



 **DynaTech** | Systems

Accelerate Business

About DynaTech

Unified Purpose, Shared Journey

DynaTech Systems stands out as a comprehensive and flexible solution for businesses looking to leverage technology to drive growth and innovation.

As thought leaders in digital transformation, we deliver cutting-edge solutions and industry best practices. From consulting and proof of concept to end-to-end implementation and custom solutions, our expertise ensures your success.



150+

Projects

100+

Happy Clients

350+

Expert Minds

What Sets Us Apart

DynaTech's Competitive Advantage



Global Work Experience
(USA, Europe, Asia) for
seamless rollouts



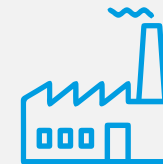
Successful Deployment
of 150+ Microsoft
Dynamics Projects



A single-stop shop for
all of Microsoft's
Business Applications



In-house QA Teams to
ensure Information and
Data Security



Empowering businesses in
Manufacturing, Retail,
Education, and more



Strategic Approach
Resulting in Quick
Turnaround & Solutioning

Microsoft Cloud Capabilities



Microsoft Azure



Azure Infra



Azure Services



Azure Fabric for BI



Logic Apps



Service Bus



Functions



Event Grid



API Management



Synapse Analytics



Data Lake



Data Factory



Load Testing



Microsoft Dynamics 365



Marketing



Sales



Finance



Supply Chain Management



Commerce



Customer Service



Field Service



Project Operations



Human Resources



Customer Insights



Finance & SCM



Copilot



Power Platform



Power Pages



Power BI



Power Apps



Power Automate



Copilot Studio



Dataverse



AI Builder

Manufacturer's Accelerator



- › We've introduced the "Ready to Release" and "Reserved Quantity" fields in the open sales order line form.
- › The purpose of the "Ready to Release" field is to enhance efficiency in stock reservation. It considers available on-hand stock and the earliest delivery date of sales order items.
- › This field acts as a stock identifier, automatically suggesting the ready-to-release quantity for the same items based on stock availability and order delivery schedule.
- › Additionally, users can perform reservation and release-to-warehouse processes directly from this page.

Open sales order lines

Overview Sales order

Display dimensions

Customer	Customer Name	Sales order	Country Code	Business unit	Item number	Ready to release	Reserved qty	Extended Product Name	Sales category	Site	Warehouse
00000377	ALLESKO	30015029	USA	DEAN	3157201		4.00	PL500 5 1/2 X 6 1/16 X 0.010 SH...		IND1	IND1
00000602	DORAN DRAKE INTERNA...	30055551	USA	DEAN	3157201	3.00		PL500 5 1/2 X 6 1/16 X 0.010 SH...		IND1	IND1
00000302	INDUSTRIAL SPECIALTIES ...	30034600	USA	FYBR	3157201	30.00		PL500 5 1/2 X 6 1/16 X 0.010 SH...		IND1	IND1
00000301	WESTERN CONTAINER C...	30028401	USA	FYBR	3157201	21.00		PL500 5 1/2 X 6 1/16 X 0.010 SH...		IND1	IND1

- › Users previously released factory orders without sufficient raw materials.
- › They followed a manual process, opening production orders based on the earliest delivery date of the same finished goods (FG) items.
- › After checking raw material on-hand stock, they performed the reservation process.
- › To improve efficiency, we introduced the “Ready to Release” and “Reserved Quantity” fields on the production order and Bill of Materials (BOM) screen.
- › The “Ready to Release” field considers available on-hand stock of raw materials and the earliest delivery date of the FG item.
- › It suggests the ready-to-release quantity for FG items based on stock availability and order delivery schedule.

Production Order Standard View

Item	Quantity	Ready to release	Exp. product	Reserved qty	Reserved amount	Planned date	Product name	Schedule Planned Date	Released	Remaining quantity
000000001-204	1.0000	1.0000	10.0000			1.07.24	A SPACER, 20x1.34 THRU...	10.0000		10.0000
401000201-204	1.0000		10.0000			1.00.24	A APPLER, 20x1.34 THRU...	10.0000		10.0000
401000205-204	1.0000		10.0000			1.00.24	B RETELLER, 20x1.34 THRU...	10.0000		10.0000

Bill of Materials (BOM) Standard View

Production	Product name	Item name	Entered Product Name	Qty used by	Qty used	Quantity	Ready to Release	Reserved quantity at Product	Delivery	Status	Material
FO0000004	400170001	400170001	APLOWATERING GRN-195	1.00	1.00	1.00	5/8/2024		5/8/2024	Scheduled	Material
FO0000040	400170001	400170001	APLOWATERING GRN-195	1.00	5.00	1.00	5/8/2024		5/8/2024	Scheduled	Material
FO0000042	011100001	011100001	COVER FOR 1500...-V91	1.00		1.00	5/9/2024		5/9/2024	Scheduled	Material
FO0000041	00000001	00000001	25AL ADAPTOR BLANKING	1.00		1.00	5/7/2024		5/7/2024	Released	Material
FO0000040	011010020	011010020	COVER FOR 1500...-V91	1.00		1.00	4/22/2024		4/22/2024	Scheduled	Material
FO0000039	001010007	001010007	COVER FOR 1500...-V91	1.00		1.00	4/22/2024		4/22/2024	Scheduled	Material
FO0000038	00000001	00000001	APLOWATERING GRN-195	1.00		1.00	4/22/2024		4/22/2024	Scheduled	Material
FO0000037	00000001	00000001	APLOWATERING GRN-195	1.00		1.00	5/7/2024		5/7/2024	Scheduled	Material
FO0000036	00000001	00000001	APLOWATERING GRN-195	1.00		1.00	5/7/2024		5/7/2024	Released	Material
FO0000035	001000009	001000009	COVER FOR 1500...-V91	1.00		1.00	5/8/2024		5/8/2024	Cancelled	Material
FO0000034	00000001	00000001	APLOWATERING GRN-195	1.00		1.00	5/7/2024		5/7/2024	Cancelled	Material
FO0000033	001000009	001000009	COVER FOR 1500...-V91	1.00		1.00	5/7/2024		5/7/2024	Cancelled	Material
FO0000032	001000009	001000009	COVER FOR 1500...-V91	1.00		1.00	5/7/2024		5/7/2024	Cancelled	Material
FO0000031	001000009	001000009	COVER FOR 1500...-V91	1.00		1.00	5/7/2024		5/7/2024	Cancelled	Material
FO0000030	001000009	001000009	COVER FOR 1500...-V91	1.00		1.00	5/7/2024		5/7/2024	Cancelled	Material
FO0000029	001000009	001000009	COVER FOR 1500...-V91	1.00		1.00	5/7/2024		5/7/2024	Cancelled	Material
FO0000028	001000009	001000009	COVER FOR 1500...-V91	1.00		1.00	5/7/2024		5/7/2024	Cancelled	Material
FO0000027	001000009	001000009	COVER FOR 1500...-V91	1.00		1.00	5/7/2024		5/7/2024	Cancelled	Material
FO0000026	001000009	001000009	COVER FOR 1500...-V91	1.00		1.00	5/7/2024		5/7/2024	Cancelled	Material
FO0000025	001000009	001000009	COVER FOR 1500...-V91	1.00		1.00	5/7/2024		5/7/2024	Cancelled	Material
FO0000024	001000009	001000009	COVER FOR 1500...-V91	1.00		1.00	5/7/2024		5/7/2024	Cancelled	Material
FO0000023	001000009	001000009	COVER FOR 1500...-V91	1.00		1.00	5/7/2024		5/7/2024	Cancelled	Material
FO0000022	001000009	001000009	COVER FOR 1500...-V91	1.00		1.00	5/7/2024		5/7/2024	Cancelled	Material
FO0000021	001000009	001000009	COVER FOR 1500...-V91	1.00		1.00	5/7/2024		5/7/2024	Cancelled	Material
FO0000020	001000009	001000009	COVER FOR 1500...-V91	1.00		1.00	5/7/2024		5/7/2024	Cancelled	Material
FO0000019	001000009	001000009	COVER FOR 1500...-V91	1.00		1.00	5/7/2024		5/7/2024	Cancelled	Material
FO0000018	001000009	001000009	COVER FOR 1500...-V91	1.00		1.00	5/7/2024		5/7/2024	Cancelled	Material
FO0000017	001000009	001000009	COVER FOR 1500...-V91	1.00		1.00	5/7/2024		5/7/2024	Cancelled	Material
FO0000016	001000009	001000009	COVER FOR 1500...-V91	1.00		1.00	5/7/2024		5/7/2024	Cancelled	Material
FO0000015	001000009	001000009	COVER FOR 1500...-V91	1.00		1.00	5/7/2024		5/7/2024	Cancelled	Material
FO0000014	001000009	001000009	COVER FOR 1500...-V91	1.00		1.00	5/7/2024		5/7/2024	Cancelled	Material
FO0000013	001000009	001000009	COVER FOR 1500...-V91	1.00		1.00	5/7/2024		5/7/2024	Cancelled	Material
FO0000012	001000009	001000009	COVER FOR 1500...-V91	1.00		1.00	5/7/2024		5/7/2024	Cancelled	Material
FO0000011	001000009	001000009	COVER FOR 1500...-V91	1.00		1.00	5/7/2024		5/7/2024	Cancelled	Material
FO0000010	001000009	001000009	COVER FOR 1500...-V91	1.00		1.00	5/7/2024		5/7/2024	Cancelled	Material
FO0000009	001000009	001000009	COVER FOR 1500...-V91	1.00		1.00	5/7/2024		5/7/2024	Cancelled	Material
FO0000008	001000009	001000009	COVER FOR 1500...-V91	1.00		1.00	5/7/2024		5/7/2024	Cancelled	Material
FO0000007	001000009	001000009	COVER FOR 1500...-V91	1.00		1.00	5/7/2024		5/7/2024	Cancelled	Material
FO0000006	001000009	001000009	COVER FOR 1500...-V91	1.00		1.00	5/7/2024		5/7/2024	Cancelled	Material
FO0000005	001000009	001000009	COVER FOR 1500...-V91	1.00		1.00	5/7/2024		5/7/2024	Cancelled	Material
FO0000004	001000009	001000009	COVER FOR 1500...-V91	1.00		1.00	5/7/2024		5/7/2024	Cancelled	Material
FO0000003	001000009	001000009	COVER FOR 1500...-V91	1.00		1.00	5/7/2024		5/7/2024	Cancelled	Material
FO0000002	001000009	001000009	COVER FOR 1500...-V91	1.00		1.00	5/7/2024		5/7/2024	Cancelled	Material
FO0000001	001000009	001000009	COVER FOR 1500...-V91	1.00		1.00	5/7/2024		5/7/2024	Cancelled	Material
Total				1.00		1.00					Material
Calculated											

- › Users previously maintained an Excel backlog report for planning and production activities to achieve order delivery on time.
- › To simplify shipment and Material Requirements Planning (MRP) processes, we created a Backlog Report in D365 F&O.
- › We improved the existing open sales order line report based on user needs. The report includes sales order line details such as:

Item details

Quantity

Delivery date

Net amount

Customer details

Delivery reminders

Available physical quantity

Business unit

Planned orders

Production orders

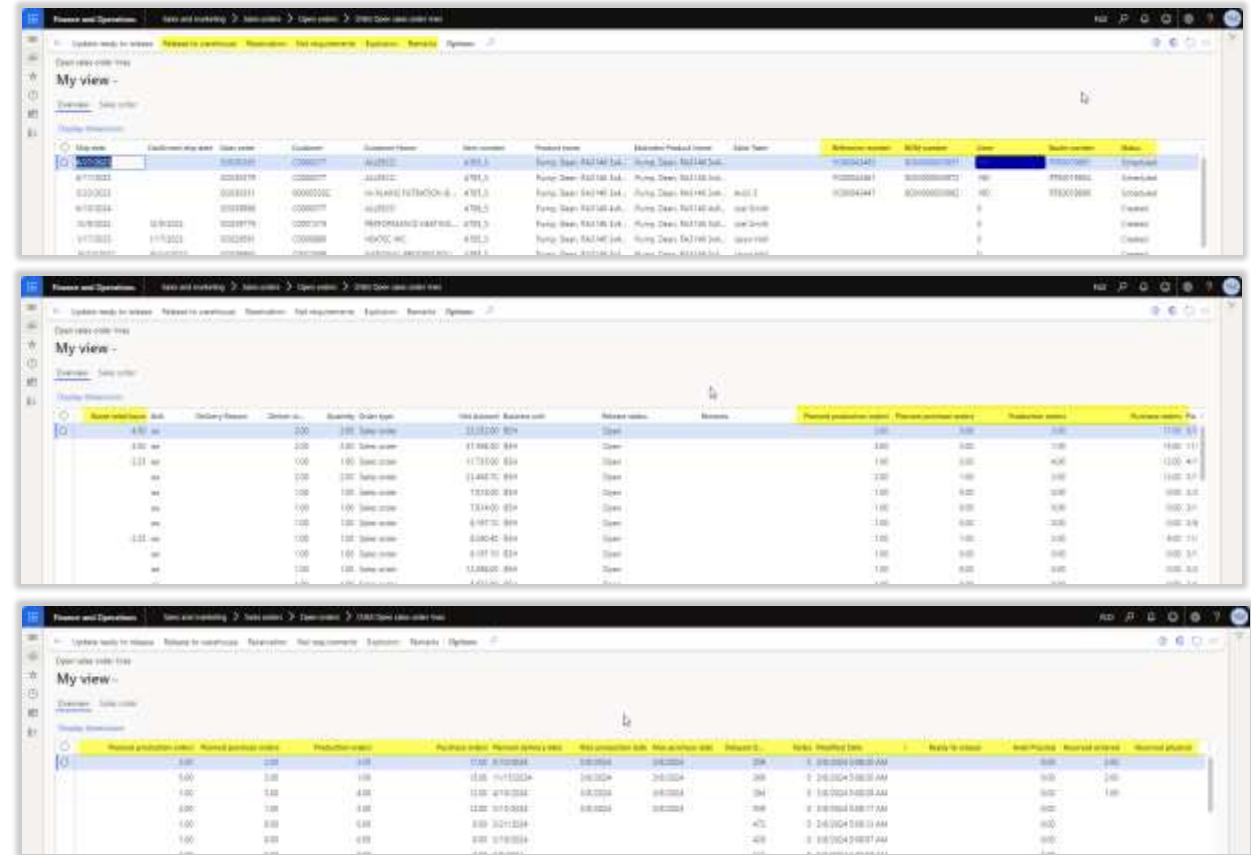
Purchase orders

Max. production date

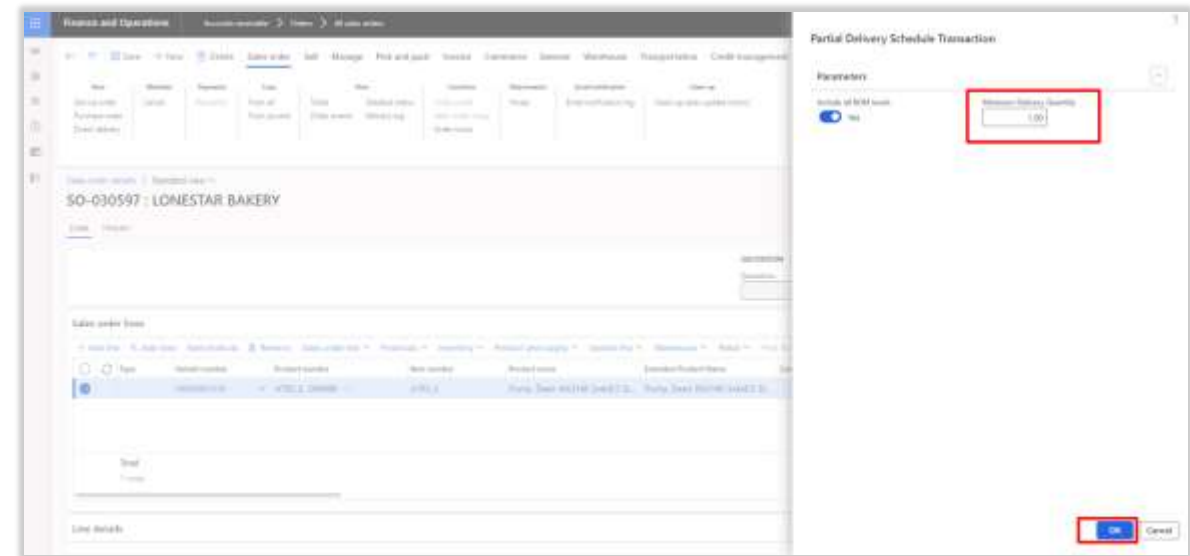
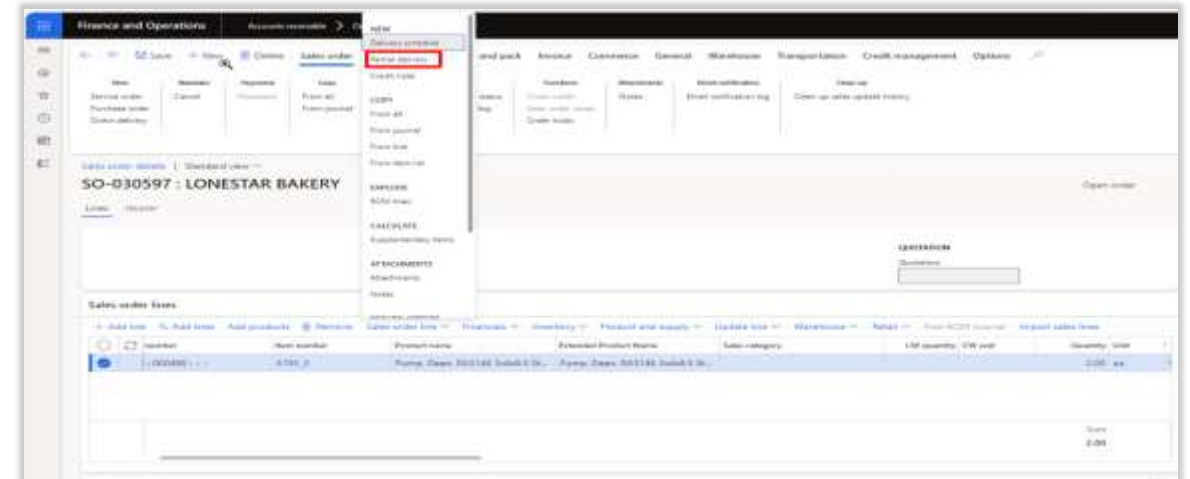
Max purchase date

Planning delay days

Sales order header notes

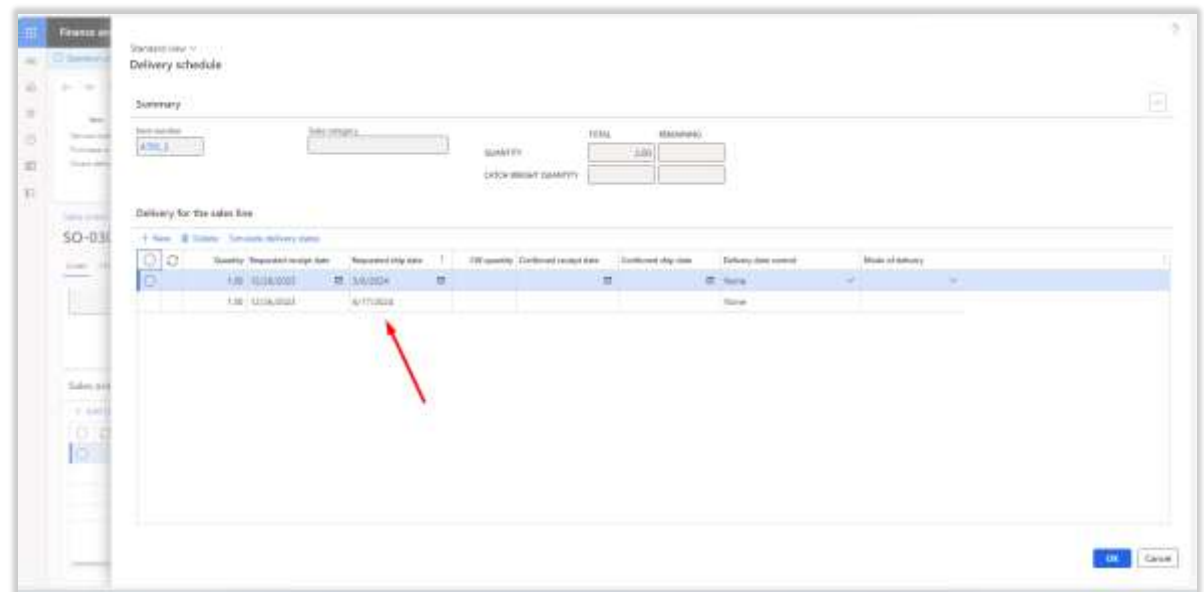


- › Partial delivery functionality allows delivering a portion of a customer order or a specific quantity of items from a sales order, rather than the entire order at once.
- › Useful when raw items are not available simultaneously or when delivering goods in multiple shipments is more efficient.
- › Enables organizations to fulfill customer orders based on inventory availability, preventing delays.
- › Integrated within MRP, it reduces end-to-end lead times by delivering partial quantities, improving responsiveness.



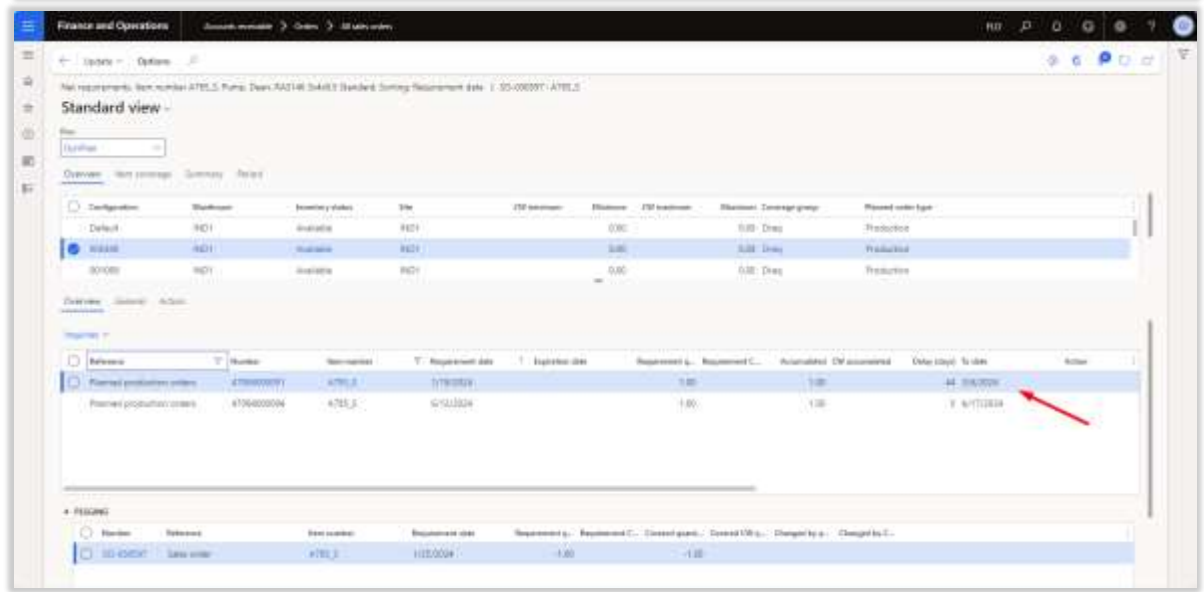
Now we will run the Partial Delivery Schedules Engine for Quantity 2

Navigation Path : sales order Line (Line Level) > Partial Delivery > Insert the Spilt Qty



Let's update the master planning and cross-check the "To-Date" we are getting for planned orders in relation to those split quantities.

Notably, the partial delivery scheduled engine dates precisely match the planned order dates.



Automated packing slip creation against purchase orders for subcontracting streamlines workflows and minimizes manual data entry errors.

- › Users manually created packing slips outside of D365 in Excel.
- › To reduce manual efforts, we developed an in-D365 service for packing slip creation.
- › Purchasing users can now send packing slips directly from the purchase order when vendors collect materials from the CECO warehouse.
- › Information is automatically fetched into the packing slip based on the requested data format.
- › We implemented custom email sending functionality within D365, allowing users to send emails to vendors directly from the purchase order.
- › Email logs are available, and custom attachments can flow along with PO confirmations and packing slips.



Provide visibility of subcontracting orders on the Planned Order and Item Net Requirement pages to prevent scheduling orders in the absence of inventory.

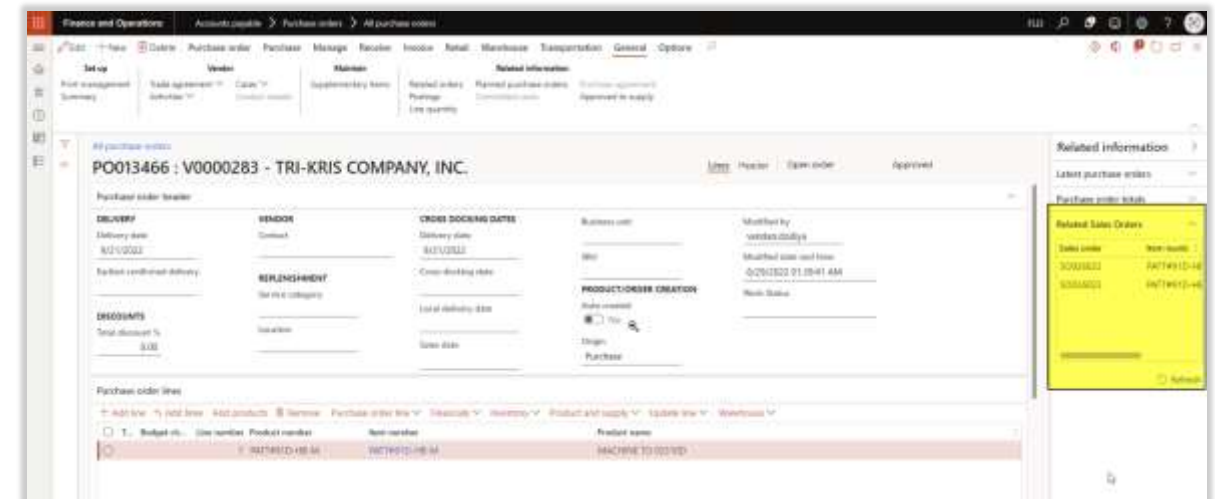
- › Planned Orders and Net Requirements forms lack indicators for factory orders with outside service purchase orders.
- › Planners may schedule orders even when inventory is insufficient for outside service items.
- › The Purchasing department confirms orders with vendors, unaware of the issue, leading to delays in the outside service process.
- › We propose adding an indicator to notify planners of factory orders generating outside service purchase orders, allowing material availability verification before confirmation.

This screenshot shows a SAP Net Requirements table. The table has columns for Item, Reference, Item category, Material, Storage Project name, Requirement date, Lot, Date, Delivery date, Requirement date, Delivery date, and Status. A yellow highlight is placed over the 'Outside Service' column, which contains a series of '+' and '-' signs indicating the presence of outside service requirements for various production orders.

This screenshot shows a detailed view of an Item Net Requirement table. It includes a header section with 'Standard view' and a table with columns for Reference, Item, Item category, Material, Storage group, Planned order type, Requirement date, Requirement quantity, Requirement (TR) date, Outside Service, Requirement (TR) date, and Status. A yellow highlight is placed over the 'Outside Service' column, showing a '+' sign for the selected production order.

Provide Visibility Of Sale Order From Outside Service Purchase Order.

- › Purchasing department must go through each factory order associated to outside service to identify for which sales order this outside service PO inventory is going to be used.
- › In most cases one outside service PO is linked to many sales order's requirement hence for Purchasing department it takes 30 to 40 minutes to identify related sales order details.
- › To fulfil the requirement, on the purchase order page, we will build a fact box which include all sales order details which is linked to that particular outside service purchase order.



- › The Shortage report provides visibility for items required to schedule or start production orders (primarily BOM items).
- › It also indicates whether planned orders, production orders, or purchase orders have been prepared for those BOM items.
- › The report includes details such as planned order dates, customer names and IDs, warehouse information, and required quantities.
- › This visibility helps planners determine which orders need scheduling, including sub-BOM items.
- › A scheduled batch job ensures data updates.
- › Real-time updates enable informed decisions and reduce the time spent switching between forms to check item shortages.
- › Shortage items are fetched from the production order explosion.

Shortage Report - Design

Item Code	Warehouse	Planned Order Date	Qty Req	Customer Name	Customer ID	Item Name	UOM	Inventory	Order Type	Qty	Warehouse	Reorder Pt	Min Stock	Max Stock	Order Qty	Order Date
P000001	WH00001	1/1/2024	100000	Customer A	1000001	Item A	EA	100000	Production Order	100000	WH00001	10000	0	100000	100000	1/1/2024
P000002	WH00002	2/1/2024	200000	Customer B	1000002	Item B	EA	200000	Production Order	200000	WH00002	20000	0	200000	200000	2/1/2024
P000003	WH00003	3/1/2024	300000	Customer C	1000003	Item C	EA	300000	Production Order	300000	WH00003	30000	0	300000	300000	3/1/2024

The goal is to consolidate product information on a single page for efficient material procurement strategies based on item usage history.

› The functionality showcases item usage along with purchase details and lead time.

› **Key columns include:**

› **Item details:** Description and available physical quantity.

› **Item usage:** Quantity used in the past 1, 3, 6, and 12 months.

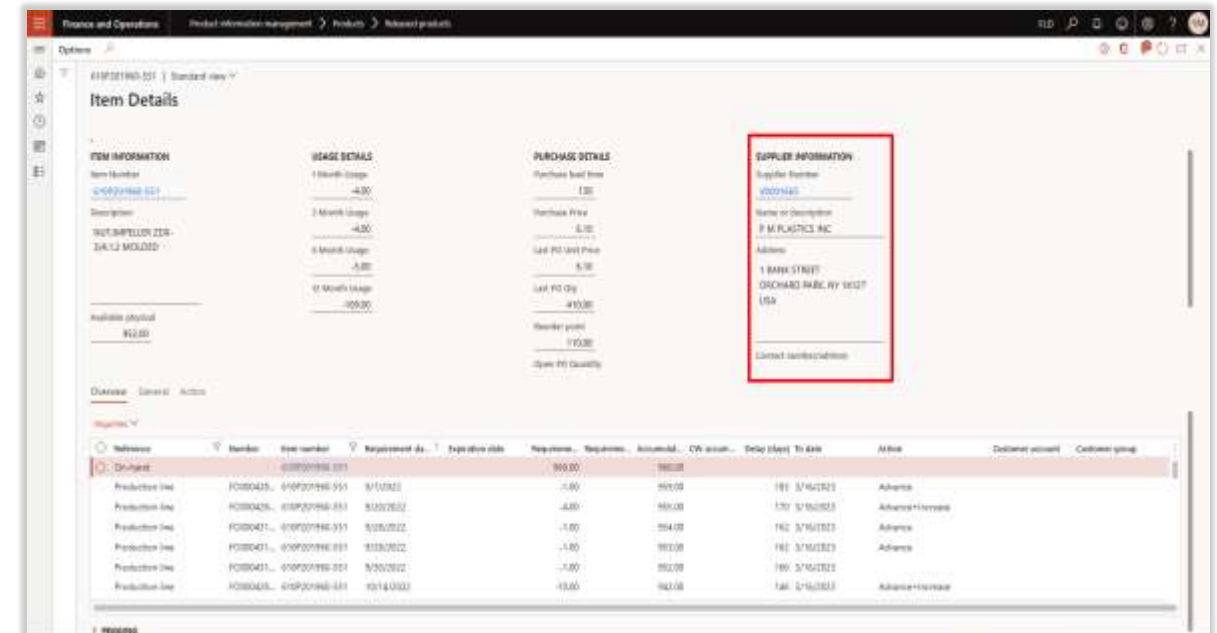
› **Purchase details:** Purchase lead time, price, last PO unit price, last PO quantity, reorder point, open PO quantity, quantity received in 12 months, and minimum order quantity.

› **Supplier details:** User-selectable supplier.

› References for item usage are provided.

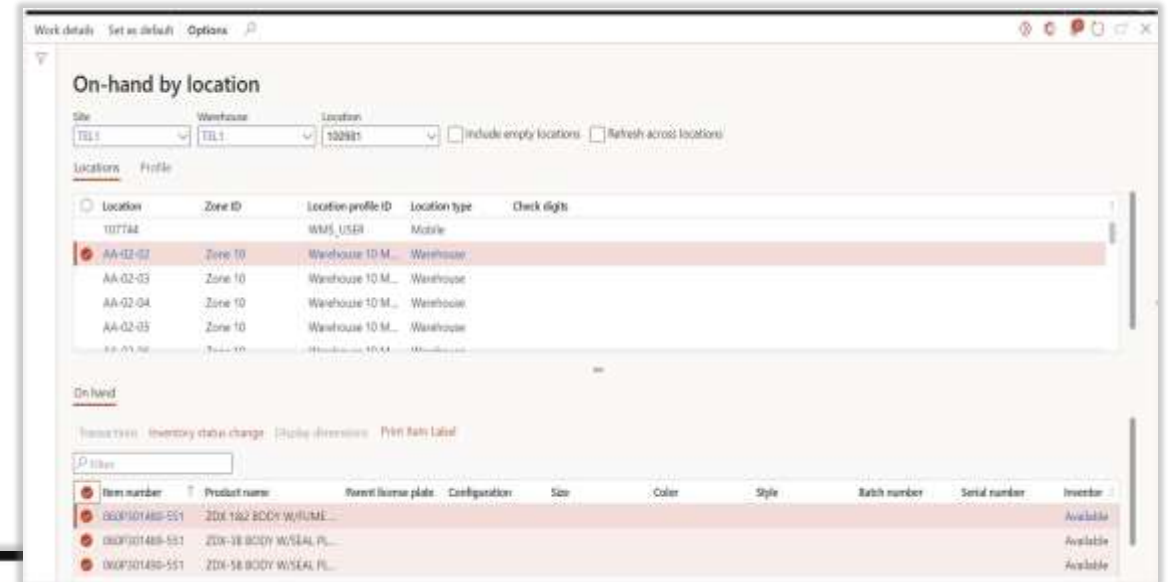
› Data is collected from various forms for better visibility of the selected item.

Item usage and Purchased Qty Overview Page

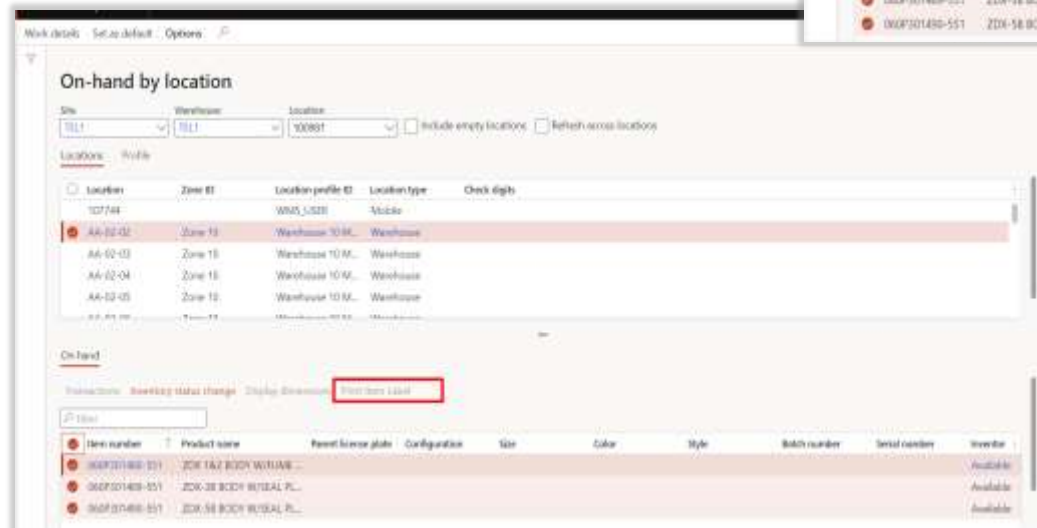


- › This functionality has an ability to print multiple item label at one click of the user.
- › There is a standard form in D365 for label printing, but the problem lies on the point of printing.
- › It only gives the ability to print one item label at a time, so printing multiple item labels becomes a task for the user.
- › Modifications in the code has been done in a way that multiple items can be selected to print the labels.

Label Item after the modification in the code



Label Item as of now in D365



The goal is to access inventory issue quantities for each Bill of Materials (BOM) line in the max report as finished, enabling accurate determination of expected delivery dates for customers.

- › **Max Report as Finished:** Provides inventory data for BOM lines, including production, inventory, and sales order consumption.
- › **Problem:** Planners couldn't see inventory consumption on this page, requiring navigation to item net requirements.
- › **Solution:** Add consumption fields to the max report as finished page and enable quick access to item net requirements.
- › **Example:** For item "A" composed of "Part-1" and "Part-2," system checks child items' stock to determine maximum production quantity.
- › **Benefits:** Improved visibility and time savings for planners.

The system's report is contradictory. It says you can make 2 more pumps, but your motor requirements are already overbooked by -2.

Display dimensions

Item number	Site	Warehouse	L. Ser.	Issn.	L.	Quantity	Unit	On-hand	Max. report as finished	BOM line	Level	CW quant
344-FV5V	TEL1	TEL1				1.00	ea	0.00			0	
581P001308-320	TEL1	TEL1				-1.00	ea	57.00		57.00	1	
720P031006-680	TEL1	TEL1				-4.00	ea	36,746.00		24,185.50	1	
375P01032313D40	TEL1	TEL1				-1.00	ea	-2.00		-2.00	1	
133P400167-576	TEL1	TEL1				-1.00	ea	1,036.00		1,036.00	1	
183P001326-376	TEL1	TEL1				-1.00	ea	917.00		917.00	1	

Plan

DynPlan

Overview Item coverage Summary Period

ON-HAND	FORECAST	RECEIPT	ISSUE	INVENTORY	SALES ORDER	PLANNED ORDER
On-hand	Supply forecast	Inventory	Production	CW inventory	CW sales orders	Purchase
4.00		20.00	-6.00			
CW on-hand	CW supply forecast	CW inventory	CW production	CW inventory	CW sales orders	CW purchase

Overview General Item

Inquiries

Reference	Number	Item number	Requirement date	Requirement quantity	Accumulated	CW amount	Delay (days)	To date	Action
Production line	FO0053156	375P01032313D40	5/19/2023	-3.00	2.00		.20	6/15/2023	Postpone
Production line	FO0053458	375P01032313D40	6/6/2023	-3.00			2	6/15/2023	
Production line	FO0053478	375P01032313D40	6/15/2023	-1.00	-1.00			15	7/27/2023
Production line	FO0053478	375P01032313D40	6/15/2023	-1.00	-2.00			15	7/27/2023
Purchase order	PO018885	375P01032313D40	7/20/2023	15.00	17.00				Advance
Purchase order	PO018885	375P01032313D40	7/20/2023	1.00	16.00				Advance

To improve order life cycle efficiency, streamline workflows across departments for smooth order processing, from booking to delivery and billing.

Case Management and Automation

- › Leveraged D365 standard case management functionality.
- › Customized workflows to align with business needs.
- › Created two workflow categories: Sales OE (for original equipment orders) and Sales AM (for after-market orders).

Workflow Process

- › OE involves departments like application, engineering, purchasing, planning, production routing, and CSR.
- › AM depends on whether parts are made or purchased.

Departmental Activity

- › Departments initiate tasks after workflow creation.
- › Feedback and information flow to achieve timely order delivery.

To improve order life cycle efficiency, streamline workflows across departments for smooth order processing, from booking to delivery and billing.

Workflow Tracking

- › Time stamps track each department's progress.
- › Overall cycle time and wait time are measured for efficient management.

Workflow Status Automation

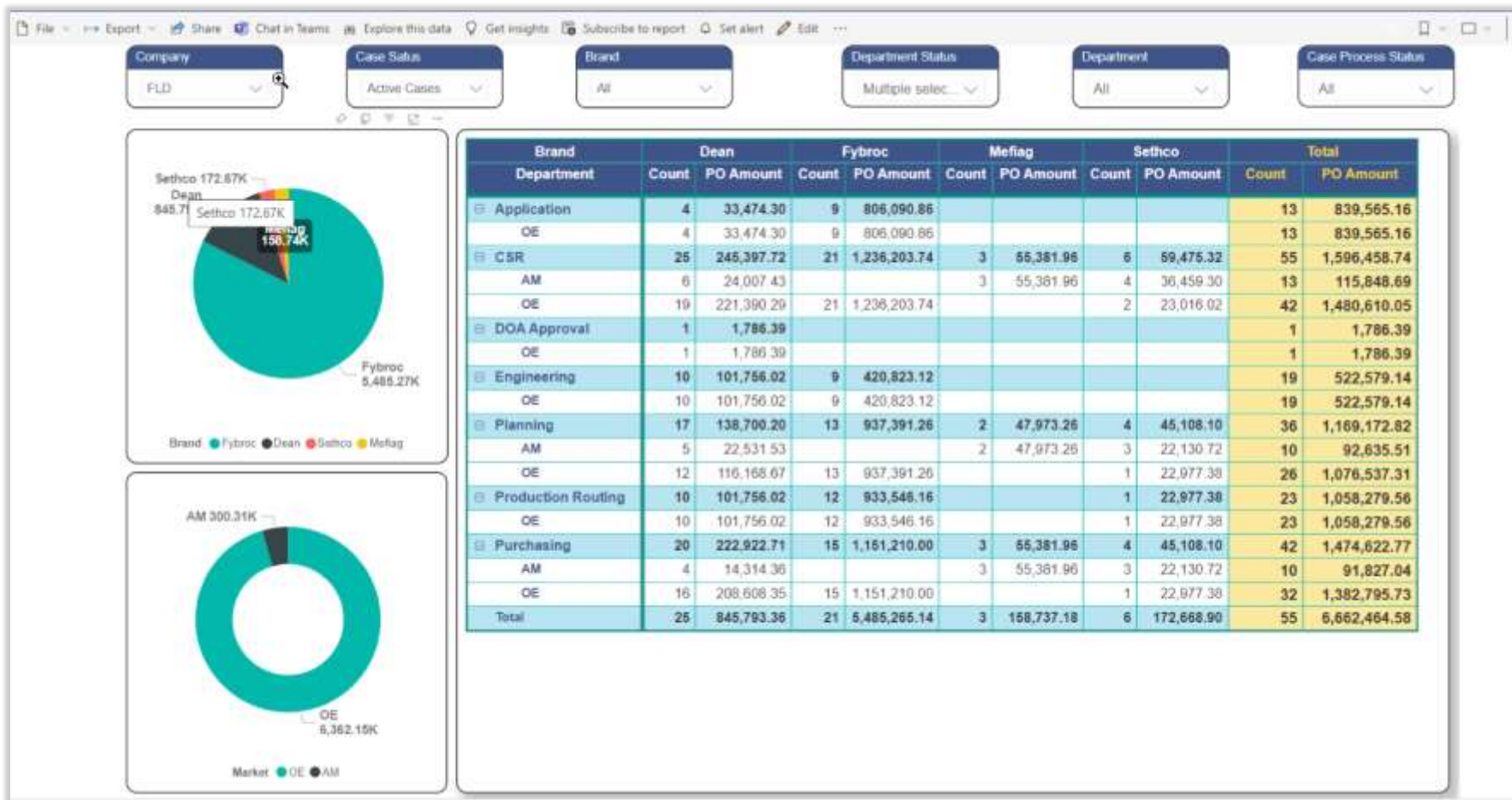
- › Workflow status changes automatically based on Sales Order status (e.g., Shipped or Closed).

Reporting Workspace

- › Simple workspace shows workflow counts by brand.
- › Global workspace reports customer purchase order amounts to higher management.

To improve order life cycle efficiency, streamline workflows across departments for smooth order processing, from booking to delivery and billing.

Workflow BI Reporting Workspace

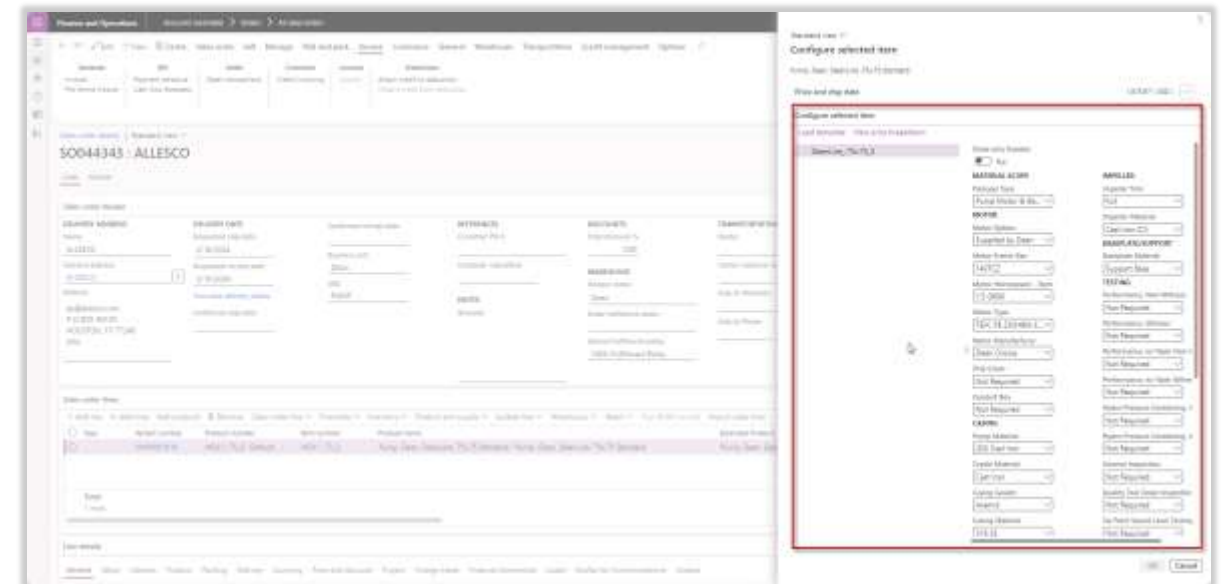


- › Created for sales order serial number search.
- › Includes other sales order details: department, product number, BOM & Route, sales price, shipping date, and customer information.
- › Aims to simplify re-order scenarios, reducing manual inputs and Excel file comparisons.
- › Enables users to perform tasks like serial number lookup, access product attributes, and view BOM details within a single interface.
- › Facilitates prompt access to item details for customer re-order requests and collaboration across departments.
- › Globally accessible to all teams for efficient workflow.

Customer account	Location	Line no.	Line desc.	Date order	Product number	Product name	Qty on hand	BOM	Route number	Business Unit	Customer ID #	Ship date	Ship date	Ship date
C0000017	00000	200000	30048910	4782,S	Pump Dean, RA2148 1.5L	307824	000000044789	0700020812	DEAN	703981	240419 021980	3/18/2024	3/20/2024	9,275.00
C0000017	00000	200000	30048910	4782,S	Pump Dean, RA2148 1.5L	307824	000000044789	0700020812	DEAN	703981	240419 021980	3/18/2024	3/20/2024	9,275.00
C0000017	00000	200000	30048910	4782,S	Pump Dean, RA2148 1.5L	307824	000000044789	0700020812	DEAN	703981	240419 021980	3/18/2024	3/20/2024	9,275.00

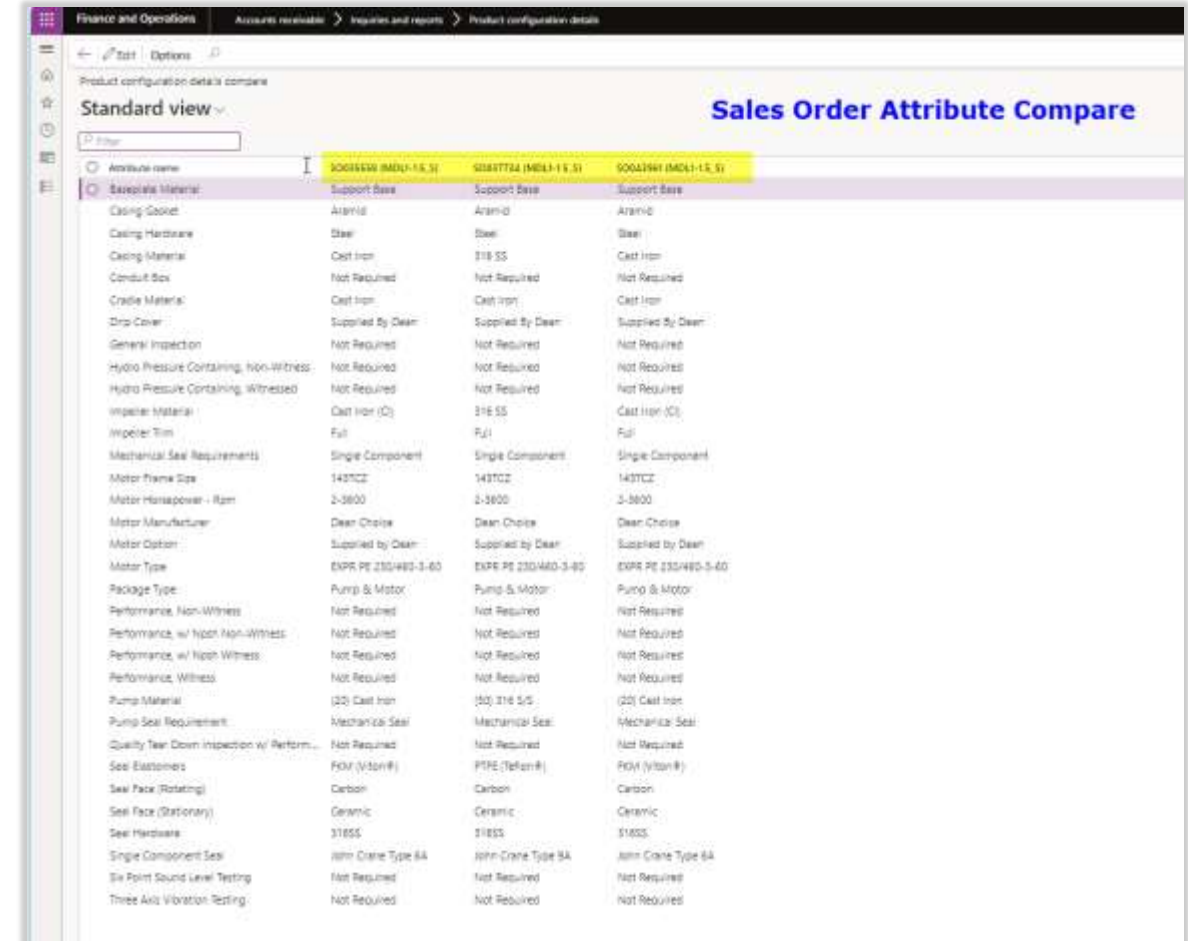
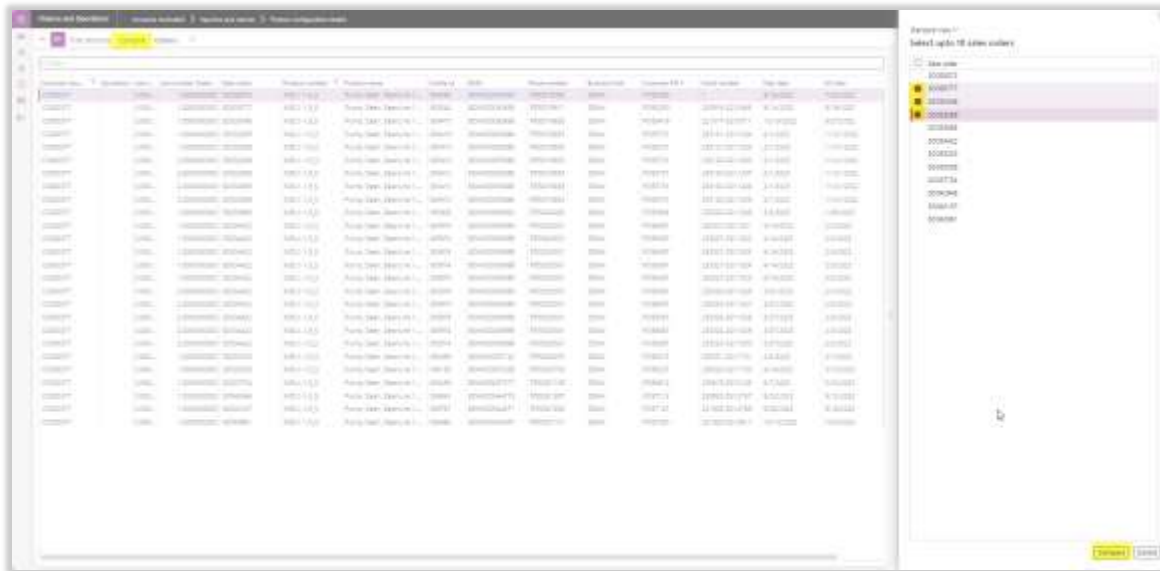
- › Created for sales order product configuration attributes.
- › Enables attribute search and comparison.
- › Includes sales order details: department, product number, BOM & Route, sales price, shipping date, and customer information.
- › Aims to simplify re-order scenarios, reducing manual inputs and Excel file comparisons.
- › Users can perform tasks like serial number lookup, access product attributes, and view BOM details within the same interface.
- › Attribute filter functionality helps determine configured attributes across orders.

When users perform the product configuration process from the sales order line, the same configured attributes will appear in the customized product configuration form.



Sales order comparison:

We have the capability to compare up to 10 sales orders simultaneously on a single screen, along with access to the BOM comparison report.



BOM Comparison from Product configuration/sales order compare page:

User perform product configuration process from the sales order line and the same configured attributes will be appear in the customized product configuration form.

BOM Compare report for the same sales order item

BOM versions:

BOM VERSION 1 Product: MDL1-1-E-S BOM version: BOM000037208	BOM VERSION 2 Product: MDL1-1-E-S BOM version: BOM000042497	BOM VERSION 3 Product: _____ BOM version: _____	BOM VERSION 7 Product: _____ BOM version: _____	BOM VERSION 9 Product: _____ BOM version: _____
BOM VERSION 2 Product: MDL1-1-E-S BOM version: BOM000037577	BOM VERSION 4 Product: _____ BOM version: _____	BOM VERSION 5 Product: _____ BOM version: _____	BOM VERSION 8 Product: _____ BOM version: _____	BOM VERSION 10 Product: _____ BOM version: _____

Parameters:

BOM comparison

Overview | Compare Page | Difference

BOM id	Position	BOM item id	Item number	Product name	Unit	Cost	Level No.	BOM000037208	BOM000037577	BOM0000...	Product type	Total avail...	On hand	Total qty
BOM000037208	1	MDL1-1-E-S	040144	CI 10 DL450-22A BACKH...	ea	12.85	2,000,000,000	1,000			Item	111.00	111.00	1,000
BOM000042497	1	MDL1-1-E-S	0408144	CI 10 DL450-22A BACKH...	ea	12.85	2,000,000,000		1,000		Item	111.00	111.00	1,000
BOM000037577	1	MDL1-1-E-S	0408145	SS 23 DL450-22A BACKH...	ea	49.50	2,000,000,000			1,000	Item	32.00	32.00	1,000
BOM000037208	1	MDL1-1-E-S	0425210	CI 10 DL-7A ADAPTER CR...	ea	20.15	2,000,000,000	1,000			Item	180.00	77.00	1,000
BOM000037577	1	MDL1-1-E-S	0425210	CI 10 DL-7A ADAPTER CR...	ea	20.15	2,000,000,000		1,000		Item	180.00	77.00	1,000
BOM000042497	1	MDL1-1-E-S	0425210	CI 10 DL-7A ADAPTER CR...	ea	20.15	2,000,000,000			1,000	Item	180.00	77.00	1,000
BOM000037208	1	MDL1-1-E-S	0428990	CI 10 DL150-34 IMPELLER...	ea	7.27	3,000,000,000	1,000			Item	4.00	4.00	1,000
BOM000042497	1	MDL1-1-E-S	0428990	CI 10 DL150-34 IMPELLER...	ea	7.27	3,000,000,000			1,000	Item	4.00	4.00	1,000
BOM000037577	1	MDL1-1-E-S	0428991	SS 23 DL150-34 IMPELLER...	ea	39.88	3,000,000,000		1,000		Item	60.00	72.00	1,000
BOM000037208	1	MDL1-1-E-S	0433396	CI 10 DL150-54 CASE CA...	ea	30.25	2,000,000,000	1,000			Item	50.00	0.00	1,000
BOM000042497	1	MDL1-1-E-S	0433396	CI 10 DL150-54 CASE CA...	ea	30.25	2,000,000,000			1,000	Item	50.00	0.00	1,000
BOM000037577	1	MDL1-1-E-S	0433397	SS 23 DL150-54 CASE CA...	ea	744.21	2,000,000,000		1,000		Item	25.00	6.00	1,000
BOM000037208	22	MDL1-1-E-S	1080292	CI 10 DL450-22A1 BACKH...	ea	85.09	1,000,000,000	1,000			Item	81.00	84.00	1,000
BOM000042497	22	MDL1-1-E-S	1080292	CI 10 DL450-22A1 BACKH...	ea	85.09	1,000,000,000			1,000	Item	81.00	84.00	1,000
BOM000037208	1	MDL1-1-E-S	1080292F	CI 10 DL450-22A1 BACKH...	ea	94.00	2,000,000,000	1,000			Service	0.00	0.00	1,000
BOM000042497	22	MDL1-1-E-S	1080292F	CI 10 DL450-22A1 BACKH...	ea	94.00	2,000,000,000			1,000	Service	0.00	0.00	1,000
BOM000037577	22	MDL1-1-E-S	1080293	SS 23 DL450-22A1 BACK...	ea	217.95	1,000,000,000		1,000		Item	82.00	82.00	1,000
BOM000037577	1	MDL1-1-E-S	1080293F	SS 23 DL450-22A1 BACK...	ea	124.00	2,000,000,000		1,000		Service	0.00	0.00	1,000
BOM000037208	7	MDL1-1-E-S	1207703	CI 10 DL-7A1 ADAPTER C...	ea	51.16	1,000,000,000	1,000			Item	123.00	34.00	1,000
MDL0000119757	7	MDL1-1-E-S	1207703	CI 10 DL-7A1 ADAPTER C...	ea	51.16	1,000,000,000		1,000		Item	123.00	34.00	1,000

Steel Add-on Metals Accelerator



While creating a new steel item, Item type master defines that which type of item it is. i.e. Hot roll coil, Cold rolled coil, Steel pipe, Steel bars, Plates etc. It also defines at different stages what will be the UOM, Configuration and Formula for the item type. Further the item type master is attached at the product dimension group.

The screenshot shows the SAP Item Type Master configuration for 'COILSHEET'. The interface includes a navigation pane on the left with a filter and a list of item types. The main area displays the configuration details for the selected item type.

Item Type ID	Item Type Name	Item Type Description	Item group	Batch Attribute Group
COILSHEET	Coil sheet	Coil sheet	Coil	Coil Item

Units			
Linear Unit	Volume Unit	Secondary Unit	Inventory Unit
ft		ft	ft
Mass Unit	Physical Dimension Unit	Purchase Unit	Sales Unit
ft	ft	ft	ft

Formula				
Configuration Sequence	Mass Formula	Height	Pieces	Thickness Type
COIL	MUF	<input type="checkbox"/> No	<input type="checkbox"/> No	<input checked="" type="checkbox"/> Yes
Linear Formula	Volume Formula	Length	Thickness	Width
		<input type="checkbox"/> No	<input checked="" type="checkbox"/> Yes	<input checked="" type="checkbox"/> Yes

Under Delivery/Over Delivery	
SALES	PURCHASE
Sales Over delivery	Purchase Overdelivery
5.00	10.00
Sales Under Delivery	Purchase UnderDelivery
5.00	10.00

Density master is used for maintaining the density of an item variant. It is the range of width and thickness. For the set of range, a density is entered manually. This is attached at the formula designer to calculate the unit weight.

Finance and Operations Search for a page USMF

Save + New Delete Master Code Configuration Options

Density

Standard view

Filter

Item number	Density	From Thick...	To Thickne...	From Width...	To Width/...	Color	Size	Style
00001	0.88000	0.00000	200.00000	0.00000	200.00000	Blossom-P	10	Big
00001	0.90000	0.00000	100.00000	0.00000	200.00000			
00002	0.90000	0.00000	100.00000	0.00000	100.00000	Blossom-P	10	Big
00003	0.87870	0.00000	100.00000	0.00000	100.00000	Abbey	0	Big
10001	1.98700	1.00000	100.00000	1.00000	100.00000	Abbey	10	Big
A-1001	1.87687	1.00000	100.00000	1.00000	100.00000	Abbey	10	Big
bansari	0.70000	0.00000	100.00000	0.00000	100.00000			
bansari	0.90000	0.00000	100.00000	100.00000	200.00000			
CF Testing	0.43520	0.00000	100.00000	100.00000	1,000.000...		10	
CL001	0.28830	0.00000	100.00000	0.00000	1,200.000...	Abbey	10	Dark
CL001	0.28830	0.00000	120.00000	0.00000	1,000.000...	Abbey	10	Dark
COILTEST1	0.28330	0.00000	100.00000	0.00000	2,000.000...	Blue	10 ft 6 in	Dark
COILTEST1	0.28330	0.00000	100.00000	0.00000	2,000.000...	Almond	10.5	Dark
COILTEST1	0.28330	0.00000	100.00000	0.00000	2,000.000...	Aluminum	130	Medium
COILTEST1	0.28830	0.00000	100.00000	0.00000	2,000.000...	Blossom-P	10	Big
COILTEST1	0.28830	0.00000	100.00000	0.00000	2,000.000...	Akaroa	11	Light
CS Coldrolled A653	0.28830	0.00000	120.00000	0.00000	1,000.000...	Aluminum	10	Dark
CSSTEEL10	0.28335	0.00000	125.00000	0.00000	500.00000	Blacksolid	10.5	Dark

Configuration designer helps in designing the product dimension configuration for the item. This is attached at the item type master.

The screenshot displays the SAP Configuration Designer interface. On the left, a navigation pane shows a list of configuration sequences: COIL (Coil cold rolled sheet), FlackSteel config (FlackSteel config), HB (TEST), MA (MA), Test 001 (Steel Testing), and TEST-001 (HB). The 'MA' sequence is selected, and a tooltip with 'MA' is visible over it. The main area shows the configuration details for 'MA'. At the top, it says 'Standard view' and 'Configuration Designer'. Below this, a table lists configuration sequences:

Configuration sequence ID	Configuration sequence name	Configuration Description
COIL	Coil cold rolled sheet	Coil cold rolled sheet

The 'Elements' section contains a table with the following data:

Sequence ...	Element Type	Master Type	Constant Value
A	Thickness		
B	Thickness Type		
C	Width		

The 'Sequence' section shows the sequence name 'A*B-C'.

Formula Designer is for designing the formula and assigning that to item type master, that helps in calculating the unit weight while doing the transactions.

The screenshot displays the 'Formula Designer' interface within the 'Finance and Operations' application. The top navigation bar includes 'Edit', '+ New', 'Delete', and 'Options' buttons, along with a search bar and user profile 'USMF'. The left sidebar shows a list of formula items: 'HB-FD Mass Formula', 'MA-MUF MA-MUF', 'MUC Mass unit calculation', 'MUF Mass unit flat', and 'TESTMF TESTMF'. The main area is titled 'Formula Designer' and shows a table with the following data:

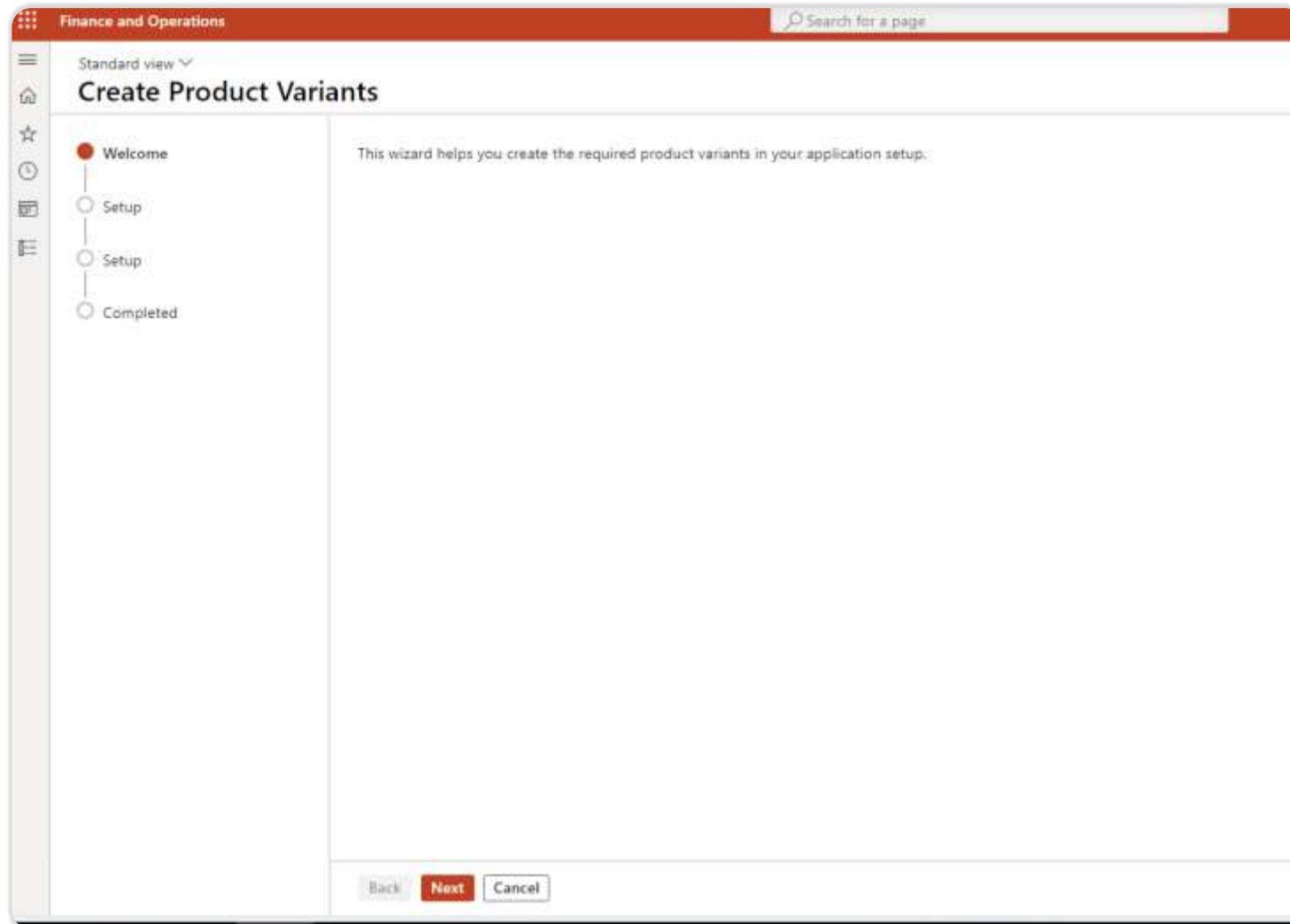
Formula ID	Formula Name	Formula Description
HB-FD	Mass Formula	Mass Formula

Below the table is an 'Elements' section with '+ Add variable' and '- Remove variable' buttons. It contains a table with the following data:

Equation E...	Element Type	Constant V...
<input type="radio"/> A	Thickness	0.00
<input type="radio"/> B	Width	0.00
<input type="radio"/> C	Height	0.00
<input type="radio"/> D	Density	0.00
<input type="radio"/> E	Constant	10.00

The 'Equation' section at the bottom shows a 'Validate Equation' button and the equation $A*B*C*D/E$.

Product variant wizard is for creating multiple variants at a time. All the combinations are selected on the first hand and then the wizard is run for creating the multiple variants. N number of variants can be created at a time.



Product variant wizard is for creating multiple variants at a time. All the combinations are selected on the first hand and then the wizard is run for creating the multiple variants. N number of variants can be created at a time.

Finance and Operations

Standard view

Create Product Variants

Welcome

Setup

Setup

Completed

Select and enter values for product dimension

Dimension Type	Values
Thickness	1.64628
Thickness Type	Min
Width	120

Back Next Cancel

Product variant wizard is for creating multiple variants at a time. All the combinations are selected on the first hand and then the wizard is run for creating the multiple variants. N number of variants can be created at a time.

The screenshot shows the 'Create Product Variants' wizard interface. The title bar reads 'Finance and Operations' and 'Standard view'. The main heading is 'Create Product Variants'. On the left, a navigation pane shows four steps: 'Welcome' (checked), 'Setup' (checked), 'Setup' (unchecked), and 'Completed' (unchecked). The main area contains the instruction 'Select values for product Grades, Colours and Styles'. Below this, there are three dropdown menus: 'Colors' with the value ': Blossom-P;Abbey,...', 'Grades' with the value ':1;10;10 ft 6 in;10.5', and 'Styles' with the value ':Big;Crew;Dark;Hood'. At the bottom, there are three buttons: 'Back', 'Next', and 'Cancel'.

All the dimensions details of purchase order line is calculated through configuration and formula designer which is stored in fields Dimensions, Unit weight, Secondary unit, Secondary quantity.

The screenshot displays the SAP Finance and Operations interface for a purchase order. The header shows the purchase order number 00004700 and the supplier name 'Acme Office Supplies'. The interface includes various tabs for managing the order, such as 'Purchase order', 'Purchase', 'Manage', 'Receive', 'Invoice', 'Retail', 'Warehouse', 'Transportation', 'General', and 'Options'. Below the header, there are sections for 'Purchase order header' and 'Purchase order lines'. The 'Purchase order lines' section contains a table with the following data:

Line	Adjusted u...	Discount	Discount p...	Net amount	Adjusted n...	Quality order status	Receive now	CW receiv...	Load ID	Dimensions	Color	Style	Grades	Unit Weight	Secondary...	Secondary...	Purch Pric...	Purch Price	Batch Attribute Te...
30	0.00000				0.00					Max-22.979-25-65	HB_MTBLUE Matt Blue TE...	Big		16,897.72	ft	0.20		40.00	
30	0.00000			-40,000.00	0.00					Max-22.979-25-65	HB_MTBLUE Matt Blue TE...	Big		16,897.72	ft	0.10		40.00	
30	0.00000			40,000.00	0.00					Max-22.979-25-65	HB_MTBLUE Matt Blue TE...	Big		16,897.72	ft	0.10		40.00	
30	0.00000			40,000.00	0.00					Max-22.979-2...	HB_MTBLUE Matt Blue...	Big		16,897.72	ft	0.10		40.00	

All the related details of purchase order line is stored in different sections of purchase order line details like Product variant view, Paint details, Product notes (Batch attributes), Related Transfer orders.

All purchase orders | Standard view

00004700 : 1001 - Acme Office Supplies

Open order Confirmed

Lines Header

Purchase order header

DELIVERY Requested receipt date 11/23/2023 Earliest confirmed receipt date	Ownership At 11 Loading location 11 Create Transfer order	DISCOUNTS Total discount % 0.00 Consider Claim Reimbursement <input type="radio"/> No	VENDOR Contact REPLENISHMENT Service category Location	CROSS DOCKING DATES Requested receipt date 11/23/2023 Cross docking date	Local delivery date Sales date	PRODUCT/ORDER CREATION Auto created <input checked="" type="radio"/> No Origin Purchase	Applied Amount 0.00 PO Settled 0.00 Processing invoice on actual qua... <input checked="" type="radio"/> No
--	---	--	--	--	---------------------------------------	--	--

Purchase order lines

+ Add line + Add lines Add products Remove Charges Enter Dimension Serial number entry Change View Registered lines Open Sales Order Purchase order line Financials Inventory Product and supply Update line Warehouse

Type	Budget check results	Line number	Item number	Product name	Procurement category	Variant number	Site	Warehouse	CW quantity	CW unit	Quantity	Unit	Unit price	Adjusted u...	Discount	Discount p...	Net amount
		1000	A-1001	55-TypeB-ASTM-Acrylic / ...		VN-011867	1	11			3,000.00	lb	40.00	0.00000			
		2000	A-1001	55-TypeB-ASTM-Acrylic / ...		VN-011867	1	11			1,000.00	lb	40.00	0.00000			-40,000.00
		3000	A-1001	55-TypeB-ASTM-Acrylic / ...		VN-011867	1	11			1,000.00	lb	40.00	0.00000			40,000.00
		4000	A-1001	55-TypeB-ASTM-Acrylic / ...		VN-011867	1	11			1,000.00	lb	40.00	0.00000			40,000.00

Line details

General Setup Address Product **Product Variant View** Paint details Product Notes Transfer Order Delivery Picking Price and discount Project Product packages Variants Foreign trade Fixed assets 1099 Financial dimensions Loads Landed cost

REQUEST FOR QUOTATION RFQ number	ORDER LINE Procurement category	PURCHASE REQUISITION Purchase requisition	INTERCOMPANY Origin (intercompany orders)	DELIVERY REFERENCE Customer requisition	Advanced selection options	Prevent partial delivery <input checked="" type="radio"/> No	Finalized <input checked="" type="radio"/> No
--	---	---	---	---	-----------------------------------	---	--

All the related details of purchase order line is stored in different sections of purchase order line details like Product variant view, Paint details, Product notes (Batch attributes), Related Transfer orders.

The screenshot displays a software interface for viewing purchase order details. At the top, it shows 'All purchase orders | Standard view' and the specific order '00004700 : 1001 - Acme Office Supplies'. There are 'Open order' and 'Confirmed' status buttons. Below this is a table with columns for 'Lines' and 'Header'. The table contains three rows of data:

Lines	Header																			
30	0.00000			40,000.00	0.00					Max-22.979-25-65	HB_MTBBLUE Matt Blue TE...	Big		16,897.72	ft	0.10			-40.00	
30	0.00000			40,000.00	0.00					Max-22.979-25-65	HB_MTBBLUE Matt Blue TE...	Big		16,897.72	ft	0.10			-40.00	
30	0.00000			40,000.00	0.00					Max-22.979-25-65	HB_MTBBLUE Matt Blue TE...	Big		16,897.72	ft	0.10			-40.00	

Below the table is a 'Line details' section with a navigation bar containing various tabs: General, Setup, Address, Product, **Product Variant View**, Paint details, Product Notes, Transfer Order, Delivery, Picking, Price and discount, Project, Product packages, Variants, Foreign trade, Fixed assets, 1099, Financial dimensions, Loads, Landed cost. The 'Product Variant View' tab is active, showing a table with 'Dimension Type' and 'Values' columns:

Dimension Type	Values
Thickness Type	Max
Thickness	22.979
Width	25
ASTM	65
Color	HB_MTBBLUE Matt Blue TE...
Style	Big

All the related details of purchase order line is stored in different sections of purchase order line details like Product variant view, Paint details, Product notes (Batch attributes), Related Transfer orders.

All purchase orders | Standard view

00004700 : 1001 - Acme Office Supplies

Open order Confirmed

Lines Header

30	0.00000		40,000.00	0.00				Max-22.979-25-65	HE_MTBLUE Matt Blue TE...	Big	16,897.72	ft	0.10	40.00
30	0.00000		40,000.00	0.00				Max-22.979-25-65	HE_MTBLUE Matt Blue TE...	Big	16,897.72	ft	0.10	40.00
30	0.00000		40,000.00	0.00				Max-22.979-25-65	HE_MTBLUE Matt Blue TE...	Big	16,897.72	ft	0.10	40.00

Line details

General Setup Address Product Product Variant View **Paint details** Product Notes Transfer Order Delivery Picking Price and discount Project Product packages Variants Foreign trade Fixed assets 1099 Financial dimensions Loads Landed cost

Paint vendor <input type="text" value="TEST-1"/>	Topcoat color <input type="text" value="Matt Blue"/>	Topcoat DFT min <input type="text" value="10.000"/>	Topcoat color group <input type="text" value="CG-1"/>	Backer color code <input type="text" value="White"/>	Backer DFT max <input type="text" value="100.000"/>	Backer primer color code <input type="text" value="White"/>	Warranty <input type="text"/>
Paint system/type <input type="text" value="BLMT001ST"/>	Topcoat color code <input type="text" value="MTBLUE"/>	Topcoat DFT max <input type="text" value="100.000"/>	Backer color <input type="text" value="White"/>	Backer DFT min <input type="text" value="10.000"/>	Topcoat primer color code <input type="text" value="MTBLUE"/>	Special paint/film/coating <input type="text"/>	

All the related details of purchase order line is stored in different sections of purchase order line details like Product variant view, Paint details, Product notes (Batch attributes), Related Transfer orders.

All purchase orders | Standard view

00004700 : 1001 - Acme Office Supplies

Open order Confirmed

Lines Header

Line	Qty	Unit Price	Amount	Tax	Product	Product Variant	Product Description	Product Unit	Product Weight	Product Length	Product Width	Product Height	Product Volume
30	0.00000		40,000.00	0.00	Max-22.979-25-65	HB_MTBBLUE Matt Blue TE...	Big		16,897.72	ft	0.10		40.00
30	0.00000		40,000.00	0.00	Max-22.979-25-65	HB_MTBBLUE Matt Blue TE...	Big		16,897.72	ft	0.10		40.00
30	0.00000		40,000.00	0.00	Max-22.979-25-65	HB_MTBBLUE Matt Blue TE...	Big		16,897.72	ft	0.10		40.00

Line details

General Setup Address Product Product Variant View Paint details **Product Notes** Transfer Order Delivery Picking Price and discount Project Product packages Variants Foreign trade Fixed assets 1099 Financial dimensions Loads Landed cost

New Delete Create New Template

Attribute	Minimum	Maximum	Target	Attribute value	Quality order	Notes
Concentration	0.0000	0.0000	25	0		
Flatness Critical	0.0000	0.0000		Text		
Notes	0.0000	0.0000		Notes		

All the related details of purchase order line is stored in different sections of purchase order line details like Product variant view, Paint details, Product notes (Batch attributes), Related Transfer orders.

All purchase orders | Standard view

00004700 : 1001 - Acme Office Supplies

Open order Approved

Lines Header

Create Transfer order

Service category

Location

Processing invoice on actual qua... No

Purchase order lines

+ Add line Add lines Add products Remove Charges Enter Dimension Serial number entry Change View Registered lines Open Sales Order Purchase order line Financials Inventory Product and supply Update line Warehouse

Type	Budget check results	Line number	Item number	Product name	Procurement category	Variant number	Site	Warehouse	CW quantity	CW unit	Quantity	Unit	Unit price	Adjusted u...	Discount	Discount p...	Net amou
<<		1000	A-1001	55-TypeB-ASTM-Acrylic / ...		VN-011867	1	11			3,000.00	lb		0.00000			
<<		2000	A-1001	55-TypeB-ASTM-Acrylic / ...		VN-011867	1	11			1,000.00	lb	40.00	0.00000			40,000.00
<<		3000	A-1001	55-TypeB-ASTM-Acrylic / ...		VN-011867	1	11			1,000.00	lb	40.00	0.00000			40,000.00
<<		4000	A-1001	55-TypeB-ASTM-Acrylic / ...		VN-011867	1	11			1,000.00	lb	40.00	0.00000			40,000.00

Line details

General Setup Address Product Product Variant View Paint details Product Notes Transfer Order Delivery Picking Price and discount Project Product packages Variants Foreign trade Fixed assets 1099 Financial dimensions Loads Landed cost

Transfer number	Transfer status	From warehouse	To warehouse	Ship date	Receipt date	Item number	Batch number	Transfer q...
002253	Created	11	12	12/4/2023	12/4/2023	A-1001	A1001-1	100.00
002253	Created	11	12	12/4/2023	12/4/2023	A-1001	A1001-2	200.00
002253	Created	11	12	12/4/2023	12/4/2023	A-1001	A1001-3	1,000.00

Multiple serial numbers can be created at a time and also the registration is done for the serial numbers.

Finance and Operations Search for a page USMF

Serial number entry | 00002125 : TESTCOIL

Standard view

Filter BL Number Document date Heat number

Line nu...	Product name	Quantity	Secondary...	Secondary quantity	Receive no...	Invent serial id	Input Unit	Input quan...	Prefix	Suffix	Start	incr.	SrNos	Duplicate ...	Receive now	Packing Remarks	Pieces	Total Recei...	Tota
1	TESTCOIL / TESTCOIL	10,000.00		4.80	0.00		lb	10,000.00			0	0	0	<input type="checkbox"/>			0.00		
2	TESTCOIL / TESTCOIL	1,000.00		0.40	0.00	BH01GG	lb	1,000.00			0	0	0	<input type="checkbox"/>			0.00		
3	TESTCOIL / TESTCOIL	1,000.00		0.40	0.00	BH02GG	lb	1,000.00			0	0	0	<input type="checkbox"/>			0.00		
4	TESTCOIL / TESTCOIL	1,000.00		0.40	0.00	BH03GG	lb	1,000.00			0	0	0	<input type="checkbox"/>			0.00		
5	TESTCOIL / TESTCOIL	1,000.00		0.40	0.00	BH04GG	lb	1,000.00			0	0	0	<input type="checkbox"/>			0.00		
6	TESTCOIL / TESTCOIL	1,000.00		0.40	0.00	BH05GG	lb	1,000.00			0	0	0	<input type="checkbox"/>			0.00		
7	TESTCOIL / TESTCOIL	1,000.00		0.40	0.00	BH06GG	lb	1,000.00			0	0	0	<input type="checkbox"/>			0.00		
8	TESTCOIL / TESTCOIL	1,000.00		0.40	0.00	BH07GG	lb	1,000.00			0	0	0	<input type="checkbox"/>			0.00		
9	TESTCOIL / TESTCOIL	1,000.00		0.40	0.00	BH08GG	lb	1,000.00			0	0	0	<input type="checkbox"/>			0.00		
10	TESTCOIL / TESTCOIL	1,000.00		0.40	0.00	BH09GG	lb	1,000.00			0	0	0	<input type="checkbox"/>			0.00		
11	TESTCOIL / TESTCOIL	1,000.00		0.40	0.00	BH10GG	lb	1,000.00			0	0	0	<input type="checkbox"/>			0.00		

When there is a case of inventory return, this process helps in getting that reimbursed from the vendor. This is the process where we get the reimbursement in the form of future discounts on all the purchases from the vendor. This can be the fixed amount or the percentage of total invoice or it can be according to the quantity purchased.

Claim Reimbursement Agreement Summary

Settlement Id	Name	Name	Category	Charges	Total Debit	Settled Amount
USMF-0001	Contoso Retail USA	Acme Office Supplies	Fixed	100.00	4,500.00	2,100.00
Customer account	Vendor account	IsActive	Charge Unit	Total Balance	PO Settled	Total Applied Amount
US-040	1001	<input type="checkbox"/> No	lb	2,400.00	300.00	2,000.00

Claim Reimbursement Agreement Details

Case ID	Case Date	Debit Note...	Debit Sales Order	Original Customer	Original Sales Order	Debit Po Settled ...	Balance	Settled Am...	Total Appli...	
00028	9/19/2023	CIV-0000...	00031	US-040	001537	4,500.00	300.00	2,400.00	2,100.00	2,000.00

Claim Reimbursement Agreement PO Settled

Debit Note No	Purchase order	Line number	Charges co...	Category	Charge Unit	Charges	PO Settled	Total Applied Am...
CIV-00000729	00001475	1	FutDisc	Fixed		100.00	100.00	1,000.00
CIV-00000729	00001500	1	FutDisc	Fixed		100.00	100.00	0.00
CIV-00000729	00001502	1	FutDisc	Fixed		100.00	100.00	1,000.00

This form is used for tracking of serial numbers, starting from the serial number entering the warehouse till the sales of the serial number. It tracks everything like processing, changing the serial number or any process for that serial number.

The screenshot shows the 'Serial numbers' form in Dynamics 365 Finance and Operations. The form is titled 'Standard view' and 'Serial numbers'. It displays a table of serial number details and a 'General' section with a 'Serial disposition code' field highlighted.

Serial number	Bill of Lading	OriginSerialNo	Last Serial No	Original Purchase Order	Received in country	Secondary quantity	Transaction
as01sa 00001	asdf	as01sa	as01sa	00000925		0.00	Purchase
Item number	Document date	Purchase Order	Original Receipt Date	Last bil of lading	Secondary Unit	Unit Weight	Pieces
00001	6/16/2023	00000925	6/16/2023	asdf	ft	1,486.85	0.0000
Packing Remarks							
Notes							

General

Manufacturing date:	Description:	Serial disposition code:

When there is a situation that involves the vendor warehouse in between, Then process of auto transfer inventory is used. When the serial numbers are created using serial number entry process and it is registered. It has been registered at the vendor warehouse and transfer order has been created for all the serial number created from vendor warehouse to company's warehouse.

The screenshot displays the Microsoft Dynamics 365 Finance and Operations interface for a purchase order. The main header shows the purchase order number '00002225 : 1001 - Acme Office Supplies'. The 'Ownership At' field is highlighted with a red box, and the 'Create Transfer order' button is visible below it. The interface includes a navigation menu, a search bar, and a table of purchase order lines.

T...	Budget ch...	Line number	Item number	Product name	Procurement category	Variant number	Site	Warehouse	CW quantity	CW unit	Quantity	Unit	Unit price	Adjusted u...	Discount	Discount p...	Net amount	Adjusted n...
		1	10001	10001 / 10001		VN-013640	1	11			1,000.00	lb	20.00	0.00000			0.00	

When a purchase order has been created from a sales order and the warehouse on sales is not the same which is on purchase then it automatically creates a transfer order to the sales warehouse. Either way it can be used is for packing slip on sales, while we post product receipt on purchase, if the Boolean of post packing slip is on then packing slip on sales automatically gets posted.

Standard view

Posting product receipt

Settings

Select Arrange Printer setup

View charges

PARAMETERS

Quantity

Ordered quantity

Posting

Yes

Receive Multiple BL

No

BL Number

GROUP1

Destination Location

Post packing slip

No

Create Transfer order

No

GROUP2

Shipping carrier

Mode

Shipment Name

Ship to location name

Vessel

Container Numbers

Carrier Contact

GROUP3

ETA

Load Date

Load Port

Origin

Acme Office Supplies

Status

Delivery Date

PRINT OPTIONS

Print

Current

Print product receipt

No

Use print management destina...

No

Print sales documents

No

Print shelf labels

No

Print product labels

No

SETUP

Check credit limit

None

SUMMARY PURCHASE

Summary update for

None

Overview

+ Add Remove Totals Sales tax

	Update	Purchase order	Name	Product re...	BL Number	Product receipt date	Document date	Terms of payment	No of Sr
	Product receipt	00002176	Acme Office Supplies		SLIT-TEST	12/3/2023			3

When any of the item purchased needs to be done processing like paint, slit, emboss or anything then processing order is used to keep the track of the process and maintain the cost in the system. Processing order is nothing but a service purchase order.

Standard view

Create purchase order

Lines

Item number	Net amount	Line number	Purchase U...	Warehouse	Sales order	Quantity	Unit	Type	Line status	Unit price	Delivery name
00003	400,000.00	1.0000000000	lb	11	002163	5,000.00	lb	Sales order	Open order	80.00	Contoso Retail USA

Processing

New Delete

Vendor account	Warehouse	Item number	Name	Unit	Quantity	Purch Price	Purch Pric...	Sales order	Line number	Processing item	Batch numb...
1002	11	Slit	Slit	lb	5,000.00	0.00		002163	1.0000000000	00003	

OK Cancel

The serial number is processed, and a new one is generated through the processing order's serial number entry.

Finance and Operations Search for a page USMF

Serial number entry | 00684 : Inventory transfer journal

Standard view

Filter BL Number: VCXZ Document date: 8/21/2023

	Item number	Original serial no	Serial number	New serial no	Finished q...	Process qu...	Yield	Leftover Q...	# Sr nos.	Prefix	Suffix	Start	incr.	Receive now
	00003	DL01LD	DL01LD	AX1XA	200.00	200.00	<input type="checkbox"/>	<input type="checkbox"/>	0			0	0	222.22
<input checked="" type="checkbox"/>	00003	DL01LD	DL01LD	AX2XA	150.00	250.00	<input type="checkbox"/>	<input type="checkbox"/>	0			0	0	277.77
	00003	DL01LD	DL01LD		0.00	50.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>	0			0	0	
	00003	DL02LD	DL02LD	AX3XA	250.00	250.00	<input type="checkbox"/>	<input type="checkbox"/>	0			0	0	250.00
	00003	DL02LD	DL02LD	AX4XA	250.00	250.00	<input type="checkbox"/>	<input type="checkbox"/>	0			0	0	250.00
	00003	DL02LD	DL02LD		0.00		<input checked="" type="checkbox"/>	<input type="checkbox"/>	0			0	0	

Serial number here are used as the financial dimension to keep the cost tracking of a serial number in the system from purchase to sales.

The screenshot displays the Microsoft Dynamics 365 Finance and Operations interface. The main window shows a purchase order for '00002225 : 1001 - Acme Office Supplies'. The 'Financial dimensions' section is expanded, showing the following details:

Field	Value
BusinessUnit	001 Home
CostCenter	No default
Department	No default
ItemGroup	No default
SerialNo	.TYG08GTY TYG08GTY

The 'SerialNo' field and its value are highlighted with a red box. The interface also shows a table of purchase order lines with columns for Line, Header, Invoiced, and Confirmed. The selected line (9) has a quantity of 10001 and a unit of 10001, with a serial number of VN-013640.

On hand inventory details with all the information including purchasing vendor, Aging, Inventory dimensions.

Finance and Operations

Search for a page

USMF

As On Date Options

Personalize: Personalize this page, Add to workspace

Page options: Security diagnostics, Advanced filter or sort, Record info, Go to

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

On-hand

Standard view * v

Filter

Item number	Product name	Batch number	Serial number	Serial Status	Style	Site	Size	Warehouse	Color	Configuration	Vendor account	Vendor Name	Customer	Customer Name
00001	Steel Frame / Steel Frame	TEST-001	TE015T		Big	1	10	HB	Blossom-P	5.09-Max-15	1004	TEST-VENDOR	US-040	Contoso Retail USA
00001	Steel Frame / Steel Frame	TEST-001	TE025T		Big	1	10	HB	Blossom-P	5.09-Max-15	1004	TEST-VENDOR	US-040	Contoso Retail USA
00001	Steel Frame / Steel Frame	TEST-001	TE035T		Big	1	10	HB	Blossom-P	5.09-Max-15	1004	TEST-VENDOR	US-040	Contoso Retail USA
00001	Steel Frame / Steel Frame	TEST-001	TE045T		Big	1	10	HB	Blossom-P	5.09-Max-15	1004	TEST-VENDOR	US-040	Contoso Retail USA
00001	Steel Frame / Steel Frame	TEST-001	TE055T		Big	1	10	HB	Blossom-P	5.09-Max-15	1004	TEST-VENDOR	US-040	Contoso Retail USA
00001	Steel Frame / Steel Frame	TEST-001	TE065T		Big	1	10	HB	Blossom-P	5.09-Max-15	1004	TEST-VENDOR	US-040	Contoso Retail USA
00001	Steel Frame / Steel Frame	TEST-001	TE075T		Big	1	10	HB	Blossom-P	5.09-Max-15	1004	TEST-VENDOR	US-040	Contoso Retail USA
00001	Steel Frame / Steel Frame	TEST-001	TE085T		Big	1	10	HB	Blossom-P	5.09-Max-15	1004	TEST-VENDOR	US-040	Contoso Retail USA
00001	Steel Frame / Steel Frame	TEST-001	TE095T		Big	1	10	HB	Blossom-P	5.09-Max-15	1004	TEST-VENDOR	US-040	Contoso Retail USA
00001	Steel Frame / Steel Frame	TEST-001	TE105T		Big	1	10	HB	Blossom-P	5.09-Max-15	1004	TEST-VENDOR	US-040	Contoso Retail USA

When there are attributes/specifications attached to the item, it can be added under product specific batch attributes and it will appear on the line details on purchase order, sales order, Transfer order, Production order and Co-products.

The screenshot displays the SAP Finance and Operations interface for configuring a product-specific batch attribute. The main window title is "A-1001 : A1001 | Standard view". The left sidebar shows a navigation menu with "Table" selected, and a list of attributes: "Concentration", "Fitness Critical", "Spangle", and "Width".

The main content area is titled "Product specific" and contains the following configuration fields:

Attribute code	Attribute relation	Paint Code	Primer/Coat
Table	Concentration		

Below this, the "Values" section is expanded, showing the following configuration:

Tolerance action	Minimum	Maximum	Increment	Target	Potency base attribute
Warning	10	30	1	25	No

When there are attributes/specifications attached to the item variant, it can be added under product variant specific batch attributes and it will appear on the line details on purchase order, sales order, Transfer order, Production order and Co-products.



Attribute	Minimum	Maximum	Target	Attribute value	Quality order
Concentration	10.0000	30.0000	25	23	
Flatness Critical	0.0000	0.0000		333	
Spangle	0.0000	0.0000		Minimum Spangle	
Width	50.0000	300.0000		233	

When the steel item is added on the sales order, custom fields to enter its dimensions and configuration will appear and if it the normal item, these custom fields will not appear on the sales order.

Sales order details | Standard view

002210 : Contoso Retail San Diego

Lines Header Open order

Sales order header

DELIVERY ADDRESS
Name: Contoso Retail San Diego
Address: 456 Peach Road, San Diego, CA 92114, USA

DELIVERY DATE
Requested ship date: 8/7/2024
Requested receipt date: 8/8/2024

REFERENCES
Customer reference: []
Customer requisition: []

DISCOUNTS
Total discount %: 0.00

WAREHOUSE
Release status: Open

TRANSPORTATION
Routes: []
Carrier customer account number: []

DISTRIBUTED ORDER MANAGEMENT
DOM Status: Not processed

Sales order lines

+ Add line + Add lines Add products Remove Select serial number Enter Dimension Change View Sales order line Financials Inventory Product and supply Update line Warehouse Retail

	Estimated ...	Margin alert	Same batc...	Fulfillment status	Dimensions	Grades	Style	Color	Unit Weight	Secondary...	Secondary...	Sales Price...	Sales price	DOM Status	Revenue schedule	Bundle net...
00	100.00	✓	<input type="checkbox"/>	Unknown	1.25NOM3001HTS	10.5		Grey	4,440.96	ft	0.20		50.00	Not processed		0.00

When there is a requirement to create a purchase order directly from sales order, Purchase order custom form will appear with all the details of the item and its dimension and only vendor needs to be added, and purchase order will be created.

The screenshot displays two overlapping windows from the Dynamics 365 Steel Add-on interface. The top window is titled 'Create purchase order' and shows a form with various input fields such as 'Vendor Account' (1001), 'Purchase Unit' (LB), 'Purchase Price' (25.00), 'Loading Location' (11), and 'Ownership At' (11). Below the form is a table with one row of item data.

The bottom window is titled 'Sales order details' for '002210 : Contoso Retail San Diego'. It shows a 'Sales order lines' table with one line item: 'Steel coil 1 / Steel coil 1' with a quantity of 1,000.00 lb. Below this, the 'Line details' section has a tabbed interface where the 'Purchase order' tab is selected and highlighted with a red box. This tab displays a table of purchase order lines:

Purchase order	Vendor account	Line number	Item number	Configuration	Color	Size	Style	Purch Price	Purch Price	Quantity	Unit	Net amount	No of Sr	Total Resal	Total Regis
00002425	1001	1	SteelCoil1	1.259CM0001HTS	Grey	10.5		LB	15.00	1,000.00	lb	0.00	4	10.00	
00002425	1001	1	SteelCoil1	1.259CM0001HTS	Grey	10.5		LB	25.00	1,000.00	lb	25,000.00			

When the transaction is for non-steel item, custom fields will not appear on the purchase order because of the toggle-based screen, toggle is set for the steel items.

The screenshot shows the Oracle Finance and Operations interface for a purchase order. The title is "00002426 : 1001 - Acme Office Supplies". The "Purchase order header" section contains various fields:

- DELIVERY:** Delivery date (8/8/2024), Earliest confirmed delivery.
- Ownership At:** 11, Loading location: 11, Create Transfer order button.
- DISCOUNTS:** Total discount % (0.00), Consider Claim Reimbursement (No).
- VENDOR:** Contact dropdown.
- REPLENISHMENT:** Service category and Location dropdowns.
- CROSS DOCKING DATES:** Delivery date (8/8/2024), Cross docking date.
- Local delivery date:** Input field.
- Sales date:** Input field.
- PRODUCT/ORDER CREATION:** Auto created (No), Origin (Purchase).
- Applied Amount:** 0.00, PO Settled (0.00), Processing invoice on actual q... (No).

The "Purchase order lines" table below shows one line item:

Type	Budget ch...	Line number	Item number	Product name	Procurement category	Variant number	Site	Warehouse	CW quantity	CW unit	Quantity	Unit	Unit price	Adjusted u...	Discount	Discount p...	Net amount	Adj
		1	A0002	HDMI 12' Cables			1	11			50.00	Pcs	24.00	0.00000			1,200.00	

Non-Steel Product

When the transaction is for non-steel item, custom fields will not appear on the purchase order because of the toggle-based screen, toggle is set for the steel items.

The screenshot displays the Dynamics 365 Finance and Operations interface for a purchase order. The header shows the purchase order number '00002450 : 1001 - Acme Office Supplies'. The 'Purchase order lines' table is visible, with a red box highlighting the 'Dimensions' field for a line item, which is set to '1.25NDM3001HTS'. A blue callout box labeled 'Steel Product' points to this line item.

Line	Item	Quantity	Unit	Price	Amount	Dimensions	Color	Style	Grades	Unit Weight	Secondary...	Secondary quantity	Purch Pric...	Purch Price
1	000000	25.0000	0.00			1.25NDM3001HTS	Grey		10.3	4,440.96		0.20	LB	25.00

When any transfer order needs to be created for any related purchase order, User can directly select the purchase order and select the serial number associated with that purchase order and transfer order can be processed.

Transfer orders | Standard view

Transfer order: 000484

Lines Header Created


Transfer order header 11 | 12 Created

OVERVIEW

Transfer number	8/8/2024	Load Port	Origin	Purchase order	ETA	Mode	STATUS
000484	8/8/2024		0	00002275			Transfer status
From warehouse	8/8/2024	Delivery Date	Status	Vessel	Carrier Contact	Shipment Name	Created
11	8/8/2024						
To warehouse	Load Date	Ship to location name	Container Numbers	Shipping carrier	Sales Order	BL Number	
12							

Transfer order lines

+ Add + Add products Remove Warehouse Charges Deliver remainder Inventory Select serial number

Item number	Transfer q...	CW transfe...	Ship date	Receipt date	Product name	Reserve ite...	Packing qu...
 We didn't find anything to show here.							

Select Serial Number on transfer order

Standard view

Select serial number

Transfer number	Item number	Estimated	CW posted	Batch number	Serial number	Color	Warehouse	Site	Size	Inventory status	Style	Location	Pallet ID	Configuration
000484	Sikich01	50.00		YUW382	THW02TWH	Blossom-P	11	1	10		Big			Min-3.195-48.232
000484	Sikich01	50.00		YUW382	THW03TWH	Blossom-P	11	1	10		Big			Min-3.195-48.232
000484	Sikich01	50.00		YUW382	THW04TWH	Blossom-P	11	1	10		Big			Min-3.195-48.232
000484	Sikich01	50.00		YUW382	THW05TWH	Blossom-P	11	1	10		Big			Min-3.195-48.232
000484	Sikich01	50.00		YUW382	THW06TWH	Blossom-P	11	1	10		Big			Min-3.195-48.232
000484	Sikich01	50.00		YUW382	THW07TWH	Blossom-P	11	1	10		Big			Min-3.195-48.232
000484	Sikich01	50.00		YUW382	THW08TWH	Blossom-P	11	1	10		Big			Min-3.195-48.232
000484	Sikich01	50.00		YUW382	THW09TWH	Blossom-P	11	1	10		Big			Min-3.195-48.232
000484	Sikich01	50.00		YUW382	THW10TWH	Blossom-P	11	1	10		Big			Min-3.195-48.232

Transfer Line Created

Transfer orders | Standard view

Transfer order: 000484

OVERVIEW

Transfer number: 000484

From warehouse: 11

To warehouse: 12

Ship date: 8/8/2024

Receipt date: 8/8/2024

Load Date:

Load Port:

Delivery Date:

Ship to location name:

Origin: 0

Status:

Container Numbers:

Purchase order: 00002275

Vessel:

Shipping carrier:

ETA:

Carrier Contact:

Sales Order:

Mode:

Shipment Name:

BL Number:

STATUS: Created

Transfer order lines

+ Add + Add products Remove Warehouse Charges Deliver remainder Inventory Select serial number

Item number	Transfer q...	CW transfe...	Ship date	Receipt date	Product name	Reserve It...	Packing qu...
Sikich01	50.00		8/8/2024	8/8/2024	Sikich01 / Sikich01	<input checked="" type="checkbox"/>	0.00
Sikich01	50.00		8/8/2024	8/8/2024	Sikich01 / Sikich01	<input checked="" type="checkbox"/>	0.00

When a transfer journal has to be created then there is no need to enter all the data, Just we need to select the serial number, and all the details will be entered, we only need to modify the field which is required and process the transfer journal.

Transfer | Standard view

00776 : Inventory transfer journal

Lines Header

Journal header details


VOUCHER
Voucher series: Inve_165
Selection by: Posting
New voucher by: Change date

POSTING
Detail level: Summary
Delete lines after posting: No
Offset account:

NEW
New batch no:

Journal lines

+ New Delete Display dimensions Inventory Functions **Select serial number**

Date	Item number	Product name	From site	To site	From warehouse	To warehouse	From configuration	To configuration	From size	To size	From color	To color	From style	To style
 We didn't find anything to show here.														

Select Serial Number on transfer journal: All the serial number with on hand inventory will be visible in the select serial number table.

The screenshot displays two overlapping windows from a software application. The top window, titled 'Select serial number', shows a table with columns: Item number, Extent, CW posted, Batch number, Serial number, Color, Warehouse, Site, Size, Inventory status, Style, Location, and Packet ID. The bottom window, titled '00776 : Inventory transfer journal', shows a form with 'Journal header details' and 'Journal lines'. The 'Journal lines' table includes columns for From/To color, style, location, batch number, serial number, quantity, and unit.

Item number	Extent	CW posted	Batch number	Serial number	Color	Warehouse	Site	Size	Inventory status	Style	Location	Packet ID	Configuration
Slach01	20.00		UW02739	YH01UWT	Blossom-P	11	1	10		Big			Max-3.213-38.2612
Slach01	20.00		UW02739	YH02UWT	Blossom-P	11	1	10		Big			Max-3.213-38.2612
Slach01	20.00		UW02739	YH03UWT	Blossom-P	11	1	10		Big			Max-3.213-38.2612
Slach01	20.00		UW02739	YH04UWT	Blossom-P	11	1	10		Big			Max-3.213-38.2612
Slach01	20.00		UW02739	YH05UWT	Blossom-P	11	1	10		Big			Max-3.213-38.2612
Slach01	20.00		UW02739	YH06UWT	Blossom-P	11	1	10		Big			Max-3.213-38.2612
Slach01	20.00		UW02739	YH07UWT	Blossom-P	11	1	10		Big			Max-3.213-38.2612
Slach01	20.00		UW02739	YH08UWT	Blossom-P	11	1	10		Big			Max-3.213-38.2612
Slach01	20.00		UW02739	YH09UWT	Blossom-P	11	1	10		Big			Max-3.213-38.2612
Slach01	20.00		UW02739	YH10UWT	Blossom-P	11	1	10		Big			Max-3.213-38.2612

From color	To color	From style	To style	From location	To location	From batch number	To batch number	From serial number	To serial number	Quantity	Unit quantity	Unit	CW quanti
Blossom-P	Blossom-P	Big	Big			UW02739	UW02739	YH01UWT	YH01UWT	-20.00	-20.00	lb	
Blossom-P	Blossom-P	Big	Big			UW02739	UW02739	YH02UWT	YH02UWT	-20.00	-20.00	lb	

When we need to post movement journal for any of the item and there is no variant created for that item, then we can create the variant on the fly through enter dimension and if the variant already exists then we can directly select it through select serial number.

Finance and Operations

Search for a page

USMF

Save + New Delete Validate Post Functions View postings Print Unlock Workflow Options

Personalize Page options Edit Share

Always open for editing Personalize this page Add to workspace

Security diagnostics Advanced filter or sort Record info Go to

Read mode Revert

Get a link Create a custom alert Manage my alerts

Movement | Standard view

00753 : Inventory movement journal

Journal header details

VOUCHER
Voucher series: Inve_165
Selection by: Posting
New voucher by: Change date

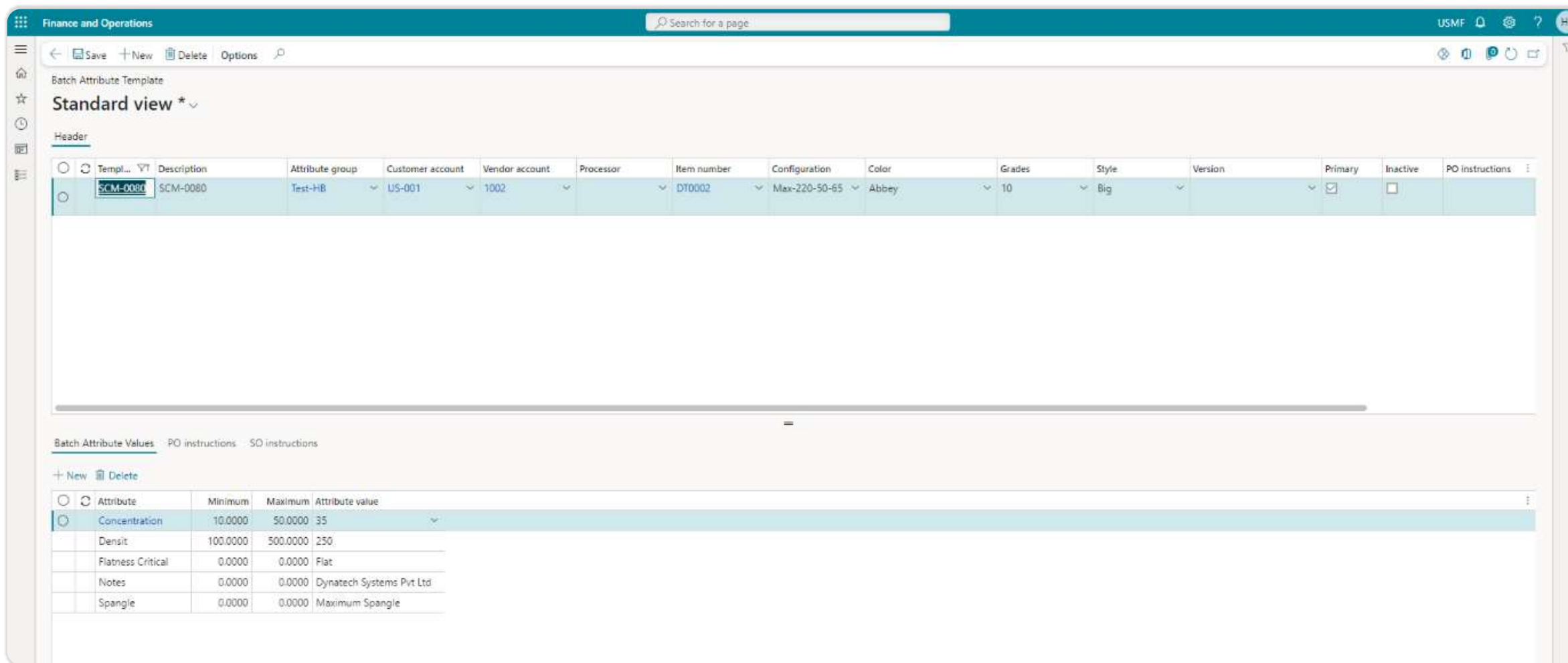
POSTING
Detail level: Summary
Delete lines after posting: No
Offset account: 510500

Journal lines

+ New Delete Display dimensions Inventory Functions Select serial number Enter Dimension

Site	Warehouse	Location	CW quantity	CW unit	Quantity	Unit quant...	Unit	Cost price	Cost amount	Offset account	L...	Dimensions	Color	Grades	Style	Secondary...	Secondary...	Unit Weight	
1	12				1.00	1.00	lb	0.00		510500		Min-3.195-48...	Blossom-P	10	Big	lb		1.00	1.00

To manage the batch attributes specific to customer, vendor or warehouse batch attribute template has been designed and we can specify if there are any specific instructions related to Sales or purchase order.



Finance and Operations

Search for a page

USMF

Batch Attribute Template

Standard view * v

Header

Templ...	Description	Attribute group	Customer account	Vendor account	Processor	Item number	Configuration	Color	Grades	Style	Version	Primary	Inactive	PO instructions
SCM-0080	SCM-0080	Test-HB	US-001	1002		DT0002	Max-220-50-65	Abbey	10	Big		<input checked="" type="checkbox"/>	<input type="checkbox"/>	

Batch Attribute Values PO instructions SO instructions

+ New Delete

Attribute	Minimum	Maximum	Attribute value
Concentration	10.0000	50.0000	35
Densit	100.0000	500.0000	250
Flatness Critical	0.0000	0.0000	Flat
Notes	0.0000	0.0000	Dynatech Systems Pvt Ltd
Spangle	0.0000	0.0000	Maximum Spangle

Finance and Operations

Search for a page

USMF

Save + New Delete Purchase order Purchase Manage Receive Invoice Retail Warehouse Transportation General Options

Generals: Invoice, Pro forma Invoice, Prepayment Invoice
 BR: Payment schedule, Cash flow forecasts
 Settle: Open transactions
 Introduce: Credit invoicing
 Journals: Invoice, Pending Invoices

All purchase orders | Standard view

00006300 : 1002 - Lande Packaging Supplies

Open order Approved

Lines Header

Purchase order header

DELIVERY: Requested receipt date: 8/8/2024, Earliest confirmed receipt date: []

DISCOUNTS: Total discount %: 0.00, Consider Claim Reimbursement: No

VENDOR: Contact: []

REPLENISHMENT: Service category: [], Location: []

CROSS DOCKING DATES: Requested receipt date: 8/8/2024, Cross docking date: []

Local delivery date: [], Sales date: []

PRODUCT/ORDER CREATION: Auto created: No, Origin: Purchase, Applied Amount: 0.00, PO Settlement: 0.00, Processing invoice on actual qua...: No

Purchase order lines

+ Add line Add lines Add products Remove Charges Enter Dimension Change View Registered lines Open Sales Order Purchase order line Financials Inventory Product and supply Update line Quick copy Warehouse Engineering change

Net amount	Adjusted n...	Quality order status	Receive now	CW receiv...	Load ID	Dimensions	Color	Style	Grades	Unit Weight	Secondary Unit	Secondary quantity	Purch Price Unit	Purch Price	Batch Attribute Te...
	0.00					Max-220-50-65	Abbey	Big	10	132,000.00	lb	0.00	0.00	0.00	SCM-0060

Line details

General Setup Address Product Product Variant View Paint details Batch Attributes Transfer Order Delivery Picking Price and discount Project Product packages Variants Foreign trade Fixed assets 1099 Financial dimensions Loads Landed cost

New: Delete Create New Template

Attribute	Minimum	Maximum	Target	Attribute value	Quality order	Notes
Concentration	10.0000	50.0000	30	35		Concentration
Denial	100.0000	500.0000	150	250		
Flatness Critical	0.0000	0.0000		Flat		
Notes	0.0000	0.0000		Dynatech Systems Pvt Ltd		Fleck Steel
Spangle	0.0000	0.0000		Maximum Spangle		
Total	3 rows					

Different forms have been designed to store the information related to paint for the steel coils and one of the product dimension “Color” is used to track it. Also, there is a tab in line details on Purchase order, Sales order, Transfer order, Production order and Co-products to track the information.

The screenshot displays the SAP Finance and Operations interface. On the left, the navigation menu is visible, with the 'Paint' sub-menu under 'Product masters' highlighted in a red box. The main area shows two views:

Top View: Paint Master Configuration

Paint type	Search colors	Paint system code	Color group code	Vendor Paint ID	Paint Warranty	Also known as
Primer	Black	Black			6 months	
Paint	Crimson	Crimson			1 Year	
Primer	White-WT001	A17299	R7299	DW982	25 Years	
Primer	Green	Green			1 Year	
Paint	DynGrey	Dyn grey	DG8798	DG68299	25 Years	
Paint				SSHB1234	3 months	SSHB
Paint				SSHB4321	3 months	SSHB

Bottom View: Standard view of Paint Systems

Color	Description	Paint vendor	Paint system/type	Topcoat state code	Topcoat state	Search colors	Topcoat D...	Topcoat D...	Topcoat vendor code	Topcoat color gr...
Off White (Off White) / Crimson (Crimson)	AkzoNobel Off White Off White	AkzoNobel	OW001	Off White	Off White	Off White	1,000	1,000,000	OTHB1212	OW9911
Off White (Off White) / Crimson (Crimson) [01]	AkzoNobel Off White Off White	AkzoNobel	OW001	Off White	Off White	Off White	1,000	120,000	OTHB1212	OW9911
Off White (Off White) / Crimson (Crimson) [02]	AkzoNobel Off White Off White	AkzoNobel	OW001	Off White	Off White	Off White	1,000	1,230,000	OTHB1212	OW9911
Off White (Off White) / Crimson (Crimson) [03]	AkzoNobel Off White Off White	AkzoNobel	OW001	Off White	Off White	Off White	1,000	1,230,000	OTHB1212	OW9911
Off White (Off White) / Crimson (Crimson) [04]	AkzoNobel Off White Off White	AkzoNobel	OW001	Off White	Off White	Off White	1,000	1,450,000	OTHB1212	OW9911
Off White (Off White) / Crimson (Crimson) [05]	AkzoNobel Off White Off White	AkzoNobel	OW001	Off White	Off White	Off White	1,000	1,450,000	OTHB1212	OW9911
Off White (Off White) / Crimson (Crimson) [06]	AkzoNobel Off White Off White	AkzoNobel	OW001	Off White	Off White	Off White	1,000	1,000,000	OTHB1212	OW9911
Off White (Off White) / Crimson (Crimson) [07]	AkzoNobel Off White Off White	AkzoNobel	OW001	Off White	Off White	Off White	1,000	1,000,000	OTHB1212	OW9911
Off White (Off White) / MattGrey (MattGrey)	Off White (Off White) / MattGrey (MattGrey)	AkzoNobel	OW001	Off White	Off White	Off White	0,000	0,000	OTHB1212	OW9911
Off White (Off White) / MattGrey (MattGrey) [01]	Off White (Off White) / MattGrey (MattGrey)	AkzoNobel	OW001	Off White	Off White	Off White	0,000	0,000	OTHB1212	OW9911
Off White (Off White) / MattGrey (MattGrey) [02]	Off White (Off White) / MattGrey (MattGrey) [02]	AkzoNobel	OW001	Off White	Off White	Off White	0,000	0,000	OTHB1212	OW9911
Off White (Off White) / MattGrey (MattGrey) [03]	Off White (Off White) / MattGrey (MattGrey) [03]	AkzoNobel	OW001	Off White	Off White	Off White	0,000	0,000	OTHB1212	OW9911
Off White (Off White) / MattGrey (MattGrey) [04]	Off White (Off White) / MattGrey (MattGrey) [04]	AkzoNobel	OW001	Off White	Off White	Off White	0,000	0,000	OTHB1212	OW9911
Off White (Off White) / Off White (Off White)	AkzoNobel Off White Off White	AkzoNobel	OW001	Off White	Off White	Off White	1,000	999,765	OTHB1212	OW9911
Off White (Off White) / Off White (Off White) [01]	AkzoNobel Off White Off White	AkzoNobel	OW001	Off White	Off White	Off White	1,000	1,000,000	OTHB1212	OW9911
Off White (Off White) / Off White (Off White) [02]	AkzoNobel Off White Off White	AkzoNobel	OW001	Off White	Off White	Off White	110,000	1,230,877	OTHB1212	OW9911
Off White (Off White) / Off White (Off White) [03]	AkzoNobel Off White Off White	AkzoNobel	OW001	Off White	Off White	Off White	110,000	1,230,877	OTHB1212	OW9911
Off White (Off White) / Off White (Off White) [04]	AkzoNobel Off White Off White	AkzoNobel	OW001	Off White	Off White	Off White	110,000	1,250,877	OTHB1212	OW9911
Off White (Off White) / Off White (Off White) [05]	AkzoNobel Off White Off White	AkzoNobel	OW001	Off White	Off White	Off White	1,000	100,000	OTHB1212	OW9911

Also to make it easy, we can copy the color and change the DFT on topcoat or backer.

The screenshot displays a software interface with a 'Copy color' dialog box overlaid on a 'Line details' section. The 'Copy color' dialog box contains the following fields:

- Color: [Paint / Color (Green) (21)]
- Description: [AczPaint OP White OP White]
- Topcoat color code: [OP White]
- Backer color: [Green]
- Backer DFT min: [12.877]
- Backer DFT max: [12.1478]
- Backer primer color code: []
- Special paint/Wirecoating: []
- Warranty: [1 Year]
- Search system: [OP White]

The 'Line details' section has a 'Paint details' tab with the following fields:

- Paint vendor: [AczPaint]
- Description: [AczPaint OP White OP White]
- Topcoat color: [OP White]
- Topcoat DFT min: [1.000]
- Topcoat color group: [OPWH1]
- Backer color code: [OP White]
- Backer DFT min: [1.000]
- Backer primer color code: []
- Special paint/Wirecoating: []
- Warranty: [1 Year]
- Search system: [OP White]

Red boxes highlight the 'Copy color' dialog box and the 'Paint details' section in the 'Line details' section.

Name of the product created from released products can be created with the sequence for the different type of items.

The screenshot shows the 'Product name designer' configuration page. It includes a 'Standard view' dropdown, a search bar, and a table of 'Elements' with columns for 'Sequence Element' and 'Property type code'. The elements are A (BPA), B (Class), C (Designation), D (Form), E (Grade), and F (Modification). Below the table is a 'Sequence' section with three input fields: 'Product Name' (A-B-C-D-E-F-G), 'Product description' (G-F-E-D-C-B-A), and 'Product search name' (A-B-C-D-E-F-G).

The screenshot shows a table of 'Released product details' in 'Standard view'. The table has columns for Item number, Product name, Search name, Product type, Product subtype, Product service type, Product dimension, Product lifecycle state, and Engineering product category. The first row is highlighted, showing item 1000 with product name 'Surface Pro 128 GB' and search name '1001'.

The screenshot shows the 'Released product details' page for product 'DT0002 : Acrylic-A-HSLA-HR-SS-N'. The 'General' section is expanded, showing various fields. The 'Search name' field is highlighted with a red box and contains 'Acrylic-A-HSLA-HR-SS'. The 'Product name' field in the 'FURTHER IDENTIFICATION' section is also highlighted with a red box and contains 'Acrylic-A-HSLA-HR-SS-N'.

Carry trade or fixed price hedging can be managed through the hedging process. It helps to find out the actual profit earned when hedging was done for steel as a commodity.

Status	Purchase order	Line number	Cust Invoice Acct	Deal	Hedge (cwt)	Created date and time	Created by
Active	PO000000299	1000		Test Hedge Deal 1	6.99	2/13/2024 8:50:37 PM	sean.finigan
Active	PO000000300	1000		Big River Steel H21	6.48	2/13/2024 9:38:01 PM	Andrew.Farley
Active	PO000000303	1000		CMIndex310	7.25	2/20/2024 11:33:19 AM	chintan.panchal
Active	PO000000310	1000		Test Hedge Deal 2	6.80	2/28/2024 3:41:48 PM	sean.finigan
Active	PO000000312	1000		Test Hedge Deal 3	6.80	3/8/2024 4:07:56 PM	sean.finigan
Active	PO000000313	1000		Test Hedge Deal 4	6.80	3/11/2024 7:51:36 PM	sean.finigan
Active	PO000000314	1000		Test Hedge Deal 4	6.80	3/11/2024 8:11:19 PM	sean.finigan
Active	PO000000318	3000		Test Hedge Deal 5	6.80	3/27/2024 1:30:53 PM	sean.finigan
Active	PO000000318	4000		Test Hedge Deal 5	6.80	3/27/2024 1:34:56 PM	sean.finigan
Active	PO000000325	1000		Hedge deal 7	7.50	4/22/2024 4:19:13 PM	sean.finigan
Active	PO000000362	2000		Big River Steel H21	30.98	6/26/2024 10:35:41 AM	chintan.panchal
Active	PO000000363	1000		Steel City 6	28.75	6/26/2024 1:41:51 PM	sean.finigan
Active	PO000000364	1000	1234	Big River Steel 1234	35.82	6/26/2024 2:17:13 PM	sean.finigan
Active	PO000000365	1000		12345	10.57	7/1/2024 6:28:02 PM	sean.finigan

Hedge Master

Finance and Operations > Inventory management > Setup > Hedges > Hedge deals

Hedge deals

Standard view

Filter

Deal	Description
12345	12345
Big River Steel 1234	Big River Steel 1234
Big River Steel H21	BRS H21 02.06.2024
CMEIndex310	CMP02012024
Hedge deal 7	
Steel City 6	Steel city 6 super bowl Pit...
Test Hedge Deal 1	Test Hedge Deal 1
Test Hedge Deal 2	Test Hedge Deal 2
Test Hedge Deal 3	Test Hedge Deal 3
Test Hedge Deal 4	Test Hedge Deal 4
Test Hedge Deal 5	Test Hedge Deal 5
Test Hedge Deal 6	Test Hedge Deal 6

Hedge Deal

Finance and Operations > Inventory management > Setup > Hedges > Market price variance

Market price variance

Standard view

Filter

Market price variance Log

Item group	Market price	HR Adders	Discount	CT Adj	Use CT Adj	Fab marke...	Fab CT Adj	FabUseCTA...
ALUM	25.00	0.00	0.00	5.50	✓	0.00	0.00	
CR	80.00	0.00	0.00	6.80		0.00	0.00	
GALV	22.50	0.00	0.00	13.50	✓	16.50	8.50	
HR	60.15	0.00	0.00	11.25	✓	39.00	0.00	✓
SS	92.00	0.00	0.00	0.00		0.00	0.00	

Market Price Variance

Finance and Operations

005660 : Contoso Retail San Diego

DELIVERY ADDRESS

Address: 456 Peach Road, San Diego, CA 92114, USA

CT AG (rate): 00.87

Market price: 100.00

Requested receipt date: 8/8/2024

DELIVER DATE: 8/7/2024

WAREHOUSE: Open

TRANSPORTATION: Routes

ZUHO DEAL: Zoho Deal ID

Sales Order

005660 : Contoso Retail San Diego

Line	Item number	Product name	Procurement category	Variant number	Sales order	SD Line	Site	Warehouse	CW quantity	CW unit	Quantity	Unit
1000	D10002	Acrylic-A-HSLA-HR-SS-N / Acrylic-A-HSLA-HR-SS-N		VW-003840	005660	005660-1	1	11			1.00	Lb
2000	HTEST-004	HTEST-004 / HTEST-004		VW-003E19	005660	005660-1	1	11			1.00	Lb

Line details

Acrylic-A-HSLA-HR-SS-N / Acrylic-A-HSLA-HR-SS-N

Acrylic-A HSLA Hot Roll

Stainless Steel

Producing mill

Product name: Acrylic-A-HSLA-HR-SS-N / Acrylic-A-HSLA-HR-SS-N

Text: Acrylic-A HSLA Hot Roll, Stainless Steel

Producing mill

DESCRIPTION

General budget reservation: Not submitted

State: Not submitted

Quality order status

Finalized: No

Added by PDS receiving: No

Hedge (cost): 0.00

Hedge price: 0.00

Business Type

Hedge Deal

Purchase Order

Hedging cost tracking through serial numbers.

The screenshot displays the SAP Serial numbers interface. The left sidebar lists serial numbers from JM-11111-00 to YH6YTW. The main area shows details for JM-11111-00, including purchase order PO000000131 and document date 11/13/2023. The 'Cost' section is highlighted with a red box and contains the following data:

Material CWT	Processing CWT	Total cost CWT	No hedge	Hedge CWT	SO hedge CWT
0.00	0.00	0.00	<input checked="" type="radio"/> No	0.00	0.00
Freight CWT	Adjustment CWT	Scrap CWT	Carry trade CWT	PO hedge CWT	
0.00	0.00	0.00	0.00	0.00	

Sr. No.	Inventory and Sales Reports
1	Open sales order lines
2	Open sales order within 10% qty
3	Delivery tracking report
4	Inventory aging
5	On-hand batchwise
6	Aged inventory by sales agent
7	Overall inventory position
8	Aged inventory by customer
9	Borrowing base inventory aging
10	Inventory location snapshot
11	Inventory by location
12	Yield report by processor
13	Credit limit report
14	Serial number history
15	Cargo insurance

Finance and Operations

Search for a page

USMF

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

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

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

Open sales Order Lines

Standard view

Filter

Sales order	Line number	Customer account	Customer Name	Item number	Product name	Configuration	Size	Color	Style	Top Paint Code	Confirmed Receipt	Date	Unit	Net
000772	1.0000000000	US-006	Contoso Retail Portland	T0005	TelevisionHDTVX59052			White				1/23/2017	ea	-0
000772	2.0000000000	US-006	Contoso Retail Portland	T0005	TelevisionHDTVX59052			White				1/23/2017	ea	-52
000776	1.0000000000	US-027	Birch Company	A0001	HDMI 6' Cables							4/15/2017	Pcs	
000776	2.0000000000	US-027	Birch Company	A0002	HDMI 12' Cables							4/15/2017	Pcs	
000783	1.0000000000	US-001	Contoso Retail San Diego	M0030	Professional speaker cable		4	White				8/17/2017	ea	
000783	2.0000000000	US-001	Contoso Retail San Diego	M0030	Professional speaker cable		6	White				8/17/2017	ea	
000784	1.0000000000	US-003	Forest Wholesales	A0001	HDMI 6' Cables							8/25/2017	Pcs	
000785	1.0000000000	US-004	Cave Wholesales	GA0001	SpeakerSet Highline-41A							7/23/2020	pcs	
00081	91,000,000,000,000,000	US-002	Contoso Retail Los Angeles	TESTCOIL	TESTCOIL	Max+1.09+10.76...	10	Abbey	Big			10/6/2023	lb	15
000810	1.0000000000	US-003	Forest Wholesales	GA0001	SpeakerSet Highline-41A							7/23/2020	pcs	
001761	1.0000000000	US-001	Contoso Retail San Diego	A0001	HDMI 6' Cables							10/6/2023	Pcs	
001810	1.0000000000	US-040	Contoso Retail USA	TESTCOIL	TESTCOIL	Max+10.432+10+...	10	Abbey	Big			10/12/2023	lb	800
001835	1.0000000000	US-002	Contoso Retail Los Angeles	TESTCOIL	TESTCOIL	Max+1.09+10.76...	10	Abbey	Big			10/12/2023	lb	150
001885	1.0000000000	US-040	Contoso Retail USA	TESTCOIL	TESTCOIL	Max+12.5454+12...	10	Abbey	Big			10/13/2023	lb	70
001910	1.0000000000	US-040	Contoso Retail USA	TESTCOIL	TESTCOIL	Max+1.09+10.76...	10	Abbey	Big			10/13/2023	lb	100
001911	1.0000000000	US-040	Contoso Retail USA	TESTCOIL	TESTCOIL	Min+10.988+15+...	10	Abbey	Big			10/13/2023	lb	50
001935	1.0000000000	US-040	Contoso Retail USA	A0001	HDMI 6' Cables							10/16/2023	Pcs	80
001960	1.0000000000	US-040	Contoso Retail USA	TESTCOIL	TESTCOIL	Max+15.763+10+...	10	Abbey	Big			10/20/2023	lb	100
002085	1.0000000000	US-001	Contoso Retail San Diego	10001	10001	Max+20.098+20+...	10	Abbey	Big			11/28/2023	lb	90
002110	1.0000000000	US-002	Contoso Retail Los Angeles	10001	10001	Max+20.098+20+...	10	Abbey	Big			11/29/2023	lb	30
002135	1.0000000000	US-001	Contoso Retail San Diego	A-1001	A-1001	Min+10.987-20-Min	10	Abbey	Big			12/15/2023	lb	40
002161	1.0000000000	US-001	Contoso Retail San Diego	A-1001	A-1001	Min+10.987-20-Min	10	Abbey	Big			7/17/2024	lb	500
002210	1.0000000000	US-001	Contoso Retail San Diego	SteelCoil1	Steel coil 1	1.25NDM3001HTS	10.5	Grey				8/8/2024	lb	50

Serial number History

Parameters

Purchase Order: 00002400

Sales Order:

Item Serial:

Customer Reference:

Finance and Operations

Serial number History

Serial Number History | NEW RECORD

Standard view

Reference	Number	Item number	Invoice	Packing slip	Physical date	Quantity	Financial cost amount	Serial number	Refers...	Bit of Ladi...	Receipt Date	Last bill of L...	Last Serial No	Original Purchase ...	Original Receipt Date
Purchase order	00002400	A-1001	A-07298	YH8729	7/17/2024	1,000.00	20,000.00	YH01UJT	66T19923...	YH8729	7/17/2024	YH8729	YH01UJT	00002400	7/17/2024
Purchase order	00002400	A-1001	A-07298	YH8729	7/17/2024	1,000.00	20,000.00	YH02UJT	66T19923...	YH8729	7/17/2024	YH8729	YH02UJT	00002400	7/17/2024
Purchase order	00002400	A-1001	A-07298	YH8729	7/17/2024	1,000.00	20,000.00	YH03UJT	66T19923...	YH8729	7/17/2024	YH8729	YH03UJT	00002400	7/17/2024
Purchase order	00002400	A-1001	A-07298	YH8729	7/17/2024	1,000.00	20,000.00	YH04UJT	66T19923...	YH8729	7/17/2024	YH8729	YH04UJT	00002400	7/17/2024
Purchase order	00002400	A-1001	A-07298	YH8729	7/17/2024	1,000.00	20,000.00	YH05UJT	66T19923...	YH8729	7/17/2024	YH8729	YH05UJT	00002400	7/17/2024
Purchase order	00002400	A-1001	A-07298	YH8729	7/17/2024	1,000.00	20,000.00	YH06UJT	66T19923...	YH8729	7/17/2024	YH8729	YH06UJT	00002400	7/17/2024
Purchase order	00002400	A-1001	A-07298	YH8729	7/17/2024	1,000.00	20,000.00	YH07UJT	66T19923...	YH8729	7/17/2024	YH8729	YH07UJT	00002400	7/17/2024
Purchase order	00002400	A-1001	A-07298	YH8729	7/17/2024	1,000.00	20,000.00	YH08UJT	66T19923...	YH8729	7/17/2024	YH8729	YH08UJT	00002400	7/17/2024
Purchase order	00002400	A-1001	A-07298	YH8729	7/17/2024	1,000.00	20,000.00	YH09UJT	66T19923...	YH8729	7/17/2024	YH8729	YH09UJT	00002400	7/17/2024
Purchase order	00002400	A-1001	A-07298	YH8729	7/17/2024	1,000.00	20,000.00	YH10UJT	66T19923...	YH8729	7/17/2024	YH8729	YH10UJT	00002400	7/17/2024

Finance and Operations

Search for a page

USMF

Options

Personalize: Personalize this page, Add to workspace

Page options: Security diagnostics, Record info, Go to

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

Enter filter criteria to find records

Yield By Processor

Standard view

Filter

Purchase order	Item number	@DtSteelLabelName	Vendor account	Vendor Name	Total Qty	Output Qu...	Yield Qty	Yield Perc...	Yield Lost	Original serial no	Original Purchase ...	Serial number	Batch number	Yield Value	Processing item
00001630	Slitting	Slitting	1001	Acme Office Supplies	450.00	435.00	15.00	96.67	3.33	FO01QF	00001628	FO01QF	MNBC	600.00	00002
00001630	Slitting	Slitting	1001	Acme Office Supplies	450.00	430.00	20.00	95.56	4.44	FO02QF	00001628	FO02QF	MNBC	800.00	00002
00001451	Slitting	Slitting	1001	Acme Office Supplies	1,000.00	800.00	200.00	80.00	20.00	HB01BH	00001450	HB01BH	HBTEST-004	6,000.00	HBSTEELTEST
00001451	Slitting	Slitting	1001	Acme Office Supplies	1,000.00	750.00	250.00	75.00	25.00	HB02BH	00001450	HB02BH	HBTEST-004	7,500.00	HBSTEELTEST
00002301	Slitting	Slitting	1002	Lande Packaging Supplies	10,000.00	10,000.00		100.00		JKL011	00002300	JKL011	WSR1231		10001
00001376	Slitting	Slitting	1002	Lande Packaging Supplies	500.00	410.00	90.00	82.00	18.00	SA01NC	00001375	SA01NC	uytghjm		Paint Item
00001376	Slitting	Slitting	1002	Lande Packaging Supplies	500.00	430.00	70.00	86.00	14.00	SA02NC	00001375	SA02NC	uytghjm		Paint Item
00001376	Slitting	Slitting	1002	Lande Packaging Supplies	500.00	400.00	100.00	80.00	20.00	SA03NC	00001375	SA03NC	uytghjm		Paint Item
00002202	Slitting	Slitting	1001	Acme Office Supplies	100.00	70.00	30.00	70.00	30.00	SDG01GDS	00002200	SDG01GDS	10001-1	900.00	10001
00001578	Slit1	Slit1	1002	Lande Packaging Supplies	7.00	7.00		100.00		TG02AS	00001550	TG02AS	DEWWIE		Steel Coil2311
00001631	Paint	Paint	1001	Acme Office Supplies	7.00	7.00		100.00		TH01QA	00001629	TH01QA	YHWQ112		Steel2345
00001630	Paint	Paint	1003	Ade Supply Company	8.00	8.00		100.00		TH02QA	00001629	TH02QA	YHWQ112		Steel2345
00002226	Slitting	Slitting	1001	Acme Office Supplies	100.00	75.00	25.00	75.00	25.00	TYG01GTY	00002225	TYG01GTY	TEST	623.10	10001
00001577	Slitting	Slitting	1001	Acme Office Supplies	100.00	80.00	20.00	80.00	20.00	VC01CV	00001576	VC01CV	VCXSA	1,000.00	00001
00001577	Slitting	Slitting	1001	Acme Office Supplies	100.00	95.00	5.00	95.00	5.00	VC02CV	00001576	VC02CV	VCXSA	250.00	00001
00001626	Slit1	Slit1	1003	Ade Supply Company	7.00	7.00		100.00		TG02AS	00001550	YHT1UJI	DEWWIE		Steel Coil2311

Finance and Operations

Search for a page

USMF

Options

Personalize: Personalize this page, Add to workspace

Page options: Security diagnostics, Advanced filter or sort, Record info, Go to

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

Credit Limit Report

Standard view

Filter

Customer Name	Customer code	Balance Open Invoices	Balance of Open Sales Orders	customer credit limit	Customer Payment Terms	Average Sales Per Month	Open Order Value Divided By Outstanding Tons	Outstanding Tons	Average Tons Sol...	Available Cr
Contoso Europe	DE-001	0.00	4,169,277.75	0.00	Net 10 days	0.00	0.00	0.00	0.00	0.00
Contoso Retail San Diego	US-001	643,241.75	50,961,092.00	300,000.00	Net 10 days	5,750.00	0.00	0.00	3,833.33	-20,134,531
Contoso Retail Los Angel...	US-002	1,068,000.00	30,356,171.00	300,000.00	Net 10 days	33,750.00	0.00	0.00	57,750.00	-3,278,000
Forest Wholesales	US-003	67,834.18	520,020.00	400,000.00	Net 45 days	0.00	0.00	0.00	0.00	315,577
Cave Wholesales	US-004	1,040.00	26,000.00	250,000.00	Net 45 days	0.00	0.00	0.00	0.00	248,960
Contoso Retail Seattle	US-005	0.00	15,425.00	250,000.00	Net 10 days	0.00	0.00	0.00	0.00	250,000
Contoso Retail Portland	US-006	0.00	109,726.00	250,000.00	Net 10 days	0.00	0.00	0.00	0.00	250,000
Desert Wholesales	US-007	0.00	64,886.00	400,000.00	Net 45 days	0.00	0.00	0.00	0.00	400,000
Sparrow Retail	US-008	5,031.74	203,191.00	20,000.00	Net 45 days	0.00	0.00	0.00	0.00	-310,260
Owl Wholesales	US-009	2,000.00	4,000.00	1,000,000.00	Net 45 days	0.00	0.00	0.00	0.00	994,000
Sunset Wholesales	US-010	531,250.00	237,600.00	400,000.00	Net 45 days	0.00	0.00	0.00	0.00	-131,250
Contoso Retail New York	US-012	25,020.00	339,771.00	400,000.00	Net 10 days	0.00	0.00	0.00	0.00	374,980
Contoso Retail Chicago	US-015	159,375.00	120,555.00	100,000.00	Net 10 days	0.00	0.00	0.00	0.00	-187,460
Contoso Retail Detroit	US-018	31,800.00	110,086.00	350,000.00	Net 10 days	0.00	0.00	0.00	0.00	201,500
Orchid Shopping	US-020	104,000.00	74,847.00	250,000.00	Net 10 days	0.00	0.00	0.00	0.00	146,000
Otter Wholesales	US-021	0.00	2,500.00	250,000.00	Cash on delivery	0.00	0.00	0.00	0.00	250,000
Contoso Retail Virginia	US-022	200,000.00	209,506.00	150,000.00	Net 10 days	0.00	0.00	0.00	0.00	-259,506
Shrike Retail	US-023	573.02	86,789.00	250,000.00	Net 45 days	0.00	0.00	0.00	0.00	249,427
Yellow Square	US-024	316,500.00	88,170.00	250,000.00	Net 30 days	0.00	0.00	0.00	0.00	-159,510
Birch Company	US-027	2,150.61	76,880.00	100,000.00	Net 10 days	0.00	0.00	0.00	0.00	22,449
Contoso Retail Miami	US-028	210,000.00	2,733,774.00	100,000.00	Net 10 days	0.00	0.00	0.00	0.00	-2,845,800
Contoso Retail USA	US-040	9,331,100.00	37,783,000.00	0.00	Net 10 days	0.00	0.00	0.00	552,925.00	0.00
Test Customer	US-104	0.00	0.00	0.00	Net 30 days	0.00	0.00	0.00	0.00	0.00

Finance and Operations Search for a page USMF

New Delete Options

Personalize
 Always open for editing
 Personalize this page
 Add to workspace

Page options
 Security diagnostics
 Advanced filter or sort
 Record info

Share
 Get a link
 Create a custom alert
 Manage my alerts

Record Insert Successfully

Delivery Tracking Report

Standard view

Filter

Sales order	Line number	Customer account	Customer Name	Item number	Product name	Configuration	Size	Color	Style	Sales Warehouse	Top Paint Code	Business Unit	Sales Person
000697	1.0000000000	DE-001	Contoso Europe	D0001	MidRangeSpeaker					13		001	Home
000697	4.0000000000	DE-001	Contoso Europe	D0003	StandardSpeaker					13		001	Home
000697	2.0000000000	DE-001	Contoso Europe	L0001	MidRangeSpeaker2					13		001	Home
000697	3.0000000000	DE-001	Contoso Europe	P0001	AcousticFoamPanel					32		001	Home
000697	5.0000000000	DE-001	Contoso Europe	D0004	HighEndSpeaker	000005				13		001	Home
000698	6.0000000000	US-001	Contoso Retail San Diego	D0004	HighEndSpeaker	000005				13		001	Home
000698	7.0000000000	US-001	Contoso Retail San Diego	T0004	TelevisionM12037"			Silver		21		001	Home
000698	10.0000000000	US-001	Contoso Retail San Diego	T0003	SurroundSoundReceive					21		001	Home
000698	5.0000000000	US-001	Contoso Retail San Diego	T0001	SpeakerCable		10			21		001	Home
000698	8.0000000000	US-001	Contoso Retail San Diego	T0002	ProjectorTelevision					21		001	Home
000698	3.0000000000	US-001	Contoso Retail San Diego	P0001	AcousticFoamPanel					32		001	Home
000698	2.0000000000	US-001	Contoso Retail San Diego	L0001	MidRangeSpeaker2					13		001	Home
000698	4.0000000000	US-001	Contoso Retail San Diego	D0003	StandardSpeaker					13		001	Home
000698	1.0000000000	US-001	Contoso Retail San Diego	D0001	MidRangeSpeaker					13		001	Home
000698	9.0000000000	US-001	Contoso Retail San Diego	T0005	TelevisionHDTVX59052			White		21		001	Home
000699	9.0000000000	US-002	Contoso Retail Los Angeles	T0005	TelevisionHDTVX59052			White		21		001	Home
000699	1.0000000000	US-002	Contoso Retail Los Angeles	D0001	MidRangeSpeaker					13		001	Home
000699	4.0000000000	US-002	Contoso Retail Los Angeles	D0003	StandardSpeaker					13		001	Home
000699	2.0000000000	US-002	Contoso Retail Los Angeles	L0001	MidRangeSpeaker2					13		001	Home
000699	3.0000000000	US-002	Contoso Retail Los Angeles	P0001	AcousticFoamPanel					32		001	Home
000699	8.0000000000	US-002	Contoso Retail Los Angeles	T0002	ProjectorTelevision					21		001	Home
000699	5.0000000000	US-002	Contoso Retail Los Angeles	T0001	SpeakerCable		10			21		001	Home

Finance and Operations

Search for a page

USMF

Options

Personalize: Personalize this page, Add to workspace

Page options: Security diagnostics, Record info, Advanced filter or sort, Go to

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

On - hand batchwise

Standard view

Filter

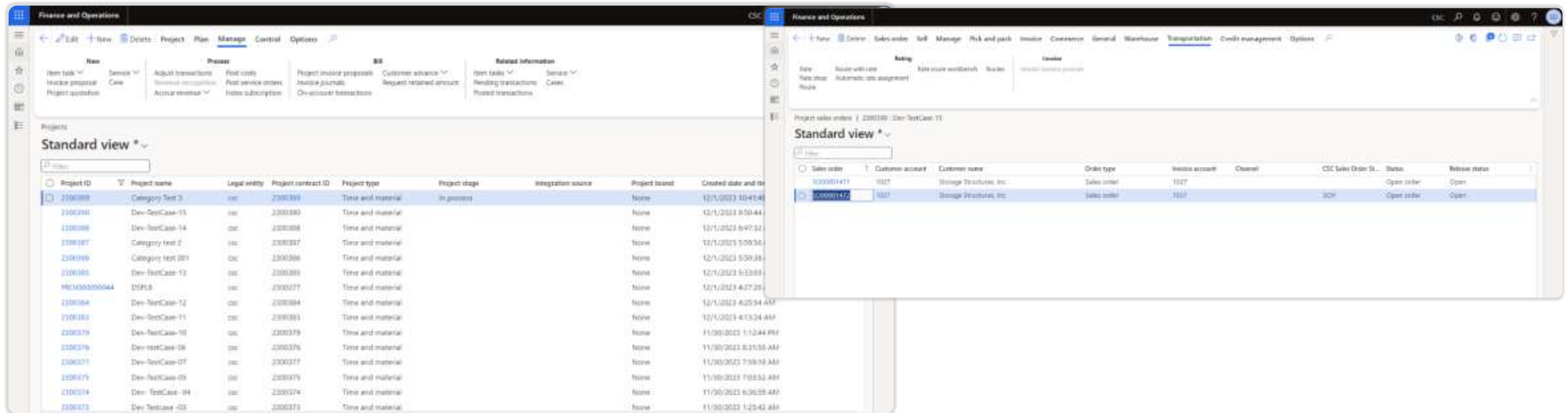
Item number	Batch number	Style	Site	Size	Warehouse	Color	Configuration	Customer	Customer Name	Business Unit Name	Product Group Name	Sales order	Line number	Vendor acc.
00001	fdsa	Big	1	10	11	Blossom-P	0.88"Nom-160*1...	US-002	Contoso Retail Los Angeles	Home		001110	10.0000000000	1001
00001	VCXSA	Big	1	10	12	Blossom-P	2.98"Nom-25	US-040	Contoso Retail USA	Auto		001660	91,000.0000000000	1001
00003	New-002	Big	1	0	12	Abbey	Max-1.09-10-2HT5						0.0000000000	1001
COILTEST1	ABC001	Big	1	10	11	Blossom-P	Nom-2.53-145						0.0000000000	1003
COILTEST1	ABC002	Big	1	10	11	Blossom-P	Nom-2.53-145						0.0000000000	1003
COILTEST1	AZ001	Big	1	10	11	Blossom-P	Nom-0.99-99						0.0000000000	1001
COILTEST1	AZ001	Big	1	10	11	Blossom-P	Nom-0.99-99						0.0000000000	1001
COILTEST1	BNM001	Big	1	10	11	Blossom-P	Nom-2.15-145						0.0000000000	1003
COILTEST1	BNM002	Big	1	10	11	Blossom-P	Nom-2.15-145						0.0000000000	1003
COILTEST1	BNM003	Big	1	10	11	Blossom-P	Nom-2.15-145						0.0000000000	1003
COILTEST1	COIL_1	Big	1	10	11	Blossom-P	Nom-1.5-120						0.0000000000	1001
COILTEST1	COIL_2	Big	1	10	11	Blossom-P	Nom-1.5-120						0.0000000000	1001
COILTEST1	COIL_3	Big	1	10	11	Blossom-P	Nom-1.2-210						0.0000000000	1001
COILTEST1	COIL_4	Normal	1	135	11	Ash	Nom-1.2-100						0.0000000000	1001
COILTEST1	COIL_5	Normal	1	135	11	Ash	Nom-1.2-100						0.0000000000	1001
COILTEST1	COIL_6	Medium	1	130	11	Aluminum	Min-1.2-125						0.0000000000	1001
COILTEST1	COIL_7	Medium	1	130	11	Aluminum	Min-1.2-125						0.0000000000	1001
COILTEST1	LAP001	Big	1	10	11	Blossom-P	Nom-1.1-101						0.0000000000	1001
COILTEST1	PL001	Big	1	10	11	Blossom-P	Nom-1.56-180						0.0000000000	1001

Steel Add-on Project Management & CRM



The initiation of the process commences from the CE side with the establishment of a Master Opportunity, which corresponds to the Project ID in Finance and Operations (F&O). This progression encompasses a sequence of stages, including Bidders, Opportunities, Opportunity Product Line, Schedule of Values, Merging Quotes, Funding Source & Rule, culminating in the Creation of Order.

In the final phase, a new Project ID is generated, designated with the Project Type “Time & Material.” Concurrently, an Estimated Sales Order and a SOV Sales Order are also produced, each associated with the respective Project ID. This systematic approach ensures a cohesive and efficient workflow from inception to completion.



As per the scope and requirement of client's business process, here we have customized client's Sales Order Status i.e Estimated, SOV & Sequenced.

The screenshot displays the SAP S/4HANA Finance and Operations interface for a Sales Order. The main header shows the Sales Order ID SO00001450 for Storage Structures, Inc. The interface is divided into several sections: Sales order header, Sales order lines, and a detailed view of the Sales order header fields.

Sales order header fields:

DELIVERY ADDRESS	DELIVERY DATE	REFERENCES	WAREHOUSE	TRANSPORTATION	CSC Sales Order Status
Name: Storage Structure	Requested ship date: 11/29/2023	Customer reference	Release status: Open	Routes	Sequenced
Delivery address: Storage Structure	Requested receipt date: 11/29/2023	Customer requisition	Order fulfillment policy	Carrier customer account number	Sequence: 1A
Address: USA	Confirmed ship date	DISCOUNTS Total discount %: 0.00	Default fulfillment policy	DISTRIBUTED ORDER MANAGEMENT DOM Status: Not processed	Sequence Description: Demo
	Confirmed receipt date				Project brand: None

Sales order lines:

Variant number	Product number	Item number	Product name	Sales category	CW quantity	CW unit	Quant
T...							

The Sequenced Sales Orders are derived from the Sequence Calculator functionality, which has been developed on the Customer Engagement (CE) side. These orders are subsequently linked with the corresponding Project ID in Finance and Operations (F&O). Additionally, we meticulously document the Sequence ID, Sequence Description, and Project Brand. Furthermore, these Sequenced Sales Orders are integrated with the ensuing nodes within the Work Breakdown Structure in F&O, ensuring a comprehensive and interconnected project management system.

The screenshot displays the SAP Finance and Operations (F&O) interface. The left pane shows a list of sales orders with columns for Sales order, Customer account, Invoice account, Customer name, Order type, CMC Sales Order M., Project brand, Currency, Status, and Country. The right pane shows a detailed view of a sales order for 'Storage Structures, Inc.' with fields for Order, Stock, and Line details, including Product, Packing, Delivery, Pricing, and Storage dimensions.

Sales order	Customer account	Invoice account	Customer name	Order type	CMC Sales Order M.	Project brand	Currency	Status	Country
1000001443	1027	1027	Storage Structures, Inc.	Sales order		None	USD	Open order	USD
1000001444	1027	1027	Storage Structures, Inc.	Sales order	SDV	None	USD	Open order	USD
1000001445	1027	1027	Storage Structures, Inc.	Sales order		None	USD	Open order	USD
1000001447	1027	1027	Storage Structures, Inc.	Sales order		None	USD	Open order	USD
1000001450	1027	1027	Storage Structures, Inc.	Sales order	Sequenced	None	USD	Open order	USD
1000001451	1027	1027	Storage Structures, Inc.	Sales order	Sequenced	None	USD	Open order	USD
1000001452	1027	1027	Storage Structures, Inc.	Sales order	Sequenced	None	USD	Open order	USD
1000001453	1027	1027	Storage Structures, Inc.	Sales order	Sequenced	None	USD	Open order	USD
1000001454	1027	1027	Storage Structures, Inc.	Sales order	Sequenced	None	USD	Open order	USD
1000001455	1027	1027	Storage Structures, Inc.	Sales order	Sequenced	None	USD	Open order	USD
1000001456	1027	1027	Storage Structures, Inc.	Sales order		None	USD	Open order	USD
1000001457	1027	1027	Storage Structures, Inc.	Sales order	SDV	None	USD	Open order	USD
1000001458	1027	1027	Storage Structures, Inc.	Sales order	Sequenced	None	USD	Open order	USD
1000001459	1027	1027	Storage Structures, Inc.	Sales order		None	USD	Open order	USD

An essential functionality has been developed to meet the specific requirements of client. This functionality automates the creation of product variants for steel products, which is triggered by the Sales Order Sequence ID. The newly created product variant is then associated with the corresponding project, facilitating a seamless process flow within the system. This feature represents a significant advancement in streamlining operations and enhancing project management efficiency.

Generate Sequence Button: Here the functionality is to generate the WBS from the specified WBS template in F&O with the related data and the same generated WBS will be created in CE with Dual Write for the further scope of WBS Audit log.

The screenshot displays the SAP Finance and Operations interface for a Work Breakdown Structure (WBS) template. The main title is "2300390: Dev-TestCase-15". Below the title, there is a toolbar with various actions: "+ New", "Delete", "Outdent", "Indent", "Move up", "Move down", "Expand to", "Details", "Import", "Export", "Attachments", "Auto scheduling", "Resource", "Product dimension", and "Generate sequence". The "Generate sequence" button is highlighted with a red rectangular box. Below the toolbar, there is a "View" section with a "Filter" input field, a "Scheduling" dropdown menu, and two radio buttons: "Auto scheduling" (selected) and "Show schedule errors". Below the view section is a table with the following columns: "WBS ID", "Scheduling...", "Note", "Task name", "Type", "Production...", "Shipping C...", "Predecessors", "Category", "Sequence ...", "Effort in hours", and "Task start". The table contains one row with the following data: "WBS ID" is empty, "Scheduling..." is empty, "Note" is empty, "Task name" is "2300390", "Type" is "@SIK:None", "Production..." is an empty checkbox, "Shipping C..." is an empty checkbox, "Predecessors" is empty, "Category" is empty, "Sequence ..." is an empty checkbox, "Effort in hours" is "0.00", and "Task start" is "11/3/2023".

WBS ID	Scheduling...	Note	Task name	Type	Production...	Shipping C...	Predecessors	Category	Sequence ...	Effort in hours	Task start
			2300390	@SIK:None	<input type="checkbox"/>	<input type="checkbox"/>			<input type="checkbox"/>	0.00	11/3/2023

As per the business requirement we have created different columns in WBS like Production Commencement Confirmation, Shipping Customer Confirmation, Sequence Specific, Sequence Id,

Work Breakdown Structure Matrix Screen Enhancement

The screenshot displays two views of the WBS screen. The left view, titled 'My view with Notes', shows a table with columns: WBS ID, Scheduling error, Name, Tab name, Type, Production Commencement C., Shipping Customer C., Sequence specific, and Category. The right view, titled 'Standard view', shows a table with columns: Tab name, Production, Shipping C., Cost Base Review, Risk Off Complete, RFF end date, Cost end date, OFA end date, Client Appl end date, RFF2 Start end date, CSC Appl end date, and Billing end date.

Tab name	Production	Shipping C.	Cost Base Review	Risk Off Complete	RFF end date	Cost end date	OFA end date	Client Appl end date	RFF2 Start end date	CSC Appl end date	Billing end date
2300390			11/3/2023	11/3/2023	11/3/2023	11/3/2023	11/3/2023	11/3/2023	11/3/2023	11/3/2023	11/3/2023
31A	✓		11/3/2023	11/3/2023	11/3/2023	11/3/2023	11/3/2023	11/3/2023	11/3/2023	11/3/2023	11/3/2023
32A	✓		11/3/2023	11/3/2023	11/3/2023	11/3/2023	11/3/2023	11/3/2023	11/3/2023	11/3/2023	11/3/2023
33A	✓	✓	11/3/2023	11/3/2023	11/3/2023	11/3/2023	11/3/2023	11/3/2023	11/3/2023	11/3/2023	11/3/2023
34A	✓		11/3/2023	11/3/2023	11/3/2023	11/3/2023	11/3/2023	11/3/2023	11/3/2023	11/3/2023	11/3/2023
35A	✓		11/3/2023	11/3/2023	11/3/2023	11/3/2023	11/3/2023	11/3/2023	11/3/2023	11/3/2023	11/3/2023
36A	✓	✓	11/3/2023	11/3/2023	11/3/2023	11/3/2023	11/3/2023	11/3/2023	11/3/2023	11/3/2023	11/3/2023
37A	✓		11/3/2023	11/3/2023	11/3/2023	11/3/2023	11/3/2023	11/3/2023	11/3/2023	11/3/2023	11/3/2023
38A	✓		11/3/2023	11/3/2023	11/3/2023	11/3/2023	11/3/2023	11/3/2023	11/3/2023	11/3/2023	11/3/2023
39A	✓		11/3/2023	11/3/2023	11/3/2023	11/3/2023	11/3/2023	11/3/2023	11/3/2023	11/3/2023	11/3/2023
310A	✓		11/3/2023	11/3/2023	11/3/2023	11/3/2023	11/3/2023	11/3/2023	11/3/2023	11/3/2023	11/3/2023

Here the Type column in WBS is linked with the Production Stages which is automatically updated as Production Start and Production finish based on the Production Stages.

In addition to the advancements, our team has diligently executed the development of Revenue Recognition and billing protocols for Sales Order Shipments. We are currently engaged in the integration of the Desgo 3 and Desgo 4 costing software into the Finance and Operations (F&O) framework from the Customer Engagement (CE) side along with relevant data, aligning with the operational requisites of client's Business Process. This initiative is pivotal in enhancing the operational efficiency of the organization.

Want to know more?

Contact Us!

DynaTech Systems has proudly served clients seeking advanced tech solutions across the globe with top-notch precision and excellence!



Locations

USA, Canada, UK, India



Mail Us

sales@dynatechconsultancy.com



Phone

+1 844 787 3365



Visit Our Website

www.dynatechconsultancy.com