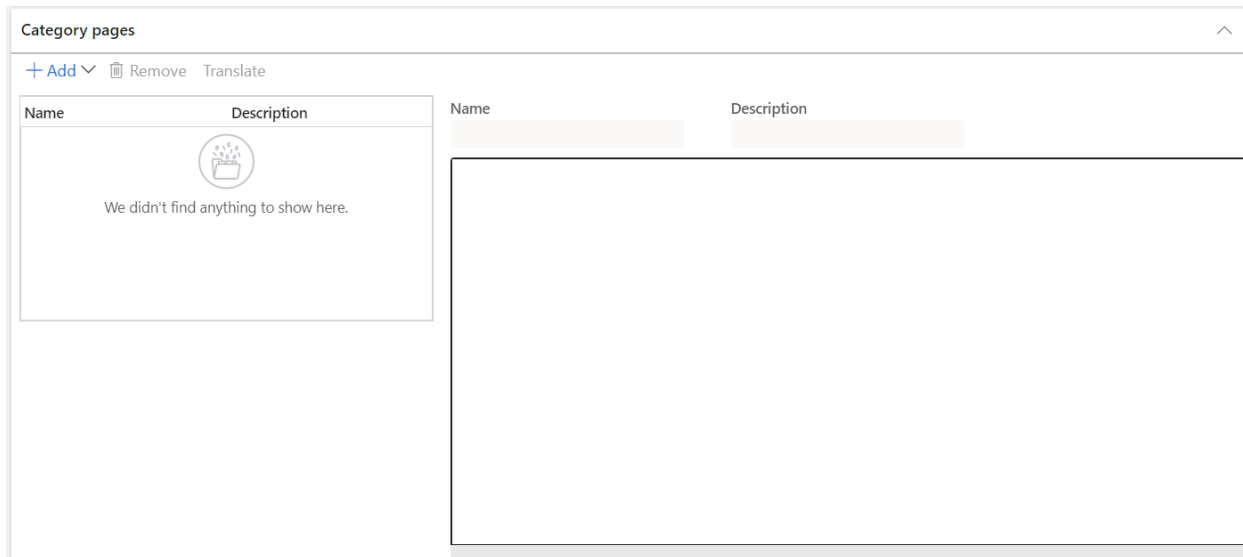
In the “**Category attributes**” fast tab you can select attributes related to the selected category node. So instead of attributes related to the product which can be enabled using the procurement category hierarchy, category attributes are attributes set at the category level. After you select a category attribute for the node and take the hierarchy out of edit mode you can select an attribute value for the attribute.

Category attributes				
+ Add Remove				
Inherit category attributes fro...				
<input checked="" type="radio"/>	No			
	Name	Type	Attribute type	Inherited from
<input checked="" type="radio"/>	Bag type	Text	Bag type	Auto audio parts

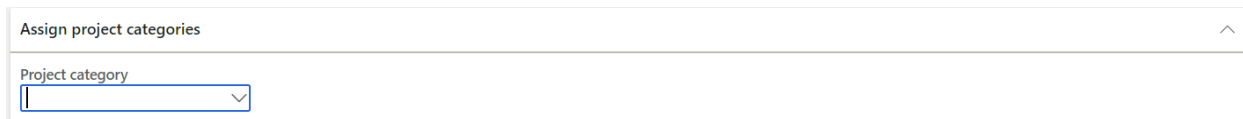
In the “**Commodity codes**” fast tab you can associate industry defined commodity codes to the selected category node. Commodity codes can be used for cross-industry reporting and there are some standard Dynamics 365 Finance and Operations reports that used commodity codes.



In the “**Category pages**” fast tab, for the selected node, you can add additional information about the category including rich text and images. This can be used to make announcements about sales or discounts for the category.



In the “**Assign project categories**” fast tab you can associate a project category that should be associated to the selected sales category. This will default the project category to the sales line for any product associated with the category. If you are not planning on using projects, you can ignore this section.



Once you have your parent category node defined, you can either create another parent category node or you can create a child node. The context of the node you have currently selected when you click the “New category node” will determine the level where the category node will sit. For example, if you want to create a child category of the node you just created, click the node you just created and click the “New category node” this will create a subcategory node. If instead you want to create another parent category node click the root node and click the “New category node” button. Continue this until you have your desired category hierarchy structure.

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PROCUREMENT CATEGORIY HIERARCHY



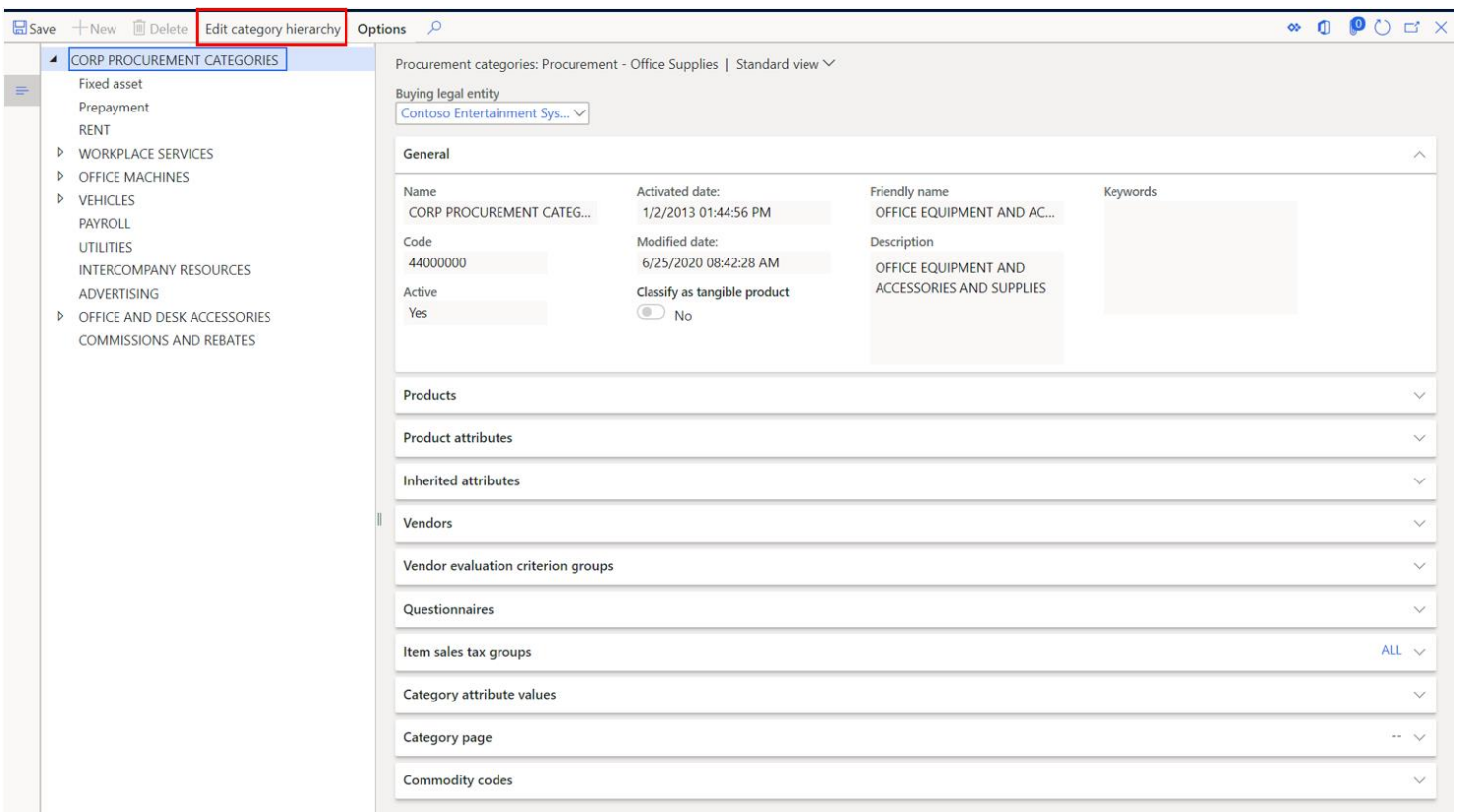


The procurement category hierarchy is used similarly to the sales category hierarchy, in that it can be used for reporting and organizing procured products into a hierarchical structure. However, it also has other procurement related functionality like specifying preferred and approved vendors as well as creating vendor evaluation criteria. Unlike the sales category hierarchy, the procurement category hierarchy can be used to define product attributes that are associated with each category node which enables the selection of attribute values on the product setup. This will be shown in the product creation section later in this user guide.

To setup the procurement category hierarchy, navigate to Procurement and sourcing > Procurement categories.

Initially the form displays the following sections and after you click the “Edit category hierarchy” button you will see some different fast tab. We will go through both.

To create a category node, click the “Edit category hierarchy” button and click the “New category node button”.



- **Name** – This is the name for the category node.
- **Code** – This is a shorter unique code that represents the category node.
- **Description** – This is a long description that allows the user to give more detail about this specific category node.
- **Friendly name** – This friendly name appears in parenthesis next to the “Name” when the user interacts with the category selection in most forms. The intent of this field is to give the user a more user friendly or meaningful name.
- **Keywords** – This is used to enhance the search feature during category selection on forms like the purchase order lines or released product form where the user can select a procurement category.



- **Display order** – This defines the display order that the category node will appear the lowest number will appear first.

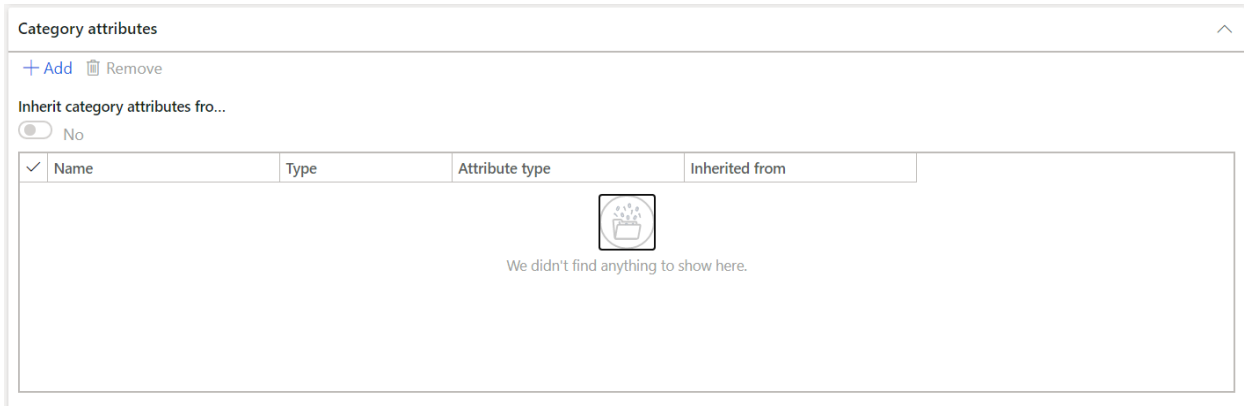
In the **“Products”** fast tab you can select all the products that should be assigned to this specific category node. You can also do this during the product creation process which will be shown in the product creation section below.

*Note: Best practice is to assign products to the lowest level category node possible.*

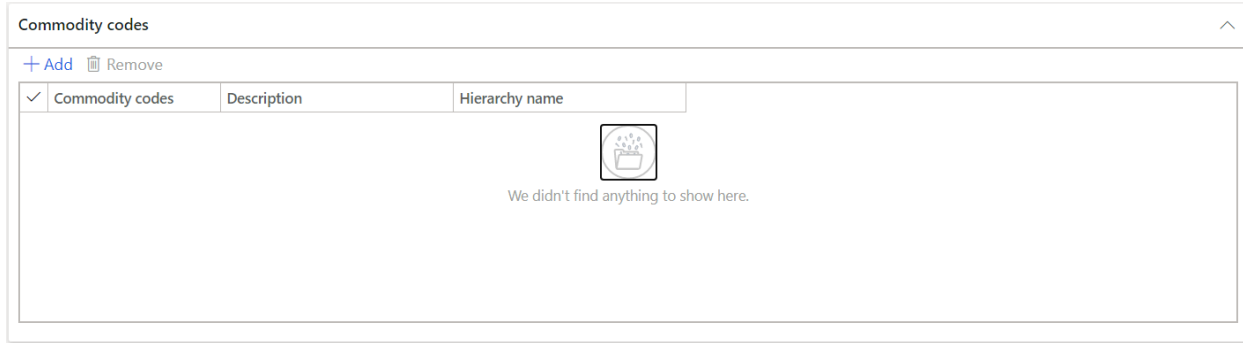


To add products to the currently selected category node click the **“Add”** button. This will open a product selection form where you can multi-select products and move them over from the **“Available”** section to the **“Selected”** section.

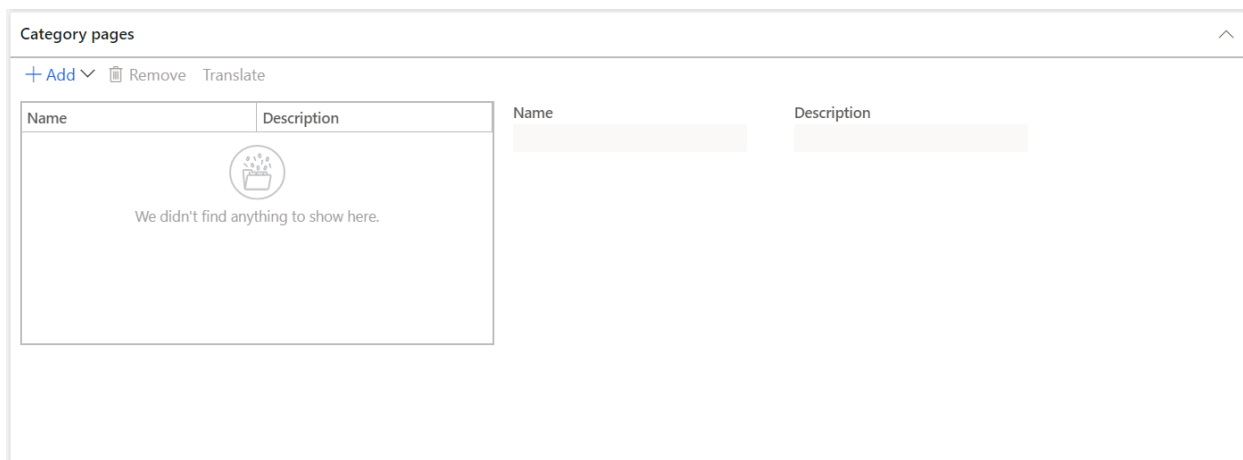
In the **“Category attributes”** fast tab you can select attributes related to the selected category node. So instead of attributes specific to the product, category attributes are attributes set at the category level. After you select a category attribute for the node and take the hierarchy out of edit mode you can select an attribute value for the attribute.



In the **“Commodity codes”** fast tab you can associate industry defined commodity codes to the selected category node. Commodity codes can be used for cross-industry reporting and there are some standard Dynamics 365 Finance and Operations reports that used commodity codes.



In the **“Category pages”** fast tab, for the selected node, you can additional information about the category including rich text and images. This can be used to make announcements about sales or discounts for the category.



In the **“Assign project categories”** fast tab you can associate a project category that should be associated to the selected procurement category. This will default the project category to the purchase order line for any product associated with the category. If you are not planning on using projects, you can ignore this section.



Once you have your parent category node defined, you can either create another parent category node or you can create a child node. The context of the node you have currently selected when you click the “New category node” will determine the level where the category node will sit. For example, if you want to create a child category of the node you just created, click the node you just created and click the “New category node” this will create a subcategory node. If instead you want to create another parent category node click the root node and click the “New category node” button. Continue this until you have your desired category hierarchy structure.

Once you have finished your procurement hierarchy structure there are a few more features related to procurement categories that can be configured when the procurement categories are out of “Edit mode”. Close and re-open the form and you will see some additional sections (Fast tabs).



In the **“Product attributes”** fast tab you can specify which product attributes should default to products that are associated with this procurement category node. This will enable you to enter a product attribute on the released products form by using the “Product attributes” button.

Product attributes							
+ Add  Remove							
	Name	Type	Attribute type	Required ...	Internal	Searchable	Sortable
<input type="radio"/>	Bag type	Text	Bag type	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

In the **“Inherited attributes”** fast tab you can inherit product attributes from a parent node by enabling the “Inherit attributes from parent category” flag. This is a helpful feature that quickly assigns parent attributes to the child category node.

Inherited attributes								
	Name	Attribute type	Type	Category	Required ...	Internal	Searchable	Sortable
<p>We didn't find anything to show here.</p>								

Inherit attributes from parent ...  No

In the **“Vendors”** section you can associate specific vendors that are either approved or preferred for this category. This feature can be used to auto-add vendors to a request for quotation. Selecting preferred or approved vendor is also a required step for the vendor evaluation functionality.

Vendors					
+ Add  Remove Evaluation					
	Vendor account	Name	Vendor status	↑	Inherited from
<input type="radio"/>	1001	Acme Office Supplies	Approved	↓	Cleaning

Inherit vendors from parent ca...  No



In the **“Vendor evaluation criterion groups”** fast tab, you can use the vendor evaluation criterion form to create a group for similar or related vendor rating criteria. For example, you can create a vendor evaluation criterion group named “Base criterion”, and then create rating criteria such as quality, price, and delivery time that buyers can use to rate all vendors in the specified procurement category.

Vendor evaluation criterion groups ^

+ Add Remove View criteria

Name	Description	Inherited from
Accuracy		Cleaning

Inherit vendor evaluation crite...  No

In the **“Questionnaires”** fast tab Questionnaires can be added to a procurement category. When a vendor requests to do business in a procurement category, the vendor must complete the questionnaire for that category. Questionnaires can be used in the request for quotation process to ensure the vendor meets certain qualifications.

Questionnaires ^

+ Add Remove View questions

Name	Description	Activity type	Inherited from
VendorEval	Vendor Qualification - RF...	Not assigned	Cleaning

Inherit questionnaires from pa...  No

In the **“Item sales tax groups”** fast tab you can select a default item sales tax group that should be applied for certain categories or items that fall into that category.

Item sales tax groups HOURS ^

Item sales tax group:

HOURS v

In the **“Category attribute values”** you can assign category attributes to a category. Similar to product attributes, you can also assign attributes at the category level. You can use attributes to define an unlimited amount of additional information about a category. After the attributes are created, you can associate them to categories. Several types of attributes can be setup in the system.



Category attribute values

Reset value

<b>Finish</b> Text Finish Cleaning	Attribute name: Finish	Type: Text
	Value: Gloss	<input type="checkbox"/>

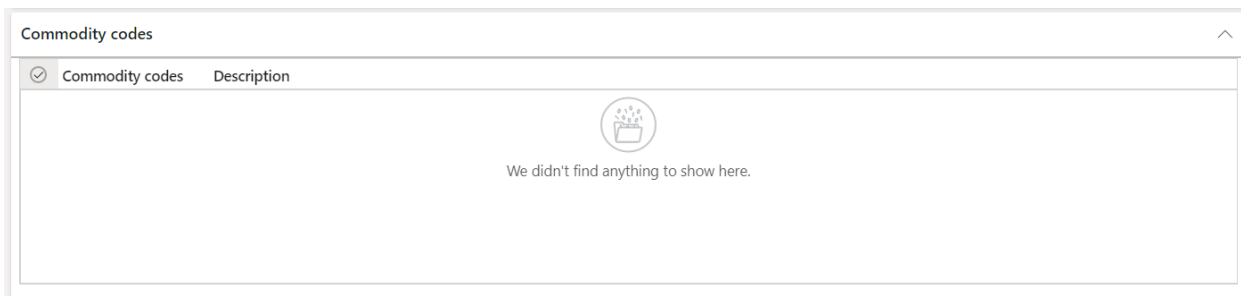
In the **“Category page”** fast tab you can create a page that contains information about a category, such as announcements and guidelines. You can display the category page in an internal procurement catalog on your employee self-service portal and on a purchase requisition line.

Category page

Category page \*  Description

HTML DOCUMENT

In the **“Commodity codes”** fast tab you can assign commodity codes to the category. A commodity code is any alphanumeric system designed to identify particular products. There are different types of commodity codes that are associated with government and some that are associated with the private sector. All commodity codes are used to classify items and services so that they can be better identified.



## OTHER SETUPS

Depending on your organizations specific business requirements there may be other product related setup that is required. These setups are optional for the core setup but may be required for certain functionality in other areas of the system.

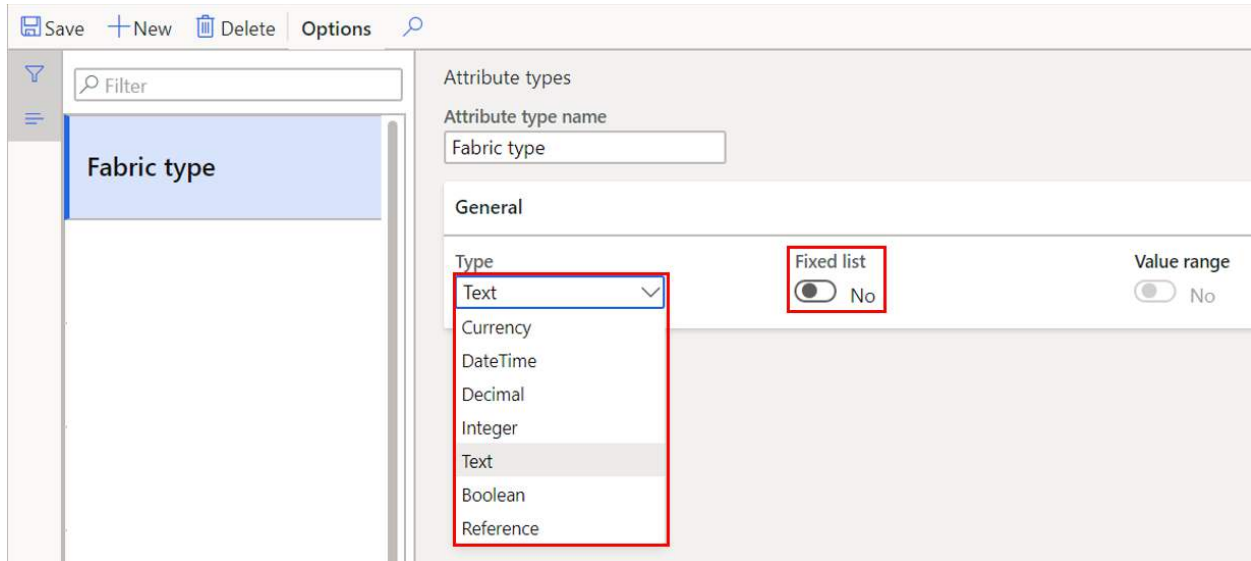
## PRODUCT ATTRIBUTES

Product attributes give the user the ability to assign user defined attributes to the product. Product attributes are assigned at the product level and are not specific to a product variant. Product attributes can be set up to accommodate multiple data types: Text, DateTime, Decimal, Integer, Boolean. Some examples are “Allergens” and “Serving size” in the case of food and for clothing there might be attributes like “Fabric type” and whether or not it is “Machine washable”. If you are using the Dynamics 365 for Commerce functionality these attributes can be exposed to the modern POS and the ecommerce site for rich customer experience.

### ATTRIBUTE TYPES

Before we can create attributes, we need to define the attribute type. Attribute type defines the data type of the attribute. While attributes type can be associated with multiple attributes, on many implementations it is easier in terms of maintenance and other aspects of reporting to create an attribute type that shares the same name as the attribute.

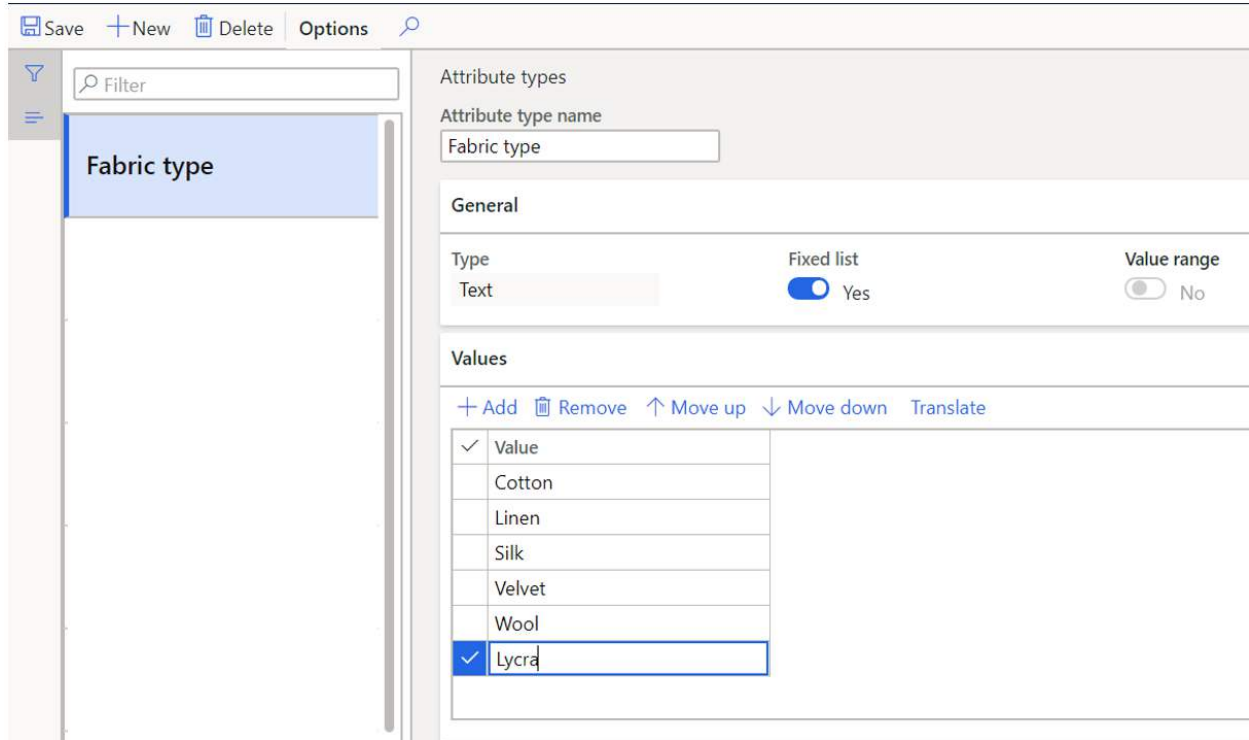
To create an attribute type, navigate to Product information management > Setup > Categories and Attributes > Attribute types. Click the “New” button to create a new attribute type. In the “Attribute type name” field give the attribute type a name. In this example I have used “Fabric type”.



- **Type** – The “Type” field lets you select the data type that this attribute will contain. For this example, I will select “Text”.
- **Fixed list** – If this field is disabled and you select the “Text” data type, the attribute will just be a free text field. If the flag is enabled the user is able to predefine the dropdown values for the field.
- **Value range** – This field is only applicable for number data types like “Currency”, “Decimal”, and “Integer”. If you enable this field, you can define an acceptable value range for the data being entered.

Because I selected the data type “Text” and enabled the “Fixed list” flag I can now define the values that be selected for this field. To add values, simply click the “Add” button and enter the values. If you want to change the order in which the values appear you can use the “Move up” or “Move down” buttons. If any of this data of these values need to appear in any other languages, you can use the “Translate” button to open the translation form where you can select the desired language and enter in the translated value.





## ATTRIBUTES

Now that we have created the attribute type, we can create the attribute and associate the attribute type to the attribute. This will tell the system that our attribute will need to display this list of values for the dropdown when the user enters the “Fabric type” for a product.

To create an attribute, navigate to Product information management > Setup > Categories and Attributes > Attributes. Click the “New” button to create the attribute. Give the attribute a “Name” which typically will just match the attribute type. Next in the “Attribute type” field we will select the attribute type that we have just created. Now this attribute can be associated with a procurement category or a retail category and we can start to assign specific attribute values for each product.



The screenshot shows the 'Options' page for the 'Fabric type' attribute. The left sidebar shows a filter for 'Fabric type'. The main area is divided into sections for attribute configuration and metadata.

**Attributes**

Name	Attribute type	Attribute modifier
Fabric type	Fabric type	Catalog

**General**

Friendly name: Fabric type

Description: [Empty text area]

Help text: [Empty text area]

**ATTRIBUTE METADATA FOR POS**

Can be refined:  No

**ATTRIBUTE METADATA FOR EXTERNAL SEARCH INDEX IMPROVEMENTS**

Searchable:  Yes

Retrievable:  Yes

Can be queried:  No

Sortable:  No

Allow multiple values:  No

Ignore case and format:  Yes

Complete match:  Yes

Mandatory:  No

Hidden:  No

After I have assigned the “Fabric type” to a procurement category I can assign a value to a specific product.

The screenshot shows the 'Product attribute values' page for the 'Fabric type' attribute. The left sidebar shows a filter for 'Fabric type' with the value 'Cotton'. The main area shows the configuration for the attribute value.

Product attribute values | S002 : Shark shirt

Name	Data type	Attribute type
Fabric type	Text	Fabric type

**Value**

Cotton

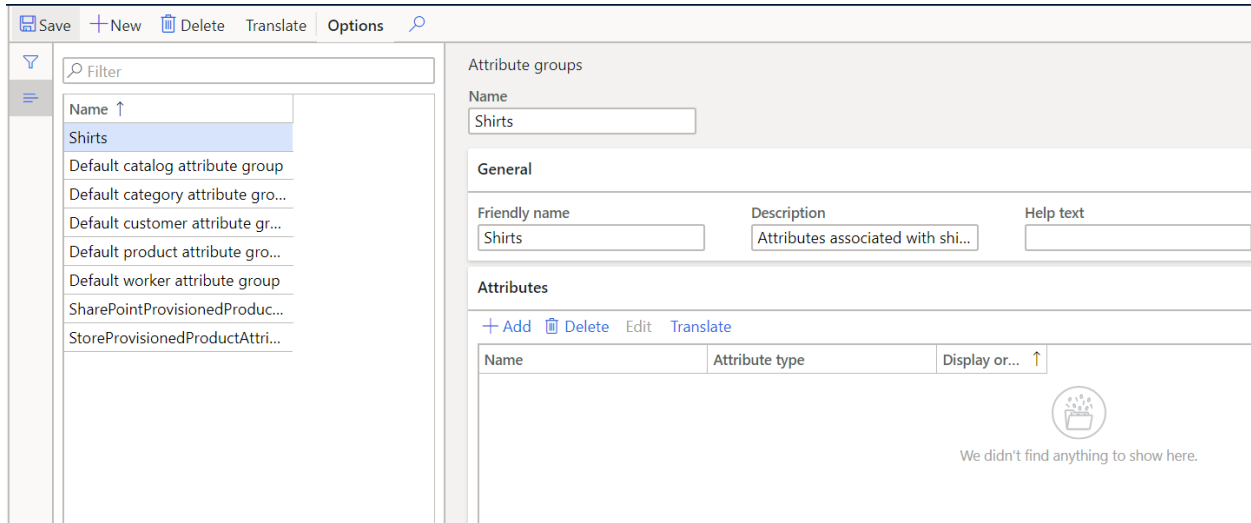
- Cotton
- Linen
- Silk
- Velvet
- Wool
- Lyra

ATTRIBUTE GROUPS



Attribute groups are only used in the retail category hierarchy. Attribute groups let you logically define sets of attributes together so that when you assign an attribute group to a category those specific attributes associated to that group are also assigned and available to products in that category.

To create a new attribute group, navigate to Product information management > Setup > Categories and Attributes > Attribute groups. You will see some system generated attribute groups; you can ignore those. To create a new attribute group, click the “New” button. In the “Name” field you can enter the name for the group. The “Friendly name” field is a user friendly name that may be more helpful than the ID. The “Description” field is a long description of the attribute group. To start adding attributes to the group click the “Add” button.



This will open a form that allows you to multi-select attributes that should be part of this attribute group. Select the attributes you want to add to the group and click the right arrow button to move the attribute(s) over to the “Selected” section and click Ok. Now the attribute group can be added to any category of the retail category hierarchy.



Attribute group attributes

Filter

AVAILABLE			
<input checked="" type="checkbox"/>	Name	Attribute type	Type
<input checked="" type="checkbox"/>	Fabric type	Fabric type	Text

→

SELECTED			
<input checked="" type="checkbox"/>	Name	Attribute type	Type
 We didn't find anything to show here.			

←

OK Cancel

PRODUCT NOMENCLATURE

When you create product variants Dynamics 365 Finance and Operations generates “Product number” IDs for each specific variant. So, you will have a product number for the base product master and then several other product numbers which represent all the different variants that have been generated for that product. Product nomenclature gives you the ability to control the way this product ID is generated to make the product number more meaningful to an end user. So, if you wanted to embed certain meaningful attributes in the generated product number for the variant, like size, color, style or even a text constant you can do that with the product nomenclature setup.

To create a new product nomenclature setup, navigate to Product information management > Setup > Product nomenclature.

Click the “New” button and give the nomenclature setup a “Name” ID and a description.

The “Segments” section is where you actually build how the sequence number will be generated.



Save + New Delete Options

Filter: siz

**Size,Color,Style**  
Product variant nomenclature

Product nomenclature

Name: Size,Color,Style    Description: Product with Size Color and S...    Type: Product variant nomenclature    Example: S0002324|Small|Red|V-Neck

Segments

Add Remove

✓	Number ↑	Type	Text	Number sequence
	1	Product master number		
	2	Text constant		
	3	Size id		
	4	Text constant		
	5	Color id		
	6	Text constant		
	7	Style id		

To add the first segment, click the “Add” button. This will display a list of all the available variables.

Segments

Add Remove

- Color id
- Color name
- Configuration id
- Configuration name
- Number sequence value
- Product master name
- Product master number
- Size id
- Size name
- Style id
- Style name
- Text constant

- Select the variable you want to use. This selection will appear in the “Type” field. If you have selected a variant variable like “Size id” or “Color id” you do not need to enter any other information because the system will simply insert the variable for that product dimension at this point in the string.
- If you selected a “Number sequence” you will need to select the specific number sequence you want the system to use when generating the ID. You will need to create the number sequence beforehand so you can select it here.
- If you selected a text constant you will need to define the constant you want to use. You can do this in the “Text” field. In the example above I used the pipe “|” as a delimiter between all my variables.

Once you have completed your nomenclature setup you will see that in the “Example” field in the top right of the form, the system shows you an example of what your variant product number will look like. In the example below we have the product master base number followed by a pipe “|” delimiter, followed by the size id, a pipe “|”, color id, another pipe “|”, and the style id.



Save + New Delete Options

Filter: siz

**Size,Color,Style**  
Product variant nomenclature

Product nomenclature

Name: Size,Color,Style    Description: Product with Size Color and S...    Type: Product variant nomenclature    Example: S0002324|Small|Red|V-Neck

Segments

Add Remove

✓	Number ↑	Type	Text	Number sequence
	1	Product master number		
	2	Text constant		
	3	Size id		
	4	Text constant		
	5	Color id		
	6	Text constant		
	7	Style id		

Now let's see where this is actually used. When you go to generate your product variants you will see this nomenclature in action later in the user guide when we create and release product variants. You can view the generated variant product numbers in Product information management > Products > Product variants or Released product variants.

Save + New Delete Product variant Engineer Plan General Options

Released product variants

Variant suggestions    Generate descriptions  
Translations    Unit conversions

Released product variants

Filter

✓	Item number ↑	Product number	Product name	Search name	Size ↑	Color ↑	Style ↑
	S0002324	S0002324 Small Red V-Neck	Kids Swimming Shark	KidsSwimmingShark	Small	Red	V-Neck

## PRODUCT LIFECYCLE STATE

Product lifecycle state is used to help identify the status or state that the product is currently in among the broader product lifecycle for your company. Each business has a slightly different product lifecycle, but the main stages are essentially the same. To give you an idea, below are some of the states I have seen:

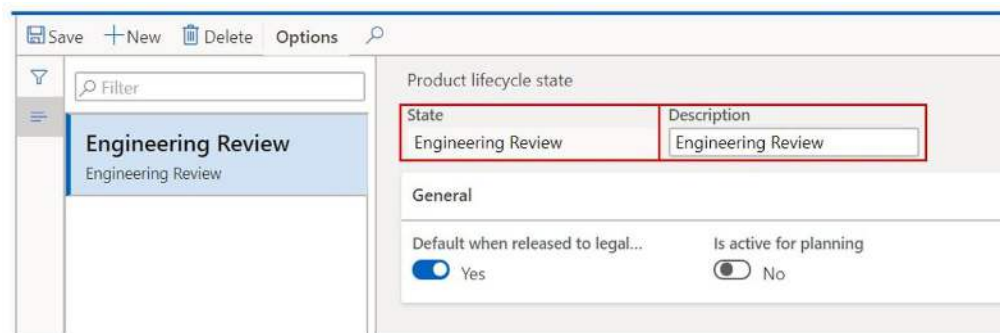
- Product development and Engineering – You may have a shell of a product where you are working out the details or engineering specifics related to the product and the product is not ready for sourcing or manufacturing.
- Pre-production – You may have trial production runs and route testing to work out the kinks of production.
- Supply Chain Review – Once the product is ready to be launched there is a supply chain review where buyers and planners will review the product setup, pricing, lead time etc. to ensure the product is ready to be sourced and entered into the production schedule.
- Active – The product is active and in manufacturing or available for master planning and sourcing.



- **Sunset** – This is a state where the product is actively being phased out. So, this is an indication to planners that the product should be sourced down to only meet existing demand and no new demand should be planned for.
- **Inactive** – This is where the product is inactive and has reached the end of the product lifecycle.

The product lifecycle state can also be applied by variant if you are using product masters. You could have a case where a certain style or configuration is going to be phased out but the line as a whole, will remain in production. If you change the product lifecycle state, you will be prompted with a dialog box asking if you want to update all the variants to the same state.

To create a lifecycle state, navigate to Product information management > Setup > Product lifecycle state. Click the “New” button and enter a “State” and a “Description”.



- **Default when released to legal entity** – There is an option to default this “State” when an item is released to the current legal entity. If you create a new released product for the current legal entity or release an item master to the current legal entity it will default to the lifecycle state that has this option selected. *Note: Only one product lifecycle state can have this option selected.*
- **Is active for planning** – There is an “Is active for planning” flag that, when enabled, will allow master planning to plan requirements for the item. If this flag is disabled master planning will ignore the item.

## BATCH ATTRIBUTES

Batch number is a unique identifier that is assigned to a given quantity of material during a production run. Batch numbers are also referred to as “Lots”, “Lot numbers”, or “Lot codes” in various industries. Batch attributes are similar to product attributes except that batch attributes are specific to each batch number. Batch attributes can be user defined and include free text fields, defined lists, Yes/No (Boolean), date, fraction, and integer. Batch attributes can be used to filter down on-hand inventory based on specific attribute values.

An example of how batch attribute can be used is to define the potency level of each specific batch because it may change slightly between production runs.

To set up a batch attribute navigate to Product information management > Setup > Categories and Attributes > Batch attributes.

Click the “New” button to create a new batch attribute. Give the attribute a unique ID and a description and select the attribute type from the drop down. In this example I have selected “Fraction” because potency is expressed as a percentage of the active ingredient.



- **Tolerance action** – Tolerance action defines what should happen when the user enters a batch value that lands outside the minimum and maximum tolerance values.
- **Minimum** – This is the minimum tolerance value for the batch attribute.
- **Maximum** – This is the maximum tolerance value for the batch attribute.
- **Increment** – This field can indicate incremental changes in the batch attribute value.
- **Target** – This is the target value that is expected for the batch attribute value.

To be able to use the batch attribute, it must be assigned to the product. That can be done from the released product form. Navigate to Product information management > Products > Released products. Click the “Product specific” button.

Item number	Product name	Search name	Product type	Product subtype	Product service type
S001	Sample Product	SampleProduct	Item	Product	Not specified

Next click the “New” button to add the attribute. In the “Attribute code” field the “Table” option allows you to assign a single batch attribute to the product, the “Group” option allows you to assign a batch attribute group that can have multiple batch attributes, and the “All” option allows you to assign all batch attributes to this product.





Now I can go to a batch number that is associated to this product by navigating to Inventory management > Inquiries and reports > Tracking dimensions > Batches. Click the “Inventory batch attributes” button.

This takes us to the batch attribute value form. Click the “Load item attributes” button. The batch attributes that you associated to the product will appear in this form and you will be able to specify an attribute value for each of the batch attributes.

Attribute	Minimum	Maximum	Target	Attribute value	Quality order
Potency	0.7500	1.0000	0.9500	0.8900	

Now you can use the “Search inventory” button to search for inventory based on batch attribute values.

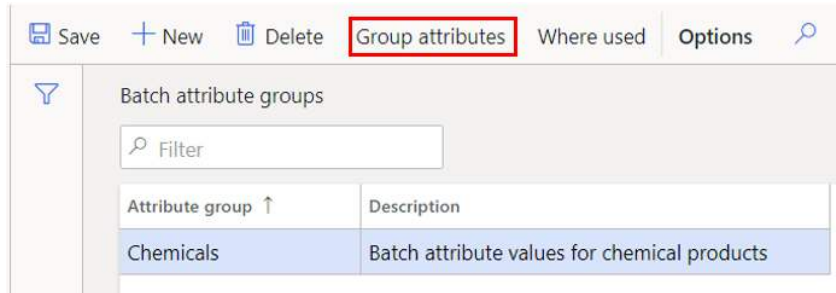
Item number	Product name	Search name	Product type	Product subtype	Product service type
S001	Sample Product	SampleProduct	Item	Product	Not specified

BATCH ATTRIBUTE GROUP

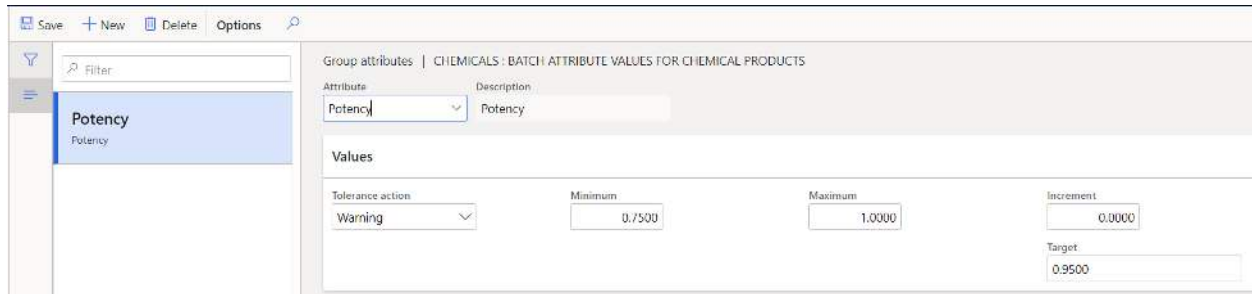


Batch attribute groups can be used to logically group together batch attributes so that when you go to assign batch attributes to products you don't need to select each individual batch attribute you can just select the group which will contain multiple batch attributes associated with the group.

To create a new batch attribute group, navigate to Product information management > Setup > Categories and Attributes > Batch attribute groups. Click the "New" button and give the attribute group an ID and a description. Click the "Group attributes" button to associate the batch attributes to the batch attribute group.



To add attributes to the group, click the "New" button and select the attribute in the "Attribute" field. Continue this process until you have added all the applicable attributes.



## REGULATED PRODUCTS REGIONAL LISTS

A regulated product is a product that is regulated by a government agency and may require specific reporting. Some products are reported products that may require certain reports about the usage of that product to be sent to certain regional or national authorities. In D365 you can create different types of lists for different reporting requirements and associate products to those lists. The lists can be by country region or down to the state/provincial level. Some products may be regulated but not require reporting and others may be regulated and require reporting.

To create a regulated products region list, navigate to Product information management > Product compliance > Regulated products region lists. Click the "New" button to create a new list.

- **Country/region** – This is the country that this list applies to.
- **Name** – This field will be automatically be populated based on the country/region selected.
- **State/Province** – If the list is specific to a state or a province, you can select that in this field.
- **Reported** – If this flag is left blank the "Regulated products" button will become enabled indicating that products underneath this list are regulated but not reported.
- **List ID** – This field will be enabled only when the "Reported" flag is enabled. This field is the unique identifier for the list.



- **Description** - This field is also only enabled when the “Reported” flag is enabled. This field allows you to add a more detailed description to the list.

To associate products to the regulated product list, click the “Regulated products” button.

Country/region	Name	State/province	Reported	List ID ↑	Description
USA	United States	TX	<input type="checkbox"/>		

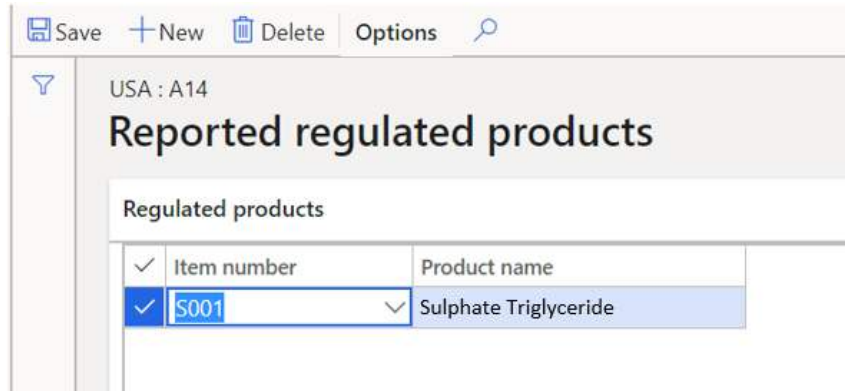
Click the “New” button to add products to the list.

Item number	Product name
✓ S001	Sulphate Triglyceride

If you have created a “Reported” regulated product list, you can add products by clicking the “Reported regulated products” button.

Country/region	Name	State/province	Reported	List ID ↑	Description
USA	United States	TX	<input checked="" type="checkbox"/>	A14	A14 Products
USA	United States	TX	<input type="checkbox"/>		

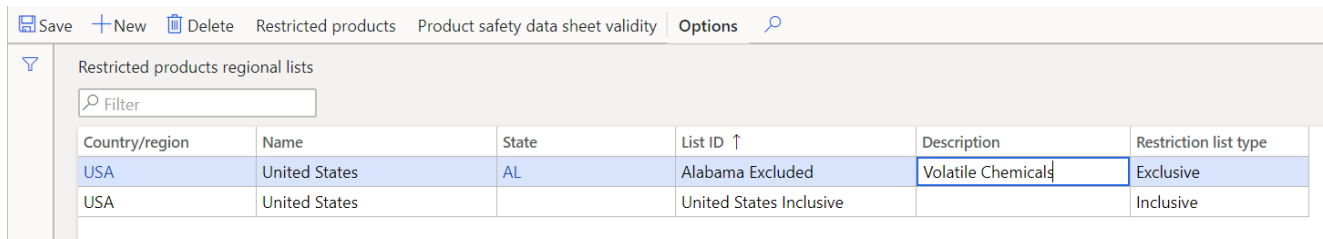
Click the “New” button to add products to the reported regulated products list.



### RESTRICTED PRODUCTS REGIONAL LISTS

Restricted products regional lists are used to prevent shipping certain restricted products to countries, states, or provinces where they are not allowed. There are two different types of lists. One is an “Inclusive” list and one is an “Exclusive” list. The “Exclusive” list where you define the products that are excluded from the country and/or the state/province. Once the products are added to the excluded list users will receive an error if that product is placed on a sales order where the delivery address state and country matches the exclusive list. The “Inclusive” list is required prior to creating an exclusive list.

To create a restricted product list, navigate to Product information > Setup > Product compliance > Restricted products regional lists. Click the “New” button to create a new list.



- **Country/region** – Select the country code that the
- **Name** – This field will be automatically populated based on the “Country/region” selection.
- **State** – The state field can be selected to further define which states/provinces in which these products are not allowed.
- **Description** – This field is used to give a more user friendly description of the list.
- **Restriction type** – This field indicates if the list is an “Inclusive” or “Exclusive” list.

To add products to the “Exclusive” list click the “Restricted products” button in the ribbon. In the “Restricted products” form click the “New” button to add that product to the excluded list.



Save + New Delete Options

USA : ALABAMA EXCLUDED

### Restricted products

Restricted products

Item number	Product name
S001	Sulphate Triglyceride

---

Region and reporting list

RESTRICTION LISTS	Restriction list type	REGION	Name
List ID	Exclusive	Country/region	United States
Alabama Excluded	Description	USA	State
	Volatile Chemicals		AL

When the excluded product is added to a sales order the user will receive the error below.

⊗ Product 'S001' is restricted for sale to the delivery address on the sales line. Change the address or the product.

### PRODUCT SAFETY DATA SHEET VALIDITY

A product safety data sheet (PSDS) is a brochure that contains handling, emergency, and other related information about the product. For example, the flash point, or boiling point of a substance. Typically, chemical, and pharmaceutical manufacturers will keep product safety data sheets for all applicable raw materials and finished products. When the PSDS expires or is revised the manufacturer must communicate those revisions to the customer or vendor. The product safety data sheet validity form allows the user to specify a validity period and expiration advice period for each country or region. The default record will be based on the settings in the “Inventory management” parameters in the “Compliance” tab.

To create a new product safety data sheet validity record, navigate to Product information management > Setup > Product compliance > Product safety data sheet validity. Click the “New” button and enter the fields below.



Product safety data sheet validity

Standard view ∨

Filter

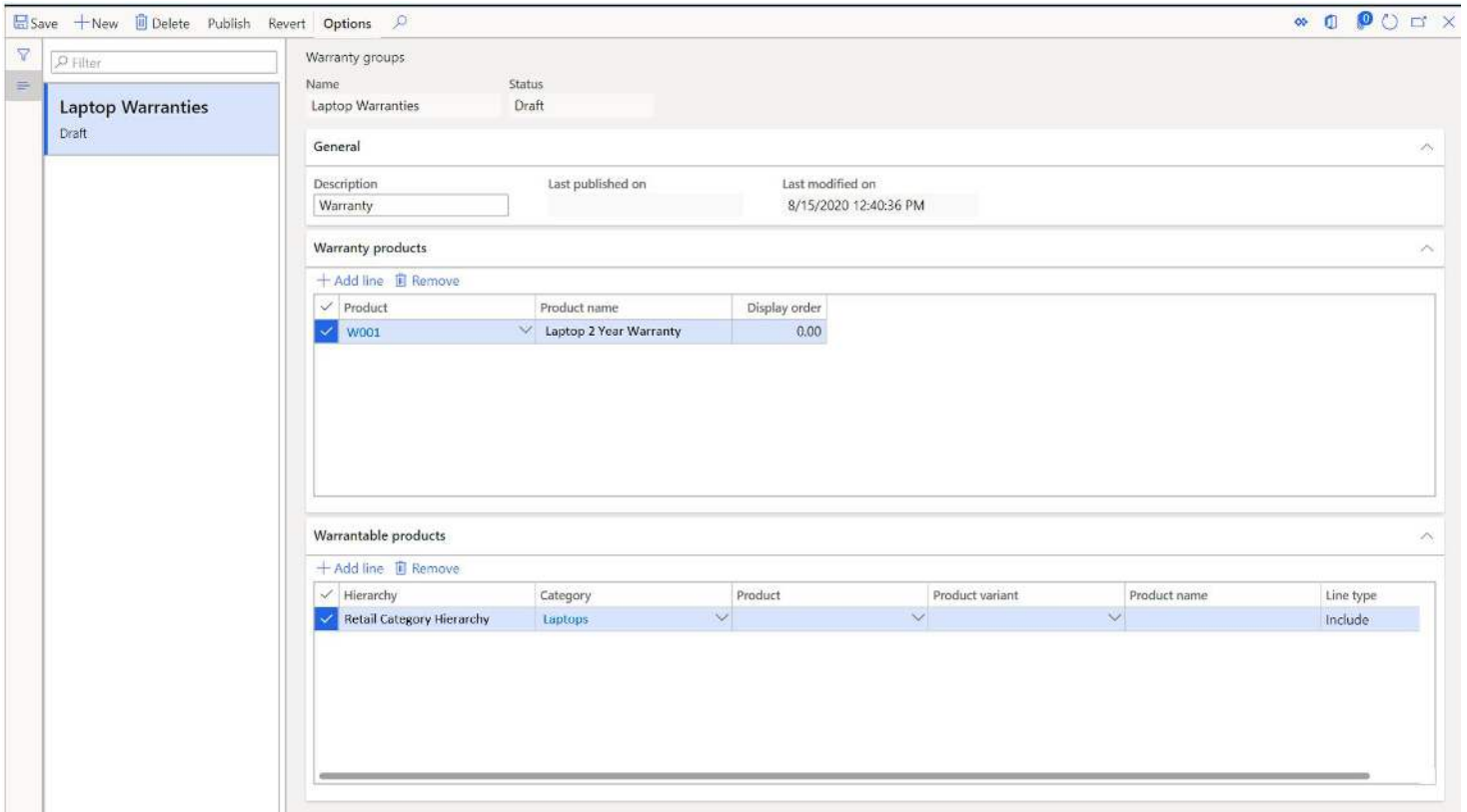
	Country/region <span>↑</span>	Short name	Validity in days	Expiry advice in days	No versions
	USA	United States	30	7	<input type="checkbox"/>

- **Country/region** – This indicates country or region that the expiration and advice settings apply for.
- **Short name** – This field will automatically default based on the country region selection.
- **Validity in days** – This is the number of days for which a product safety data sheet is valid starting from the approval date.
- **Expiry advice in days** – This is the number of days of advance notice before the product safety data sheet expiry date.

## WARRANTY GROUPS

Warranty functionality is only available when utilizing the retail, also known as “Commerce,” features in Dynamics 365 Finance and Operations. If you are not using retail or commerce functionality this section will not apply. The warranty functionality in D365 allows you to sell warranties associated with specific products, product variants, or entire categories of products. The functionality at the time this user guide is being written is limited only to the sales of a warranty item at the point of sale system. The warranty group allows you to define which warranty items a user is prompted to up-sell at the modern point of sale system (MPOS) for specific products.

To create a warranty group, navigate to Product information management > Setup > Warranty > Warranty groups. To create a new warranty group, click the “New” button and give the warranty group a “Name” and “Description.”



In the “Warranty products” fast tab, click the “Add line” button to add in each warranty service item that you want the user to be prompted to sell for the products selected in the “Warrantable products” fast tab.

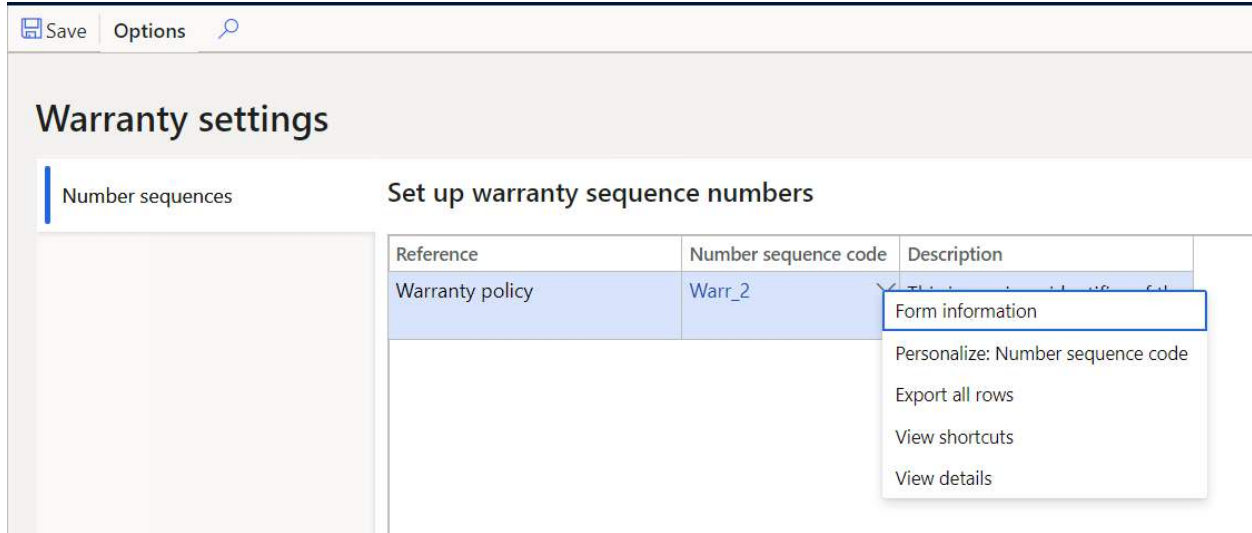
In the “Warrantable products” section we are defining which product should we sell a warranty for. You can get as broad or as granular as you want here, and you can use the “Line type” field to include or exclude specific products, variants, or entire categories from being a warrantable product. Click the “Add line” button to add a warrantable product line and then depending on how granular or broad your criteria is you can fill in the “Category” field, the “Product” field, or the “Product” and “Product variant” fields. Make sure you indicate on the “Line type” that your selection should be included or excluded. Typically, your inclusion rule is broader and then your exclusion rule which will exclude outlying products that should not be under warranty.

Once you are finished click the “Publish” button at the top to make the changes take effect.

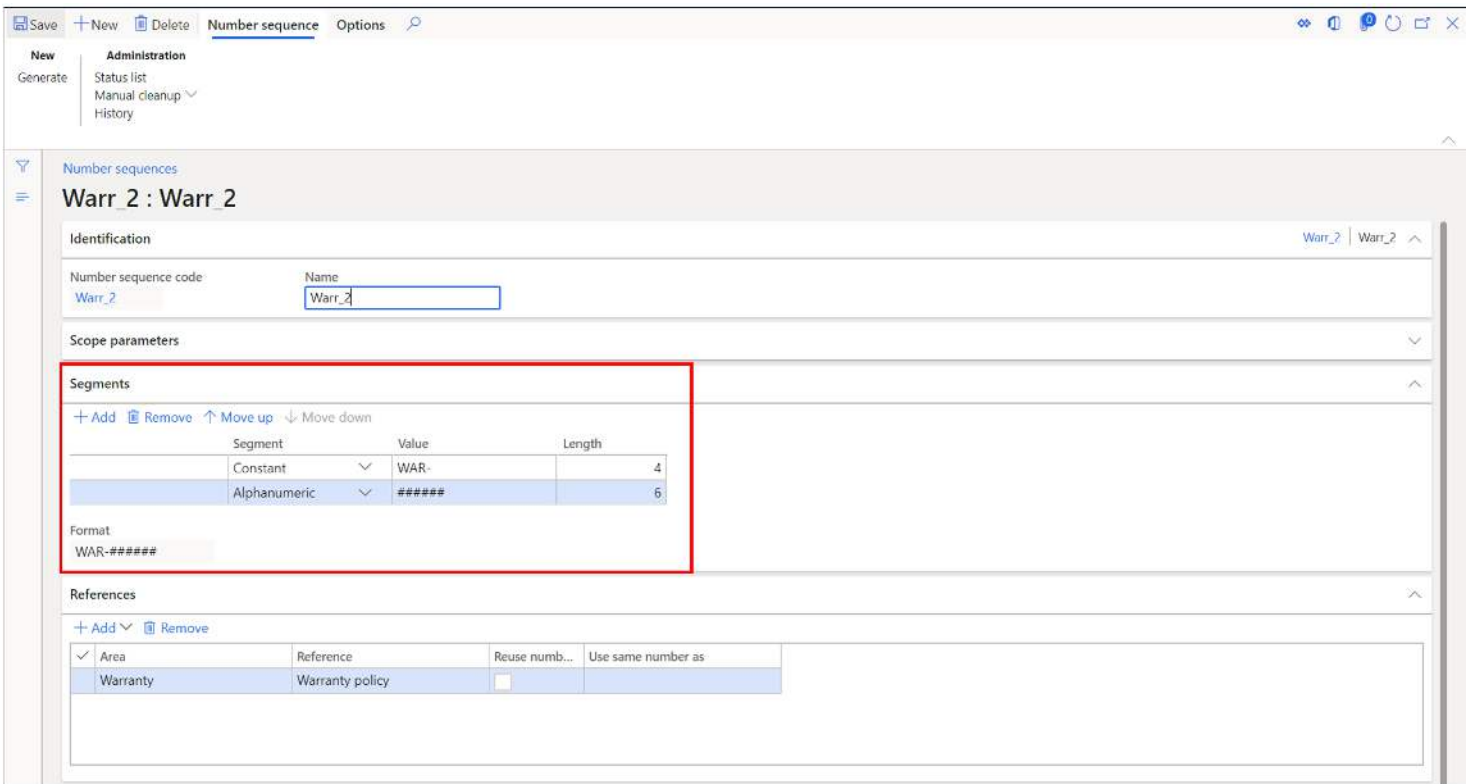
## WARRANTY SETTINGS

Warranty settings are a piece of the setup required to process the warranty transaction. This is just a number sequence that must be defined. If you have run the number sequence wizard and you are fine with the system generated number sequence you do not need to worry about this. However, if you would like to change the sequence you can do that here.

Navigate to Product information management > Setup > Warranty > Warranty settings. Right click on the down arrow for the number sequence code and click the “View details” option.



You can change the number sequence by changing the “Constant” and “Alphanumeric” segments in the “Segments” fast tab of the form. In this example I have changed the prefix to be “WAR-” and the “Alphanumeric” to be six number characters that will increment.



## CREATE A PRODUCT MASTER AND RELEASE A PRODUCT VARIANTS

In this section we will take the setups we have discussed earlier and see where they are incorporated in the overall product setup. This section will go through the entire end to end flow of creating and releasing a product to a legal entity. Depending on your unique business requirements you may or may not use all the features and functionality



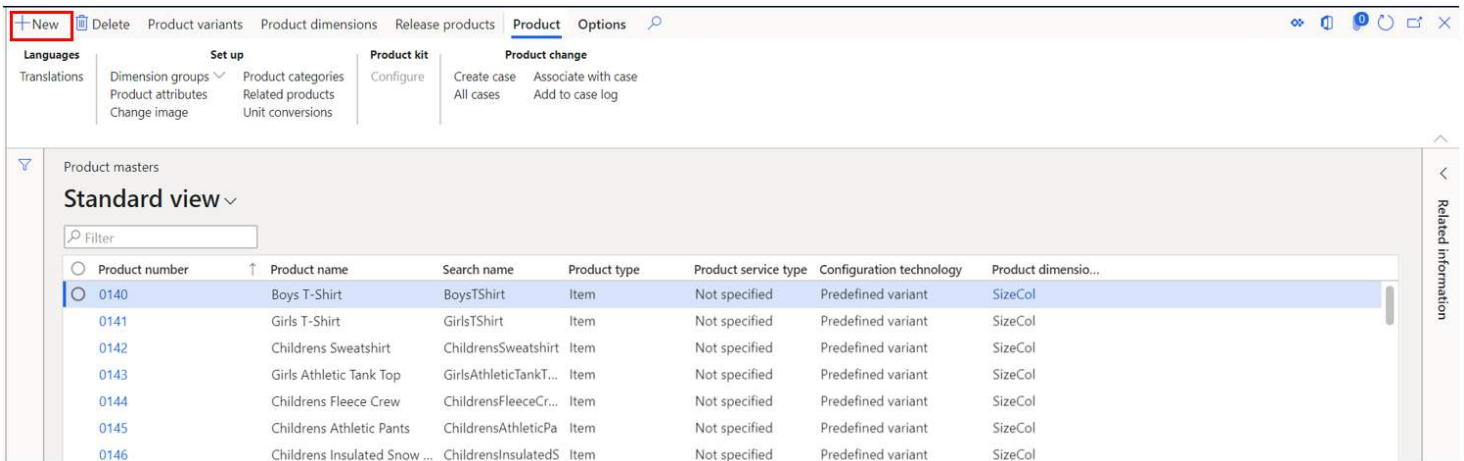


described and demonstrated, but the intent is to inform you of all the options available. The example I will use is a product master that will have several product variants for color, style, and size. If you are not using the product variant functionality the same process applies except you will not need to create any product variants only release the product to the desired legal entity.

### CREATE A PRODUCT MASTER

If you recall the core concepts section, a product master is functional product representation that is the basis for configuring product variants. You can think of a product master like a shell of a product under which all the variant combinations of the product will be created.

To create a product master, navigate to Product information management > Products > Product masters. This will bring you to the product masters list page which shows all product masters in the system. Keep in mind the “Product masters”, and “Products” form are not legal entity specific so here we are seeing product masters from all legal entities.



To create a new product master, click the “New” button. This will trigger a fly out form where you can enter in the product master details.





- **Product name** – This is the official product name. This is not meant to be a long description of the product.
- **Search name** – This field will be automatically populated based on the product name. This field is used as a secondary search field that eliminates space characters.
- **Retail category** – This field allow you to select the category of the retail category hierarchy that this product is associated to. If you are not using the retail functionality you can leave this field blank.
- **Product kit** – This flag is used to turn on the retail kit functionality for the item. A retail kit allows you to bundle multiple items into a sellable kit that can priced and sold together. Kits can be assembled and disassembled into their individual components. The kit functionality is not to be confused with the bill of material functionality in D365.
- **Product dimension group** – The product dimension group defines which product dimensions will be enabled for the product.
- **Configuration technology** – Defines how product variants are created. There are three configuration technologies:
  - **Predefined variant** – This is by far the most common variant technology. If you are unsure about which to use, the odds are that it's this one. The predefined variant option enables the product to be modeled based on the product dimensions style, color, configuration, and size. Any combinations of the product dimensions are allowed under this configuration technology. This configuration technology is used when you know the variants beforehand.
  - **Dimension-based configuration** - This configuration technology is used in manufacturing settings. An example might be a company that sells multiple sound systems that are produced in the same manner. These systems offer various features that are interchangeable, for example, different color and size and subwoofer models. When the sales order taker selects dimension configurations, they only have to set up one product for the sound system, and they can still provide the available combinations.
  - **Constraint based configuration** – Constraint based configuration technology allows you to create complex rules and constraints that can be applied to output new product variants based on attribute selection on a sales order. This technology is most often used in make to order scenarios (MTO) where the order taker is selecting custom features and attributes to a product based on specific rules and logic. The output of those selections could be a new variation of the product.
- **Catch weight** – Catch weight is a concept used in industries that invoice and sell in a weight unit of measure such as pounds, ounces, or kilograms but handle the product in typical warehouse units of measure like each, case, and pallets. Setting this flag to “Yes” will enable catch weight functionality which is integrated throughout the system including a number of advanced warehouse processes.





The screenshot shows the 'Product details' page for 'S002 : Great White Shark T-Shirt'. The interface is divided into several sections:

- General:** Includes fields for Product number (S002), Product name (Great White Shark T-Shirt), Search name (GreatWhiteSharkTShir), and Description (Great White Shark T-Shirt with glow in the dark ink).
- ADMINISTRATION:** Includes Product dimension group (SCS), Storage dimension group (Ware), and Tracking dimension group (None).
- VARIANTS:** Includes Color group (BASIC), Style group, and Size group.
- PRODUCT VARIANTS:** Includes Configuration technology (Predefined variant), Allow identical configurations (No), Generate variants automatically (No), Enable unit of measure conversion (Yes), Use number nomenclature (Yes), Product variant number nomenclature (ColorSizeStyle), Use name nomenclature (No), and Product variant name nomenclature.
- WAREHOUSE:** Includes NATIONAL MOTOR FREIGHT CLASSIFICATION (NMFC code) and ADDITIONAL CODES (STCC code, Harmonized system).

- **Description** – The description field is where you can put a long form description of the product.
- **Color, Style and Size groups** – As we saw in the “Product Dimension Groups” section of this user guide, these color, style, and size groups allow you to define groups of dimension values for each dimension group and automatically assign those values to the product without having to re-create those dimension values each time you create a new product. In the example shown here I have selected the “BASIC” color group which contains a set of 8 colors already pre-defined.

The screenshot shows the 'Color groups' page for 'BASIC'. It displays a table of 'Color group lines' with the following data:

Color	Color name	Replenishme...	Number in b...	Display order
Black		3	1	1.00
Blue		2	7	2.00
Green		2	6	3.00
Magenta		1	4	4.00
Purple		1	8	5.00
Red		2	3	6.00
White		3	2	7.00
Yellow		1	5	8.00

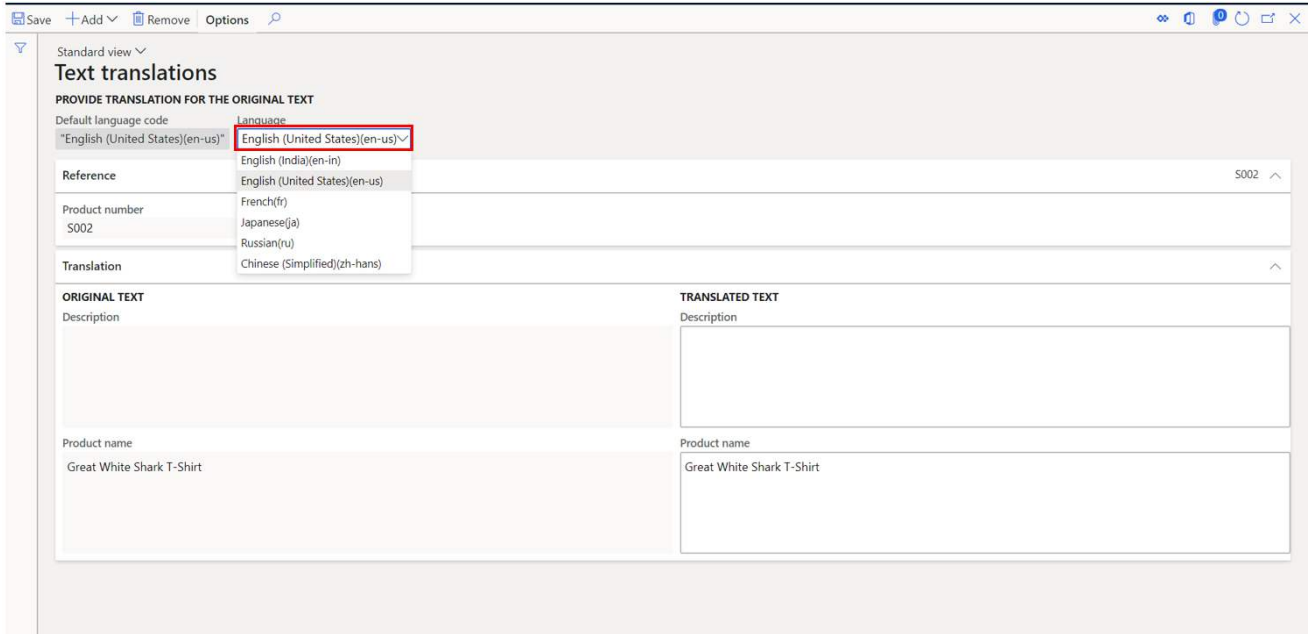


- **Allow identical configurations** - For a dimension-base configuration product master, you can select this option to create product variants that are identical to existing product variants. There may be cases where you are working with completely unique items like diamonds that you need to create new variant that is identical to an existing variant.
- **Generate variants automatically** - This option allows you to generate new product variants when a product dimension value is created for a product master. This functionality can only be used with product masters with the predefined variant and dimension-based configuration selected.
- **Enable unit of measure conversion** – This option allows for variant specific unit conversions. There may be cases where for larger or smaller sized variants you may have differing unit conversions that could dictate how items are handled in the warehouse. For example, there may be 100 extra small shirts that come in a case but only 96 extra-large shirts that come in a case. This feature enables configuring unit conversions for each product variant.
- **Use number nomenclature** – Setting this flag to “Yes” will enable the “Product variant number nomenclature” field which is where you can define which nomenclature you want the system to use when generating the variant numbers for each product variant.
- **Product variant number nomenclature** – This is where you can define which nomenclature you want the system to use when generating the variant numbers for each product variant.
- **Use name nomenclature** – Similar to the variant number nomenclature functionality, you can apply a nomenclature to the system generated variant name. Setting this flag to “Yes” will enable the “Product variant name nomenclature” field where you can select the nomenclature you would like the system to use when generating the variant names.
- **Product variant name nomenclature** - This is where you can define which nomenclature you want the system to use when generating the variant names for each product variant.
- **NMFC Code** – This is the National Motor Freight Code. This field is a standardized classification for the type of freight this item would fall into. This field is required to generate a bill of lading document.
- **STCC Code** – This is a seven digit numeric code representing 38 commodity groupings. Assignment of a STCC Code is associated by a commodity description developed to conform with exact descriptions in freight transportation classifications of rail and motor carriers.
- **Harmonized system** – HTS is based on the international Harmonized System, which is the global system of nomenclature applied to most world trade in goods. HTS codes are statistical categories for all merchandise imported into the United States.

At the top of the form in the ribbon section in the “Product” tab there are a number of buttons. In this section we will go through each button before we continue with the product creation process.

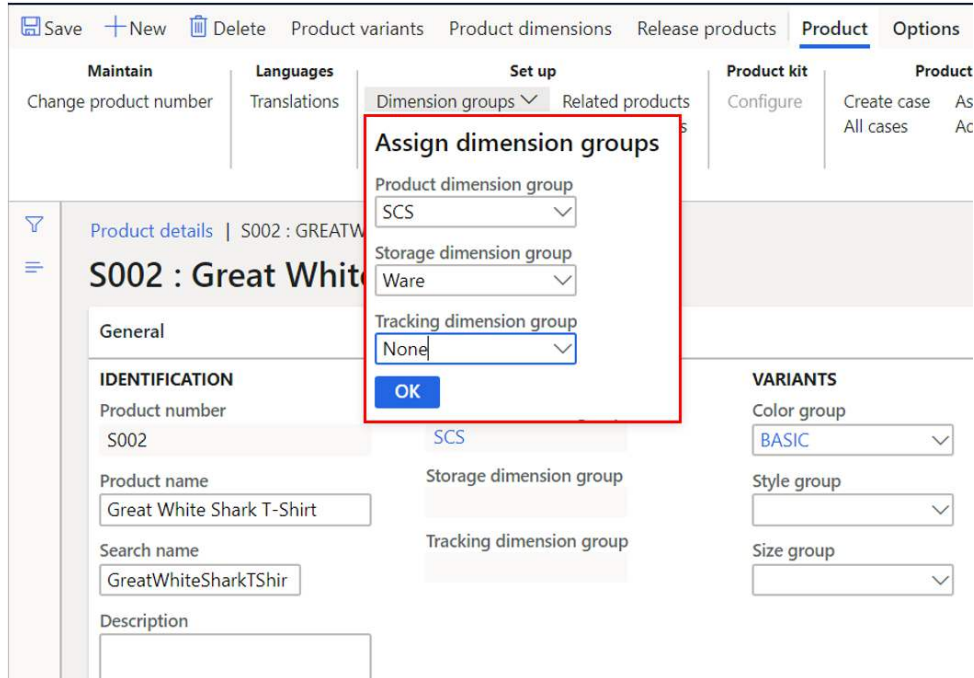


- **Change product number** – There may be a rare scenario where you need to change the product number. This button allows you to change the product number ID. This should be used with caution because there may be downstream implications to changing a product number from the original.
- **Translations** – If you need to display your product name and description in various languages, you can use the translation form to do that. Click the “Language” dropdown and select the language you wish to enter the translation for. You can enter the translated product name in the “Product name” field and enter the translated description in the “Description” field.

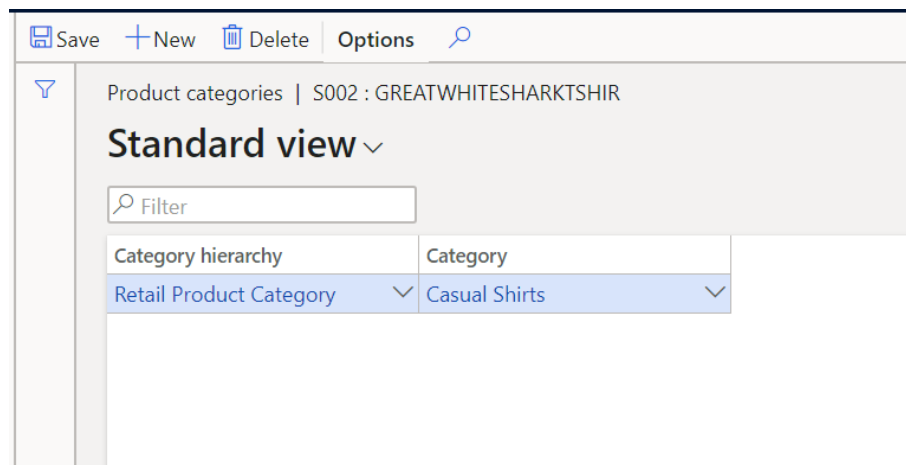


- **Dimension groups** – The “Dimension groups” button allows you to select the product dimension groups for the three types of product dimension groups: Product, Storage, and Tracking.
  - **Product dimension group** – As we saw in the “Product dimension groups” section of this user guide, the product dimension group activates specific product dimensions.
  - **Storage dimension group** – As we saw in the “Product dimension groups” section of this user guide, the storage dimension group determines which inventory dimensions will be used with the item for various inventory transactions.
  - **Tracking dimension group** – As we saw in the “Product dimension groups” section of this user guide, the tracking dimension group defines which, if any, tracking dimensions (serial number, batch number) will be used in inventory transactions.

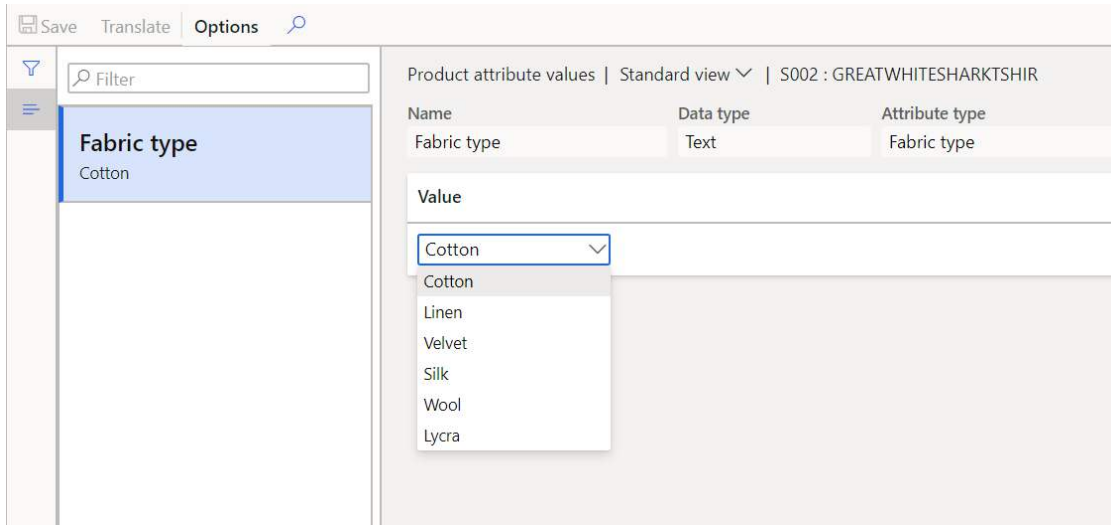




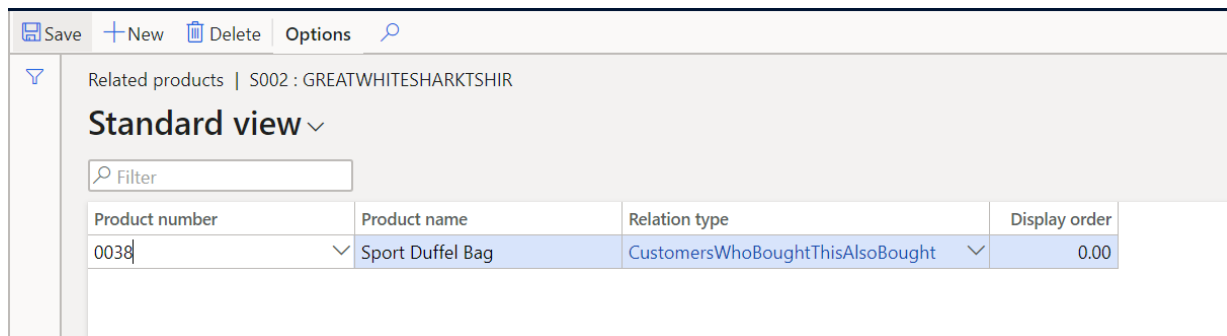
- Product categories** – This button will take you to a form where you can assign categories related to different category hierarchies to the product. Click the “New” button and select the category hierarchy in the “Category hierarchy” field and then in the “Category” field select the category this product belongs to. In this case I added my product to the retail category hierarchy in the casual shirts category.



- Product attributes** – If the product category has product attributes associated with it, I can select product attribute values for the product. As you can see, I can now select one of the attribute values we set up in the “Product attribute”.



- Related products** – Related products is a retail related functionality that allows you to associate related products to the current product. This could be things like a life vest associated with a canoe. Click the “New” button and select the related product and relationship type.



- Unit conversions** – Clicking the “Unit conversion” button will bring you to the product specific unit conversion form. This form allows you to enter the unit conversions between the different handling units of measure like each, case, and pallet. Unit conversions are required setup for an advanced warehouse enabled products. There are two types of conversions: inter-class conversions and intra-class conversions. Inter-class conversions are for unit conversions between units of measure of the same class. For example, each and case are both quantity units of measure as opposed to kilograms to case which is a mass to a quantity unit of measure. Intra-class conversions are for the latter example where you are converting between unit of measure classes. To create a new unit conversion record, click the “New” button and enter the conversion.



Options

S002 : GREATWHITESHARKTSHIR | Standard view

## Unit conversions

Standard conversions

Intra-class conversions

Inter-class conversions

**Set up product-specific conversion rules for units of measure in the same unit class**

+ New   Edit   Delete Calculator for units

Product	Definition	From unit	To unit	Rounding
S002	1 PL = 300 ea	PL	ea	To nearest
S002	1 PL = 30 Case	PL	Case	To nearest
S002	1 Case = 100 ea	Case	ea	To nearest

- **Create case** – The case management framework is pervasive in the D365 application. Cases can be raised to document certain issues, tasks, or changes in certain areas of the business. In the context of a product, a case may be raised for an engineering change or some other material change in the product. Clicking the “Create case” button will associate a case record with the product where the change, task, or activity can be tracked in an organized manner.
- **All cases** – This button will take you to all cases associated with the product.
- **Associated with a case** – This button will allow you to associate a case with an existing case. For example, if there was an existing case associated with a customer complaint, it may be helpful to allow associate the case with the product that was the impetus for the customer complaint.
- **Add to a case log** – A case log is basically the activities that occurred within the case. This allows you to associate a product with the case log for posterity.

At this point we have created the product master but have not yet created any variants and have not released any products or variants to any legal entity. In the next section we will continue with the product variant creation and release process.

## CREATE PRODUCT VARIANTS

The next step in the process is to create our product variants by defining our product dimension values. To do this click the “Product dimensions” button.



Save + New Delete Product variants **Product dimensions** Release products Product Options

Maintain Languages Set up Product kit Product change

Change product number Translations Dimension groups Product attributes Product categories Related products Unit conversions Configure Create case All cases Associate with case Add to case log

Product details | S002 : GREATWHITESHARKTSHIR | Standard view

### S002 : Great White Shark T-Shirt

General S002

<b>IDENTIFICATION</b> Product number S002 Product name Great White Shark T-Shirt Search name GreatWhiteSharkTShir Description Great White Shark T-Shirt with glow in the dark ink	<b>ADMINISTRATION</b> Product dimension group SCS Storage dimension group Ware Tracking dimension group None	<b>VARIANTS</b> Color group BASIC Style group  Size group  	<b>PRODUCT VARIANTS</b> Configuration technology Predefined variant Allow identical configurations <input type="radio"/> No Generate variants automatically <input type="radio"/> No Enable unit of measure conver... <input checked="" type="checkbox"/> Yes Use number nomenclature <input checked="" type="checkbox"/> Yes Product variant number nomencl... ColorSizeStyle Use name nomenclature <input type="radio"/> No Product variant name nomenclat...	<b>CATCH WEIGHT</b> CW product <input checked="" type="radio"/> No
---	--	--	--	--

Warehouse

<b>NATIONAL MOTOR FREIGHT CLASSIFICATION</b> NMFC code 	<b>ADDITIONAL CODES</b> STCC code Harmonized system
---	---

The tabs on the left side of the form will depend on which product dimension group you selected for your product. In my case my product dimension group has the size, colors, and styles dimensions active. In each tab you will enter the applicable dimension values of each product dimension. You can see that the “Colors” tab already has dimensions values pre-defined. This is because I selected the “BASIC” color group which already had these colors pre-defined. You can add additional dimension values if needed by clicking the “New” button. Now you can continue with the remaining tabs and add the applicable dimension values under each dimension.

Save Options

S002 : GREATWHITESHARKTSHIR | Standard view

### Product dimensions

Sizes

Define sizes for a product master

+ New Delete Translations

Size ↑	Name	Description	Replenishme...	Display or... ↑
<input checked="" type="checkbox"/> S	Small	Small	0	1.00
<input type="checkbox"/> M	Medium	Medium	0	2.00
<input type="checkbox"/> L	Large	Large	0	3.00



Save Options

S002 : GREATWHITESHARKTSHIR | Standard view

### Product dimensions

Sizes

Colors

Define colors for a product master

+ New Delete Translations

Color ↑	Name	Description	Replenishme...	Display or... ↑
<input type="checkbox"/>	Black	Black	3	1.00
<input type="checkbox"/>	Blue	Blue	2	2.00
<input type="checkbox"/>	Green	Green	2	3.00
<input type="checkbox"/>	Magenta	Green	1	4.00
<input type="checkbox"/>	Purple	Purple	1	5.00
<input type="checkbox"/>	Red	Red	2	6.00
<input type="checkbox"/>	White	White	3	7.00
<input checked="" type="checkbox"/>	Yellow	Yellow	1	8.00

Styles

Save Options

S002 : GREATWHITESHARKTSHIR | Standard view

### Product dimensions

Sizes

Colors

Styles

Define styles for a product master

+ New Delete Translations

Style ↑	Name	Description	Replenishme...	Display or... ↑
<input type="checkbox"/>	Modern	Modern	0	0.00
<input checked="" type="checkbox"/>	Retro	Retro	0	0.00

Once you have all of the dimension values defined close the form and back on the product master form you can click on the “Product variants” button where we can have the system automatically generate the product variants based on the dimensions values we have defined.



On the product variants form we can see that we have not yet created any product variants. You can create the variants manually but typically there are multiple combinations of variants which can make creating variants manually a very tedious task. Instead if we want the system to do it, we can click the “Variant suggestions” button.

The system will take all the possible variant combinations based on the dimensions and dimension values that we set up above. If you want all the possible variants to be created, simply click the “Select all” button to select all the variants and click the “Create” button to create the variants. If you do not want to create them all you can manually select or deselect any variant.



Variant suggestions

Select	Product number	Product name	Search name	Size	Color	Style
<input checked="" type="checkbox"/>	Black[S]Modern	Great White Shark T-Shirt	GreatWhiteSharkTshir	S	Black	Modern
<input type="checkbox"/>	Black[S]Retro	Great White Shark T-Shirt	GreatWhiteSharkTshir	S	Black	Retro
<input type="checkbox"/>	Blue[S]Modern	Great White Shark T-Shirt	GreatWhiteSharkTshir	S	Blue	Modern
<input type="checkbox"/>	Blue[S]Retro	Great White Shark T-Shirt	GreatWhiteSharkTshir	S	Blue	Retro
<input type="checkbox"/>	Green[S]Modern	Great White Shark T-Shirt	GreatWhiteSharkTshir	S	Green	Modern
<input type="checkbox"/>	Green[S]Retro	Great White Shark T-Shirt	GreatWhiteSharkTshir	S	Green	Retro
<input type="checkbox"/>	Magenta[S]Modern	Great White Shark T-Shirt	GreatWhiteSharkTshir	S	Magenta	Modern
<input type="checkbox"/>	Magenta[S]Retro	Great White Shark T-Shirt	GreatWhiteSharkTshir	S	Magenta	Retro
<input type="checkbox"/>	Purple[S]Modern	Great White Shark T-Shirt	GreatWhiteSharkTshir	S	Purple	Modern
<input type="checkbox"/>	Purple[S]Retro	Great White Shark T-Shirt	GreatWhiteSharkTshir	S	Purple	Retro
<input type="checkbox"/>	Red[S]Modern	Great White Shark T-Shirt	GreatWhiteSharkTshir	S	Red	Modern
<input type="checkbox"/>	Red[S]Retro	Great White Shark T-Shirt	GreatWhiteSharkTshir	S	Red	Retro
<input type="checkbox"/>	White[S]Modern	Great White Shark T-Shirt	GreatWhiteSharkTshir	S	White	Modern
<input type="checkbox"/>	White[S]Retro	Great White Shark T-Shirt	GreatWhiteSharkTshir	S	White	Retro
<input type="checkbox"/>	Yellow[S]Modern	Great White Shark T-Shirt	GreatWhiteSharkTshir	S	Yellow	Modern
<input type="checkbox"/>	Yellow[S]Retro	Great White Shark T-Shirt	GreatWhiteSharkTshir	S	Yellow	Retro
<input type="checkbox"/>	Black[M]Modern	Great White Shark T-Shirt	GreatWhiteSharkTshir	M	Black	Modern
<input type="checkbox"/>	Black[M]Retro	Great White Shark T-Shirt	GreatWhiteSharkTshir	M	Black	Retro
<input type="checkbox"/>	Blue[M]Modern	Great White Shark T-Shirt	GreatWhiteSharkTshir	M	Blue	Modern
<input type="checkbox"/>	Blue[M]Retro	Great White Shark T-Shirt	GreatWhiteSharkTshir	M	Blue	Retro
<input type="checkbox"/>	Green[M]Modern	Great White Shark T-Shirt	GreatWhiteSharkTshir	M	Green	Modern
<input type="checkbox"/>	Green[M]Retro	Great White Shark T-Shirt	GreatWhiteSharkTshir	M	Green	Retro
<input type="checkbox"/>	Magenta[M]Modern	Great White Shark T-Shirt	GreatWhiteSharkTshir	M	Magenta	Modern
<input type="checkbox"/>	Magenta[M]Retro	Great White Shark T-Shirt	GreatWhiteSharkTshir	M	Magenta	Retro
<input type="checkbox"/>	Purple[M]Modern	Great White Shark T-Shirt	GreatWhiteSharkTshir	M	Purple	Modern
<input type="checkbox"/>	Purple[M]Retro	Great White Shark T-Shirt	GreatWhiteSharkTshir	M	Purple	Retro
<input type="checkbox"/>	Red[M]Modern	Great White Shark T-Shirt	GreatWhiteSharkTshir	M	Red	Modern
<input type="checkbox"/>	Red[M]Retro	Great White Shark T-Shirt	GreatWhiteSharkTshir	M	Red	Retro
<input type="checkbox"/>	White[M]Modern	Great White Shark T-Shirt	GreatWhiteSharkTshir	M	White	Modern
<input type="checkbox"/>	White[M]Retro	Great White Shark T-Shirt	GreatWhiteSharkTshir	M	White	Retro
<input type="checkbox"/>	Yellow[M]Modern	Great White Shark T-Shirt	GreatWhiteSharkTshir	M	Yellow	Modern
<input type="checkbox"/>	Yellow[M]Retro	Great White Shark T-Shirt	GreatWhiteSharkTshir	M	Yellow	Retro
<input type="checkbox"/>	Black[L]Modern	Great White Shark T-Shirt	GreatWhiteSharkTshir	L	Black	Modern

Now back on the product variants form we can see the system generated product variants using the product nomenclature we defined.



Save + New Delete Variant suggestions Release products Translations Generate descriptions Unit conversions Options

Personalize: Always open for editing, Personalize this page, Add to workspace

Page options: Security diagnostics, Record info, Advanced filter or sort, Change view

Edit: Read mode, Revert

Share: Get a link, Create a custom alert, Manage my alerts

Product variants | S002 : GREATWHITESHARKTSHIR

Standard view

Filter

Product number	Product name	Search name	Size ↑	Color ↑	Style ↑	Total weight
Black[S]Modern	Great White Shark T-Shirt	GreatWhiteSharkTShir	S	Black	Modern	3
Black[S]Retro	Great White Shark T-Shirt	GreatWhiteSharkTShir	S	Black	Retro	3
Blue[S]Modern	Great White Shark T-Shirt	GreatWhiteSharkTShir	S	Blue	Modern	2
Blue[S]Retro	Great White Shark T-Shirt	GreatWhiteSharkTShir	S	Blue	Retro	2
Green[S]Modern	Great White Shark T-Shirt	GreatWhiteSharkTShir	S	Green	Modern	2
Green[S]Retro	Great White Shark T-Shirt	GreatWhiteSharkTShir	S	Green	Retro	2
Magenta[S]Modern	Great White Shark T-Shirt	GreatWhiteSharkTShir	S	Magenta	Modern	1
Magenta[S]Retro	Great White Shark T-Shirt	GreatWhiteSharkTShir	S	Magenta	Retro	1
Purple[S]Modern	Great White Shark T-Shirt	GreatWhiteSharkTShir	S	Purple	Modern	1
Purple[S]Retro	Great White Shark T-Shirt	GreatWhiteSharkTShir	S	Purple	Retro	1
Red[S]Modern	Great White Shark T-Shirt	GreatWhiteSharkTShir	S	Red	Modern	2
Red[S]Retro	Great White Shark T-Shirt	GreatWhiteSharkTShir	S	Red	Retro	2
White[S]Modern	Great White Shark T-Shirt	GreatWhiteSharkTShir	S	White	Modern	3
White[S]Retro	Great White Shark T-Shirt	GreatWhiteSharkTShir	S	White	Retro	3
Yellow[S]Modern	Great White Shark T-Shirt	GreatWhiteSharkTShir	S	Yellow	Modern	1
Yellow[S]Retro	Great White Shark T-Shirt	GreatWhiteSharkTShir	S	Yellow	Retro	1
Black[M]Modern	Great White Shark T-Shirt	GreatWhiteSharkTShir	M	Black	Modern	3
Black[M]Retro	Great White Shark T-Shirt	GreatWhiteSharkTShir	M	Black	Retro	3
Blue[M]Modern	Great White Shark T-Shirt	GreatWhiteSharkTShir	M	Blue	Modern	2
Blue[M]Retro	Great White Shark T-Shirt	GreatWhiteSharkTShir	M	Blue	Retro	2
Green[M]Modern	Great White Shark T-Shirt	GreatWhiteSharkTShir	M	Green	Modern	2
Green[M]Retro	Great White Shark T-Shirt	GreatWhiteSharkTShir	M	Green	Retro	2
Magenta[M]Modern	Great White Shark T-Shirt	GreatWhiteSharkTShir	M	Magenta	Modern	1
Magenta[M]Retro	Great White Shark T-Shirt	GreatWhiteSharkTShir	M	Magenta	Retro	1
Purple[M]Modern	Great White Shark T-Shirt	GreatWhiteSharkTShir	M	Purple	Modern	1
Purple[M]Retro	Great White Shark T-Shirt	GreatWhiteSharkTShir	M	Purple	Retro	1
Red[M]Modern	Great White Shark T-Shirt	GreatWhiteSharkTShir	M	Red	Modern	2

Related information

RELEASE PRODUCT AND VARIANTS

The next step in the process is to release the product and variants to a legal entity. This will make the product and variant available for additional legal entity specific setup and transaction processing. To release the product and variants click the “Release products” button.





Save + New Delete Variant suggestions **Release products** Translations Generate descriptions Unit conversions Options

Personalize: Always open for editing, Personalize this page, Add to workspace  
 Page options: Security diagnostics, Record info, Advanced filter or sort, Change view  
 Edit: Read mode, Revert  
 Share: Get a link, Create a custom alert, Manage my alerts

Product variants | S002 : GREATWHITESHARKTSHIR

Standard view

Filter

Product number	Product name	Search name	Size ↑	Color ↑	Style ↑	Total weight
Black[S]Modern	Great White Shark T-Shirt	GreatWhiteSharkTShir	S	Black	Modern	3
Black[S]Retro	Great White Shark T-Shirt	GreatWhiteSharkTShir	S	Black	Retro	3
Blue[S]Modern	Great White Shark T-Shirt	GreatWhiteSharkTShir	S	Blue	Modern	2
Blue[S]Retro	Great White Shark T-Shirt	GreatWhiteSharkTShir	S	Blue	Retro	2
Green[S]Modern	Great White Shark T-Shirt	GreatWhiteSharkTShir	S	Green	Modern	2
Green[S]Retro	Great White Shark T-Shirt	GreatWhiteSharkTShir	S	Green	Retro	2
Magenta[S]Modern	Great White Shark T-Shirt	GreatWhiteSharkTShir	S	Magenta	Modern	1
Magenta[S]Retro	Great White Shark T-Shirt	GreatWhiteSharkTShir	S	Magenta	Retro	1
Purple[S]Modern	Great White Shark T-Shirt	GreatWhiteSharkTShir	S	Purple	Modern	1
Purple[S]Retro	Great White Shark T-Shirt	GreatWhiteSharkTShir	S	Purple	Retro	1
Red[S]Modern	Great White Shark T-Shirt	GreatWhiteSharkTShir	S	Red	Modern	2
Red[S]Retro	Great White Shark T-Shirt	GreatWhiteSharkTShir	S	Red	Retro	2
White[S]Modern	Great White Shark T-Shirt	GreatWhiteSharkTShir	S	White	Modern	3
White[S]Retro	Great White Shark T-Shirt	GreatWhiteSharkTShir	S	White	Retro	3
Yellow[S]Modern	Great White Shark T-Shirt	GreatWhiteSharkTShir	S	Yellow	Modern	1
Yellow[S]Retro	Great White Shark T-Shirt	GreatWhiteSharkTShir	S	Yellow	Retro	1
Black[M]Modern	Great White Shark T-Shirt	GreatWhiteSharkTShir	M	Black	Modern	3
Black[M]Retro	Great White Shark T-Shirt	GreatWhiteSharkTShir	M	Black	Retro	3
Blue[M]Modern	Great White Shark T-Shirt	GreatWhiteSharkTShir	M	Blue	Modern	2
Blue[M]Retro	Great White Shark T-Shirt	GreatWhiteSharkTShir	M	Blue	Retro	2
Green[M]Modern	Great White Shark T-Shirt	GreatWhiteSharkTShir	M	Green	Modern	2
Green[M]Retro	Great White Shark T-Shirt	GreatWhiteSharkTShir	M	Green	Retro	2
Magenta[M]Modern	Great White Shark T-Shirt	GreatWhiteSharkTShir	M	Magenta	Modern	1
Magenta[M]Retro	Great White Shark T-Shirt	GreatWhiteSharkTShir	M	Magenta	Retro	1
Purple[M]Modern	Great White Shark T-Shirt	GreatWhiteSharkTShir	M	Purple	Modern	1
Purple[M]Retro	Great White Shark T-Shirt	GreatWhiteSharkTShir	M	Purple	Retro	1
Red[M]Modern	Great White Shark T-Shirt	GreatWhiteSharkTShir	M	Red	Modern	2

Related information

This will open a wizard type user experience where you can click through the remaining options and release the product. On the first page of the wizard click the “Next” button.



Release products | Standard view ∨

Select products to release

+ Add Remove Product details

Product name	Product number ↑	Search name	Product type	Product subtype	Product dimension gr...
Great White Shark T-Shirt	S002	GreatWhiteSharkTShir	Item	Product master	SCS

Back Next Cancel

In the next page of the wizard you can select all or specific product variants to release.



Release products | Standard view

Select product variants to release

Product number	Total variants	Marked varia...
S002	48	48

Product number: S002      Product name: Great White Shark T-Shirt

**PRODUCT VARIANTS**

Include product master:  Yes

Select all    Deselect all

Select	Product name	Search name	Configuration	Size	Color	Style
<input checked="" type="checkbox"/>	Great White Shark T-Shirt	GreatWhiteSharkTShir		L	Black	Mode:
<input checked="" type="checkbox"/>	Great White Shark T-Shirt	GreatWhiteSharkTShir		L	Black	Retro
<input checked="" type="checkbox"/>	Great White Shark T-Shirt	GreatWhiteSharkTShir		M	Black	Mode:
<input checked="" type="checkbox"/>	Great White Shark T-Shirt	GreatWhiteSharkTShir		M	Black	Retro
<input checked="" type="checkbox"/>	Great White Shark T-Shirt	GreatWhiteSharkTShir		S	Black	Mode:
<input checked="" type="checkbox"/>	Great White Shark T-Shirt	GreatWhiteSharkTShir		S	Black	Retro
<input checked="" type="checkbox"/>	Great White Shark T-Shirt	GreatWhiteSharkTShir		L	Blue	Mode:
<input checked="" type="checkbox"/>	Great White Shark T-Shirt	GreatWhiteSharkTShir		L	Blue	Retro
<input checked="" type="checkbox"/>	Great White Shark T-Shirt	GreatWhiteSharkTShir		M	Blue	Mode:
<input checked="" type="checkbox"/>	Great White Shark T-Shirt	GreatWhiteSharkTShir		M	Blue	Retro
<input checked="" type="checkbox"/>	Great White Shark T-Shirt	GreatWhiteSharkTShir		S	Blue	Mode:
<input checked="" type="checkbox"/>	Great White Shark T-Shirt	GreatWhiteSharkTShir		S	Blue	Retro
<input checked="" type="checkbox"/>	Great White Shark T-Shirt	GreatWhiteSharkTShir		L	Green	Mode:
<input checked="" type="checkbox"/>	Great White Shark T-Shirt	GreatWhiteSharkTShir		L	Green	Retro
<input checked="" type="checkbox"/>	Great White Shark T-Shirt	GreatWhiteSharkTShir		M	Green	Mode:
<input checked="" type="checkbox"/>	Great White Shark T-Shirt	GreatWhiteSharkTShir		M	Green	Retro
<input checked="" type="checkbox"/>	Great White Shark T-Shirt	GreatWhiteSharkTShir		S	Green	Mode:
<input checked="" type="checkbox"/>	Great White Shark T-Shirt	GreatWhiteSharkTShir		S	Green	Retro
<input checked="" type="checkbox"/>	Great White Shark T-Shirt	GreatWhiteSharkTShir		L	Magenta	Mode:
<input checked="" type="checkbox"/>	Great White Shark T-Shirt	GreatWhiteSharkTShir		L	Magenta	Retro
<input checked="" type="checkbox"/>	Great White Shark T-Shirt	GreatWhiteSharkTShir		M	Magenta	Mode:
<input checked="" type="checkbox"/>	Great White Shark T-Shirt	GreatWhiteSharkTShir		M	Magenta	Retro
<input checked="" type="checkbox"/>	Great White Shark T-Shirt	GreatWhiteSharkTShir		S	Magenta	Mode:
<input checked="" type="checkbox"/>	Great White Shark T-Shirt	GreatWhiteSharkTShir		S	Magenta	Retro

Back    **Next**    Cancel

The next page of the wizard is where you can select one or multiple legal entities to release the products to.



Release products | Standard view

Select companies to release to


Company	Name
BRMF	Contoso Entertainment Syste...
CNMF	Contoso Entertainment China
DEMF	Contoso Entertainment Syste...
FRRT	Contoso Retail FR
FRSI	Contoso Consulting FR
GBSI	Contoso Consulting GB
GLCO	Contoso Group
GLMF	Contoso Entertainment System
GLRT	Contoso Retail
GLSI	Contoso Consulting
INMF	Contoso Entertainment Syste...
ITCO	Contoso Italy
JPMF	Contoso Entertainment Japan
MXMF	Contoso Entertainment Syste...
MYMF	Contoso Entertainment Syste...
RUMF	Contoso Entertainment Syste...
RURT	Contoso Retail RUS
SAMF	Contoso Entertainment Syste...
THMF	Contoso Entertainment Syste...
<input checked="" type="checkbox"/>	USMF Contoso Entertainment Syste...
USP2	Contoso Orange Juice
USPI	Contoso Process Industry
USRT	Contoso Retail USA
USSI	Contoso Consulting USA

Back Next Cancel

Related information

On the final page of the wizard we get a summary of the number of products and companies we are releasing to. Click the “Finish” button complete the wizard and release the products.



Release products | Standard view 

Confirm selection

Selected products  
49

Selected companies  
1

Show infolog upon failure  
 Yes

Run in batch  
 No

Back **Finish** Cancel

Related information

## COMPLETE THE RELEASED PRODUCT SETUP

Now that the product has been released the next step is to complete the released product setup which defines the legal entity specific attributes and setups. Once the released product setup is complete the product can be used in transactions in Dynamics 365 Finance and Operations. The released products form has many fields but depending on your business needs and requirements you will only be using a subset of them.

To find the product that has just been released navigate to Product information management > Products > Released products. You can filter the item number by clicking the "Item number" column and typing in the item number which will be the same as the product number.



Released product details

Standard view \* ▾

Filter

Item number ↑ ▾	Product name	Search name	Product type	Product subtype	Product service type	Product dimension gr...	Product lifecycle state
S002	Great White Shark T-Shirt	GreatWhiteSharkTShir	Item	Product master	Not specified	SCS	

Click the item number hyperlink to open the released product form. In the released product form, there are two main parts of the setup. The first is form itself which contains all the product specific fields. The second is the ribbon which also contains product specific setup, but the data resides on other related tables. We will start with the released product form and go through each fast tab and each field within each fast tab and then go through the various setups in the ribbon.

Released products form

General

**IDENTIFICATION**

Item number: S002

Product type: Item

Product subtype: S002

Product master: Product master

Product service type: Not specified

**FURTHER IDENTIFICATION**

Product name: Great White Shark T-Shirt

**ADMINISTRATION**

Storage dimension group: Ware

Tracking dimension group: None

Item model group: [Dropdown]

**BUNDLE**

Bundle: No

Reservation hierarchy: [Dropdown]

Counting reason code policy: [Dropdown]

Product lifecycle state: [Dropdown]

## RELEASED PRODUCT FORM

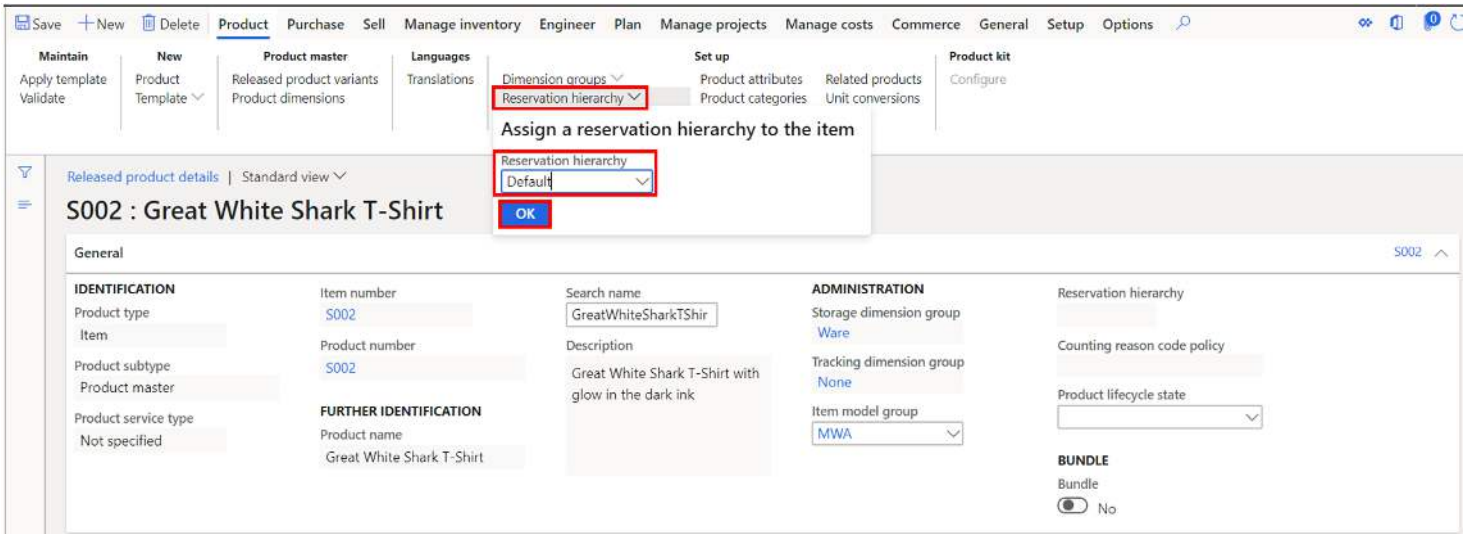
### GENERAL

In the “General” fast tab there are some required fields that any product will need. We have already defined the “Storage dimension group” and the “Tracking dimension group” at the product master level so that has carried over.

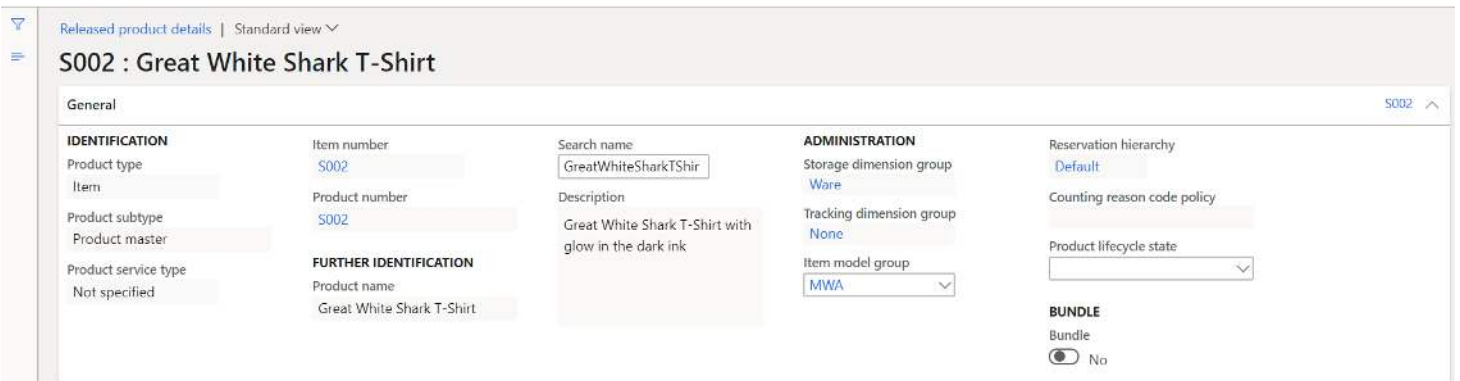
- **Item model group** – The item model group is a **required field** for all items. Item model group controls several settings about how the item is handled in inventory, how the item is posted to the ledger and how the item is costed. For more information on item model group refer to the “Item model group” section of this user guide.
- **Reservation hierarchy** – The reservation hierarchy is a **required field** for all advanced warehouse enabled items. Reservation hierarchy models different levels on which reservations can be made. Each level represents a physical storage or tracking dimension in inventory. For more information on the setup of the reservation hierarchy refer to the “Reservation hierarchy” section of this user guide. You will notice



that the reservation hierarchy field is disabled but that is because there is a button in the “Setup” section of the “Product” tab in the ribbon that you need to use to assign the reservation hierarchy.



- **Product lifecycle state** – Product lifecycle state is used to help identify the status or state that the product is currently in among the broader product lifecycle for your company. For more information see the “Product Lifecycle State” section of this user guide.
- **Bundle** – The bundle functionality allows you to indicate that an item is a bundle item. This means that you can set up a bundle of component items that are bundled together whenever you sell the item. If you enabled, this flag you will need to change the default order type (which is discussed later in this guide) from “Purchase to “Production”. Then you will need to define the bill of materials which will be the items that make up the bundle.



## PURCHASE

In the “Purchase” fast tab we define procurement related information and setups that affect pricing, planning, invoice matching and more.



Purchase ea | -- | 0.00 ^

<b>PURCHASE ORDER</b> Unit ea <input type="text"/> Overdelivery 0.00 <input type="text"/> Underdelivery 0.00 <input type="text"/> Intercompany stopped <input checked="" type="radio"/> No <b>ADMINISTRATION</b> Buyer group <input type="text"/>	Item price tolerance group <input type="text"/> Vendor <input type="text"/> <b>TAXATION</b> Item sales tax group <input type="text"/> <b>PRICE UPDATE</b> Latest purchase price <input checked="" type="radio"/> No Date of price 8/7/2020 <input type="text"/>	<b>PRICES</b> Price 0.00 <input type="text"/> Price quantity 0.00 <input type="text"/> <b>CHARGES</b> Price charges 0.00 <input type="text"/> Charges quantity 0.00 <input type="text"/>	Charges group <input type="text"/> Incl. in unit price <input checked="" type="radio"/> No <b>DISCOUNTS</b> Line discount group <input type="text"/> Multiline discount <input type="text"/>	Total discount <input checked="" type="radio"/> No Supplementary item group <input type="text"/> Pricing precision <input type="text"/> <b>VENDOR REBATE</b> Vendor rebate item group <input type="text"/> <b>APPROVED VENDOR</b> Approved vendor check method No check <input type="text"/>
--	--	---	--	---

- **Unit** – This is where you define what your default unit of measure is that you buy the product in. For example, you may buy a product in cases and sell the product in each. If you are in manufacturing, you may also buy the product in some weight like pounds and consume the raw material in terms of length like inches or feet. This unit of measure will be the default unit of measure for the purchase order line.
- **Overdelivery** – This is the percentage that you allow for overdelivery of this product on a purchase order. For most industries this is around five percent. If a product receipt is attempted for a quantity that is higher than this overdelivery percentage, the user will get an error during the product receipt.
- **Underdelivery** – This is the same thing as the “Overdelivery” field except for under delivery. So, if a user attempts to receive a certain percentage under the ordered quantity for the item the user will get an error. Depending on your relationship with your supplier you may never want to have an underdelivery percentage if the vendor ships several shipments to fulfill the order.
- **Intercompany stopped** – If this flag is enabled this product will not be allowed to be placed on an intercompany purchase order.
- **Buyer group** – Typically in procurement departments buyers are responsible for certain type or groups of products. The buyer group lets you identify and assign products to buyer groups so buyers can filter down their list of items based on buyer group. This field is especially useful on the master planning planned order list page where buyers can use the buyer group to filter down the planned purchase orders to only the products that they are responsible for.
- **Item price tolerance group** – In the accounts payable module you can set up price tolerances percentages that define what percentage deviation between the unit price on the purchase order and the unit price on an invoice constitute an invoice matching discrepancy that must be investigated. The tolerance percentages can be defined for all items, a group of items, or individual items. The item price tolerances group lets you group items together that have the same price tolerance percentage for invoice matching purposes. For more on item price tolerance group see the Accounts Payable User Guide.
- **Vendor** – This field indicates the default or primary vendor used to procure this product. Assigning a default vendor does not mean you can only buy from this vendor it is just the vendor that the system will default when generating planned purchase orders through the master planning process.
- **Item sales tax group** – The item sales tax group along with the sales tax group associated with the purchase order is used to calculate the appropriate sales tax associated with the purchase order in certain cases where sales tax is assessed.
- **Latest purchase price** – If this flag is enabled the latest actual purchase price will be updated in the “Price” field and the date of the latest purchase price will be updated in the “Date of price” each time a purchase order is invoiced for this item.





- **Date of price** – If the latest purchase price flag is enabled this field will be updated to the date of the latest purchase price of this item upon purchase order invoice.
- **Price** – This field represents the base purchase price for the item. If there is no trade agreement for the purchase price of the item, the price that is specified here will be defaulted to the purchase order unit price when this product is added to a purchase order line.
- **Price quantity** – This field specifies the price per quantity. So, for example if this field was set to 100 and the price was set to 50, that would mean for every 100 quantity the unit purchase price would be 50 dollars. If you created a purchase order for quantity of 1 the price would be 0.50 cents. This field is helpful for products that have pricing out to multiple decimal places.
- **Price charges** – This field allows you to specify a fixed amount that is added to the purchase price for this item. If there is a specific fixed charge amount that is incurred when buying a product this field can be used.
- **Charges quantity** – This field is used to define the price charge per quantity. The price charges field is divided by this quantity to get the charge amount. *Note:* This field is only applicable if the “Incl. in unit price” flag is enabled.
- **Charges group** – Miscellaneous charges can be setup to automatically apply to certain purchase orders for certain vendors, products, and groups of products. The charges group allows you to group certain products together that should trigger an automatic charge. For more on automatic charges please refer to the Accounts Payable User Guide.
- **Incl. in unit price** – If this flag is enabled it indicates that the charge should be assessed on a per unit bases instead of a fixed amount.
- **Line discount group** – Certain vendors may offer discounts for products they sell. Line discounts can be set up in purchase trade agreements. The line discount group allows you to group together product that should receive a certain discount from a single vendor or group of vendors. For more on trade agreements see the Procurement and Sourcing User Guide.
- **Multiline discount** – Some vendors may offer discounts when purchasing a certain quantity of a certain type of products together over multiple lines. This multiline discount field is the way you define that group of products that if you buy a certain quantity of you get the discount. For more on trade agreements and how a multiline discount is set up see the Procurement and Sourcing User Guide.
- **Total discount** – The total discount flag allows you to select whether or not this item should be included during the calculation of a total discount. There may be some products that a vendor does not allow in the calculation of a total discount.
- **Supplementary item group** – Supplementary items are items that may accompany a given item when purchasing the item. For example, if you are purchasing a camera and it comes with a free SD card you can associate various cameras to a supplementary item group and receive that item either free of charge or at specific price depending on the configuration.
- **Pricing precision** – For products that deal with pricing based on factors such as potency, pricing precision allows you to prevent the system from rounding up or down the purchase price after calculating the purchase price absolute value based on the target potency value.
- **Vendor rebate group** – Vendor rebates can be set up for individual products or groups of products. If you want to include multiple products in a vendor rebate setup you can use the vendor rebate group to associate it to multiple products. For more on vendor rebates see the Procurement and Sourcing User Guide.



- **Approved vendor check method** – The vendor approval functionality has three options. See the “Purchase” sub-section in the “Released Product Ribbon” section of this user guide for mor information on how to add approved vendors.
  - **No check** – No check will turn off the vendor approval functionality.
  - **Warning only** – This will give the user a warning if the product that is put on a purchase order line is not in the approved vendor list for the vendor associated to that purchase order. However, this will not stop the purchase order from being processed.
  - **Not allowed** - This will give the user an error (hard stop) if the product that is put on a purchase order line is not in the approved vendor list for the vendor associated to that purchase order. This will stop the purchase order from being processed.

## PROMOTE

There’s only one field here in the promote tab so this is a pretty quick one.

- **Exclude** – This flag allows you to exclude this item from coupons discounts.

## DELIVER

- **Ship alone** – This flag is only applicable if you are not using the advanced warehouse management functionality and are using the boxing functionality. Boxing logic will automatically find the most efficient way of boxing items and uses weight, volume, and dimensions. If you enable this flag, it tells the system this product should not be boxed because it is already sufficiently packaged to ship.
- **Direct delivery** – This indicates that by default the item is drop shipped to the customer (also known as direct delivery).
- **Direct delivery warehouse** – This indicates the default warehouse used in the direct delivery or drop ship.
- **Apply boxing** – Boxing logic automatically finds the most efficient way of boxing items and factors in weight, volume, and dimensions. For example, 90 items would be packed together in a single appropriately-sized box together with packing materials, instead of three boxes of 30 items.
- **Ship start date** – This date indicates when the product is available to start shipping. If a user attempts to post a packing slip (ship) this item prior to the ship start date, the use will get an error.

## SELL



Sell

ca | -- | 0.00 ^

**SALES ORDER**  
 Unit: ca  
 Overdelivery: 0.00  
 Underdelivery: 0.00  
 Intercompany stopped:  No  
**ADMINISTRATION**  
 Commission group:   
**TAXATION**  
 Item sales tax group:   
**PRICE UPDATE**  
 Sales price model: None  
 Base price: Purchase price  
 Contribution ratio: 0.00  
 Charges percentage: 0.00  
 Date of price: 8/7/2020

**BASE SALES PRICE**  
 Price: 0.00  
 Price quantity: 0.00  
**CHARGES**  
 Price charges: 0.00  
 Charges quantity: 0.00  
 Charges group:   
 Incl. in unit price:  No  
**DISCOUNTS**  
 Line discount group:   
 Multiline discount:   
 Total discount:  No  
 Supplementary item group:   
**ALTERNATIVE PRODUCT**  
 When to use: Never  
 Alternative item number:   
 Configuration:   
 Size:   
 Color:   
 Style:   
**INSTALLMENTS**  
 Installment eligible:  No  
 Pricing precision:   
**AUTOMATIC NOTIFICATION AND CANCELATION PROCESSING**  
 Automatic notification and ca...:  No  
**PRICE ADJUST**  
 Allow price adjust:  No

**CONTINUITY**  
 Continuity schedule ID:   
 Event duration: 0  
**SELL DATES**  
 Sell start date:   
 Sell end date:   
**ITEM REBATE GROUP**  
 Item rebate group:   
**FREIGHT ALLOCATION**  
 Freight allocation group:   
**COMMERCE INVENTORY**  
 Inventory buffer: 0.00  
 Inventory level profile:

- **Unit** – This field defines the default unit of measure that this product will be sold in. This unit of measure will be the default unit of measure that defaults on the sales order line when you add this product to a sales order.
- **Overdelivery** – This field indicates the percentage over the sales quantity we are allowed to ship. If the user ships a quantity that is over the percentage defined here the user will get an error.
- **Underdelivery** – This field indicates the percentage under the sales quantity we are allowed to ship. If the user ships a quantity that is under the percentage defined here the user will get an error.
- **Intercompany stopped** – If this flag is enabled the product will not be able to be put on an intercompany sales order.
- **Commission group** – Commission schemes can be defined by specific products, or by groups of products. This field is used to link a product to a specific commission group that is used to determine if the sold product is eligible for a commission calculation. The commission group will default to the sales order line when the product is selected.
- **Item sales tax group** – The item sales tax group is used in conjunction with the sales tax group defaulted to the sales order to determine the sales tax calculation. The items sales tax group is defaulted to the sales order line when the product is added to the sales order.
- **Sales price model** – The sales price model allows for options to help calculate the sales price of the item.
  - **None** – This selection means the system will not calculate the base sales price and will be manually entered by a user.
  - **Contribution ratio** – This selection indicates that the price will be calculated based on a percentage of the contributed cost or purchase price which is selected in the “Base price” field below. If you select this option, you also need to enter the contribution ratio you would like to use to calculate the price. The system calculation is the following: Base sales price = Purchase price or Cost price / Contribution ratio. The calculated price will be in the “Price” field after you press the “Save” button.



- **Base price** – This field indicates whether you want to use the cost price in the “Manage costs” fast tab or the base purchase price in the “Purchase” fast tab as the basis for the sales calculation described in the “Sales price model” field.
- **Contribution ratio** – This is the percentage used in the calculation of the base sales price if the “Contribution ratio” option is selected in the “Sales price model” field.
- **Date of price** – If you choose to calculate the base sales price on the basis of purchase or cost price and you have selected those prices to be updated using the “Latest purchase price” or the “Latest cost price” flag the base sales price of the item will be updated when either of those prices changes depending on your selection. This date field captures the date that the last price change occurred.
- **Price** – This is the base sales price. If there are no applicable sales trade agreements for the item, the base sales price will default as the sales price for the item on the sales order line.
- **Price quantity** – This field specifies the price per quantity. So, for example if this field was set to 100 and the price was set to 50, that would mean for every 100 quantity the unit sales price would be 50 dollars. If you created a sales order for quantity of 1 the price would be 0.50 cents. This field is helpful for products that have pricing out to multiple decimal places.
- **Price charges** – This field allows you to specify a fixed amount that is added to the sales price for this item. If there is a specific fixed charge amount that is incurred to the customer when selling a product this field can be used.
- **Charges quantity** – This field is used to define the price charge per quantity. The price charges field is divided by this quantity to get the charge amount. *Note:* This field is only applicable if the “Incl. in unit price” flag is enabled.
- **Charges group** – Miscellaneous charges can be setup to automatically apply to certain sales orders for certain customers, products, and groups of products. The charges group allows you to group certain products together that should trigger an automatic charge. For more on automatic charges please refer to the Accounts Receivable User Guide.
- **Incl. in unit price** – If this flag is enabled it indicates that the charge should be assessed on a per unit bases instead of a fixed amount.
- **Line discount group** – You may offer customers discounts for products you sell. Line discounts can be set up in sales trade agreements. The line discount group allows you to group together products that should trigger a certain discount from a single customer or group of customers. For more on trade agreements see the Sales and Marketing User Guide.
- **Multiline discount** – You may offer discounts when your customers purchase a certain quantity of a certain type of products together over multiple lines. This multiline discount field is the way you define that group of products that if you buy a certain quantity of you get the discount. For more on trade agreements and how a multiline discount is set up see the Sales and Marketing User Guide.
- **Supplementary item group** – Supplementary items are items that may accompany a given item when selling the item. For example, if you are selling a camera and it comes with a free SD card you can associate various cameras to a supplementary item group and receive that item either free of charge or at specific price depending on the configuration.
- **When to use** – The “When to use” option is used in the alternative product functionality. If there are cases where one product is a substitute for another product or maybe you are completely phasing out another product in favor of another this functionality can be used.
  - **Never** – This is the default setting for this functionality and basically this means no alternative item will be used.



- **Nothing in inventory** – This option means that when this item is put on a sales order and there is no inventory, the item number selected in the “Alternative item number” will replace the current item number on the sales order automatically. This would be used in the case where there is another item that is a substitute for another item.
- **Always** – This option means that whenever the current item is put on a sales order line the system will automatically switch it with the item number selected in the “Alternative item number” field. You would use this in the case where you wanted to phase out an item and start using only the new item.
- **Alternative item number** – This is the alternative item number that should be used in cases where the “when to use” field has the “Nothing in inventory” or “Always” value selected.
- **Installment eligible** – Installment payments are a part of the retail (Commerce) functionality in D365. The “installment eligible” flag enables the product for installment payments for a call center enabled sales order. Installment payments lets customers pay over a specified period of time. A payment schedule as well as many other related setups are required to enable this functionality.
- **Pricing precision** – For products that deal with pricing based on factors such as potency, pricing precision allows you to prevent the system from rounding up or down the sales price after calculating the sales price absolute value based on the target potency value.
- **Automatic notification and cancellation exempt** – There may be cases when a customer's order cannot be fulfilled on time and we need to send a notification to the customer giving them an opportunity to cancel the order. If the order is still not fulfilled beyond a specified threshold, the system can cancel the order automatically. If this flag is enabled, this product is exempt from this automatic process. This feature is specific to retail call center (Commerce).
- **Allow price adjust** – This feature will allow you to prevent the price update on a sales order for call center sales orders without a reason code. This is a call center feature that does not apply to standard sales orders not raised under a retail (Commerce) channel.
- **Continuity schedule ID** – A continuity schedule is a retail (Commerce) call center feature that is a recurring order kind of like the wine of the month type thing. So, selecting a continuity schedule associated to the item associates that item to the recurring program.
- **Event duration** – The event duration is based on the continuity schedule ID selected above. This will default the duration of the continuity program.
- **Sell start date** – This represents the date that the product can start to be put on a sales order. If you set this date and a user attempts to put this item on a sales order before this date the user will get an error and will not be able to add the product to the sales line.
- **Sell end date** – This represents the date that the product should stop being sold. If you set this date and a user attempts to put this product on a sales order after this date the user will get an error.
- **Item rebate group** – Rebates can be given to customers, or groups of customers for specific items or groups of items. The item rebate group is used to link several products to a rebate group and can then be used in the customer rebate group setup to configure a rebate for those items.
- **Freight allocation group** – Freight rebates can be calculated by the system for reporting purposes. The determination for which products apply for the freight rebate can be selected by the country/region and also the freight allocation group. The freight allocation group can be used to group items together that should trigger the freight rebate accrual.
- **Inventory buffer** – The Dynamics 365 for Commerce functionality consists of multiple channels: Retail store front, e-Commerce site, and other integrated applications. These applications get asynchronous on-hand inventory updates. This means that the inventory levels may not be 100% accurate at all times. The



inventory buffer field allows you to add a buffer quantity that subtracts the entered amount from the on-hand inventory the system shows to ensure that these channels do not oversell product that is actually not in stock. This field is only applicable if you are using the Dynamics 365 Commerce functionality.

- **Inventory level profile** – The inventory level profile works in conjunction with the inventory buffer. The inventory level profile takes the latest on-hand quantity and if it falls within a given range it can return a code and label. For example, some retailers will display “Available” or “Out of stock” instead of displaying the actual quantity the system says is on-hand. The inventory level profile assigned to the product will be what is used at the respective retail channel.

FOREIGN TRADE

- **Commodity** – This eight-digit number identifies the type of goods which are the subject of a dispatch or arrival and is the basis for most of the statistical information used by government departments, the European Commission, United Nations agencies and businesses. The fields in this “Foreign trade” fast tab can be used to transfer to an intrastate journal for statistical reporting.
- **Charges percentage** – This is the charges percentage associated with the intrastat commodity code selected above.
- **Country/region** – This is the country or region where the product is legally obtained or produced.
- **State/province** – This is the state or province for dispatches or arrivals depending on the transaction.

Foreign trade -- | -- ^

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**INTRASTAT**

Commodity

Charges percentage

**ORIGIN**

Country/region

State/province

MANAGE INVENTORY

- **Net weight** – The net weight is the weight of only the product not including the weight of any container or packaging material needed to ship the product. The unit of measure the weight is in is the system unit selected for weight. On the unit of measure form there is a “System unit” field that can only be selected for one unit class. For example, if your system unit for weight is pounds, the weights you enter here are in pounds. You can also enter weights for each handling unit in the “Physical dimensions” form which will be covered in the “Manage inventory” ribbon section of this user guide.
- **Tare weight** – Tare weight is the weight of the container of the item. Again, the unit of measure is the system unit for the mass unit class.
- **Gross depth** – This is the depth measurement of the product. The unit of measure for this measurement is the system unit for the length unit class.
- **Gross width** – This is the width measurement of the product. The unit of measure for this measurement is the system unit for the length unit class.
- **Gross height** – This is the height measurement of the product. The unit of measure for this measurement is the system unit for the length unit class.



- **Volume** – The volume of the product is calculated by multiplying the gross depth, gross width, and gross height.
- **Batch number group** – The batch number group is used in cases where you need the system to generate a batch number (also known as a lot number) when the product is registered during purchase order receipt or reported as finished during the production process. Batch numbers can be generated using a combination of variables like date, order number, or a custom number sequence.
- **Serial number group** – The serial number group is used in cases where you need the system to generate a serial number when the product is registered during purchase order receipt or reported as finished during the production process. serial numbers can be generated using a combination of variables like date, order number, or a custom number sequence.
- **Overdelivery** – If you want to allow overdelivery on transfer orders between warehouses, this is the percentage over the ordered quantity that is allowed.
- **Underdelivery** – If you want to allow underdelivery on transfer orders between warehouses, this is the percentage under the ordered quantity that is allowed.
- **Counting group** – The counting group is used mostly for WMS I functionality where you are not using the WMS mobile application and advanced warehouse cycle count plan functionality. However, it can still be used to group items together that are counted in the same way or should be grouped together for counting. If you are using WMS I functionality, the counting group enables you to populate counting journals for inventory counts using different strategies.
  - **Manual** – This selection will not populate the counting journal based on any strategy. Use this if you just want to populate the journal based on the counting group itself through a query.
  - **Period** – This selection allows you to define a counting period where the counting journal will only pull in items that have not been counted in the given period.
  - **Zero in stock** – This selection will pull in only items that show zero inventory in stock.
  - **Minimum** – This selection will only bring in items into the counting journal that have fallen below the safety stock level set in the item coverage form covered in the “Plan” subsection of the “Released Product Ribbon” section of this user guide.
- **Unit** – This is the inventory unit of measure for the product. Typically, this is the lowest unit of measure for the product like each, or pieces.
  - *Note:* Once the product has transactions this unit of measure cannot be changed.
- **Arrival handling time** – This is the time that it takes to receive the standard order quantity of the product. This time will show up on the item arrival journal which is usually only used when you are not using the advanced warehouse functionality. If you are not using the item arrival journal for receipts, this field is not applicable.
- **Sort code** – There are sort codes on the location and sort codes on the product. Sort codes are used to build a structured and ordered sort code during the picking process. If you want to order your picking route by products instead of by warehouse location, you can assign a numeric sort code which defines the sequence in which the product is picked relative to other products.
- **Base attribute** – For chemical manufacturers or manufacturers that deal with potency, the base attribute is a batch attribute of type integer or fractional that defines the item as a potency item. This attribute is the key characteristic that determines how the item is costed and priced.
- **Target** – This is related to the base attribute and comes from the target value associated to the batch attribute selected in the “Base attribute” field. This is the nominal or standard value upon which this item is defined, costed and priced



- **Record the attribute value** – This is also related to the “Base attribute” field. This field defines how the attribute value for this attribute is recorded. Typically, this is done on a product receipt with information from a certification of analysis.
- **Packing group** – Packing groups are used to define groups of products that use the same packaging materials to calculate packaging material fees. Packaging material fees can be used to for reporting purposes to keep track of packaging material usage.
- **Packing quantity** – This is the quantity used to determine the packaging material fees.
- **Shelf advice period in days** – This is the number of days forward from manufacturing date. The system uses this field to calculate the shelf advice date in cases where it is not manually specified for a batch.
- **Shelf life period in days** – This is the period from manufacture to expiration in days. The system uses this field to calculate the expiration date in cases where it is not manually specified for a batch.
- **Best before period in days** – This is the number of days back from the expiration date. The system uses this field to calculate the best before date in cases where it is not manually specified for a batch.
- **Catch weight item** – Catch weight is a concept used in industries that invoice and sell in a weight unit of measure such as pounds, ounces, or kilograms but handle the product in typical warehouse units of measure like each, case, and pallets. Setting this flag to “Yes” will enable catch weight functionality which is integrated throughout the system including a number of advanced warehouse processes.
- **CW unit** – The catch weight unit is the weight unit of measure used to track catch weight.
- **Nominal quantity** – This is the nominal quantity that represents the conversion between the catch weight unit and the inventory unit.
- **Minimum quantity** – This is the minimum quantity in which the inventory quantity can vary. So, if we inventory a product in cases but we invoice in pounds the weight of each case can vary. This is the minimum limit for that variation.
- **Maximum quantity** – This is the maximum quantity in which the inventory quantity can vary. So, if we inventory a product in cases but we invoice in pounds the weight of each case can vary. This is the maximum limit for that variation.
- **Regulated product** – This indicates whether or not the product is regulated. For more information on regulated products see the “Regulated products regional lists” section of this user guide.
- **Restricted product** – This indicates whether or not the product is restricted. For more information on regulated products see the “Restricted products regional lists” section of this user guide.

Manage inventory ea ^

<b>WEIGHT MEASUREMENTS</b> Net weight <input type="text" value="0.00"/> Tare weight <input type="text" value="0.00"/> Gross weight <input type="text" value="0.00"/>  <b>PHYSICAL DIMENSIONS</b> Gross depth <input type="text" value="0.00"/> Gross width <input type="text" value="0.00"/> Gross height <input type="text" value="0.00"/> Volume <input type="text" value="0.00"/>	<b>TRACKING</b> Batch number group <input type="text"/> Serial number group <input type="text"/>  <b>TRANSFER ORDERS</b> Overdelivery <input type="text" value="0.00"/> Underdelivery <input type="text" value="0.00"/>  <b>INVENTORY</b> Counting group <input type="text"/> Unit <input type="text" value="ea"/>	<b>SHIPPING AND RECEIVING</b> Arrival handling time <input type="text" value="00:00"/> Sort code <input type="text" value="0"/>  <b>POTENCY</b> Base attribute <input type="text"/> Target <input type="text"/> Record the attribute value <input type="text"/> Receipt entry <input type="text"/>	<b>ITEM DATA</b> Shelf advice period in days <input type="text"/> Shelf life period in days <input type="text"/> Best before period in days <input type="text"/> Batch merge date calculation <input type="text" value="Manual"/>  <b>YIELD</b> Yield percent <input type="text" value="0.00"/>  <b>CATCH WEIGHT</b> Catch weight item <input type="radio"/> No	CW unit <input type="text"/> Nominal quantity <input type="text" value="0.0000000000"/> Minimum quantity <input type="text" value="0"/> Maximum quantity <input type="text" value="0"/>  <b>PRODUCT COMPLIANCE</b> Regulated product <input type="radio"/> No Restricted product <input type="radio"/> No
		<b>PACKAGING</b> Packing group <input type="text"/> Packing quantity <input type="text" value="0.00"/>		





## ENGINEER

- **BOM Unit** – The BOM unit is the default unit of measure that will be used when this item is added to the bill of material of a manufactured item.
- **Constant Scrap** – This is a constant value if it is calculated only one time on the BOM line, regardless of how many items are produced. This value will get defaulted to the BOM line when this product is added to a bill of materials. A company produces t-shirts with a logo printed on them. Every time that a new production starts, the first t-shirt is used for test, regardless of the number of t-shirts produced. In this case, specify a constant scrap of 1.
- **Variable scrap** – This is a percentage value and is calculated as a percentage of the quantity on the BOM line. For example, when manufacturing a bike frame, 5 percent of the pipe needed ends up as off cuts that cannot be used elsewhere. In this case, specify a variable scrap of 5 percent.
- **Costing level** – This is a system calculated field when master planning runs that will determine the lowest costing level that the product is in relation to manufactured items where this item is used on the bill of material.
- **Planning level** – This field is similar to costing level. This is a system calculated field that is determined by the level at which this product resides in relation to its use on bills of materials.
- **Phantom** – A phantom item is an item where in your BOM structure you have an item with components but when you run the production order you only need to get the components of that “Phantom” item and that item is assembled right on the production line. Master planning will plan through the phantom item and plan for only the components of the phantom. This eliminates the need for an unnecessary production order.
- **Auto-report as finished** – The use case for this field would be if you have a product that you sell to customers but only stock and issue the components. Enabling this flag will allow you to define a bill of material that represent the items that will be deducted when this product is shipped on a sales order. When you packing slip update the sales order a BOM journal is posted which deducts the components and receives the top level item. At the same time the sales order shipment issues the top level product. The result of the transaction is the components are issued from inventory and the receipt and issue of the top level item cancel each other out.
- **BOM Measurements** - measurements are a type of configuration. Measurements are used in mathematical formulas for consumption. BOM measurement configurations are about consumption and measurements that relate to BOM items. Use measurement configurations to reduce the number of BOM versions. This means that the user only needs to create one BOM version for a group of items that vary in their measurements. For example, if a company manufactures nested tables in sets of three, each table is actually identical in terms of its production process and materials. The tables vary only in their height, width, and depth. When the company uses measurement configurations, they can make these nested tables by using one BOM
  - **Height**
  - **Width**
  - **Depth**
  - **Density**
- **Calculation group** – Calculation groups contain settings that can be used to run BOM calculations. Calculation groups include settings for cost price model, sales price model, and warnings. Calculation groups assigned to items enables you to specify how a cost/sales price of components classified in the calculation group should be sourced for the calculation. Additionally, it allows configuring the warning conditions to be prompted during the BOM calculation, when those components can be potential sources



of calculation errors. Calculation groups are pre-requisite to BOM calculation. A calculation group is required as a default in the Inventory and warehouse management parameter form or directly in the Released product details form.

- **Production pool** – Production pool is a way to group production orders into “Pools” for sorting, filtering, and organizing production orders into logical groupings. If you define a production pool here it will default to the production order when you create a production order for this item.
- **Production group** – The production group serves two purposes. The first purpose is to group production orders. This can be used to filter and sort production orders into a logical grouping. The second purpose is for production posting. If you set the “Ledger posting” field on the production control parameters to “Production group” you can set your production posting to be by production group instead of by item and cost category. Depending on your production posting requirements this may be an easier configuration to pursue.
- **Property** – The property field is used to help schedule similar products together to help minimize setup and changeover costs. The production property can be set up and assigned to a production calendar on particular days of the week or even specific days. Then the same property can be assigned to a route operation for a product. Then when the production scheduling engine runs it will try to match the property associated with that route operation to the day the order should be scheduled. Populating this field will default the property to the route.
- **Arrival** – If you do not select this option, item gains are put in inventory by the system when the production is started.
- **Flushing principle** – The flushing principle indicates how item consumption against a production order should happen. These settings can be set at the BOM line level. This setting on the released product will default to the BOM line when it is added to a BOM. There are four options:
  - **Start** – This setting will trigger the item consumption when the production order is started. This will post a production picking list journal. This is used if you would rather have the standard consumption happen at production order start and then post adjustments for actual consumption before you report at finished.
  - **Finish** – This setting will trigger the consumption and posting of a production picking list journal when the report as finished step occurs in the production process.
  - **Manual** – This setting means that there will be no automatic consumption. Users will need to manually enter the actual consumption that occurs on the production order.
  - **Available on location** – This setting only works with the advanced warehousing functionality with D365. This setting means that consumption only occurs when the production order has been started and when each material is picked and put to the production input location.
- **Production type** – This selection indicates the type of manufacturing or production that describes the product. There are six options, and each will dictate different behavior and functionality in the system.
  - **Co-product** – The co-product identifies the item as the secondary output to the primary formula item and it is reusable in subsequent processes or sold at a profit. Except for planning items, the product is produced as part of producing another product. Usually when the production type is set to co-product, the product is also setup as a co-product on one or more formula versions of other products.
  - **By-product** – The by-product identifies the item as the secondary output to the primary formula item or planning item. Sometimes companies spend money to dispose of the by-products and the cost incurred for disposal is accounted to the respective batch order. Therefore, the by-product involves configuring the cost burden associated with the formula.
  - **None** – The product does not belong to any of the other types.



- **Planning item** – The product is produced by using a formula, for example, in a disassembly scenario. This is used for those formula items that generate only products.
- **BOM** – The product is produced by using a bill of material (BOM) instead of being produced using a formula. The property can be changed from, for example, BOM to co-product even if there are transactions. The BOM setting is the default setting for released products and is the most common setting for discrete manufacturing. If you are trying to create a BOM for the product and your “BOM versions” button is disabled, make sure you have “BOM” set as the “Production type”.
- **Formula** – The formula identifies the item as a finished or semi-finished item in process manufacturing. This is specific to process manufacturing because it enables formula versions, co-products and by-products to be attached to the formula item. If you are trying to create a formula for the product and your “Formula versions” button is disabled, make sure you have “Formula” set as the “Production type”.
- **Planning formula** – You can use the planning formula to produce the co-product. You select the formula item and then the formula is used in batch order processing. This applies to all items of the production type “Co-products”. You can specify the planning formula for the relevant co-product at the released product level, and this will generate a planned order for the planning item to produce co-products. You can also identify the planning formula in the Planned order form for the co-product demand. You can select the planning formula even after performing the master scheduling. This flexibility accommodates up-to-date changes in the production scheduling.

PLAN

- **Coverage group** – The coverage group is one of the most important setups related to master planning. Coverage groups contain parameters and settings that determine how the master planning and scheduling engine will calculate the net requirements for the product. If you leave this blank the default coverage group set at the master planning parameters will be used. For more on coverage groups please see the Master Planning User Guide.

MANAGE COSTS

- **Item group** – Item groups are a required setup for all products. Item groups are used for two main purposes. The first is for ledger posting for various sales, purchase, inventory, production, and costing



transactions throughout the system. The second is a way to logically group different types of items on the enterprise product list. There are also reports that utilize item groups for inventory, costing, and other various reports. For more on item groups and how to set them up please see the “Item groups” section of this user guide.

- **Cost group** – Cost groups provide a breakdown of expenses over items and cost categories. Cost groups can be created for BOM related costs such as resources, wages, materials, overhead, setup and run time in route operations. When a BOM calculation is executed, cost groups determine how expenses are distributed between the BOM components and the different cost groups. Cost groups determine how much has been consumed in terms of resources, wages, overheads, and materials. You can also define profit setting. The Profit setting field in the cost groups form on the “Profit” fast tab determines how large the profit percentage attached to cost items or cost categories within each cost group is. The field is also used to determine the sales price based on the calculated production cost when BOMs and cost categories for routes are calculated. When you run a sales price calculation you will need to specify a profit setting.
- **Use cost price by variant** – If you select this flag the system will allow you to set a standard cost by each product variant.
- **Latest cost price** – If this flag is selected, the latest cost price will be updated in the “Price” field. The date that the cost price changed will also be updated in the “Date of price”. If you are using a moving average cost price, this field could be updated very frequently.
- **Date of price** – If the “Latest cost price” field is enabled, this field will be updated each time a new cost price is updated for the product.
- **Unit** – This unit of measure is the inventory unit of measure and is the cost unit of measure. This unit of measure cannot be changed if inventory transactions exist for the item.
- **Price** – This is the cost price for the item. Depending on the costing method defined in the item model group, this cost may not represent the actual cost of the item.
- **Price quantity** – This field specifies the cost price per quantity. So, for example if this field was set to 100 and the cost was set to 50, that would mean for every 100 quantity the unit cost price would be 50 dollars. This field is helpful for products that have pricing out to multiple decimal places.
- **Price charges** – In manufacturing settings this is used to identify fixed costs associated with the item such as setup costs for a standard lot size quantity.
- **Charges quantity** – In manufacturing settings that use standard costs, this represents the lot quantity or standard quantity for a production run.
- **Incl. in unit price** – If this flag is enabled it indicates that the charge should be assessed on a per unit bases instead of a fixed amount.
- **ABC Classification** – ABC classification is a fundamental inventory classification and organization practice where items are classified relative to each other. D365 allows you to assign ABC codes for four different ABC methodologies. You can assign them manually or you can have the system calculate them in Inventory warehouse management > Periodic > ABC Classification.
  - **Value** – This ABC classification uses the cost of the product to determine the ABC classification relative to the other products. For example, if A is specified in this field, the selected item is categorized as an A item, that makes up 20 percent of the total inventory and accounts for 80 percent of the total value of inventory.
  - **Margin** – This ABC classification uses the products margin to determine the ABC classification relative to the other products. For example, if A is specified in this field, the selected item is



categorized as an A item, that makes up 20 percent of the total inventory and accounts for 80 percent of the total marginal income.

- **Revenue** – This ABC classification uses the products revenue to determine the ABC classification relative to the other products. For example, if A is specified in this field, the selected item is categorized as an A item, that makes up 20 percent of the total inventory and accounts for 80% of the company's total revenue.
- **Carrying cost** – This ABC classification uses the products carrying cost to determine the ABC classification relative to the other products. Carrying cost can be thought of as the amount that a business spends on holding inventory over a period of time. It is the cost of owning, storing, and keeping the items in stock. This cost is important because it determines how long you can hold inventory before you start losing money. For example, if A is specified in this field, the item selected is categorized as an A item, that makes up 20 percent of the total inventory and is in inventory for two weeks. That means that A items are an expense in inventory for two weeks.

Manage costs				
<b>POSTING</b> Item group <input type="text"/>	<b>PRICE UPDATE</b> Latest cost price <input checked="" type="radio"/> No	Price <input type="text" value="0.00"/> Price quantity <input type="text" value="0.00"/>	Charges quantity <input type="text" value="0.00"/> Incl. in unit price <input checked="" type="radio"/> No	Margin <input type="text" value="None"/>
<b>COSTING</b> Cost group <input type="text"/>	Date of price <input type="text" value="8/7/2020"/>	<b>CHARGES</b> Price charges <input type="text" value="0.00"/>	<b>ABC CLASSIFICATION</b> Value <input type="text" value="None"/>	Revenue <input type="text" value="None"/>
Use cost price by variant <input checked="" type="radio"/> No	<b>PRICES</b> Unit <input type="text" value="ea"/>			Carrying cost <input type="text" value="None"/>

## MANAGE PROJECTS

- **Project category** – If the product will be used in project transactions a project category must be assigned. Project categories serve two purposes. The first is to categorize project transactions for reporting. The second purpose is to drive posting to the correct ledger accounts.

Manage projects
Project category <input type="text"/>

## FINANCIAL DIMENSIONS

- **Default Financial Dimensions** – The dimensions you see in this section will depend on which dimensions you have activated or enabled for your particular instance of D365. Financial dimensions are used to post particular values to ledger transactions so that trial balances can be sliced and diced by these dimensions. Financial dimensions are copied to transactions automatically. For example, financial dimensions applied at the product level will be copied to the source document as soon as the product is added. If products are added to a sales order for example the financial dimension values will default to that particular sales line and will be posted to the respective transaction voucher.



Financial dimensions

**DEFAULT FINANCIAL DIMENSIONS**

BusinessUnit  
 No default

CostCenter  
 No default

Department  
 No default

ItemGroup  
 No default

Project  
 No default

## WAREHOUSE

- **Unit sequence group** – The unit sequence group defines the handling structure for products in the warehouse. For example, a product may come in inner case packs, then several inner case packs may be packaged within a case, and then several cases may make up a pallet. The unit sequence group is used along with product specific unit conversions to define not only the handling structure of the product but also the different numerical conversions between each unit of measure in the unit sequence group. The unit sequence group is a required setup for advanced warehouse enabled items. For more on unit sequence groups see the “Unit Sequence Groups” section of this user guide.
- **Maximum pick quantity** – This is the maximum pick quantity allowed to be entered in the warehouse mobile application when picking this product. This is a safeguard against user error when over-picking is allowed.
- **Pack size category ID** – Is used when defining location stocking limits. If you are not using volumetric data on the location profile to define physical location capacity limits you can define location stocking limits. Location stocking limits can be based on a unit of measure or a pack size category. A pack size category is assigned to products with the same pack or container size in inventory. Then once these are assigned to products you can use the pack size category ID to define location stocking limits by each pack size category.
- **Physical dimension group ID** – If you are using volumetric data for location directives or load planning and you have multiple items that have the same physical dimensions, you can use the physical dimension group to define these groups instead of defining each one in the “Physical dimensions” button in the manage inventory tab of the ribbon. If you select a physical dimension group for the product, those physical dimensions will be defaulted to the product.
- **Mobile device description line 1** – This is a 20 character string field that allows you to define the description line 1 that will appear on the warehouse mobile application for the product during picks or puts on the mobile application.
- **Mobile device description line 2** – This is a 20 character string field that allows you to define the description line 2 that will appear on the warehouse mobile application for the product during picks or puts on the mobile application.
- **Fixed product locations** – This section displays all the fixed warehouse locations associated to the product. Fixed warehouse locations represent locations specifically designated for certain product. Warehouses with floating locations would not set fixed locations against products. This section is populated by defining the fixed locations in Warehouse management > Setup > Warehouse > Fixed locations.



- **Fixed product variant locations** – Fixed locations can also be defined for each product variant. If you have different fixed locations for each product variant, they can also be defined in Warehouse management > Setup > Warehouse > Fixed locations on the “Product variants” tab.
- **Filter codes** – Filter codes are user defined fields that can serve multiple purposes. The first purpose they serve can be simply for reporting purposes. The second purpose they serve is to direct warehouse location directives in a specific way. Filter codes can be easily used in a location directive or work template setup. The third purpose of filter codes is to determine product availability for customers or vendors. Filter codes can be used in the “Generally available products” functionality to only allow customers to buy products with matching filter codes and vendors to sell to us products that have matching filter codes.
  - **Filter code 1**
  - **Filter code 2**
  - **Filter code 3**
  - **Filter code 4**
- **Filter code group** – Filter code group is a way to group different filter codes together. This is helpful if you need to create a location directive based on multiple codes, you can use a filter code group instead.
  - **Filter code group 1**
  - **Filter code group 2**
- **Material picking in license plate locations** – This is a product control related setting that controls how production order picking happens.
  - **Staging** – This setting will mean that when you release a production order for picking at a license plate controlled location, the system will suggest that you pick the entire license plate quantity instead of the quantity that is required for the production order.
  - **Order picking** – This setting will mean that when you release a production order for picking, the system will tell you to pick only the quantity that is required for that production order.
- **Allow pick work center negative** – This setting allows you pick negative when doing production picking. Typically, you would never do negative picking for advanced warehouse items but there may be special cases in the production process where it makes sense. For example, if you have low value products that are counted rarely like paper inserts or flyers that must be inserted in a production process. You may not want an insufficient inventory quantity to hold up the production pick when you know you have inventory. The “Allow pick work center negative” option may be useful in such cases.
- **Default production or receiving quantity** – If you want to default a certain quantity when performing a report as finished task on the warehouse mobile application you can set that with this field. This is useful when you are always producing a specific quantity and it is easier to have the system default it rather than the user typing it in each time.
- **NMFC Code** – This is the National Motor Freight Code. This field is a standardized classification for the type of freight this item would fall into. This field is required to generate a bill of lading document. This field is defined and only editable at the product or product master level. This field just displays what is set at the product or product master level.
- **STCC code** – This is a seven digit numeric code representing 38 commodity groupings. Assignment of a STCC Code is associated by a commodity description developed to conform with exact descriptions in freight transportation classifications of rail and motor carriers. This field is defined and only editable at the product or product master level. This field just displays what is set at the product or product master level.



- **Harmonized Tariff Schedule** – HTS is based on the international Harmonized System, which is the global system of nomenclature applied to most world trade in goods. HTS codes are statistical categories for all merchandise imported into the United States. This field is defined and only editable at the product or product master level.
- **Package class ID** – This field can be used in location directives to filter for products that have similar packaging.

## COMMERCE

- **Product dimension groups** - Product dimension groups are used to streamline the creation of product masters using a standard set of product dimension values that can be assigned to product. Let’s take the example of a shirt that has a color and size dimension. If there are certain shirts that always have the sizes Small, Medium, and Large and colors Blue, Green, and Red, we can create a size dimension group and a color dimension group with those colors and sizes and instead of re-creating those dimensions over and over for each new product we can assign the size and color dimension groups to the product and they will inherit those sets of sizes and colors. For more on each of these product dimension groups please refer to the “Product Dimension Groups” section of this user guide. These fields will default from the selection made on the product master.
  - **Color group**
  - **Size group**
  - **Style group**
- **Print variants shelf labels** – Selecting this option allows you to print shelf labels by product variants.
- **Base comparison unit** – Price comparison can be done for items of different brands or packaging based on a base comparison unit of measure, for example, price per ounce. This price can also appear on shelf and item labels. It can be automatically calculated, based on the base comparison unit and its unit conversion.
- **Comparison price** – This is a system calculated field that will calculate the comparison price based on the “Base comparison unit”.
- **Blocked at register** – Selecting this option will block this product from being sold at the modern point of sale (MPOS) application at a retail store.
- **Date blocked** – This date will be applied by the system when the “Blocked at register” flag is enabled.
- **Date to be blocked** – This field allows you to set a date to block the product at the POS register in the future.
- **Bar code setup** – This field defines the base type of barcode used for this product.
- **Barcode** – This field will be populated by the system when a base barcode is defined in the “Bar codes” button in the “Manage inventory” tab in the ribbon.
- **Issue date** – This is the date when a blocked item will become available again.





- **Season** – This is a way for a retailer to define seasonality for the product. The seasons are user defined with a start and end date.
- **Validation from** – This is the start date of the selected season.
- **Valid to** – This is the end date of the selected season.
- **Scale product** – This indicates that the product is sold based on weight and would need to be weighed on a scale. The unit of measure of the item must be a weight unit of measure if this is selected.
- **Key in price** – This determines the behavior at the modern point of sale (MPOS) application regarding keying in a price. There are five options.
  - **Not mandatory** – This setting means that the user is not required to key in the price at the MPOS when this product is scanned at the register.
  - **Must key in new price** – This setting means that the user is required to key in the price at the MPOS when this product is scanned at the register.
  - **Must key in higher/equal price** – This setting means that the user is only able to key in the price at the MPOS when this product is scanned at the register that is higher than or equal to the retail sales price.
  - **Must key in lower/equal price** – This setting means that the user is only able to key in the price at the MPOS when this product is scanned at the register that is lower than or equal to the retail sales price.
  - **Must not key in price** – This setting means that the user is not able to key in the price at the MPOS when this product is scanned at the register.
- **Key in quantity** – This determines the behavior at the modern point of sales (MPOS) application regarding keying in a quantity. When a product is scanned at the register the selected option is triggered.
  - **Not mandatory** – This setting is the default and will not require the MPOS user to key in a quantity.
  - **Must key in quantity** – This setting will require the MPOS user to key in a quantity when the product is scanned at the MPOS.
  - **Must not key in quantity** – This setting will disable the ability to key in a quantity for a product and the product must be scanned for the number of items being purchased.
- **Must key in comment** – If this flag is enabled the user at the modern point of sale application will be prompted with a comment box when this product is scanned and be required to enter a comment.
- **Zero price valid** – There may be cases in a retail store where a zero price is entered for a product for various reasons. This flag indicates that if a user enters a zero price for this item the system will let the transaction proceed.
- **Quantity becomes negative** – If this flag is enabled the user is able to enter a negative quantity for this product at the modern point of sale application.
- **Prevent all discounts** – If this flag is enabled the system will prevent any discounts (manual or system discounts) to the product at the modern point of sale application.
- **Prevent manual discounts** – Retail discounts can be set up to apply to certain products based on a variety of criteria or to be manually applied by the MPOS user at the register.
- **Prevent retail discounts** – If this flag is enabled there will be no retail related system discounts applied to the product.
- **Prevent tender based discounts** – Retail discounts can be applied based on a customer using a preferred tender type. If this flag is enabled, tender based discounts will not be applied even if the customer pays using the tender type that would normally trigger a tender discount.



Commerce

<p><b>VARIANT</b></p> <p>Color group BASIC</p> <p>Size group</p> <p>Style group</p> <p>Print variants shelf labels <input type="radio"/> No</p> <p><b>COMPARISON PRICE</b></p> <p>Base comparison unit [Dropdown]</p> <p>Comparison price 0.00</p> <p><b>BLOCKING</b></p> <p>Blocked at register <input type="radio"/> No</p> <p>Date blocked [Text]</p> <p>Date to be blocked [Text]</p>	<p><b>BAR CODE</b></p> <p>Bar code setup [Dropdown]</p> <p>Bar code [Text]</p> <p><b>ACTIVATION</b></p> <p>Issue date [Text]</p>	<p><b>PRODUCT LIFE CYCLE</b></p> <p>Season [Dropdown]</p> <p>Valid from [Text]</p> <p>Valid to [Text]</p> <p><b>POS REGISTERS</b></p> <p>Scale product <input type="radio"/> No</p> <p>Key in price Not mandatory [Dropdown]</p> <p>Key in quantity Not mandatory [Dropdown]</p> <p>Must key in comment <input type="radio"/> No</p> <p>Zero price valid <input type="radio"/> No</p> <p>Quantity becomes negative <input type="radio"/> No</p> <p>Prevent all discounts <input type="radio"/> No</p> <p>Prevent manual discounts <input type="radio"/> No</p> <p>Prevent retail discounts <input type="radio"/> No</p> <p>Prevent tender based discounts <input type="radio"/> No</p>
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TRANSPORTATION

- **Use transportation management** – This flag is enabled automatically when the product is set up to use the advanced warehouse functionality. If this flag is enabled, the product can be used in the transportation management functionality.

Transportation

**GENERAL**

Use transportation managemen...  
 Yes

PRODUCT VARAINTS

- **Configuration technology** – Defines how product variants are created. There are three configuration technologies. For more information on the three technologies refer to the “Core Concepts” section of this user guide. This field just displays what is selected at the product master level.
- **Allow identical configurations** – For a dimension-base configuration product master, you can select this option to create product variants that are identical to existing product variants. There may be cases where you are working with completely unique items like diamonds that you need to create new variant that is identical to an existing variant. This field just displays what is selected at the product master level.
- **Generate variants automatically** – This option allows you to generate new product variants when a product dimension value is created for a product master. This functionality can only be used with product masters with the predefined variant and dimension-based configuration selected. This field just displays what is selected at the product master level.



- **Product dimension groups** – Product dimension groups are used to streamline the creation of product masters using a standard set of product dimension values that can be assigned to the product. This value will simply display what was selected at the product master level.
- **Default product variant** – If there is a particular set of default product dimension values that are used most often you can set this to default to transaction lines. For example, in the screen shot below if I added this product to a sales order, the size would be medium, the color would be blue, and the style, would be modern. The dimension values can be overridden but it can be helpful for order entry to default.
  - **Configuration**
  - **Size**
  - **Color**
  - **Style**

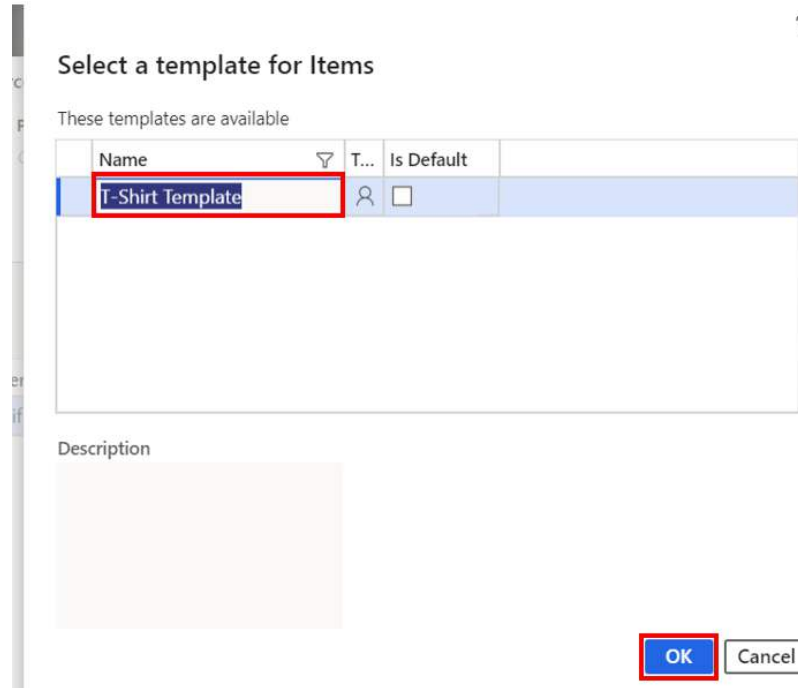
**RELEASED PRODUCT RIBBON**

The released product ribbon contains a series of **tabs**: **Product, Purchase, Sell, Manage inventory, Engineer, Plan, Manage projects, Manage costs, Commerce, General, and Setup**. Within each of those tabs there are **sections** and within each section there are **buttons**. The buttons link to other setup forms or other inquiries related to the product. In this section we will explore the functionality related to each button.

**PRODUCT**



- Apply Template** – The apply template button allows you to apply a pre-defined product template to a newly created item. The template is based on an existing released product and the fields that have been selected on the released products form. It does not copy data from related tables like, default order settings, item coverage, bar codes, GTIN, etc. The product template is meant to help streamline the product creation process. To apply a template, click the “Apply Template” button, select the desired template and click “OK”.



- Validate** – The validate button is a helpful feature for users that are responsible for creating products. The validate button will check to make sure critical fields are populated on the released products form. If you click the “Validate” button and the required fields are missing the user will receive a warning message.

Save + New Delete Product Purchase Sell Manage inventory Engineer Plan Manage projects Manage costs Commerce General Setup Options

Maintain New Product master Languages Set up Product kit

Apply template Product Released product variants Translations Dimension groups Product attributes Related products Configure

Validate Template Product dimensions Reservation hierarchy Product categories Unit conversions Counting reason code policy

⚠ For product S002, values needs to be specified for the fields Item group, Inventory unit, Unit sequence group ID, Sales unit. Specify the missing field values and try to validate again.

Released product details

Filter

	Item number	Product name	Search name	Product type	Product subtype	Product service type	Product dimension ...
	S002	Great White Shark T-Shirt	GreatWhiteSharkT...	Item	Product master	Not specified	SCS

After the user populates the required fields and runs the validation again, the system will display an information log confirming all required fields have been populated. Keep in mind the “Validate” button only checks for critical fields required to make the product function. It does not check for fields that may be required for the product to work for you organization’s specific business requirements.



Save + New Delete **Product** Purchase Sell Manage inventory Engine

Maintain	New	Product master	Languages	
Apply template Validate	Product Template ▾	Released product variants Product dimensions	Translations	Dimension gr Reservation hi Counting reas

ⓘ All field values required for validation are specified for product S002.

Released product details

Filter

	Item number	Product name	Search name	P
<input type="radio"/>	S002	Great White Shark T-Shirt	GreatWhiteSharkTSh	It

- **Product** – This button will initiate the creation of a new product. This can also be done by clicking the “New” button. The product creation flyout window will appear.



?

### New released product

Product type <input type="text" value="Item"/>	Tracking dimension group <input type="text"/>
Product subtype <input type="text" value="Product"/>	Reservation hierarchy <input type="text"/>
Product service type <input type="text" value="Not specified"/>	Buyer group <input type="text"/>

**IDENTIFICATION**

Product number

Product name

Search name

**UNITS OF MEASURES**

Inventory unit

Purchase unit

Sales unit

BOM unit

**COMPANY-SPECIFIC IDENTIFICATION**

Item number

Search name

Retail category

**SALES TAXATION**

Item sales tax group

**CATCH WEIGHT**

No

**PURCHASE TAXATION**

Item sales tax group

**ADMINISTRATION**

Apply template

**VENDOR INFORMATION**

Vendor

Vendor item number

**REFERENCE GROUPS**

Item model group

Item group

Storage dimension group

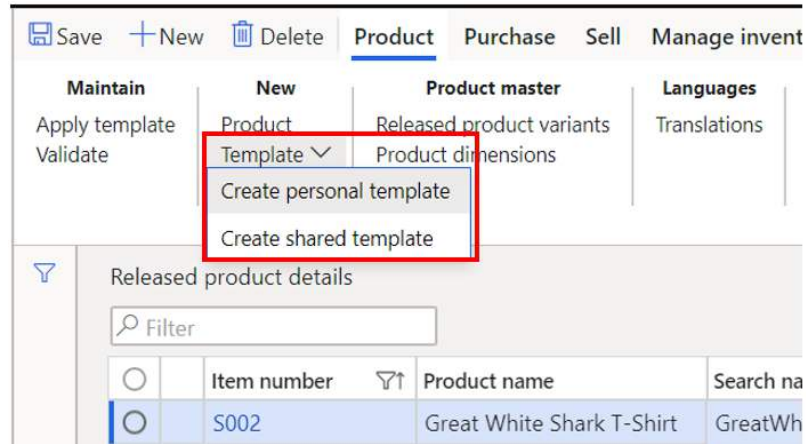
**PRICES**

Purchase price

Sales price

Inventory price

- Template** – The template button is used to create a template that is based on the item that is currently selected. When you click the “Template” button there are two options. A personal template is a template that only your user account will be able to use. If you select to create a shared template, it will be available to everyone.



Give the template a name and click the “Ok” button. This will save the template and it will now be available when you click the “Apply template” button.

### Create template

Name

Description

- **Released product variants** – This button will take you to all your released product variants for the legal entity you are currently in.



Save + New Delete **Product variant** Engineer Plan General Options

**Released product variants**

Variant suggestions Generate descriptions  
Translations Unit conversions

Released product variants | S002 : GREATWHITESHARKTSHIR

Filter

	Product number	Product name	Search name	Size	Color	Style
<input type="radio"/>	Black S Modern	Great White Shark T-Shirt	GreatWhiteSharkT...	S	Black	Modern
<input type="radio"/>	Black S Retro	Great White Shark T-Shirt	GreatWhiteSharkT...	S	Black	Retro
<input type="radio"/>	Blue S Modern	Great White Shark T-Shirt	GreatWhiteSharkT...	S	Blue	Modern
<input type="radio"/>	Blue S Retro	Great White Shark T-Shirt	GreatWhiteSharkT...	S	Blue	Retro
<input type="radio"/>	Green S Modern	Great White Shark T-Shirt	GreatWhiteSharkT...	S	Green	Modern
<input type="radio"/>	Green S Retro	Great White Shark T-Shirt	GreatWhiteSharkT...	S	Green	Retro
<input type="radio"/>	Magenta S Modern	Great White Shark T-Shirt	GreatWhiteSharkT...	S	Magenta	Modern
<input type="radio"/>	Magenta S Retro	Great White Shark T-Shirt	GreatWhiteSharkT...	S	Magenta	Retro
<input type="radio"/>	Purple S Modern	Great White Shark T-Shirt	GreatWhiteSharkT...	S	Purple	Modern

- **Product dimensions** – The product dimensions button will take you to all the product dimension values that have been created for the product.

Save Options

S002 : GREATWHITESHARKTSHIR

### Product dimensions

Sizes

Colors

Styles

Define sizes for a product master

+ New Delete Translations

	Size	Name	Description	Replenish...	Displa...
<input type="radio"/>	S	Small	Small	0	1.00
<input type="radio"/>	M	Medium	Medium	0	2.00
<input type="radio"/>	L	Large	Large	0	3.00

- **Translations** – The translations button will open the translation form where you can modify the product translation for the respective language.





Save + Add Remove Options

### Text translations

PROVIDE TRANSLATION FOR THE ORIGINAL TEXT

Default language code: "English (United States)(en-us)" Language: English (United States)(en-us)

Reference: S002

Product number: S002

Translation

ORIGINAL TEXT	TRANSLATED TEXT
Description Great White Shark T-Shirt with glow in the dark ink	Description Great White Shark T-Shirt with glow in the dark ink
Product name Great White Shark T-Shirt	Product name Great White Shark T-Shirt

- **Dimension groups** – This button will just display the currently selected dimension groups for the item.
- **Reservation hierarchy** – This button is how you select or change the reservation hierarchy for the item.
- **Counting reason code policy** – The counting reason code policy dictates whether counting reason codes are required when an item is counted. If there is no policy selected reason codes are optional.

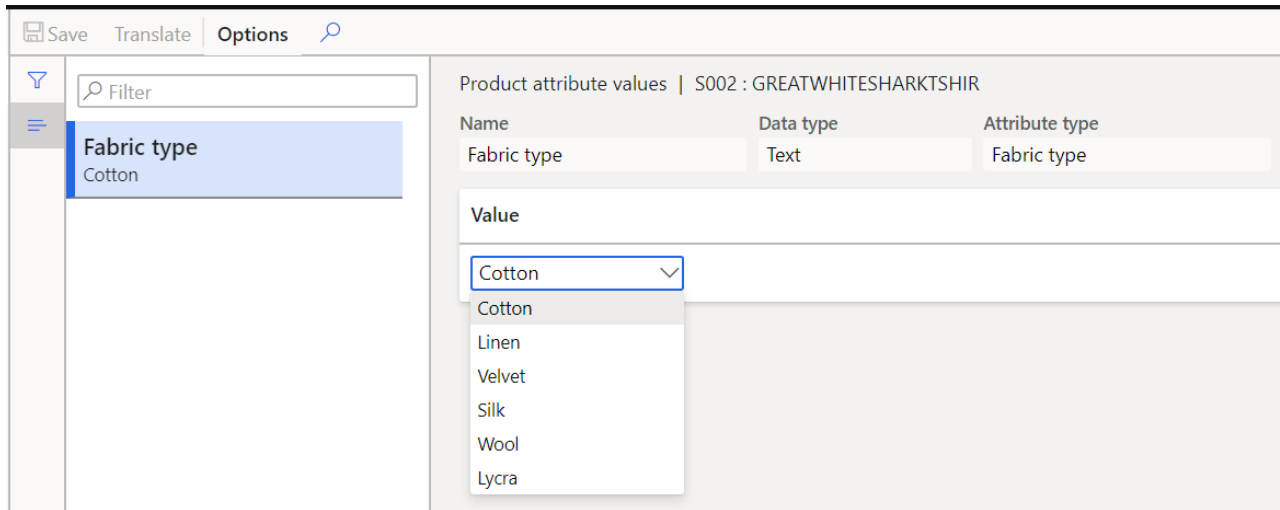
Counting reason code policy

### Assign counting reason code policy

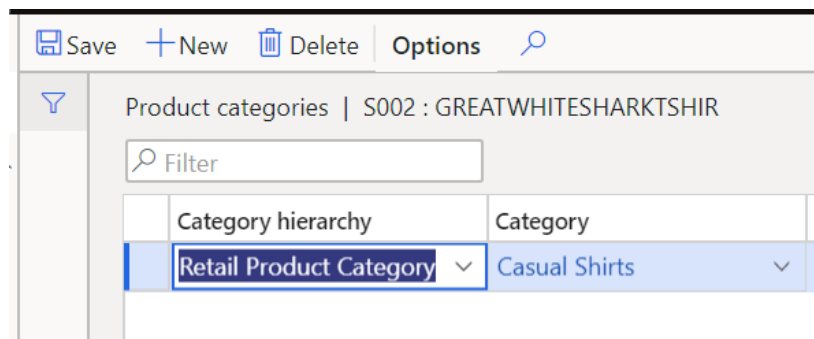
Counting reason code policy

Name	Counting reason c...
Mandatory	Mandatory
Optional	Optional

- **Product attributes** – Product attributes will open the product attributes form. Product attributes can be set and modified on this form.



- Product categories** – This button will display the product categories form where you can associate or disassociate product category hierarchies. You can also change the specific category node that has been selected for the item.



- Related products** – This button will open the related products form. Related products are a retail related functionality that allows you to associate related products to the current product. This could be things like a life vest associated with a canoe.
- Unit conversions** – Clicking the “Unit conversion” button will bring you to the product specific unit conversion form. This form allows you to enter the unit conversions between the different handling units of measure like each, case, and pallet.



Options

S002 : GREATWHITESHARKTSHIR | Standard view

## Unit conversions

Standard conversions

Intra-class conversions

Inter-class conversions

Set up product-specific conversion rules for units of measure in the same unit class

+ New Edit Delete Calculator for units

Product	Definition	From unit	To unit	Rounding
S002	1 PL = 300 ea	PL	ea	To nearest
S002	1 PL = 30 Case	PL	Case	To nearest
S002	1 Case = 100 ea	Case	ea	To nearest

- Configure** – If your item is a kit item this button will be enabled. Clicking this button will take you to the form where you add the components of the kit to the kit item.

## PURCHASE

Save + New Delete Product Purchase Sell Manage inventory Engineer Plan Manage projects Manage costs Commerce General Setup Options

View Trade agreements Approved vendor Purchase order Invoice matching Related information

Purchase prices Multiline discount View trade agreements Setup Supply overview Matching policy External item description  
Line discount Total discount Create trade agreements Approved vendors Open purchase order lines Price tolerances Supplementary purchase item  
Royalty Effective period Period statistics

Released product details | Standard view

### S002 : Great White Shark T-Shirt

General

IDENTIFICATION	Item number	Search name	ADMINISTRATION	Reservation hierarchy
Product type	S002	GreatWhiteSharkTShir	Storage dimension group	Default
Item	Product number	Description	Ware	Counting reason code policy
Product subtype	S002	Great White Shark T-Shirt with glow in the dark ink	Tracking dimension group	Product lifecycle state
Product master			None	
			Item model group	

FURTHER IDENTIFICATION

- Purchase prices** – The purchase prices button will take you to all your posted purchase price trade agreements that are applicable for this item. In the example below there is a price of \$1.35 for vendor “1003”. There are no size, color, and style dimensions specified for this price meaning the price applies for all dimensions.

Inventory Attribute-based pricing details Edit selected lines Options

Price (purch.) | S002 : GREATWHITESHARKTSHIR

Filter

Relation	Currency	Party code type	Account selection	Size	Color	Style	Site	Warehouse	Unit	From date	To date	From	To	Price
Price (purch.)	CAD	table	1003				2	24	ea			0.00		1.35

- Line discount** – Similar to the purchase price button, the line discount button will show you all the purchase line discounts that are applicable for this item.
- Multiline discount** – Similar to the purchase price button, the Multiline discount button will show you all the purchase Multiline discounts that are applicable for this item.



- **Total discount** – Similar to the purchase price button, the Total discount button will show you all the purchase total discounts that are applicable for this item.
- **View trade agreements** – This button will show you all posted trade agreements that are applicable to the item. This includes trade agreements for purchase prices, purchase line discounts, purchase multiline discounts, and total discounts.
- **Create trade agreements** – This button will take you directly to the price/discount journal form. This form will allow you to create a trade agreement journal where you can create and post a trade agreement journal that can include purchase prices, purchase line discounts, purchase multiline discounts, and total discounts. Click the “New” button and select a journal name. Then click the “Lines” button to open the journal where the price can be entered and posted.

The screenshot shows the 'Trade agreement journals' interface. At the top, there are buttons for 'Save', '+ New', 'Delete', 'Lines', and 'Options'. Below this, the title is 'Trade agreement journals | 1000 : 1001'. There is a search filter and a 'Show' dropdown set to 'Not posted'. A table below lists the journals:

Name	Price/...	Description	Posted	Posted on	Default relation	Export cur...
Pric	PDJ-00134	Purchase Price Journal			Price (purch.)	<input type="checkbox"/>

- **Royalty** – This button will open the royalty contract form where royalty contracts can be set up and associated with vendors and items. For more on royalty contracts please refer to the Procurement and Sourcing User Guide.
- **Setup (Approved vendor)** – This button will open the approved vendor list form. Here you can associate approved vendors to the product. If you have the “Approved vendor check method” on the purchase fast tab of the released product form set to “Warning only” or “Not allowed” only vendors in this approved list will be allowed to purchase from. To add vendors to the approved vendor list, click the “Add” button and select the vendor account.

The screenshot shows the 'Approved vendor list' interface for product 'S002 : GREATWHITESHARKTSHIR'. It includes buttons for 'Save', '+ Add', 'Remove', 'View', and 'Options'. The product details are shown as follows:

Item number	Product name
S002	Great White Shark T-Shirt

Vendor	Effective	Expiration
1003	9/1/2020	

- **Approved vendors** – This button will take you to the approved vendors list which is the same approved vendor list, except it is read only. You can also filter by expiration and effective dates if you have set expiration dates on your approved vendors.



View ▾ Options 🔍

Approved vendor list by item | S002 : GREATWHITESHARKTSHIR

**PRODUCTS** **SHOW PRODUCTS FOR THE PERIOD**

Item number: S002 Product name: Great White Shark T-Shirt

Effective: 9/1/2020 Expiration: Never

Vendor	Effective	Expiration
1003	9/1/2020	

- **Effective period** – This button will take you to the approved vendors list which is the same approved vendor list, except it is read only and will default to show you only the approved vendors that have expired.
- **Supply overview** –Supply overview form is used to provide an overview of the available supply beyond the default supply option and to enable the user to view and compare the alternatives for supplying items that the customer requires at the time that he or she specified.
- **Open purchase order lines** – This form will open a purchase order line view of all the open purchase order lines related to this item.

Options 🔍

PO00001576 : S002

### Open purchase order lines

Overview Purchase order

Inventory ▾

Purchase order	Line num...	Item number	Procurement category	Site	Warehouse	Delivery date	Deliver re...	Quantity	Unit price	Net amount
PO00001576	1	S002		2	24	9/1/2020	800.00	800.00	1.35	1,080.00

- **Period statistics** – This form will give you a 360 degree view of several key statistics related to product supply and demand.



Save Options

S002 : GREATWHITESHARKTSHIR

### Period statistics

Quantity available  
0.00

Period statistics

+ Add Remove

	Start date	End date	Purchase orders	Quantity purchased	Total	Sales orders	Quantity sold	Total	Return orders	Total	Quantity returned	Calculate...
<input type="radio"/>	9/1/2020	9/30/2020	0		0.00	0		0.00	0	0.00		0.0000
<input type="radio"/>	9/1/2020	8/31/2020	0		0.00	0		0.00	0	0.00		0.0000
<input type="radio"/>	1/1/2020	9/1/2020	0		0.00	0		0.00	0	0.00		0.0000
<input type="radio"/>	1/1/2019	12/31/2019	0		0.00	0		0.00	0	0.00		0.0000
<input type="radio"/>		9/1/2020	0		0.00	0		0.00	0	0.00		0.0000

Last actions

	DATE	NO.	QUANTITY	AMOUNT
LAST RECEIPT				0.00
LAST PURCHASE			0.00	0.00
LAST POSITIVE CORRECTION			0.00	0.00
LAST SHIPMENT			0.00	0.00
LAST INVOICE			0.00	0.00
LAST NEGATIVE CORRECTION			0.00	0.00

- **Matching policy** – The matching policy will show you the current purchase invoice matching policy associated with the product. The matching policy can be overridden to one of these four options:
  - **Company policy** – This selection means the matching policy will be determined by the matching policy defined in the accounts payable parameters.
  - **Three-way matching** – This selection will require matching the price information on the invoice to the price information on the purchase order. It also matches the quantity information on the invoice to the quantity information on the product receipts that are selected for the invoice.
  - **Two-way matching** – This selection will require matching the purchase price on the purchase order to the price on the vendor invoice.
  - **Not required** – This selection means that matching is not required.



### Matching policy

Specify the line matching policy for items, vendors and item/vendor combinations for vendor invoices

**COMPANY**

Line matching policy

Not required

Allow matching policy override

Lower or higher than compa...

Matching policy level

Item

+ Add Delete

<input type="radio"/>	Item number ↑	Product name	Line matching policy
<input checked="" type="radio"/>	S002	Great White Shark T-Shirt	Company policy ▾

- Company policy
- Three-way matching
- Two-way matching
- Not required

OK

- Price tolerances** –This button will open the price tolerance setup form. In the accounts payable module, you can set up price tolerances percentages that define what percentage deviation between the unit price on the purchase order and the unit price on an invoice constitute an invoice matching discrepancy that must be investigated and approved before the invoice can be posted. The tolerance percentages can be defined for all items, a group of items, or individual items.



Save + New Delete Options

Price tolerances | S002 : GREATWHITESHARKTSHIR

Filter

Item code	Item relation	Account code	Account relation	Unit price tolerance percentage
Table	S002	All		5.00

- External item description** – The external item description button is used to enter a vendor’s part number if the vendor requires you to use their part number when placing a purchase order. Vendor part number can be displayed in place of or alongside the internal item number on the printed purchase order.

Save + New Delete Options

External item descriptions | S002 : GREATWHITESHARKTSHIR

Filter

ABC code	Size	Color	Style	Account code	Vendor relation	External item number	Description	External item text
None				Table	1003	IXT-09282-2928		GREAT WHITE SHARK TSHIRT

- Supplementary purchase item** – This button will open the supplementary items form. Supplementary items are items that may accompany a given item when purchasing the item. You can add supplementary items that are associated with the product by clicking the “New” button and completing the form.

Save + New Delete Options

Supplementary items - Vendor | S002 : GREATWHITESHARKTSHIR

Item code: Table S002

Filter

Account code	Account selection	Size	Color	Style	Unit	Quantity limit	Supplementary item
Table	1003	S	Black	Modern	ea	10.00	D0011

**MULTIPLE QUANTITY**    **DATE INTERVAL**    **ADMINISTRATION**

Multiple quantity:

From date:

To date:

Free of charge:  Yes     No

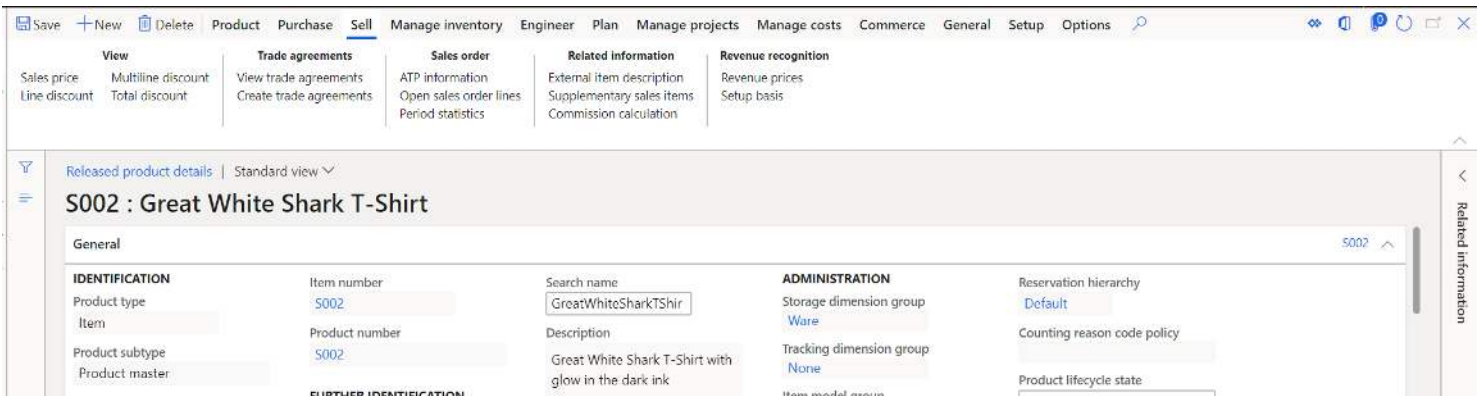
Optional:  No     Yes

Once only:  No     Yes

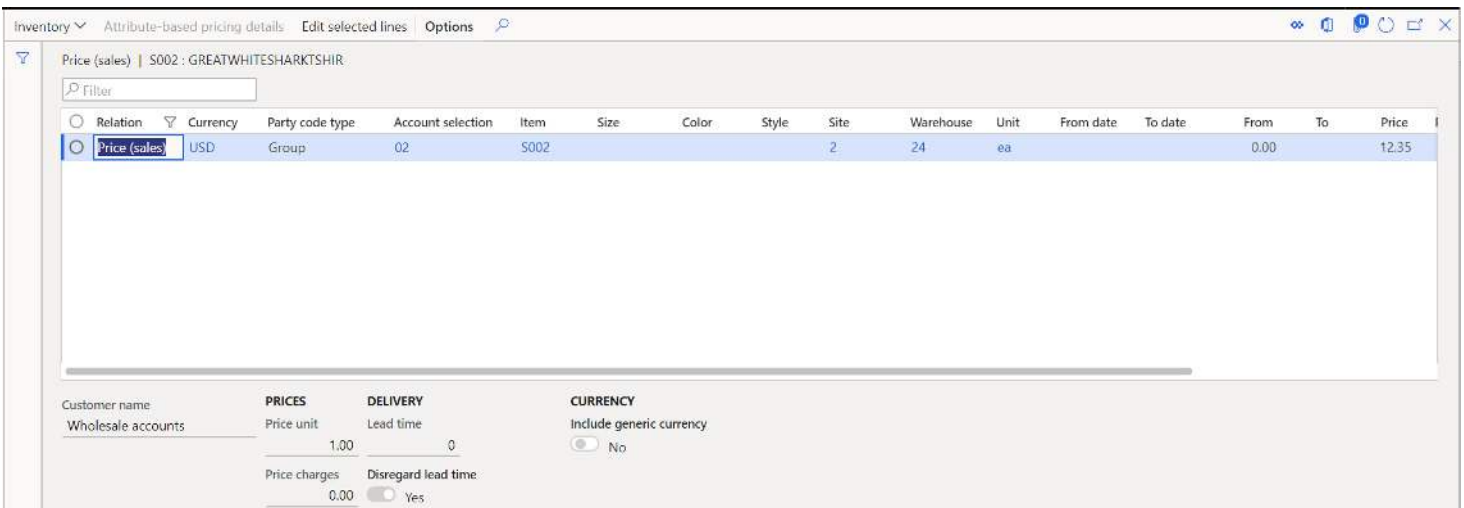




SELL



- Sales prices** – The sales prices button will take you to all your posted sales price trade agreements that are applicable for this item. In the example below there is a price of \$12.35 for customers who belong to the “02 price group. There are no size, color, and style dimensions specified for this price, meaning the price applies for all dimensions.



- Line discount** – Similar to the sales prices button, the line discount button will show you all the sales line discounts that are applicable for this item.
- Multiline discount** – Similar to the sales price button, the Multiline discount button will show you all the sales Multiline discounts that are applicable for this item.
- Total discount** – Similar to the sales price button, the total discount button will show you all the sales total discounts that are applicable for this item.
- View trade agreements** – This button will show you all posted trade agreements that are applicable to the item. This includes trade agreements for sales prices, sales line discounts, sales multiline discounts, and total discounts.
- Create trade agreements** – This button will take you directly to the price/discount journal form. This form will allow you to create a trade agreement journal. Here you can create and post a trade agreement journal that can include sales prices, sales line discounts, sales multiline discounts, and total discounts. Click the “New” button and select a journal name. Then click the “Lines” button to open the journal where



the price can be entered and posted. For more on sales trade agreements the Sales and Marketing User Guide.

- **ATP Information** – This button will take you to the available to promise form which gives you a view of the quantity that is available to promise on sales orders by date. The ATP calculation can have multiple parameters that can affect the result of the calculation. These parameters can be set at the accounts receivable parameter level, and overridden at the item level from the default order settings form. This form also shows all incoming receipts and issues and the expected on-hand inventory for each day.

Recalculate ATP quantity Options

Personalize Personalize this page Page options Security diagnostics Record info Advanced filter or sort Change view Share Create a custom alert Manage my alerts

ATP Information | S002 : GREATWHITESHARKTSHIR

## S002

ATP time fence 15 days, Planned orders included

**FILTERS**

**INVENTORY DIMENSIONS**

Quantity: 0.00 Item number: S002 Site: 1 Warehouse: 11

**ATP QUANTITY**

Date	ATP	Receipts	Issues	On hand
9/4/2020	1,972.00	0.00	5.00	1,995.00
9/5/2020	1,972.00	0.00	23.00	1,972.00
9/6/2020	1,972.00	0.00	0.00	1,972.00
9/7/2020	1,972.00	0.00	0.00	1,972.00
9/8/2020	1,972.00	0.00	0.00	1,972.00
9/9/2020	2,072.00	100.00	0.00	2,072.00
9/10/2020	2,572.00	500.00	0.00	2,572.00
9/11/2020	2,572.00	0.00	0.00	2,572.00
9/12/2020	2,572.00	0.00	0.00	2,572.00
9/13/2020	2,572.00	0.00	0.00	2,572.00
9/14/2020	2,572.00	0.00	0.00	2,572.00
9/15/2020	2,572.00	0.00	0.00	2,572.00

**ATP QUANTITY GRAPHICALLY**

- **Open sales order lines** – This button will take you to the open sales order lines inquiry form that will show you all the open sales order lines associated to this item.

Options

002195 : S002

## Open sales order lines

Overview Sales order

Display dimensions

Sales order	Item number	Sales category	Site	Warehouse	Ship date	Deliver remainder	Quantity	Unit price	Net amount
002195	S002		2	24	10/5/2020	30.00	30.00	12.35	370.50



- **Period statistics** – This form shows you the same view as the “Period statistics” button on the purchase tab. This form will give you a 360 degree view of several key statistics related to product supply and demand.
- **External item description** – This will take you to the external item description form where you can define the customer part number and description. Use this if you have customers that require their part numbers to be seen on external documents like sales order confirmations and packing slips.

ABC code	Size	Color	Style	Account code	Customer relation	External item number	Description	External item text
None				Table	US-004	XRG449-03301		GREATWHITESHARKTSHIR

- **Supplementary sales items** – This button will open the supplementary items form. Supplementary items are items that may accompany a given item when selling the item. You can add supplementary items that are associated with the product by clicking the “New” button and completing the form. The user will be able to add the supplementary item from the sales order line by clicking the “Sales order lines” button and clicking the “Supplementary items” button.

Account code	Account selection	Size	Color	Style	Unit	Quantity limit	Supplementary item
Group	01	S	Black	Modern	ea	0.00	M0004

**MULTIPLE QUANTITY**  
 Multiple quantity:

**DATE INTERVAL**  
 From date:    
 To date:

**ADMINISTRATION**  
 Free of charge:  No

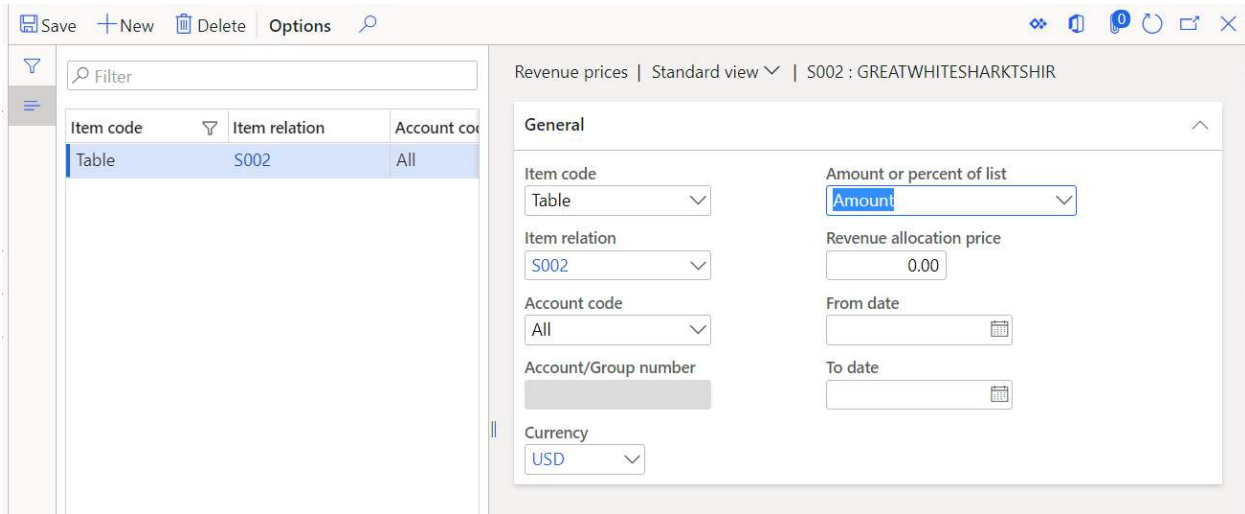
**Optional**  
 Optional:  No  
 Once only:  No

- **Commission calculation** – This button will open the commission calculation form. The commission calculation form is where the commission calculation can be set up for specific items, groups of items,



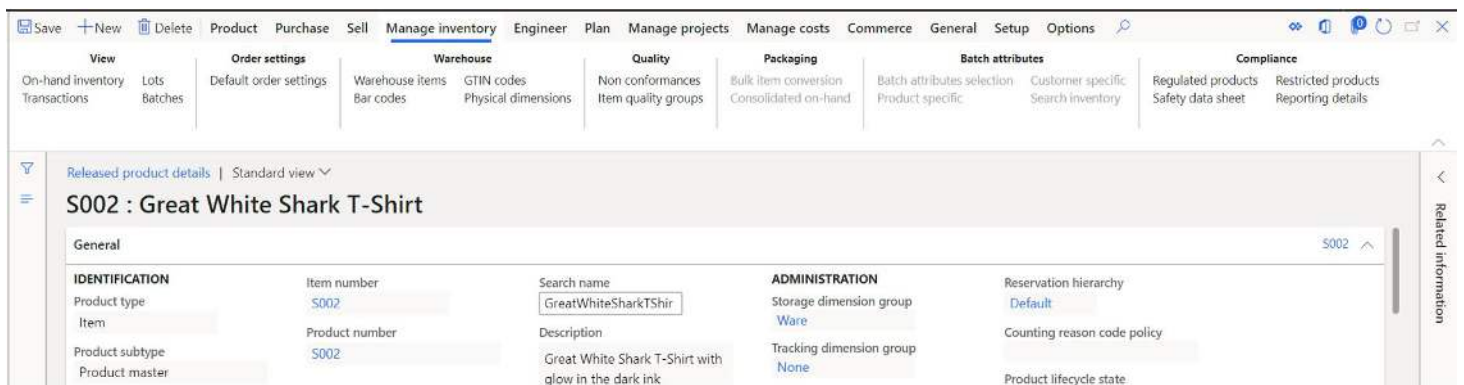
customers, groups of customers, and which sales representatives should receive those commissions. For more on commission setup and calculation see the Sales and Marketing User Guide.

- **Revenue prices** – This button will open the “Revenue prices” button. Revenue prices are used with revenue recognition functionality in D365. This form defines the fair market value of the item. This form works like a trade agreement but does not require any posting to make the price active.



- **Setup basis** – The setup basis is used in revenue recognition to specify item groups that the current item is supporting in the case of a post contract support item. When the revenue allocation is triggered, the revenue price will be distributed across the essential and nonessential parts for the post contract support item.

## MANAGE INVENTORY



- **On-hand inventory** – The on-hand inventory button will take the user to the on-hand inventory list page already filtered on the currently selected product. This form will show you inventory quantities for quantity physically on hand, quantity physically reserved, quantities pending receipt, quantities pending issue and more.
  - Item number – This is the unique item identification.
  - Product name – This is the product name.
  - Physical inventory – The physical inventory is the actual physical inventory sitting in the warehouse not including any reservations that might be against the inventory.



- Physical reserved – This is the quantity against the dimensions specified in the record that inventory has been physically reserved against.
- Available physical – Available physical is the remaining quantity available after physical reservation has been taken into account.
  - Physical inventory – Physical reserved = Available physical.
- Available physical on exact dimensions – This is the same thing as available physical except it is calculated based on the exact dimensions of the record.
- Ordered in total – This is the total number of incoming receipts for the given dimension combination. For example, this could be un-received purchase orders or unfinished production orders.
- On order – This is the total number of outgoing issues for the given dimension combination.
- Ordered reserved – This is the total number of incoming receipts with reservations. This feature can be enabled in the Inventory management parameters.
- Available for reservation – This is the total quantity that is available for reservation. If you have the “Reserve ordered items” flag enabled, this number will include the ordered quantity.
- Total available – This is the total available inventory after you take out reservations inventory on orders and include inventory on incoming orders.
  - Total available = Physical inventory - Physical reserved + Ordered - On order - Ordered reserved.

The screenshot shows the 'View' tab in the Dynamics 365 Inventory Management interface. The table displays inventory data for 'S002 : GREATWHITESHARKTSHIR'. The table has columns for Item number, Product name, Size, Color, Style, Site, Warehouse, Physical inventory, Physical reserved, Available physical, Available phys..., Ordered in..., On order, and Ordered re... The first row shows a total physical inventory of 800.00 and 30.00 on order. The second row shows a specific size 'S' with 100.00 physical inventory, 100.00 physical reserved, and 100.00 available physical.

Item number	Product name	Size	Color	Style	Site	Warehouse	Physical inventory	Physical reserved	Available physical	Available phys...	Ordered in...	On order	Ordered re...
S002	Great White Shark T-Shirt	L	Black	Modern	2	24					800.00	30.00	
S002	Great White Shark T-Shirt	S	Black	Modern	2	24	100.00		100.00	100.00			

- **Transactions** – This button will open the inventory transactions form and show the user all inventory transactions associated with the selected product. By default, this form will show warehouse work transactions if advanced warehouse functionality is configured. These can be filtered out by toggling the “Transaction filter” selection. Inventory transactions show all types of transactions including transactions that do not yet have a physical or financial impact like pending receipts (e.g. open purchase orders) and pending issues (e.g. open sales orders). For a deep dive into the inventory transactions form and how to understand it please refer to the Inventory Management User Guide.



Transaction details | Display dimensions | Summation | Split | Inventory | Ledger | Options

Inventory transactions | S002 : GREATWHITESHARKTSHIR

Standard view \* v

Transaction filter  
Filter [ ] Display all [v]

Item number	Physical date	Financial date	Reference	Number	Receipt	Issue	Quantity	Unit	Cost amount	Site	Warehouse	Location
S002			Purchase order:	PO00001576	Ordered		800.00	ea		2	24	
S002			Sales order	002195		On order	-30.00	ea		2	24	
S002	9/10/2020	9/10/2020	Counting		Purchased		100.00	ea		2	24	BULK_001

- Lots** – This button takes the user to a list of lot ID’s associated with inventory transactions. In Dynamics 365 Finance and Operations the term lots refers to a unique transaction identifier that ties a source document transaction line to the associated inventory transaction. The terminology is not to be confused with the term “Batch” which is what people most often think of when they hear the word “lots”.
- Batches** – This button takes the user to the batches form that displays all batch numbers associated with the product. In Dynamics 365 Finance and Operations batches are what most people call lots or lot codes in a manufacturing setting. Batches can have several associated attributes like expiration date, manufacturing date, shelf advice date, vendor batch date, vendor’s expiration date, and user defined batch attributes.

Save | + New | Delete | View | Trace | Reset | Inquiries | Options

View  
On hand [v] Inventory batch attributes  
Transactions Inventory blocking  
Batch restriction

Batches | S002 : GREATWHITESHARKTSHIR

Standard view \* v

Filter [ ]

Batch number	Batch disposition ...	Batch disposition s...	Best before date	Expiration date	Manufacturing date	Shelf advice date	Vendor batch date	Vendor expiry date
LOT7645				9/11/2022				

- Default order settings** – Default order settings are primarily used with the master planning module in Dynamics 365 Finance and Operations. They define order settings, defaults, and guidelines for purchase, sales, and production orders. You can define multiple default order settings by different dimensions and rank them in order of precedence. The top part of the form can be thought of as an input section where dimension and site values selected in the source document (purchase order, sales order, or production order) dictate the order settings selected for that combination. The default order type dictates if the item is produced or purchased. If the master planning functionality is enabled the planning engine will use this to either create a planned production order or a planned purchase order. For more on default order settings see the Master Planning User Guide.



Save + New Delete Default order settings Options

Rank: Move up, Move down, Renumber

Column display: Hide storage dimensions, Hide lead times, Hide order quantities, Hide delivery control

Filter: Rank ↓ Site Size

0

Default order settings | S002 : GREATWHITESHARKTSHIR | Standard view

**IDENTIFICATION**

Rank: 0

Item number: S002

Product name: Great White Shark T-Shirt

**SETTINGS APPLICABLE FOR ORDER TYPE**

Site: [ ]

Size: [ ]

Color: [ ]

Style: [ ]

Default order type: Purchase order

**Purchase order**

Unit: ea

Default site: [ ]

Mandatory site:

Default warehouse: [ ]

Mandatory warehouse:

**PURCHASE QUANTITY**

Multiple: 0.00

Min. order quantity: 0.00

Max. order quantity: 0.00

Standard order quantity: 0.00

**OTHER**

Purchase lead time: 0

Working days:

Stopped:

Save + New Delete Default order settings Options

Rank: Move up, Move down, Renumber

Column display: Hide storage dimensions, Hide lead times, Hide order quantities, Hide delivery control

Filter: Rank ↓ Site Size

0

Default order settings | S002 : GREATWHITESHARKTSHIR | Standard view

**IDENTIFICATION**

Rank: 0

Item number: S002

Product name: Great White Shark T-Shirt

**SETTINGS APPLICABLE FOR ORDER TYPE**

Site: [ ]

Size: [ ]

Color: [ ]

Style: [ ]

Default order type: Purchase order

**Inventory**

Unit: ea

Default site: [ ]

Mandatory site:

Default warehouse: [ ]

Mandatory warehouse:

**INVENTORY QUANTITY**

Multiple: 0.00

Min. order quantity: 0.00

Max. order quantity: 0.00

Standard order quantity: 0.00

**OTHER**

Inventory lead time: 0

Working days:

Stopped:

**OVERRIDE DELIVERY CONTROL**

No

**DELIVERY CONTROL**

Delivery date control: ATP + Issue margin

ATP time fence: 30

ATP backward demand time fence: 2

ATP backward supply time fence: 2

ATP delayed demand offset time: 1

ATP delayed supply offset time: 1

ATP incl. planned orders



Save + New Delete Default order settings Options

Rank: Move up, Move down, Renumber

Column display: Hide storage dimensions, Hide lead times, Hide order quantities, Hide delivery control

Filter: Rank, Site, Size

Default order settings | S002 : GREATWHITESHARKTSHIR | Standard view

**IDENTIFICATION**

Rank: 0

Item number: S002

Product name: Great White Shark T-Shirt

**SETTINGS APPLICABLE FOR ORDER TYPE**

Site: [ ]

Size: [ ]

Color: [ ]

Style: [ ]

Default order type: Purchase order

Purchase order

Inventory

Sales order

Unit: ea

Default site: [ ]

Mandatory site:

Default warehouse: [ ]

Mandatory warehouse:

**SALES QUANTITY**

Multiple: 0.00

Min. order quantity: 0.00

Max. order quantity: 0.00

Standard order quantity: 0.00

**OTHER**

Stopped:

**OVERRIDE SALES LEAD TIME**

No:

Sales lead time: 5

**OVERRIDE DELIVERY CONTROL**

No:

**DELIVERY CONTROL**

Delivery date control: ATP + Issue margin

ATP time fence: 30

ATP backward demand time fence: 2

ATP backward supply time fence: 2

ATP delayed demand offset time: 1

ATP delayed supply offset time: 1

ATP incl. planned orders:

- Warehouse items** – The warehouse items form is only used if you are not using the advanced warehouse management functionality. When you perform cycle counting in multiple warehouses, a warehouse item must be set up for each item configuration, for each warehouse. By default, when you select Counting group on the general fast tab of the Released Product's form, a warehouse item is created automatically without a specific warehouse. To define cycle counts for items where multiple warehouses exist, the warehouse items form allows for identification of which counting group should be used for each warehouse.





- Bar codes** – This form is used to enter bar codes related to each product or product variant. Different types of barcodes can be configured associated with the barcode record. The barcode can also have a quantity or unit of measure associated with it. If you want to be able to scan the barcode using the warehouse mobile application, make sure you select the “Scanning” checkbox.

	Variant number	Item number	Size	Color	Style	Bar code setup	Bar code	Quantity	Unit	Scanning	Display	To be printed
<input type="radio"/>	VN-000290	S002	L	Black	Modern	EAN-13	0084957573237		ea	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

- GTIN codes** – This form allows you to enter GTIN (Global Trade Identification Number) barcodes associated with a product or product variant for each unit of measure. These barcodes are also scannable from the warehouse mobile application and retail modern point of sale application.



Save + New Delete Display dimensions Options

Item - GTIN | S002 : GREATWHITESHARKTSHIR

Standard view

Filter

Item number	Size	Color	Style	Unit	GTIN code	GTIN	Description
S002	S	Black	Modern	Case	EAN/UCC-14	00948844843423	

- Physical dimensions** – The physical dimensions form allows you to specify your physical dimensions for each unit of measure. These dimensions are used in various areas by the system. For example, warehouse management volumetric calculations to determine space utilization to direct pick or put work to a location that has available storage capacity. They are also used for load building, planning and optimization. **Note:** The physical dimensions for the inventory unit of measure are not editable on this form because they are specified on the released product form in the “Manage inventory” fast tab.

Save + New Delete Unit conversions Import units for item Options

Physical dimensions | S002 : GREATWHITESHARKTSHIR

Standard view

Filter

Item number	Unit	Gross weight	Width	Depth	Height	Volume
S002	Case	150.00	40.00	40.00	24.00	38,400.00
S002	ea	1.26	5.00	5.00	0.10	2.50
S002	PL	500.00	40.00	40.00	40.00	64,000.00

Length Weight

- Non conformance** – This button takes you to the non-conformance form and shows the user all non-conformance records associated to the product. Non-conformances can be created for many things, but they are typically used to track incidents of product damage, non-conformity to technical specifications, or non-conformity to physical specifications. For more on non-conformances see the Inventory Management User Guide.



Non conforma...	Non-conformance type	Problem type	Date	Reported by	Worker responsible	Item number	Site	Warehouse	Treatment...	Approval
00081	Internal	Enclosure	9/11/2020			S002	2	24	<input type="checkbox"/>	New

- Item quality groups** – This form allows you to associate an item quality group to the currently selected product. An item quality group is used in the “Quality associations” form to trigger a quality or for a given set of criteria including a group of items. The item quality group lets you trigger quality orders for items that are associated with an item quality group.

Quality group
Shirts

- Bulk item conversion** – This form is used only in a process manufacturing setting. This form allows you to define the bulk item conversion to activate a conversion factor for converting the bulk item to the packed product by using the bulk item conversion form. An example would be a five liter container of chemical X (packed product) with an inventory unit measurement of ea (each) is dispensed from the chemical X (bulk item). The container of the packaged product contains five liters of the bulk item.
- Consolidated on-hand** – The consolidated on-hand form is only used with the process manufacturing functionality. The Consolidated on-hand form gives you the required information that is needed to compare similar packed products that use a common bulk item. You can review the on-hand inventory of "like" packed products with a source bulk item in a single screen (with the respective inventory unit of measurement).
- Batch attribute selection** – This form shows you the batch attributes that will be inherited by the product or co-product. This form is only applicable for process manufacturing.
- Product specific** – This form allows you to associate a group of batch attributes or specific batch attributes to products. Associating the batch attribute to a product will make the attribute available for editing on batches. For more information see the Batch Attributes section of this User Guide.
- Customer specific** – This form allows you specify attributes that may apply to a specific customer, a group of customers, or all customers. To create a customer specific relation, you must first assign a product specific relation.



- **Search inventory** – This form allows you to search on-hand inventory based on batch attributes. Click the “Search” button to display the search criteria window. Select the attribute you would like to search for and use the “Operation” fields to query the minimum and maximum attribute values. If the attribute is a text attribute you can use the “=” operator to search for an exact text batch attribute value.
- **Regulated products** – This button will take you to the regulated products form where you can identify the product as a regulated product. A regulated product is a product that is regulated by a government agency and may require specific reporting. Some products are reported products that may require certain reports about the usage of that product to be sent to certain regional or national authorities. For more on regulated products see the “Regulated products region lists” section of this User Guide.
- **Safety data sheet** – A product safety data sheet (PSDS) is a brochure that contains handling, emergency, and other related information about the product. For example, the flash point, or boiling point of a substance. Typically, chemical and pharmaceutical manufacturers will keep product safety data sheets for all applicable raw materials and finished products.
  - **Document number** – This is the unique identifier for the safety data sheet. This number can be generated from a number sequence.
  - **Document name** – This is the description of the document or the document title.
  - **Active** – This indicates whether or not the safety data sheet is active.
  - **Item number** – This field is automatically populated based on the currently selected product and linked the PSDS to the item.
  - **Product name** – This is the product name associated with the item linked to the product safety data sheet.
  - **BOM** – If there is a bill of material that the material safety data sheet is related to, the user can specify the BOM ID.
  - **Country/region** – This is the country that the safety data sheet is applicable for.
  - **Short name** – This is field is automatically populated based on the country region selection.
  - **Language** – This indicates the language of the safety data sheet.
  - **Approval source** – This is the employee that approved the safety data sheet.
  - **Major version** – This indicates a major version of a document revision.
  - **Minor version** – This indicates a minor version of a document revision.
  - **Approval date** – This is the date the safety data sheet was approved.
  - **Effective date** – This is the date the safety data sheet is effective.
  - **Expiry date** – This is the date the safety data sheet expires.
  - **Log** – The system automatically logs fields to capture the creator, date and time of creation, and any modifications to the record.
    - **Created by**
    - **Created date time**
    - **Modified by**
    - **Modified date time**
    - **Reason for modification**



Save + New Delete Open document Options

Product safety data sheet | Standard view | S002 : GREATWHITESHARKTSHIR

Document number: USMF-000003 | Document Name: | Active: No

Setup USA

SDS ASSOCIATION	Short name	EFFECTIVITY
Item number: S002	United States	Approval date: 9/15/2020
Product name: Great White Shark T-Shirt	Language: en-us	Effective date: 9/15/2020
BOM: [dropdown]	DOCUMENT DETAILS	Expiry date: 9/15/2021
Country/region: USA	Approval source: Jodi Christiansen	
	Major version: 1	
	Minor version: 0	

Log

Created by	Modified by	Reason for modification
[dropdown]	[dropdown]	[text area]
Created date and time	Modified date and time	

- **Restricted products** – This will open the restricted products form. A restricted product is a restricted product if its distribution is limited or constrained by a government authority. For more on restricted products see the “Restricted products regional lists” section of this User Guide.
- **Reporting details** – This button will bring you to the reporting details form. On this form you can set up additional information that is required by local or external regulatory authorities.



Save Item CAS relations Update quantities Options

S002 : GREATWHITESHARKTSHIR | Standard view

### Reporting details

**Compliance data**

<p><b>COMPLIANCE PRODUCT NAME</b></p> <p>EPCRA product name <input type="text"/></p> <p>TSCA product name <input type="text"/></p> <p><b>CERCLA</b></p> <p>CERCLA product name <input type="text"/></p> <p>CERCLA reportable quantity <input type="text" value="0.00"/></p> <p><b>EPA REPORTING</b></p> <p>TRI threshold <input type="text" value="0.00"/></p>	<p>Release determination <input type="text"/></p> <p>Usage <input type="text"/></p>	<p><b>OSHA</b></p> <p>OSHA product name <input type="text"/></p> <p>OSHA threshold quantity <input type="text" value="0.00"/></p> <p><b>EHS QUANTITIES</b></p> <p>EHS reportable quantity <input type="text" value="0.00"/></p> <p>EHS threshold planning quantity <input type="text" value="0.00"/></p>
--	---	--

**Usage data** 0.00

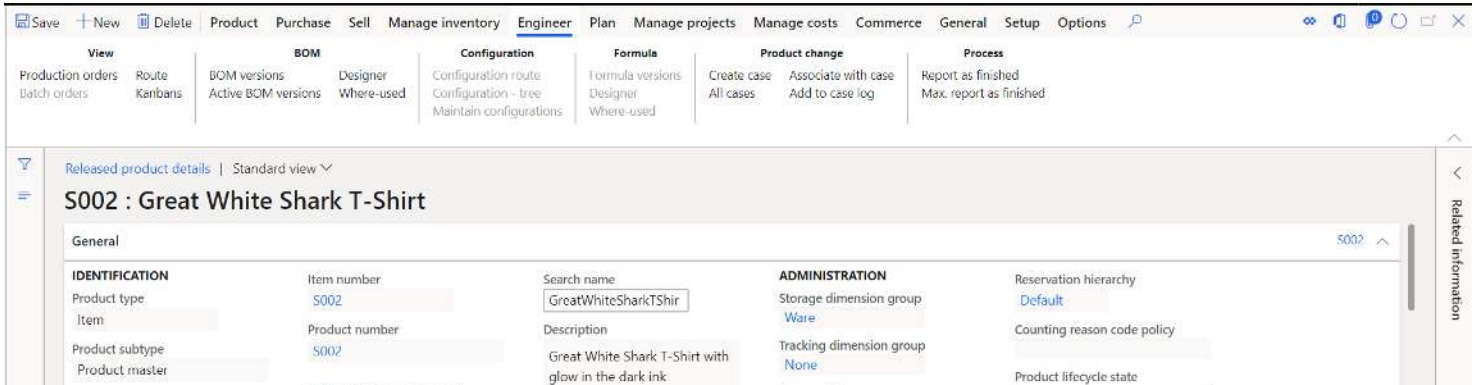
Item number S002	Yearly quantity produced 0.00	Yearly quantity used 0.00
<b>USAGE DATA</b>		Yearly production volume <input type="text" value="0.00"/>
On-hand quantity 0.00		

- **EPCRA product name** – This is the product name to report under the Emergency Planning and Community Right to Know Act.
- **TSCA product name** – This is the product name to report under the Toxic Substances Control Act.
- **CERCLA product name** – This is the product name to report under the Comprehensive Environmental Response, Compensation, and Liability Act.
- **CERCLA reportable quantity** – This is the CERCLA quantity at which reporting is required.
- **TRI threshold** – This is the Toxic Release Inventory (TRI) threshold at which reporting is required under EPCRA
- **Release determination** – This is the release of TRI.
- **Usage** – This is the TRI usage.
- **OSHA product name** – This is the product name to report under the Occupational Safety and Health Administration.
- **OSHA threshold quantity** – This is the OSHA threshold at which reporting is required.
- **EHS reportable quantity** – This is the Environmental Health and Safety (EHS) quantity at which reporting is required under EPCRA.
- **EHS threshold planning quantity** – This is the EHS threshold planning quantity at which an emergency plan must be prepared under EPCRA.
- **On-hand quantity** – This is the current on-hand quantity for the product.



- **Yearly quantity produced** – This is the item quantity that is manufactured or processed annually. The period used to calculate the quantity is based on the “Start” and “End date” parameters set up on the “Product Compliance” tab in the “Inventory management” parameters form.
- **Yearly quantity used** – This is the item quantity that was used annually. The period used to calculate the quantity is based on the “Start” and “End date” parameters set up on the “Product Compliance” tab in the “Inventory management” parameters form.
- **Yearly production volume** – The annual production volume for the item.

ENGINEER



- **Production orders** – This button will take the user to all production orders for the selected item. This is a quick way for the user to see all production orders associated to the item.
- **Batch orders** – Similar to the “Production orders” button this will take the user to all batch orders associated to the product. Batch orders are only enabled when the “Production type” field on the “Engineer” fast tab of the released product versions form is set to “Formula”.
- **Route** – This form will open the route form and display routes associated with the product. A route is a set of production steps that must occur to transform the production inputs into a finished product. For more on route setups see the Manufacturing User Guide.



Save Delete + New Route version Route Options

S002 : GREATWHITESHARKTSHIR | Standard view

### Route

Versions

Route number	Name	Size	Color	Style	Site	From date	To date	From qty.	Active	Approved by	Approved
000298	S002 Main Route				2			0.00	✓	000001	✓

+ New Delete Copy and edit relation Delete relation Applicable resources Maintain resource requirements

Overview General Setup Times Resource load Resource requirements Description

Oper. No.	Priority	Operation	Run time	Process q...	Next	Route group	Item code	Route code	Configuration
10	Primary	Press	1.00	100.00	20	Proc	Table	Route	
20	Primary	Print	1.00	100.00	25	Proc	Table	Route	
25	Primary	Dry	1.00	100.00	30	Proc	Table	Route	
30	Primary	Fold	1.00	100.00	0	Proc	Table	Route	

- **Kanbans** – Similar to the “Production orders” button this will take the user to all Kanbans associated to the product. Kanbans are used in lean manufacturing environments.
- **BOM versions** – This button will display all the bills of material versions that are associated with the product. Bills of materials contain all the components of a finished or semi-finished good. BOM versions must be approved to be used in production. There can be only one BOM version active for a given set of dimensions and date range. For more on Bills of materials see the Manufacturing User Guide.





Bills of materials | 000450 : S002 | Standard view

### 000450 : S002

**Bill of materials header**

BOM: 000450 | Name: S002 | Site: 2 | Item group: Audio

Approved by: [ ]  
 Approved:  No  
 Use configuration nomenclature:  No

---

**Bill of materials lines**

+ New | Delete | Sorting | Where-used | Configuration | Display dimensions | Product change

Item number	Configuration	Size	Color	Style	Warehouse	Resource ...	Quantity	Per series	Unit	Configuration gro...	It...	Product name
M0060						<input checked="" type="checkbox"/>	16.0000	1	lb			Polymer
1000						<input checked="" type="checkbox"/>	1.0000	1	ea			Ink seal

---

**Line details**

General | Setup | Step consumption | Dimension

**IDENTIFICATION**  
 Configuration group: [ ]  
 Item number: M0060  
 Position: [ ]

**SUBCONTRACTOR**  
 Vendor account: [ ]

**BOM**  
 Line type: Item

**Calculation**  
 Yes  
 Sub-BOM or formula: [ ]  
 Subroute: [ ]

**PROJECT**  
 Set subproduction to Consumed:  No

**VALID**  
 From: [ ]

**OPERATION**  
 Oper. No.: [ ]  
 End:  No

- **Active BOM versions** – This button will display the same form as “BOM versions” except only active BOM versions.
- **Designer** – The BOM designer is a form that gives you a hierarchical tree view of the BOM structure. This is a good view if you want to see assemblies and lower level subassemblies in a BOM structure.



Save BOM lines BOM Route Configurations View Setup Filter Options

BOM designer / Active / 9/11/2020 / 1 | Standard view | S002 : GREATWHITESHARKTSHIR

Item number / Name

Item number: S002  
M0060 / Polymer  
1000 / Surface Pro 128 GB

**BOM line details**

<b>IDENTIFICATION</b>	<b>PRODUCT DIMENSIONS</b>	Site	<b>VALID</b>
Configuration group	Configuration	Warehouse	From
Position	Size	Quantity	To
Line type	Color	Unit	<b>SUBCONTRACTOR</b>
Oper. No.	Style	Per series	Vendor account
		0	
<b>PRODUCT</b>	<b>CONSUMPTION</b>		
Item number	Resource consumption		
	<input type="radio"/> No		

**Item data** S002 | GreatWhiteSharkTShir

Edit released product

Vendor	Search name	Item type	Unit
	GreatWhiteSharkTShir	Item	ea
Item number	Planned order type	Production type	Phantom
S002	Purchase order	BCM	<input type="radio"/> No

**BOM** 000450 | S002

**Route** 000298 | S002 Main Route

**Route operations**

Componen...	Oper. No.	Priority	Name	Next
<input type="checkbox"/>	10	Primary	Press	20
<input type="checkbox"/>	20	Primary	Print	25
<input type="checkbox"/>	25	Primary	Dry	30
<input type="checkbox"/>	30	Primary	Fold	0

- **Where-used** – This form shows the user where this item is used on other BOM lines or where the BOM version is used.
- **Configuration route** – A configuration route is used during scheduling, job management, working time calendars, and capacity reservations. Configuration routes specify the order in which a BOM is configured.
- **Configuration tree** – The configuration tree is a visual representation of the configuration structure.
- **Maintain configuration** – This button opens the product configurations associated to the product.
- **Formula versions** – Similar to the BOM versions form the formula versions form is where the user can define the formula components of a finished product. This field is only enabled when the “Production type” field on the “Engineer” fast tab of the released product form is set to “Formula”.
- **Designer** – The formula designer is a form that gives you a hierarchical tree view of the formula structure. This is a good view if you want to see assemblies and lower level subassemblies in a formula structure.
- **Where-used** – This form shows the user where this item is used on other formula lines or where the formula version is used.
- **Create case** – This button allows the user to create a case that is linked to the product. A case can be created for various reasons. If a customer calls in with a complaint about a defect, a case can be raised for investigation into the issue. If there is an engineering change to the product a case can be created to track the engineering change process.



?

### New case

General
Other
Case log

**SOURCE**

Name

Status

**GENERAL**

Case category

Description

Category type

Priority

Case ID

Parent case

- **All cases** – This button will take the user to the all the cases associated with the product. From here you can filter and sort on types of cases at various stages.
- **Associate with case** – This button allows the user to associate the product with an existing case that may be related.



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### Associate with case

Case ID

Description

Name

▲ CASE LOG

Description

Notes

OK Cancel

- **Add to case log** – This button allows you to add an entry to the case log section of the case. The case log captures updates and revisions to the case with date and time stamps of the entries.
- **Report as finished** – The report as finished button opens a form that allows you to post a BOM journal directly from the product. The BOM journal is used in cases where processing a full production order may not be necessary. The BOM journal will post a receipt transaction for the finished good and issue transactions for each of the components for the respective quantities defined on the bill of materials.
- **Max report as finished** – This form gives the user a view of the maximum quantity of the product that can be produced given the current on-hand quantities of the components. This calculation does not take into account current reservations on components or things like expired batches.

PLAN

Save + New Delete Product Purchase Sell Manage inventory Engineer Plan Manage projects Manage costs Commerce General Setup Options

View Forecast Coverage Order settings Requirement Sequencing  
 Supply schedule Demand forecast Item coverage Default order settings Net requirements Sequence value  
 Supply forecast Inventory forecast Gross requirement

Released product details | Standard view

### S002 : Great White Shark T-Shirt

General S002

<b>IDENTIFICATION</b>	Item number S002	Search name GreatWhiteSharkTShir	<b>ADMINISTRATION</b>	Reservation hierarchy Default
Product type	Product number S002	Description Great White Shark T-Shirt with glow in the dark ink	Storage dimension group Ware	Counting reason code policy
Item			Tracking dimension group None	Product lifecycle state
Product subtype				
Product master				

Related information



- Supply Schedule** – The supply schedule form gives the user an outlook view of supply based on a set of parameters that can be defined using the “Modify filter” button. After parameters are selected the user is presented with an outlook based on planned and existing orders.

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### Modify filter

**SUPPLY AND DEMAND**

Plan

Period template

**PRODUCT**

Item number

Configuration

Size

Color

Style

**PRODUCT FAMILY**

Item allocation key

**SUPPLIED LOCATION**

Site

Warehouse



Modify filter Show delays Options

S002 : GREATWHITESHARKTSHIR | Standard view

## Supply schedule

S002, Site 2, Warehouse 24

Expand New Master planning Max. report as finished Update planned orders Level Material plan policy by location

	Backlog	Month September	Month October	Month November	Month December
PERIOD START INVENTORY	100.00	900.00	900.00	870.00	870.00
PERIOD END INVENTORY	900.00	900.00	870.00	870.00	870.00
PERIOD END PEGGED INVENTORY	30.00	30.00			
PERIOD NET SUPPLY	800.00		-30.00		
[+] DEMAND			30.00		
[+] SUPPLY	800.00				

Period end inventory

Summary

Related information

- Demand forecast** – The demand forecast form is where the user can either upload, using the “Open in Excel” function, or manually enter the sales forecast associated with the item. The demand forecast can be entered by multiple dimensions like storage dimensions and product dimensions. The demand forecast is used by the master planning module to calculate and net total requirements. Demand forecasts count toward total demand in the master planning netting calculation. The forecast date is the requirement date used by master planning to plan the source of supply like the purchase order, production order, or transfer order. For more on the demand forecast see the Master Planning User Guide.



Save + New Delete Forecast balances Cash flow forecasts Display dimensions General ledger preview Transfer quotation lines

S002 : GREATWHITESHARKTSHIR | Standard view \* v

### Demand forecast, Item number: S002

Overview General Item Project Financial dimensions Inventory dimensions

Allocate forecast Bulk update Inventory forecast Create item requirement

Model	Date	Customer account	Customer group	Item number	Product name	Site	Warehouse	Sales quantity	Unit
CurrentF	9/18/2020			S002	Great White Shark T-Shirt	2	24	1,000.00	ea

- Supply forecast** – Similar to the demand forecast, the supply forecast allows the user to enter a supply forecast that represents supply netted by the master planning engine in Dynamics 365 Finance and Operations. The date in the forecast is used by master planning to determine the requirement date for the supply that can be netted against demand.

Save + New Delete Forecast balances Cash flow forecasts Inventory v Options

S002 : GREATWHITESHARKTSHIR | Standard view \* v

### Supply forecast

Overview General Item Financial dimensions Inventory dimensions

Allocate forecast Bulk update Inventory forecast Create item requirement

Model	Date	Vendor account	Vendor group	Item allocation key	Quantity	Unit	Amount	Currency
CurrentF	9/18/2020				500.00	ea	0.00	USD

- Inventory forecast** – The inventory forecast form allows you to view both supply and demand forecast records in one form. The demand forecast records will be negative quantities to represent expected inventory issues. The supply forecast records will be positive quantities to represent expected inventory receipts.



Supply forecast Demand forecast Inventory ▾ Options 🔍

Inventory forecast | S002 : GREATWHITESHARKTSHIR

Standard view \* ▾

Filter

Model	Item number	Size	Color	Style	Site	Warehouse	Budget date	Forecast type	Quantity
CurrentF	S002	S	Black	Modern	2	24	9/18/2020	Supply forecast	500.00
CurrentF	S002	S	Black	Modern	2	24	9/18/2020	Demand forecast	-1,000.00

- Item coverage** – The Item coverage form is used to define detailed coverage settings and inventory dimension settings for detailed coverage planning on the current item. The system uses item coverage settings to calculate requirements for the item and its coverage-planned dimensions during master scheduling. The item coverage settings can be used to define a minimum (safety stock) level or, if the coverage group is set with a “Min/Max” coverage code, the user can define a desired minimum and maximum inventory level. There are many more settings that can change master planning behavior. For more on item coverage see the Master Planning User Guide.

Save + New Delete Wizard Default settings Options 🔍

S002 : GREATWHITESHARKTSHIR

Item coverage, Size: S, Color: Black, Style: Modern, Site: 2, Warehous...

Overview General Lead time Min./Max. Dimension

Site	Warehouse	Size	Color	Style	Minimum	Maximum	Coverage group
2	24	S	Black	Modern	100.00	200.00	Auto

- Default order settings** – Default order settings are primarily used with the master planning module in Dynamics 365 Finance and Operations. They define order settings, defaults, and guidelines for purchase,





sales, and production orders. You can define multiple default order settings by different dimensions and rank them in order of precedence. The top part of the form can be thought of as an input section where dimension and site values selected in the source document (purchase order, sales order, or production order) dictate the order settings selected for that combination. The default order type dictates if the item is produced or purchased. If the master planning functionality is enabled the planning engine will use this to either create a planned production order or a planned purchase order. For more on default order settings see the Master Planning User Guide.

- Net requirements** – The net requirements form is a snapshot of a single item that tells a story of the various receipts and issues, when those receipts and issues are occurring, when they should occur, and why a planned order was created in the first place. It also gives you a snapshot of what your inventory will look like for a given item during a specific time period. Often looking at planned orders alone will not give you the information you need to understand what is happening and what action you need to take. Usually you need to drill into the item requirements for specific items to understand the whole picture that MRP has painted.

Update Options

S002 : GREATWHITESHARKTSHIR | Standard view

### Net requirements, Item number S002, Great White Shark T-Shirt, Sorting: Requirement date

Plan  
DynPlan

Overview Item coverage Summary Period

Color	Style	Warehouse	Site	Size	Minimum	Maximum	Coverage group	Planned order type
Black	Modern	24	2	L	0.00	0.00	Req	Purchase order
Black	Modern	24	2	S	100.00	200.00	Auto	Purchase order

Overview General Action

Inquiries

Reference	Number	Item number	Requirement date	Expiration date	Requirement quantity	Accumulated	Delay (days)	To date	Action
Purchase order	PO00001576	S002	9/1/2020		800.00	800.00	17	9/18/2020	Postpone+Decrease
Sales order	002195	S002	10/5/2020		-30.00	770.00			

PEGGING

Number	Reference	Item number	Requirement date	Requirement quantity	Covered quantity	Changed by quantity
002195	Sales order	S002	10/5/2020	-30.00	-30.00	

- Gross requirements** – The gross requirements form gives the user the same view as the net requirements form except in this form the user is presented with the total demand before netting it against any on-hand inventory or expected receipts.



- Sequence value** – This form is only available for production sequencing related to master scheduling. Sequencing allows manufacturers to sequence production orders in a way to maximize run times and minimize change over time.

## MANAGE PROJECTS

- Project statements** – The project statements form gives the user a quick look at the progress of a project by showing several balances and totals. This form uses the four project statement reports in a screen that can be quickly viewed. The following options are available when running the project statements:
  - Include project types** - These check boxes will include or exclude specific project types for the cost control calculation. If the form is accessed from a specific project, these types will not be available, and the system will use the selected project's project type by default.



- **Include transaction types** - These check boxes will include or exclude specific transaction types for the cost control calculation. If the form is accessed from a specific category or category group, these types will not be available, and the system will use the selected category's transaction type by default.
- **Ledger and Project dates** - Include transactions within a certain date range, based either on project or ledger date.
- **Actual vs. Budget** - Decide whether to examine actual transactions, forecasted transactions, or a comparison of the two.

ACTUAL	
PL structure	
REVENUE	0.00
COST - EXPENSE	0.00
COST - ITEM	0.00
ACCRUED LOSS	0.00
VALUE-ADDED	0.00
COST - HOUR	0.00
GROSS MARGIN	0.00
PL ratio	
VALUE-ADDED FACTOR	0.0
GROSS MARGIN %	0.0

- **Cost control** – The cost control form is designed so project managers on long-term projects can track the cost of a project for the life of the project. The form has two tabs, a general tab, and a deviation tab. Each uses a different method to display cost compared to forecast. The display used is controlled by the Cost



control method. This field is located on the Project management and accounting parameters form on the cost control tab. Choose from one of these two options:

- **Total budget** – Total budget will compare with actual transactions on the General tab. The Deviation tab will show a deviation between the total budget and an original budget.
- **Remaining budget** – Actual costs will be compared with a remaining budget to obtain an updated total cost on the general tab and will compare actual transactions against the original forecast on the deviation tab.
- **Invoice control** – The Invoice control form provides an easy way to view both invoiced and non-invoiced transactions for time and material projects and then create invoices based on those transactions. It also provides access to the individual transactions to be adjusted after posting.
- **Cash flow** – The cash flow form helps project managers get a better sense of the cash flowing in from project invoices, sales orders, subscriptions, and fees. It also shows how cash flows out from project purchase orders, item requirements, expenses, and hours.
- **Committed costs** – The committed costs form displays all the committed cost transactions for items for projects. This form is used to calculate and analyze the committed (but not posted as actuals) costs of a project or a set of projects.

## MANAGE COSTS

- **Item price** – This form opens the costing version form where cost prices, sales prices, and purchase prices can be posted against the item. This form is used for calculated cost rollups for manufactured items and components to manufactured items. For more on costing versions see the Manufacturing User Guide.
- **Posting** – This form brings you directly to the item posting form. This form is used to direct posting for various transactions to general ledger accounts. This same form can be accessed by navigating to Inventory management > Setup > Posting > Posting. For more information see the Item Groups section of this User Guide.
- **Transactions** – This form takes the user directly to the inventory transactions related to the product.
- **Cost entries** – This form shows the user transactions that would have cost implications.
- **Standard cost transactions** – This form is only available for items that are using standard cost as the cost model defined in the item model group. This form shows the user physically and financially updated inventory transactions.
- **Cost objects** – This form will show the user the cost and average cost by warehouse. In prior versions of Dynamics 365 Finance and Operations the user had to do some filtering on the on-hand inventory form to get this data.



- **Inventory statement and KPI's** – This KPI flyout form shows the days in inventory, inventory turns, inventory beginning and ending balances and more.

### Inventory statement and KPIs ?

Date interval code  From date  To date

Name	Quantity	Amount
Beginning balance	0.00	0.00
Net sourcing	53.00	1,867.85
Procured	0.00	0.00
Manufactured cost	53.00	1,867.85
Net usage	-13.00	-447.97
Disposed	0.00	0.00
Consumed materials cost	-13.00	-447.97
Transferred	0.00	0.00
Sold	0.00	0.00
Ending balance	40.00	1,419.88
Variances	0.00	0.00

#### Inventory value over time

Legend:

- Beginning balance (Blue square)
- Procured (Dark blue square)
- Manufactured cost (Orange square)
- Disposed (Purple square)
- Consumed materials cost (Pink square)
- Transferred (Light blue square)
- Sold (Dark blue square)
- Ending balance (Red line)

**Inventory turn**

0.63  
Value vs. Goal: +0.63

**Days in inventory**

47.54

**Inventory accur...**

100.00  
Value vs. Goal: +100.00



- **Info codes** – This button will open the info codes form where you can associate an info code to the product so that when it is scanned at the retail modern point of sale the info code is triggered. The info code is used to capture additional data at the point of sale.
- **Shelf label** – This form is used to define the shelf label that is printed at a physical retail store. The shelf label can display things like the price, product name, dimensions, discounted price, and barcode. The shelf label can print a custom SSRS report for specialized requirements.
- **Product label** – Similar to the “Shelf labels”, the product labels can be configured to print product labels for products residing at specific physical brick and mortar stores. The product labels can utilize a custom SSRS report format to meet the specialized labels requirements.
- **Linked products** – This form allows you to configure a product that should be included with the purchase of the currently selected product. So, if you buy X item you get Y item added to the cart automatically.
- **Where-linked products** – This form will show you if the current product has been associated to another product in the “Linked products” form.
- **Product section location** – This form allows the user to define the exact location at the store, section, and shelf. This would be for a physical brick and mortar retail store.
- **Print shelf labels** – This button will launch the “Print shelf labels” form that will execute the printing of the shelf labels setup for the product.



?

### Print shelf labels

+ Add products 🗑 Remove ⋮

Report name

Default store number

Valid Date

		Store number	Product numl
<input type="radio"/>	<input type="radio"/>	ANNAPOL	S002

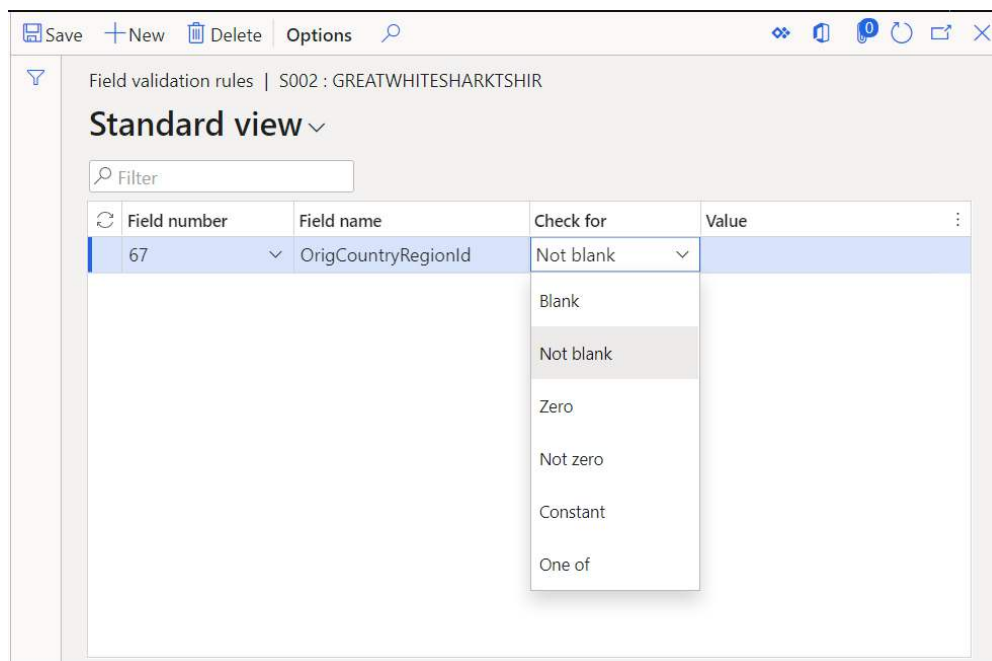
- **Print product labels** – This button will launch the “Print product labels” form that will execute the printing of the product labels setup for the product.



	Store number	Product numl
<input type="radio"/>	ATLANTA	S002

- **Mandatory check setup** – The mandatory check setup allows the user to define certain fields should be filled in during product creation or setup. The user can also define certain values that should be expected for each field. This is an excellent feature that Microsoft added that many of my clients were asking for on previous versions.





- **Check product** – Once you have defined the mandatory check setup, you can click the “Check product” button to have the system determine if there are any fields that have not been populated or have not been populated correctly according to the mandatory check setup configuration.



Save + New Delete Product Purchase Sell Manage inventory Engineer Plan Manage projects Manage costs

**Set up** Info codes Shelf label Product label  
**Linked products** Where-linked products Product section location  
**Functions** Print shelf labels Print product labels Mandatory check setup  
 Check product Buyer's push  
**Inquiries** Competitor prices Sales transactions Price list

Field 'OrigCountryRegionId' must not be blank.

Released product details | My view

## S002 : Great White Shark T-Shirt

General S002

**IDENTIFICATION**  
 Product type Item  
 Product subtype Product master  
 Product service type Not specified  
 Item number S002  
 Product number S002

Engineering product category de...  
 Product owner  
**FURTHER IDENTIFICATION**  
 Product name Great White Shark T-Shirt  
 Search name GreatWhiteSharkTShirj  
 Description Great White Shark T-Shirt with glow in the dark ink

**ADMINISTRATION**  
 Storage dimension group Ware  
 Tracking dimension group None  
 Item model group MWA  
 Reservation hierarchy Default  
 Counting reason code policy

Product lifecycle state  
 Advanced notes group

**BUNDLE**  
 Bundle No

**RELEASE**  
 Release policy

Purchase ea | -- | 0.00  
 Promote  
 Deliver  
 Sell ea | -- | 0.00

Related information

- **Buyer's push** – The buyer's push form is used to distribute and allocate retail product from the distribution center to various brick and mortar store locations. Quantities can be distributed to stores in three ways.
  - **Location weight** – The location weight method uses relative weights applies on the retail store warehouse that will determine the quantity allocated to the store.
  - **Replenishment rules** – Replenishment rules can be used to override the location weights and be assigned to retail categories to determine the quantity to be allocated to stores.
  - **Fixed quantity** – The fixed quantity method takes a given fixed quantity of inventory and distributes it out the selected stores.



Buyer's push | Standard view | S002 : GREATWHITESHARKTSHIR

Description: S002 -Great White Shark T-S... | Site: | Warehouse: |

Item number	Unit	Configuration	Size	Color	Style	Available p...	Total avail...	Pushed	am
S002	ea		M	White	Retro				
S002	ea		M	Black	Retro				
S002	ea		M	Blue	Retro				
S002	ea		M	Green	Retro				
S002	ea		M	Magenta	Retro				
S002	ea		M	Purple	Retro				
S002	ea		M	Red	Retro				
S002	ea		M	Yellow	Retro				

Total on hand: 870.00 | Remaining available quantity to ...: 870.00 | Distribution:  Replenishment rules,  Location weight,  Fixed quantity for all

Total pushed quantity: 0.00 | Additional quantity to push: 0.00 | Replenishment hierarchy: | Warehouse: | Respect assortments:  No

Percentage: 0.00

Warehouse

Name	Company	Total avail...	Pushed qu...	Unit	Net on hand
Annapolis inventory locati...	usrt			ea	
Ann Arbor inventory locat...	usrt			ea	
Atlanta inventory location	usrt			ea	
Atlantic City inventory loc...	usrt			ea	
Austin inventory location	usrt			ea	
Bangalore store	inmf			ea	
Bellevue inventory location	usrt			ea	
Bloomington inventory lo...	usrt			ea	

- **Competitor prices** – The competitor price button allows you to capture specific competitor pricing from various competitors for use in pricing analysis and market segmentation.

Competitor prices | Standard view | S002 : GREATWHITESHARKTSHIR

Item number: S002 | Competitor group: Local Retailer

Product name: Great White Shark T-Shirt | Price: 15.75

General

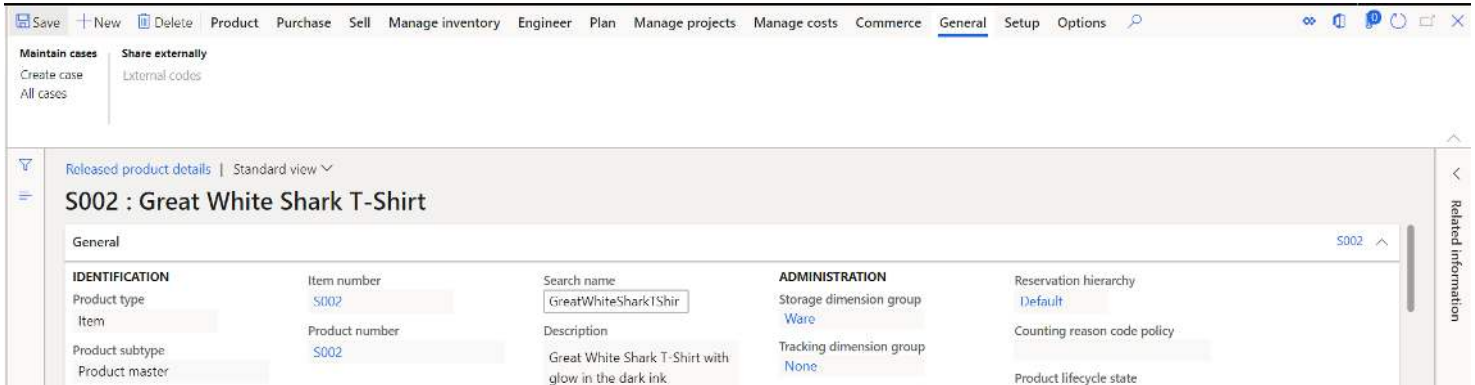
COMPETITOR	PRICE
Description: Local Retail Nearby	Price: 15.75
Reference: Local Retailer	Date of price: 9/14/2020
	Last checked date: 9/21/2020

- **Sales transactions** – This button will display any retail sales transactions posted against the selected item.



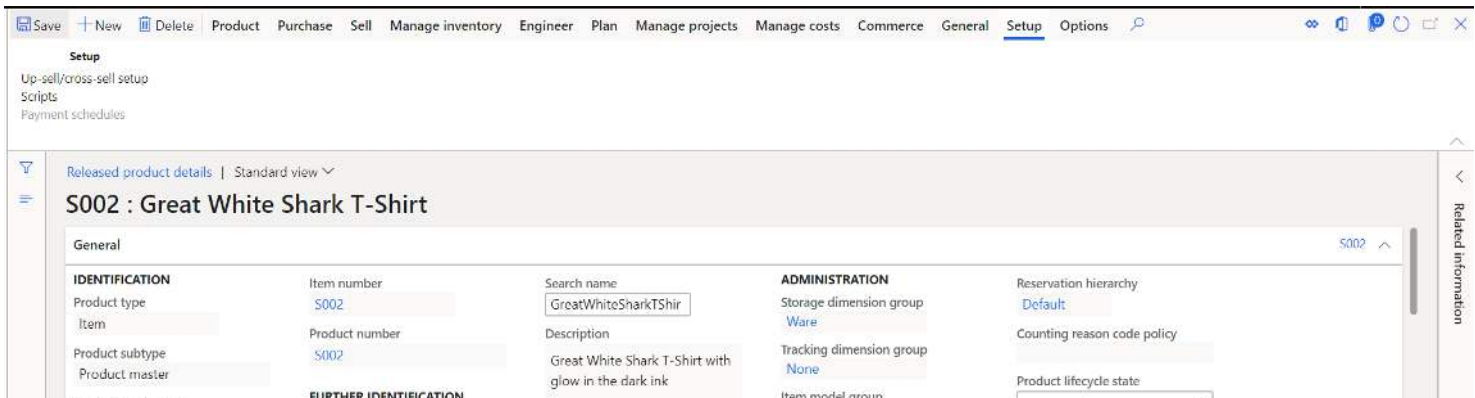
- **Price list** – The price list shows all applicable retail prices associated with the product for each retail store or operating unit.

GENERAL



- **Create case** – This button allows the user to create a case that is linked to the product. A case can be created for various reasons. If a customer calls in with a complaint about a defect, a case can be raised for investigation into the issue. If there is an engineering change to the product a case can be created to track the engineering change process.
- **All cases** – This button will take the user to the all the cases associated with the product. From here you can filter and sort on types of cases at various stages.
- **External codes** –The external codes form is where you can create or update external codes related to the selected item. External codes are used with external transactions, EDI, or intercompany processing.

SETUP



- **Up-sell/cross-sell setup** – The up-sell/cross-sell setup allows you to define up-selling and cross-selling prompts that an order taker using the Dynamics 365 for Commerce call center functionality will see when placing a call center order.



Save + New Delete Options

Filter

1000  
1  
Cross-sell

Up-sell/cross-sell items | Standard view | S002 : GREATWHITESHARKTSHIR

Parent/trigger item: S002    Priority: 1    Rule name: [dropdown]

Linked item: 1000    Up-sell/cross-sell: Cross-sell

**Script**

+ Add Remove

Priority	Type	Script name	Text	Active
1	Script	D0023 Up Sell	If you like our stand...	<input checked="" type="checkbox"/>

**Linked item**

Product name: Surface Pro 128 GB    Text

Search name: 1001

- **Scripts** – The script form allows you to write out a script that can be shown with a cross-sell or upsell prompt. The sales taker can use the script to aid in the up-sell or cross-sell opportunity.
- **Payment schedules** – This form will show the user any related payment schedules associated with the selected product.

## SUMMARY

Dynamics 365 Finance and Operations is a huge ERP system, and it can be daunting to know where to start but I hope this guide has given you a foundation from which to grow. The creation of a product is the core business processes that will allow you to move forward with other business processes throughout the application. There are many different combinations of configurations and features that can be turned on or off based on your unique business requirements. This guide is meant to give you an idea of what is available and what you think you might want to use. For more in depth coverage of some of the other features that were reference in this user guide please refer to some of the other user guides available or available soon on [www.dynamics-tips.com](http://www.dynamics-tips.com).