Dynamics Shop

User Guide for Microsoft Dynamics 365 Business Central

Product: SD Stores Manager

Release: D365 BC V20+

Revision: August 2022

1 Contents

2 Getting Started 4
3 Security Setup 5
4 Installing SD Stores Manager 6
4.1 Allowing HttpClient Requests in SD Stores Manager 7
4.2 Choosing the SD Stores Manager Role 9
4.3 Accessing the SD Stores Manager Pages 11
4.4 Activating the SD Stores Manager Licence 12
4.4.1 Activating the SD Stores Manager Licence with a Product Key 13
4.4.2 Activating the SD Stores Manager Licence with a Free Trial 14
4.4.3 Managing Your Simply Dynamics Tenant Subscriptions 16
5 Uninstalling SD Stores Manager 17
6 Setup and Configuration 18
6.1 SD Stores Manager Assisted Setup 18
7 Understanding SD Stores Manager Concepts 20
7.1 Routes 20
7.2 Jobs 20
7.3 Route Overview 20
8 Using SD Stores Manager 21
8.1 Setup 21
8.2 Workers 27
8.3 Pick Priority Mapping 28
8.4 Pick Worker Mapping 29
8.5 Job Reason Codes 31
8.6 Worker Badge 32
8.7 Generating Picks 33
8.8 The Route Overview 35
8.8.1 Ship Routes 37
8.8.2 Print Manifest 37
8.8.3 Post Invoices 38
8.8.4 Print Invoices 38
8.9 Working with Picks - Manager 39
8.9.1 Confirm Job 41
8.9.2 Print Instruction 41

8.9.3 Pick Shortage List 42
8.9.4 View Document 42
8.9.5 Reopen Document 42
8.9.6 View Detail 42
8.9.7 Set to Pending 45
8.9.8 Assign to Worker 45
8.9.9 Update Priorities 45
8.9.10 Apply Default Priorities 45
8.9.11 Delete Job 46
8.9.12 Ship Job 46
8.9.13 Ship Document 46
8.10 Working with Picks – Worker 48
8.10.1 Request/Confirm Job 48
8.10.2 Auto Fill Qty. to Handle 53
8.10.3 Auto Tracking 53
8.10.4 Manual Tracking 54
8.10.5 Create Deferred Pick 54
8.10.6 Substitute 54
8.10.7 Revert Substitution 55
8.11 Job History 56
8.11.1 View Lines 56
8.12 Stores GRN 58
8.12.1 Receive Order 59
8.13 Stock Take 60
8.14 SD Stores Manager Reports and KPI pages 60
8.14.1 Pick Shortages List 60
8.14.2 Shipment Shortages 61
8.14.3 Pick Shortages 61
8.14.4 Worker Productivity 61
8.14.5 Pick KPI 62
8.14.6 Pick Errors – by Customer 62
8.14.7 Pick Errors – by Item 62
8.14.8 Pick Errors – by Worker 62
8.14.9 Pick Errors – by Reason Code 62

9 Third Party Integration - Published Events in SD Stores Manager..... 63

2 Getting Started

SD Stores Manager provides an efficient and streamlined process for generating, managing, assigning, and processing picks and shipping routes, enabling you to organise the workflow in your warehouse.

SD Stores Manager is designed for use in those warehouses that have not implemented Microsoft Dynamics 365 Business Central Warehousing functionality.

SD Stores Manager contains two Role Centres especially tailored for stores personnel – the Manager Role Centre and the Worker Role Centre.

The Manager Role Centre allows for easy Pick Generation, Route Overviews, and easy access to Pick History. Activity centre cues provide clear visualisation of the picking process. Customised reports allow the store manager to report on Shipment Shortages, Pick Shortages and Worker Productivity.

On posted Pick Jobs, if a pick issue is reported, the store manager can log issue reasons and solution reasons which are used to provide report metrics for Pick Errors by Customer, by Item, by Picker, by Reason.

Worker productivity can be determined through the Worker Productivity Report and by tracking how long a pick has been sitting with a picker. The Pick KPI page allows for easy visualisation of worker picks and pick shorts.

On pick generation, a pick worker can be auto assigned to Jobs for a particular route.

Picks can be generated and grouped by either Order, Order/Location, Order/Location/Zone, Order/Location/Bin Prefix, or Order/Location/Bin combinations.

The store manager can easily juggle the route priority of the picks from the Job List page.

The Job History table records details of the Jobs that were shipped, allowing the store manager to query pick information such as viewing how many picks were completed in a day and the amount of pick shorts/pick issues.

Using the Scan Barcode functionality in the Worker Role Centre, workers can easily and efficiently request a new pick, or confirm an existing pick, by simply scanning their **Worker Badge** or the barcode on the **Pick Instruction** report.

3 Security Setup

We have provided the following permission sets for SD Stores Manager: SDY SM ADMIN, SDY SM USER and SDY SM VIEW *(Figure 3-1)*.

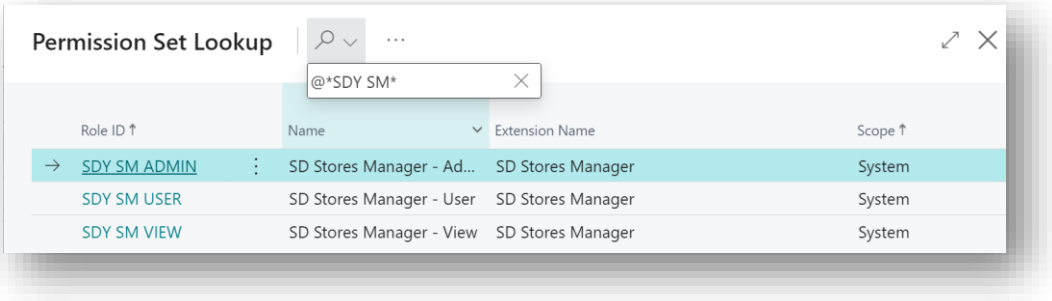


Figure 3-1

We have also created extensions on the following standard Microsoft Dynamics 365 Business Central Permissions:

- Exten. Mgt. - Admin includes SDY SM ADMIN permissions
- D365 BUS FULL ACCESS includes SDY SM USER permissions
- D365 BASIC includes SDY SM VIEW permissions

4 Installing SD Stores Manager

To install **SD Stores Manager** from the Business Administration Shell:

1. Run the **Business Central Administration Shell** as **Administrator**.

2. To publish the extension from the package file (.app), use the **Publish-NAVApp cmdlet**.

   Example:
   Publish-NAVApp -ServerInstance BC20 -Path "C:\Users\name\Downloads\Simply Dynamics Ltd_SD Stores Manager_3.0.0.0.app"

3. To synchronise the schema changes, use the **Sync-NAVApp cmdlet**.

   Example:
   Sync-NavApp -ServerInstance BC20 -Name "SD Stores Manager"

4. To install the published App, use the **Install-NAVApp cmdlet**.

   Example:
   Install-NAVApp -ServerInstance BC20 -Name "SD Stores Manager"

5. Open your Dynamics 365 Business Central Web Client and use the **Tell Me** to search for **Extension Management** *(Figure 4-1)*.

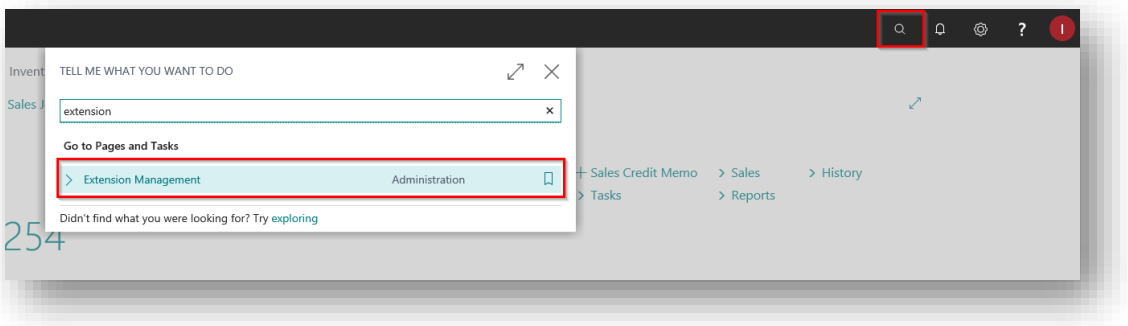


Figure 4-1

6. In the **Extension Management** list, you should see the **SD Stores Manager App** installed.

4.1 Allowing HttpClient Requests in SD Stores Manager

Switching on the **Allow HttpClient Requests** option allows SD Stores Manager to call an API that sends and returns licence key information to activate the product licence and to call GitHub to import sample data for the product. The **Allow HttpClient Requests** option is automatically switched-on during installation of SD Stores Manager.

1. Open your Dynamics 365 Business Central Web Client and use the **Tell Me** to search for **Extension Management** *(Figure 4-2)*.

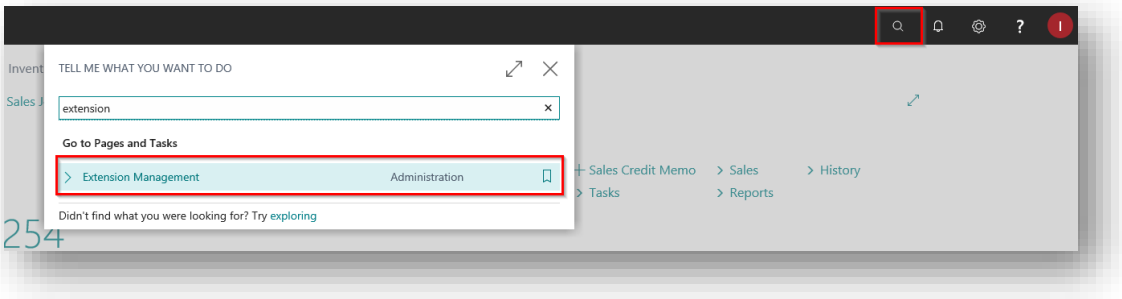


Figure 4-2

2. In the **Extension Management** list, you should see the **SD Stores Manager** App installed *(Figure 4-3)*.

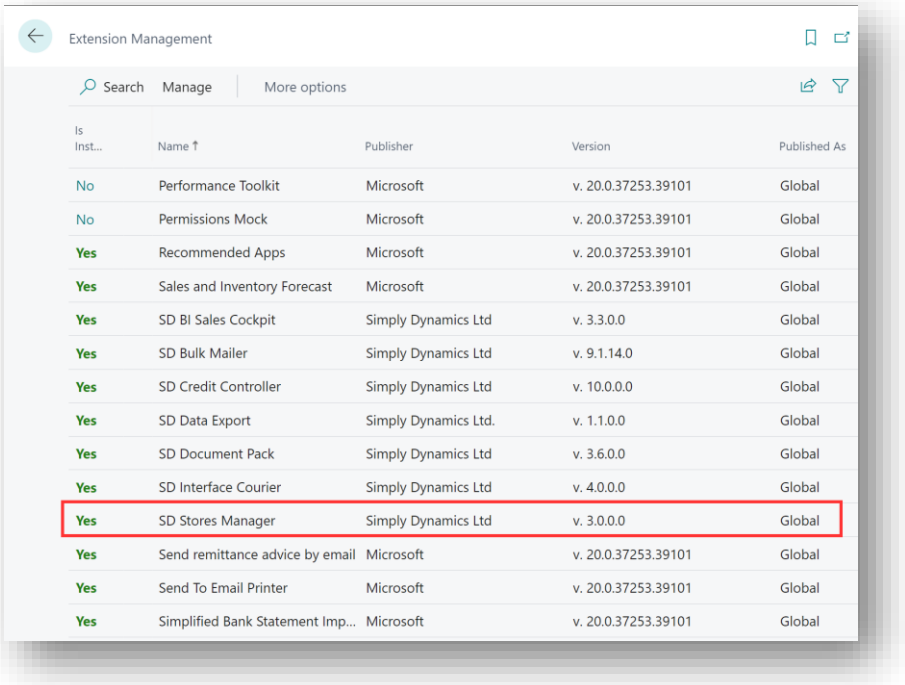


Figure 4-3

3. Select the **SD Stores Manager** record and from the menu, select the **Manage** group, and choose **Configure** *(Figure 4-4)*.

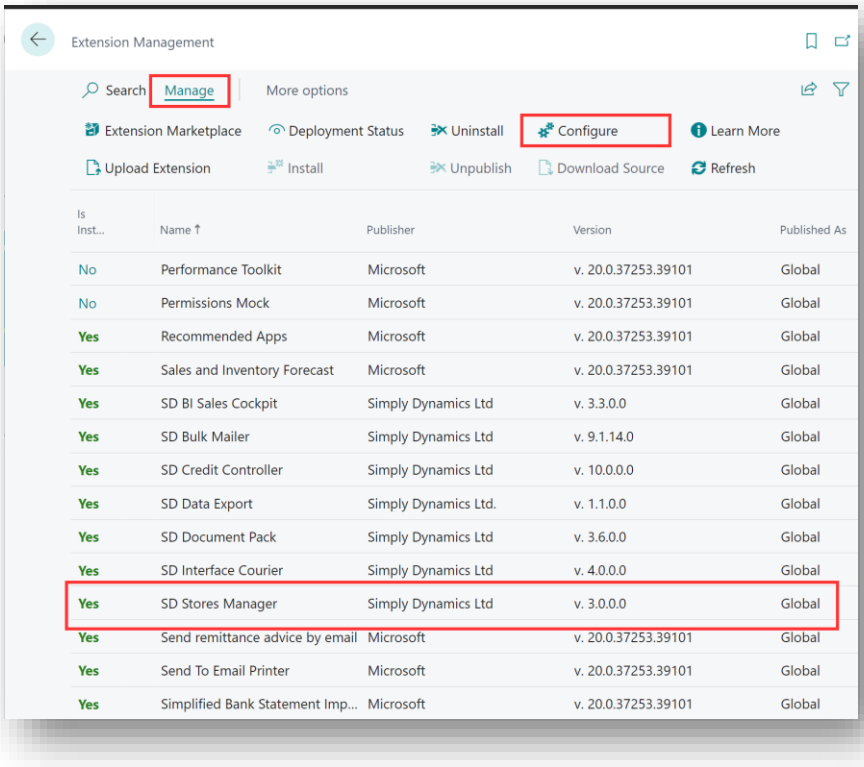


Figure 4-4

4. Choose to allow the **Allow HttpClient Requests** option *(Figure 4-5)*.

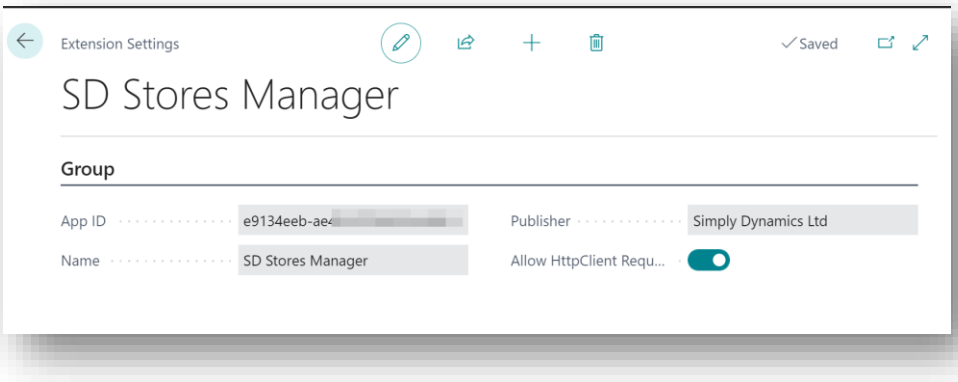


Figure 4-5

4.2 Choosing the SD Stores Manager Role

We have provided two Role Centres for **SD Stores Manager**. A Manager Role Centre and a Worker Role Centre. To choose a Role Centre follow the steps below:

1. From your Dynamics 365 Business Central Web Client, in the app bar, select the **Settings** icon and then select **My Settings** *(Figure 4-6)*.

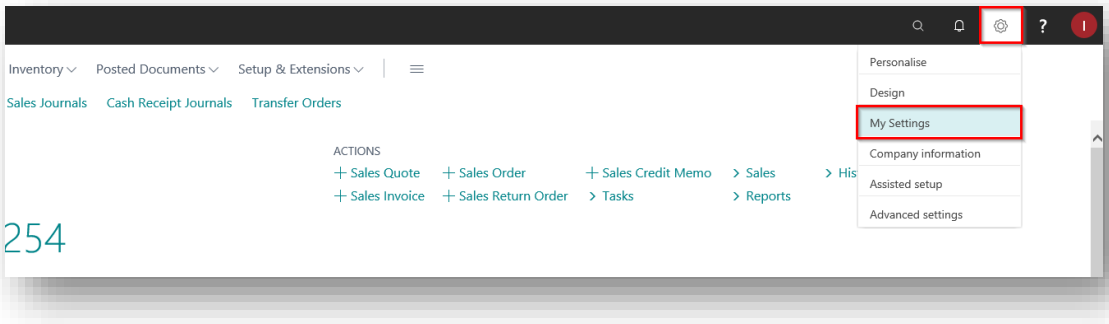


Figure 4-6

2. In the **My Settings** page, on the **Role** field, select the **AssistEdit** icon *(Figure 4-7)*.

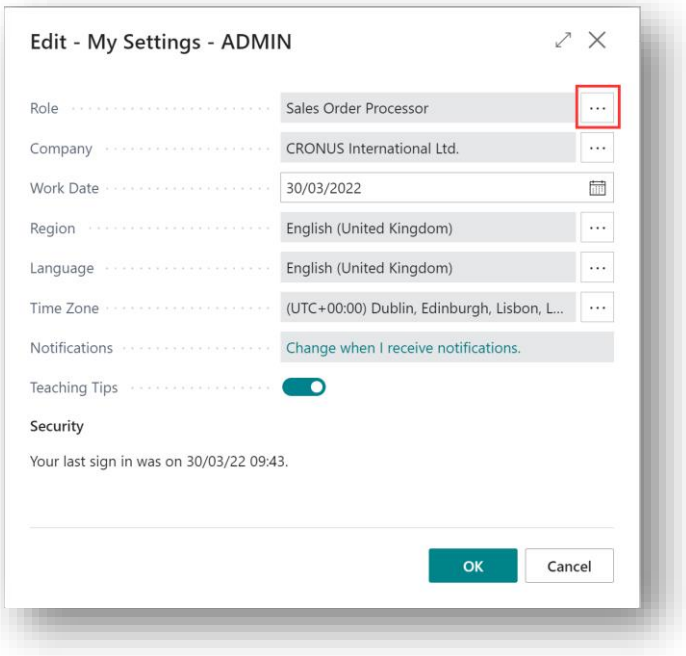


Figure 4-7

3. You should see **SD Stores Manager** and **SD Stores Manager Worker** in the list of Roles *(Figure 4-8)*.

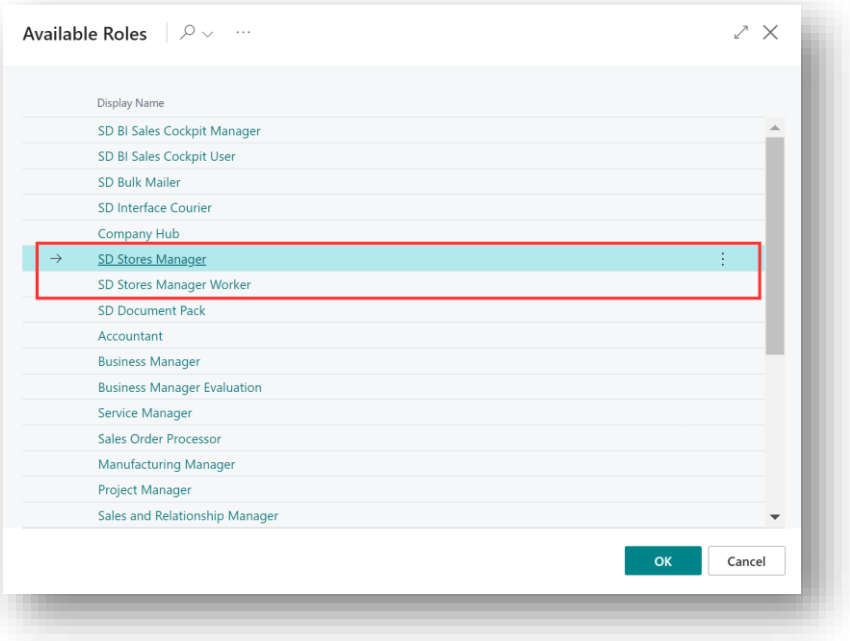


Figure 4-8

4. Choose **SD Stores Manager** and click **OK**.

5. The **SD Stores Manager** Role should now be displayed in the **Role** field *(Figure 4-9)*.

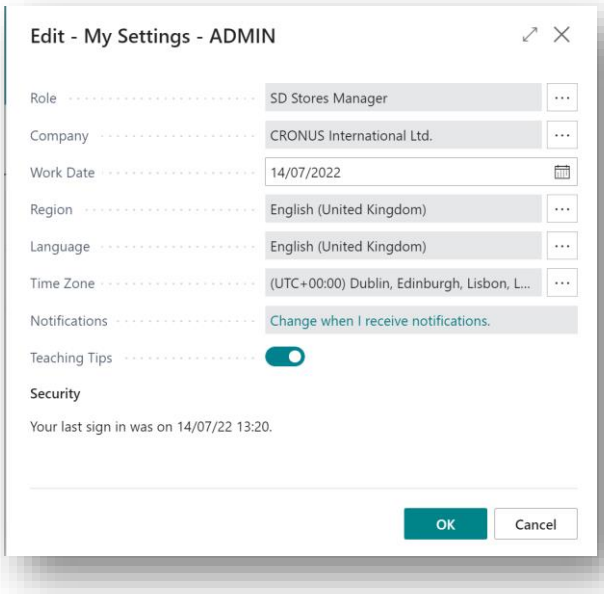


Figure 4-9

4.3 Accessing the SD Stores Manager Pages

Use the **Tell Me** to search for SD Stores Manager pages. Begin typing **SD** or **Stores** to see a list of the SD Stores Manager pages *(Figure 4-10)*.

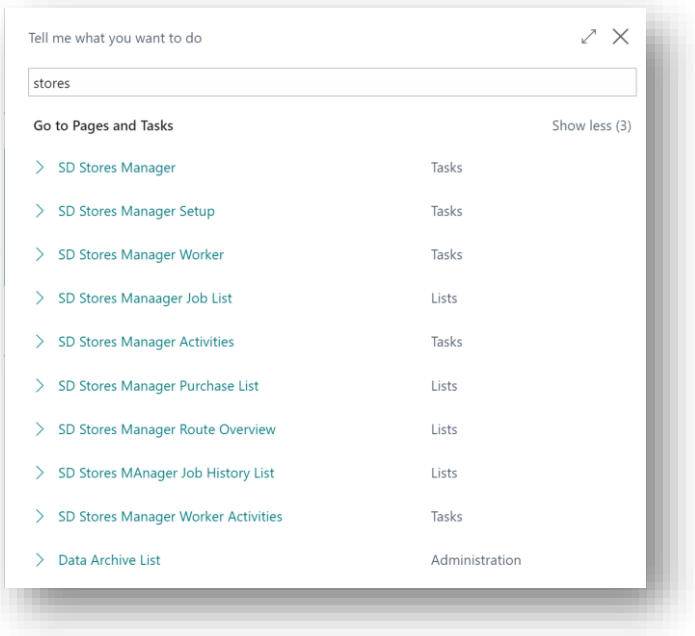


Figure 4-10

4.4 Activating the SD Stores Manager Licence

To use **SD Stores Manager**, you must activate the licence.

1. From the **Tell Me**, search for and select the **SD Stores Manager Setup** card.

2. When the **SD Stores Manager Setup** card opens, you will be prompted that "Your SD Stores Manager license needs to be validated." Choose **Yes** *(Figure 4-11)*.

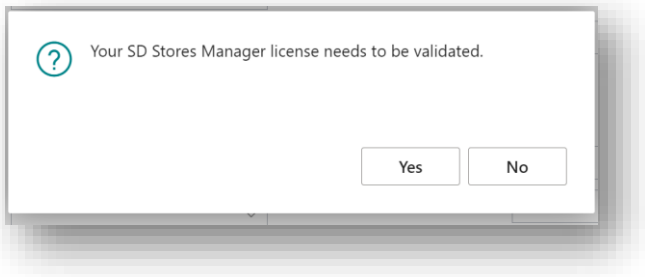


Figure 4-11

3. You will then see the **Activate your product** page *(Figure 4-12)*.

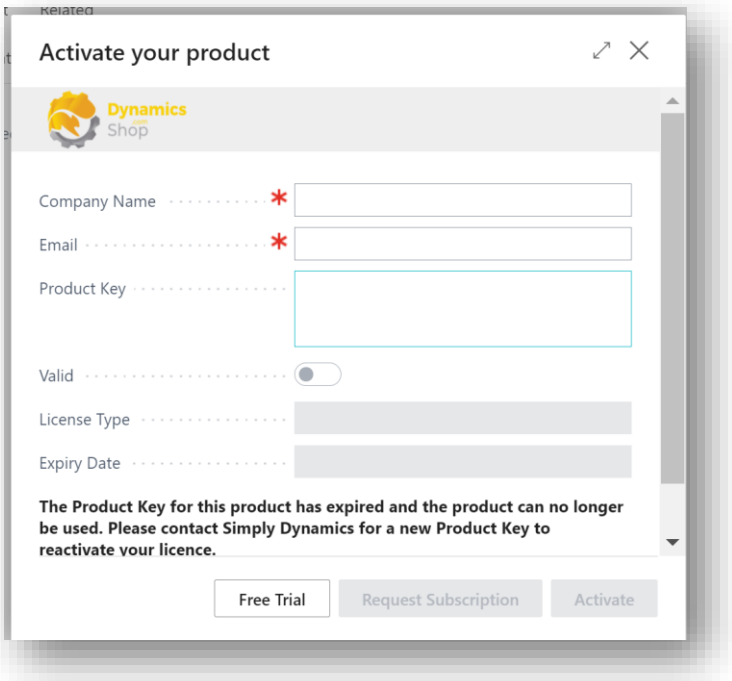


Figure 4-12

4.4.1 Activating the SD Stores Manager Licence with a Product Key

If you have received a Product Key from Simply Dynamics Ltd., in the **Activate your product** page *(Figure 4-13)*:

1. Enter your company name in **Company Name**

2. Enter your company email in **Email**

3. Paste the supplied product key into the **Product Key** field. **Tab off the Product Key field to validate the contents of the field and to enable the Activate key**. Choose **Activate**.

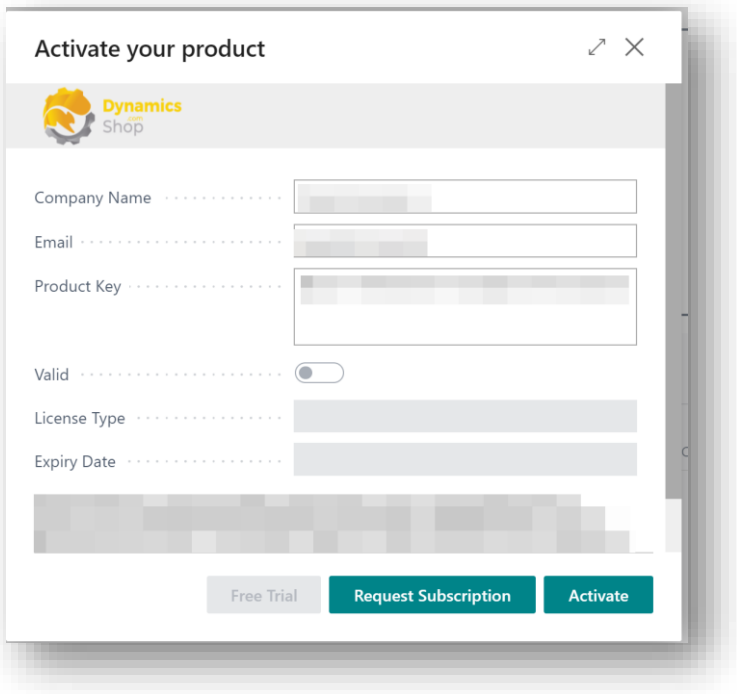


Figure 4-13

4. The **Activate your product** page will update to display a message that the activation was successful. The expiry date will depend on the date that you activated your free trial.

4.4.2 Activating the SD Stores Manager Licence with a Free Trial

If you have not received a Product Key from Simply Dynamics Ltd. and want to avail of a free trial, in the **Activate your Product** page *(Figure 4-14)*:

1. Enter your company name in **Company Name**
2. Enter your company email in **Email**
3. Choose **Free Trial**

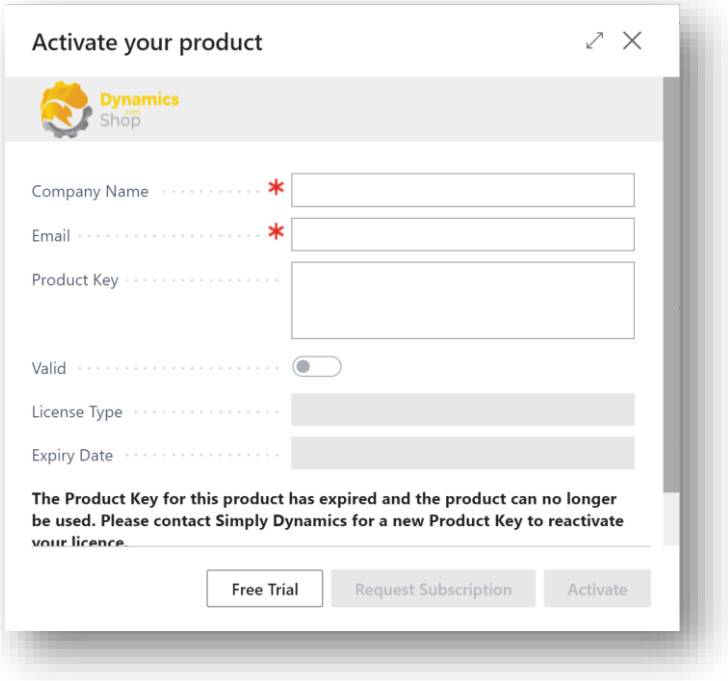


Figure 4-14

4. You are then prompted to choose **Yes** to activate your free trial. Choose **Yes** *(Figure 4-15)*.

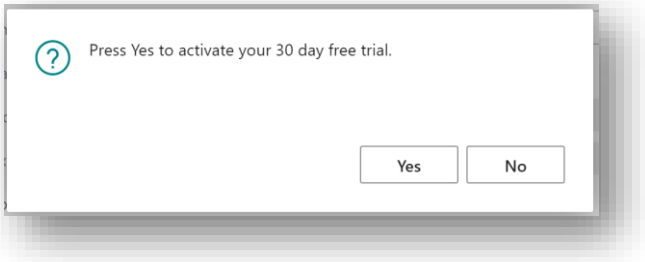


Figure 4-15

5. The **Activate your product page** will update to display a message that the activation was successful. The expiry date will depend on the date that you activated your free trial *(Figure 4-16)*.

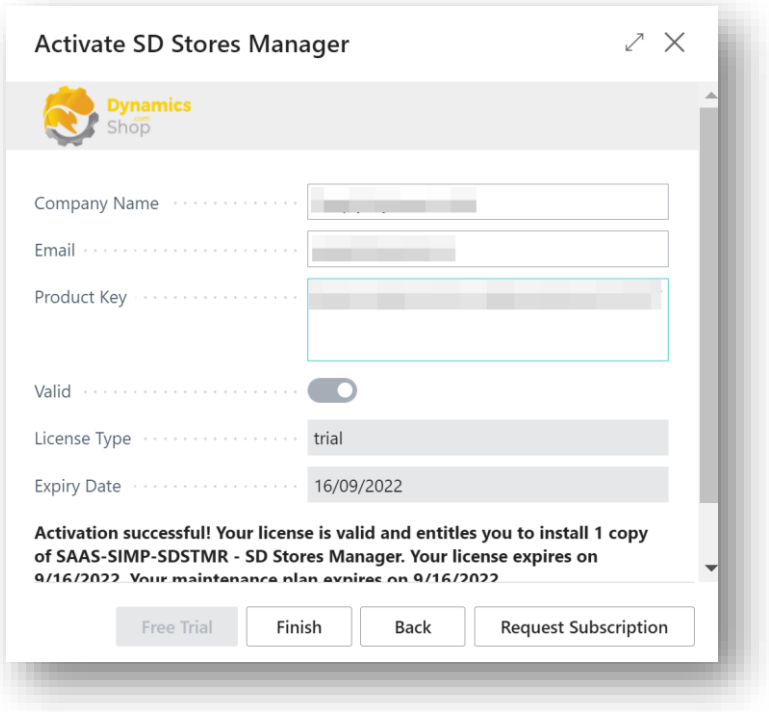


Figure 4-16

6. Choose **Finish** to exit the page.

7. When your Free Trial has expired, choose **Request Subscription** to request a Product Key from Simply Dynamics.

4.4.3 Managing Your Simply Dynamics Tenant Subscriptions

To easily view your subscriptions for this installed App and for any other installed Simply Dynamics Apps, from the **SD Stores Manager Setup**, from the **Process** group, choose the **Manage Subscriptions** action *(Figure 4-17)*.

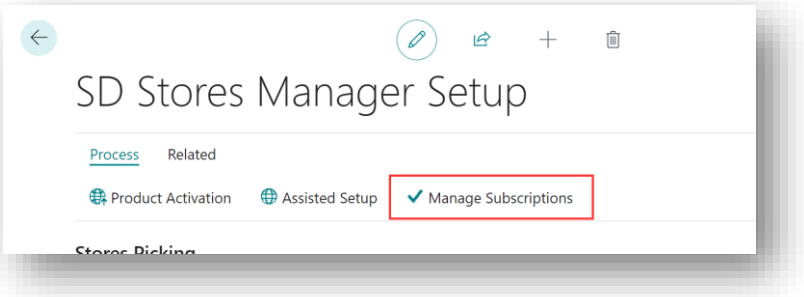


Figure 4-17

The **SD Stores Manager Tenant Subscriptions** page lists the various Simply Dynamics Apps you have installed. Clicking through on Activate brings you to the Activate Page for that App *(Figure 4-18)*.

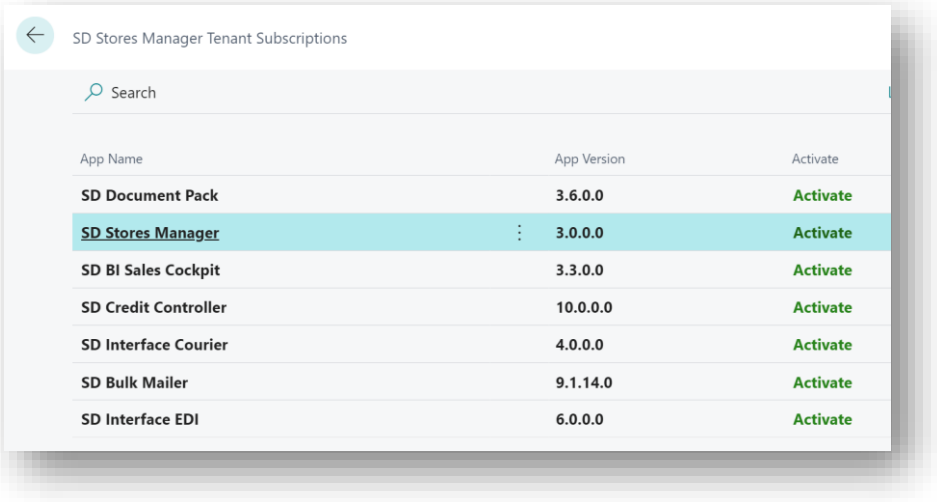


Figure 4-18

5 Uninstalling SD Stores Manager

You can uninstall **SD Stores Manager** using the Web Client:

1. Open your Dynamics 365 Business Central Web Client and use the **Tell Me** to search for **Extension Management** *(Figure 5-1)*.

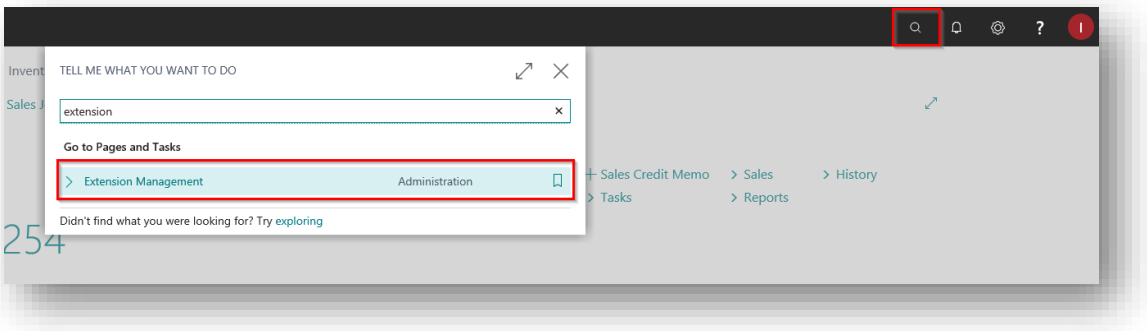


Figure 5-1

2. In **Extension Management**, you should see the **SD Stores Manager** App installed.

3. Select the **SD Stores Manager** App and choose the **Uninstall** action (*Figure 5-2*).

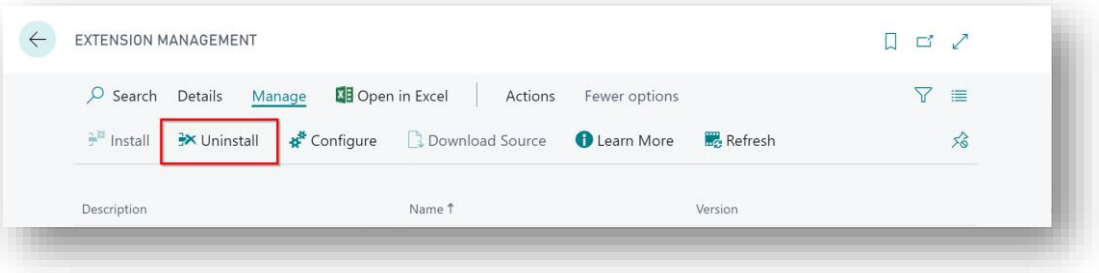


Figure 5-2

6 Setup and Configuration

6.1 SD Stores Manager Assisted Setup

You can easily import default setup for SD Stores Manager using the **Assisted Setup** action on the **SD Stores Manager Setup** card.

1. In the **SD Stores Manager** page, from the menu choose the **Process** group, and then **Assisted Setup** *(Figure 6-1)*.

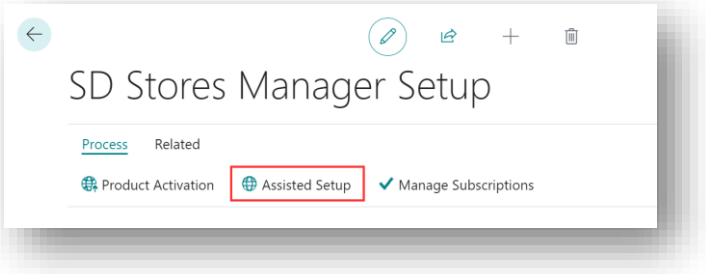


Figure 6-1

2. You are prompted that "Importing setup will modify any existing data in SD Stores Manager. Press Yes to proceed." Choose **Yes** if this is your first time to use SD Stores Manager and you have not already created any setup in SD Stores Manager *(Figure 6-2)*.

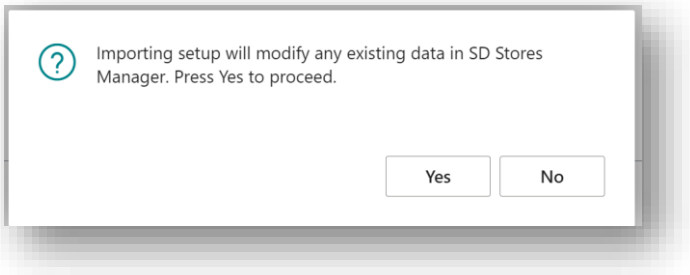


Figure 6-2

3. You are then prompted, “Are you sure?” Choose **Yes** *(Figure 6-3)*.

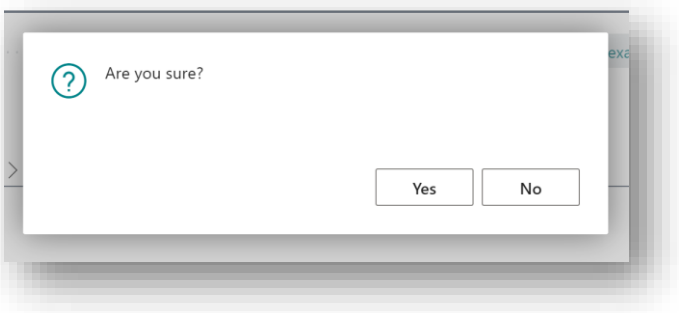


Figure 6-3

4. You will then receive a message like the one below to confirm that the default setup has imported. Choose **OK** *(Figure 6-4)*.

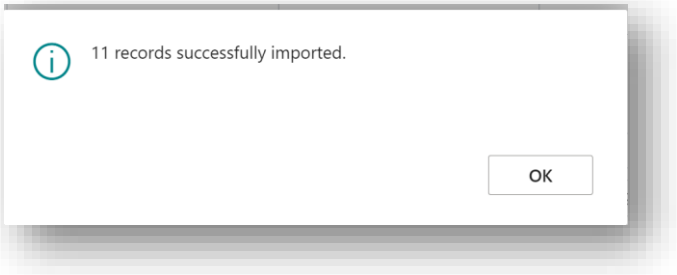


Figure 6-4

7 Understanding SD Stores Manager Concepts

7.1 Routes

The Shipping Agent Code on the Source Document/Job is defined as the Route in SD Stores Manager.

7.2 Jobs

When a store manager generates picks, Job entries of a Type 'Pick' are created. Each Job comprises of a job header and associated job lines and is created from a Source Document, in this instance, from sales orders.

From the Route Overview, the store manager can manage, assign, confirm and process the Jobs and ship the individual Job(s), ship the document, or ship the route.

SD Stores Manager allows picks to be auto assigned to workers as picks are generated. The store manager can also easily change the worker on pending picks and assign a pick job to a worker.

7.3 Route Overview

The Route Overview provides a hub from which a store manager can manage, assign and process pick jobs and shipping routes.

8 Using SD Stores Manager

8.1 Setup

The **SD Stores Manager Setup** page is accessed by searching for the **SD Stores Manager Setup** page in the **Tell Me** or by drilling through on the **Setup** action cue in the **SD Stores Manager Role Centre** *(Figure 8-1)*.

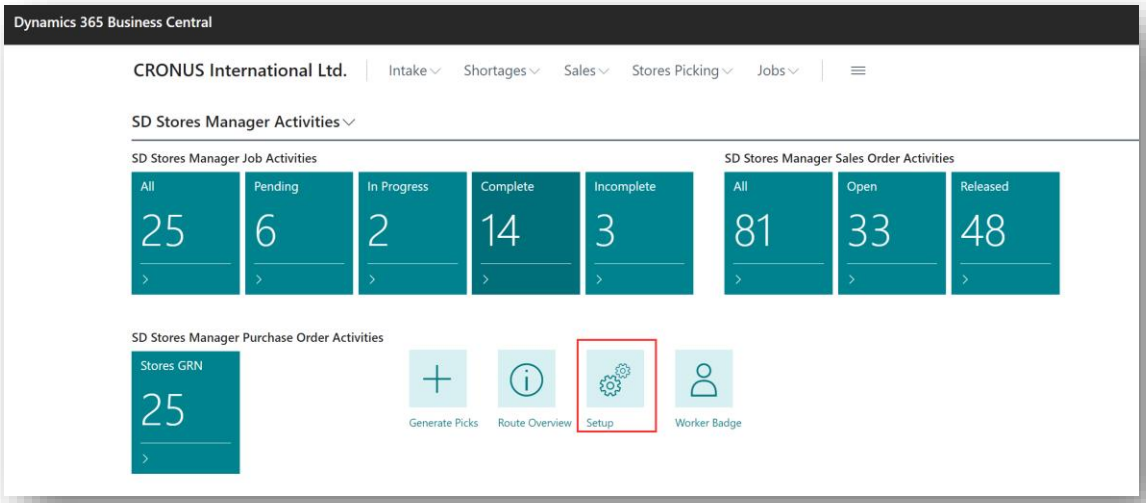


Figure 8-1

The **Stores Manager Setup** Page allows you to define certain global settings that are used in SD Stores Manager. The **Stores Picking** FastTab contains the following field *(Figure 8-2)*:

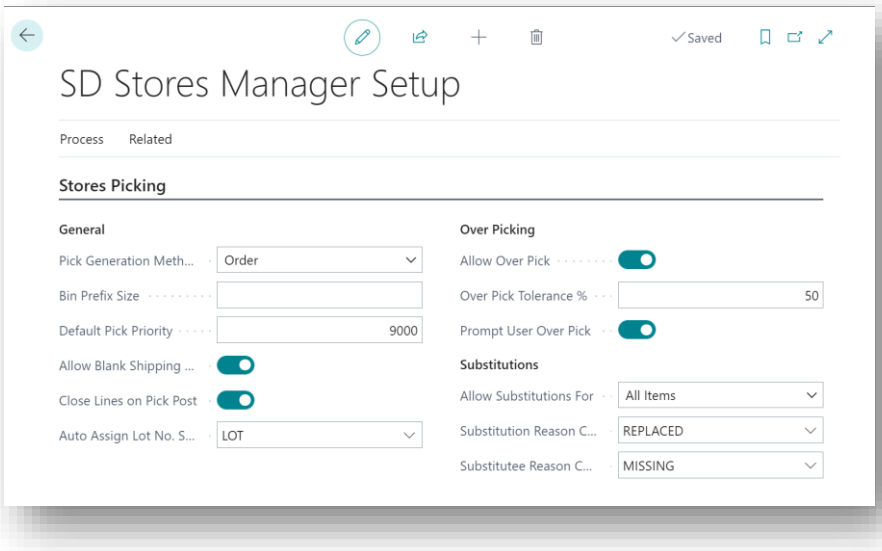


Figure 8-2

- **Pick Generation Method** – This field specifies which generation method to use when generating picks for the source document (sales orders) in SD Stores Manager. Options are **Order**, **Order/Location**, **Order/Location/Zone**, **Order/Location/Bin Prefix**, **Order/Location/Bin**.

  Order – If the Pick Generation Method is set to this option, when the picks are generated by the store manager, a pick is created for each source document. A separate pick is not created for each different location that exists on the sales order lines.

  Order/Location – If the Pick Generation Method is set to this option, when the picks are generated by the store manager, a separate pick is created for each location that exists on the sales order lines. Workers then pick the locations separately.

  Order/Location/Zone - If the Pick Generation Method is set to this option, when the picks are generated by the store manager, a separate pick is created for each Location/Zone combination on the sales order lines. Workers then pick the Location/Zone combination separately.

  Order/Location/Bin Prefix - If the Pick Generation Method is set to this option, when the picks are generated by the store manager, a separate pick is created for each Location/Bin Prefix combination on the sales order lines. Workers then pick the Location/Bin Prefix combination separately.

  Order/Location/Bin - If the Pick Generation Method is set to this option, when the picks are generated by the store manager, a separate pick is created for each Location/Bin combination on the sales order lines . Workers then pick the Location/Bin combination separately.

- **Bin Prefix Size** - Specifies the Bin Prefix Size. Applicable if a Pick Generation Method of Order/Location/Bin Prefix is selected.

  When generating picks, SD Stores Manager checks that the length of the bin code on the sales line is not less than, or equal to, the length specified in the Bin Prefix Size.

  The **Order/Location/Bin Prefix Pick Generation Method**, together with the **Bin Prefix Size** allows the picks for a sales order to be generated and grouped by the individual location and the first X characters of the bin code on the sales order line.

- **Default Pick Priority** – This field defines the Default Pick Priority in SD Stores Manager. The default value for this field is 9000. Enter an integer from 0 to 9000.

The priority of a pick determines the sequence or order in which Pick Jobs are issued to workers. The pick priority is calculated when generating the picks. This **Default Pick Priority** field allows you to sequence and order picks and is used when calculating the **Route Priority** of a pick. If there is no priority specified in the **Pick Priority Mapping** setup for the pick's Location Code/Shipping Agent Code combination, then this **Default Pick Priority** is used.

- **Allow Blank Shipping Agent** – This field is referenced on pick generation when building the Route Overview.

  If the **Allow Blank Shipping Agent** field is switched off, then Jobs cannot be created for those sales orders that do not have a shipping agent specified on the sales header.

  If the **Allow Blank Shipping Agent** field is switched on, then Jobs can be created for sales orders that do not have a shipping agent specified on the sales header.

- **Close Lines on Pick Post** – If this option is selected, then when shipping an Incomplete Job with shortages on the line, the Quantity and the Qty. Shipped on the sales order are set to the Qty. Handled that was entered on the Job Line. If this option is selected and when shipping a Job with a 0-quantity line on the Pick Job, SD Stores Manager updates the sales order and sets the **Quantity** to 0, **Unit Price** to 0, **Line Discount %** to 0 and the **Completely Shipped** flag to true.

  If this option is not enabled, when shipping an Incomplete Job, the **Qty. to Ship** on the corresponding sales line, is set to the **Qty. Handled** on the Job Line.

- **Auto Assign Lot No. Series –** Select the number series to assign lot numbers to the sales order lines when the picker selects the **Auto Tracking** action when confirming lines on the Pick Job.

- **Allow Over Pick** – This fields allows users to over pick when confirming lines on the Pick Job. Users can over pick to the amount specified in the **Over Pick Tolerance %** field. When over picking a line, prices are revalidated on the source document.

  You can choose to disable over picking for individual items by choosing the **Disable Over Pick** field on the **Item Card.**

- **Over Pick Tolerance %** - Enter a tolerance up to which a user can over pick a line on the Pick Job.

You can also specify over pick tolerances per item. You can set the **Over Pick Tolerance %** on the **Item Card**. If **Allow Over Pick** is switched on SD Stores Manager will look to the Item Card for the over pick tolerance % first and if that field is 0 then the over pick tolerance % on the Item Card is used.

- **Prompt User Over Pick** – Select this option if you want to display a prompt to the user when they over pick a line on the Pick Job.

- **Allow Substitutions For** – Choose to allow pickers to substitute on Pick Job lines for **All Items** or **Substitution Items**. Choosing **<blank>** prevents pickers from substituting items.

- **Substitution Reason Code** – Choose a reason code to auto-insert on the line when the picker chooses to substitute the item or part of the item on the Pick Job with another item. The original line is not removed from the Pick Job.

- **Substitute Reason Code** - Choose a reason code to auto-insert on the newly created line on the Pick Job that contains the item that was substituted for the original item.

In the **Stores Intake** FastTab the fields below are displayed *(Figure 8-3)*:

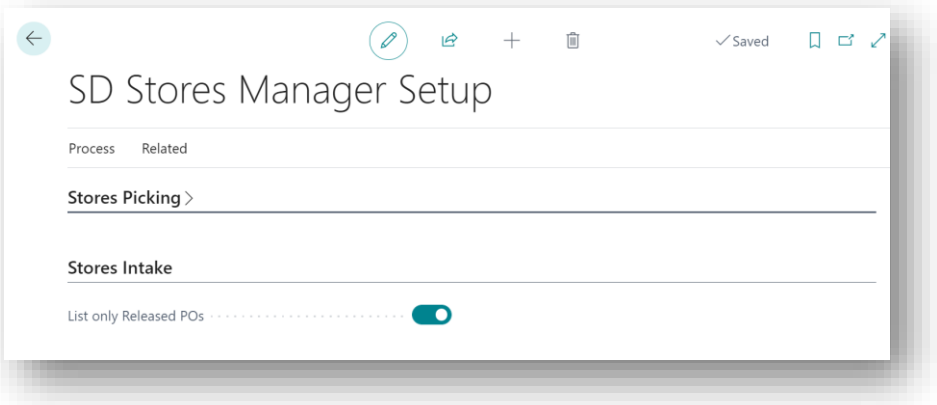


Figure 8-3

- **List only Released POs** – Select this checkbox if you want to display only those Purchase Orders that have a Status of Released on the **SD Stores Manager Purchase List** (Please see the section, **Stores GRN**, in this document).

The **Barcodes** FastTab contains the following fields *(Figure 8-4)*:

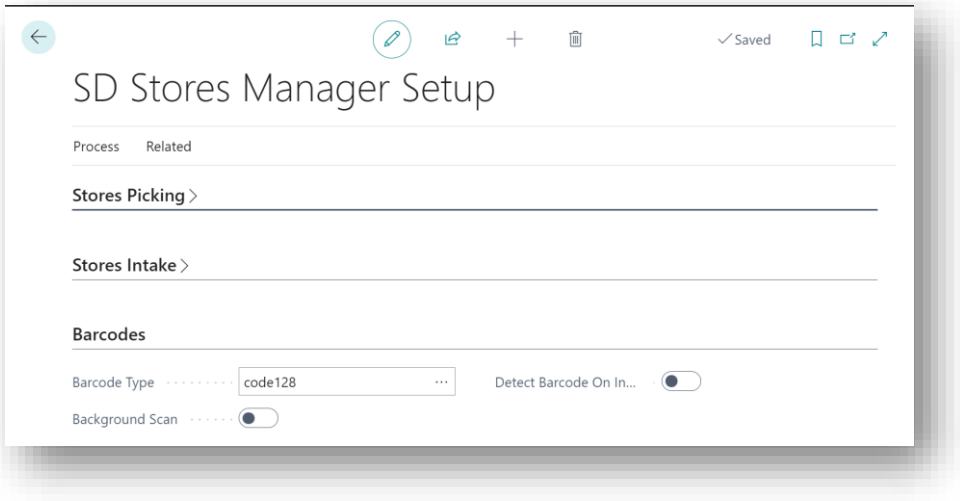


Figure 8-4

- **Barcode Type –** Select the barcode type to print on the **Worker Badge** and on the **Pick Instruction** Report.

  The barcode on the **Worker Badge** is scanned in by workers to request a new Pick Job to pick.

  The barcode on the **Pick Instruction** is scanned by workers to confirm the Pick Job and update the quantities that were physically picked.

- **Background Scan** – Switching this option on allows the browser to auto detect a value being scanned without the input field being focused. This is usually compatible with warehouse handheld scanners.

- **Detect Barcode on Input** – If this option is enabled the system will immediately detect if a value is entered on a barcode field. This is usually compatible with mobiles and tablets that read barcodes from the keyboard.

In the **Delivery Docket** FastTab you can select the following field *(Figure 8-5)*:

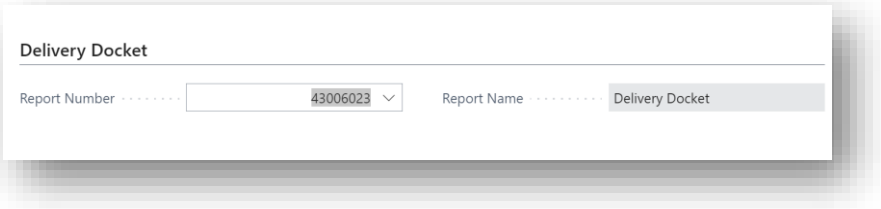


Figure 8-5

- **Report ID –** Enter a report ID here if you want the Delivery Docket to print off the Manifest report. The Manifest report is printed off from the Route Overview.

The **KPIs** FastTab has flowfield counts of the records entered in the associated setup tables *(Figure 8-6)*:

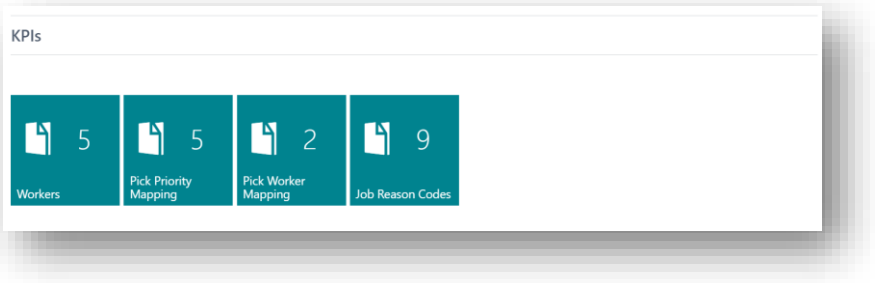


Figure 8-6

There are a number of actions available from the **Related** menu group *(Figure 8-7)*. These actions are detailed in the sections below.

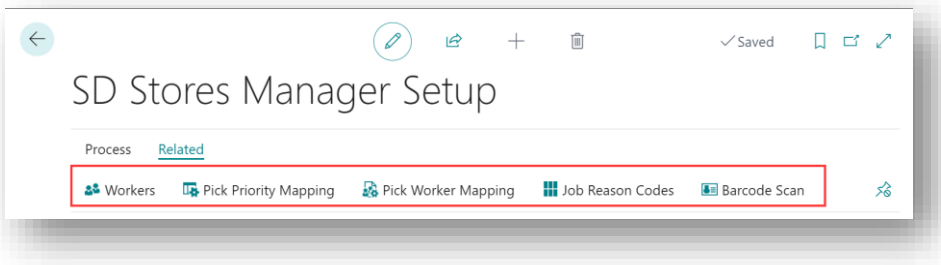


Figure 8-7

8.2 Workers

Store personnel and pickers are defined in SD Stores Manager as workers.

The information on the worker table is used when the **Worker Badge** is printed. The **Worker Badge** is used by the workers to request a new Job to pick, or to reprint an In Progress Job.

When a worker scans his worker badge, SD Stores Manager will search for In Progress Jobs assigned to the worker. If an In Progress Job assigned to the worker is found, the Pick Instruction can be re-printed. If there are currently no In Progress Jobs assigned to the worker, SD Stores Manager searches through the job header for a new Job to assign to the worker.

Assigning a worker to a location code allows SD Stores Manager to assign a Pick Job to specified workers working within a particular location when the worker requests a Job to pick.

Using the **Pick Worker Mapping List** allows you the further flexibility to auto-assign a worker to a Pick Jobs based on the Location Code/Shipping Agent Code combination on the Source Document.

The **Worker** list, is accessed from the **SD Stores Manager Setup**, or from the **Tell Me**. From here you set up the pickers in SD Stores Manager *(Figure 8-8)*.

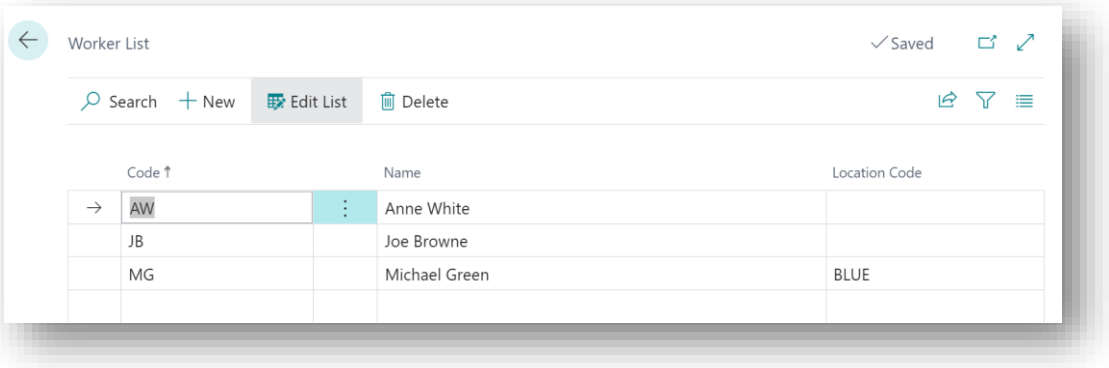


Figure 8-8

- **Code** – Enter a unique code to identify the worker.
- **Name** – Enter a user-defined name for the worker.
- **Location Code** – Enter the location code for the worker.

This **Location Code** is used by SD Stores Manager to determine what Job to assign to the worker, when the store manager manually assigns a Job to a worker, or, when a worker scans his badge to request a new Job. A blank location code on the worker table means that the worker can work in any location.

8.3 Pick Priority Mapping

Pick Priority Mapping allows you to control the priority of a pick. The priority of a pick determines the sequence or order in which Pick Jobs are issued to the workers.

Pick priority is calculated on pick generation. If there is no priority specified in the **Pick Priority Mapping** table for the current pick's Location Code/Shipping Agent Code combination, then the **Default Pick Priority** on the **SD Stores Manager Setup** is used.

SD Stores Manager enables the store manager to easily juggle the route priority of the picks.

The **Pick Priority Mapping** list *(Figure 8-9)* is accessed from the **SD Stores Manager Setup**, or from the **Tell Me** and allows you to sequence, or order, picks based on the Location Code, Shipping Agent Code combination on the sales order and is used when calculating the route priority of a pick. The pick priority is calculated when generating the picks.

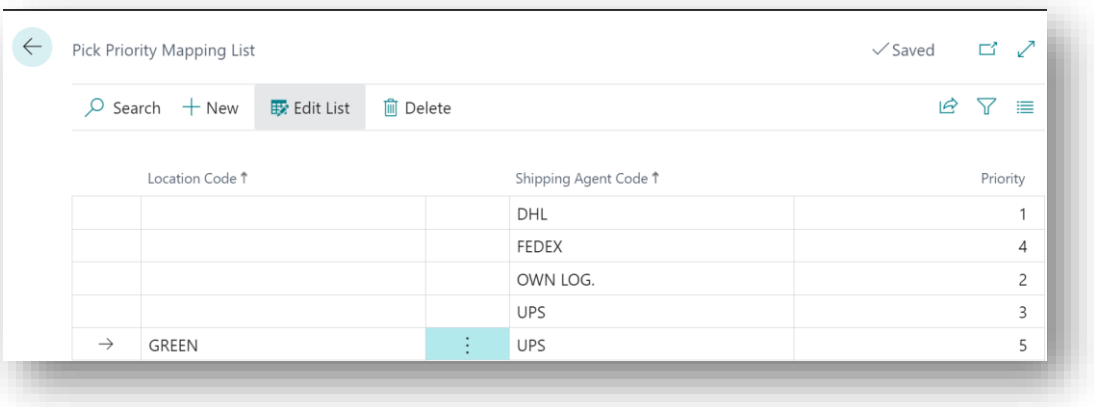


Figure 8-9

- **Location Code** – This field specifies the location code that SD Stores Manager will use when generating picks and calculating and determining the priority of the pick based on the Location Code/Shipping Agent Code combination on the Pick Job's associated Source Document (Sales Order). Choose from a list of existing location codes.

The **Pick Generation Method** field on the **SD Stores Manager Setup** must be set to **Order/Location** for a location code to be specified on the **Pick Priority Mapping List**.

- **Shipping Agent Code** – This field specifies the shipping agent code (route) that SD Stores Manager will use when generating picks and when calculating and determining the priority of the pick based on the Location Code/Shipping Agent Code combination on the Job's associated Source Document (Sales Order). Choose from a list of existing shipping agent codes.

- **Priority** - This field specifies the route priority that SD Stores Manager will apply to the individual picks when generating picks based on the Location Code/Shipping Agent Code combination that exists on the Job's Source Document (Sales Order).

  If there is no priority specified in the **Pick Priority Mapping Setup** for the pick's Location Code/Shipping Agent Code combination, then the **Default Pick Priority** on the **Stores Manager Setup** is used.

8.4 Pick Worker Mapping

The **Pick Worker Mapping** list *(Figure 8-10) i*s accessed from the **SD Stores Manager Setup**, or from the **Tell Me** and allows you the flexibility to auto-assign a worker on pick generation to those picks that have the Location Code/Shipping Agent Code combination as specified in the **Pick Worker Mapping** page. Workers are auto assigned a Pick Job when the picks are generated.

You can specify a date from which the **Pick Worker Mapping** will take effect. If a **Take Effect** date for a **Pick Worker Mapping** entry has expired, then either update the worker on the record or remove the record for the worker from the **Pick Worker Mapping List**.

If, when auto-assigning picks to workers, there is no Location Code/Shipping Agent Code combination specified that matches the Job Header, then the Job remains unassigned. Unassigned Jobs can be assigned to a worker when a worker requests a new Job or when a store manager chooses to manually assign a Job to a worker.

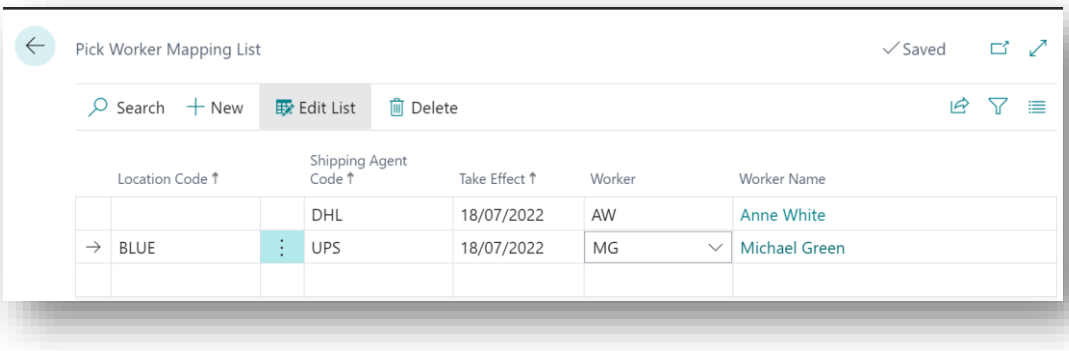


Figure 8-10

- **Location Code** – This field specifies the location code, used in conjunction with the **Shipping Agent Code** and **Take Effect** date, that SD Stores Manager will use when auto-assigning picks to workers.

  Picks are auto assigned to workers using the Location Code/ Shipping Agent Code combination on the Pick Job's Source Document (in this instance a sales order), for those Source Documents that have a Shipment Date on, or after, the Take Effect date.

- **Shipping Agent Code** – This field specifies the **Shipping Agent Code** (**Route**), used in conjunction with the **Location Code** and **Take Effect** date, that SD Stores Manager will use when auto assigning picks to workers.

- **Take Effect** - Specify the date from which to auto-assign the worker to the pick. The **Shipment Date** on the sales order must be on or after the **Take Effect** date.

- **Worker** - Select the worker that you want to auto-assign to those Jobs, of Type Pick, which have the Location Code/Shipping Agent Code combination on their source documents and that have a **Shipment Date** on or after the **Take Effect** date.

- **Worker Name** - Displays the worker's name.

8.5 Job Reason Codes

Job Reason Codes comprise of a code and description that can be used to log and track Pick Issues and Pick Solutions.

Using Reason Codes, workers can enter a reason on the Job Line when they are confirming a Job to detail why they took a particular action.

On the **Job History Line** table, a store manager can update the **Error Reason Code** and the **Solution Reason Code**, again, to quickly detail and log an occurrence of a pick issue/error (e.g., Item Error, Worker Error, Breakage, Shortage) and log a Solution to the Error.

Logging the reason codes allow metrics for Pick Errors by Customer, by Item, by Picker, by Reason to be tracked and reported on.

The **Job Reason Codes Page** list *(Figure 8-11)* is accessed from the **SD Stores Manager Setup**, or from the **Tell Me** and comprises of a code and description that can be used to log and track Pick Issues and Pick Solutions to those issues.

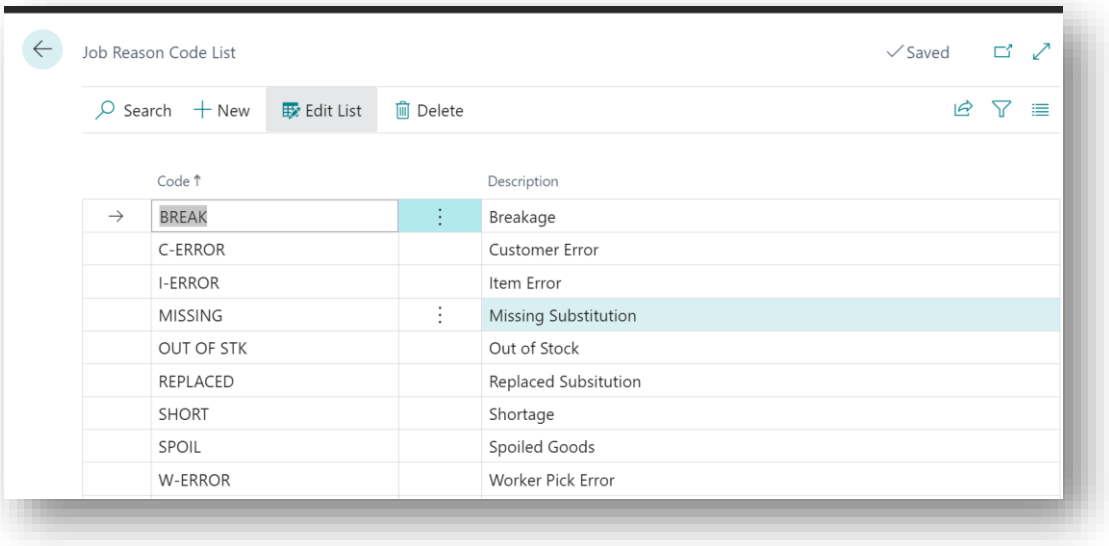


Figure 8-11

- **Code** – Enter a unique code to identify the Job Reason Code.
- **Description** – Enter a user defined description of the Job Reason Code.

8.6 Worker Badge

The **Worker Badge** can be printed by selecting the action cue in the **SD Stores Manager Role Centre** or by searching the **Tell Me**.

Printing the **Worker Badge** Report prints a report containing a barcode for each individual worker *(Figure 8-12)*. Pickers use the barcode on the worker badge to scan in when requesting a new Job or to reprint an In Progress Job.

When the picker scans his worker badge, SD Stores Manager will search for In Progress Jobs assigned to the worker. If an In Progress Job assigned to the worker is found, then the Pick Instruction can be re-printed.

If there are currently no In Progress Jobs assigned to the worker, SD Stores Manager searches through the Job Header for Pending Jobs that have been already pre-assigned to the worker. Ordering these Jobs by Route Priority, Customer Priority and Code. SD Stores Manager sets the Status on the first Job it finds to In Progress and prints the Pick Instruction for the Job.

If there are no pre-assigned Pending Jobs for the worker, SD Stores Manager searches through the Job Header for Pending Jobs that have a location code as set on the location code in the worker table. A blank location code on the worker table means that the worker can work in any location. Again, ordering these Jobs by Route Priority, Customer Priority and Entity Code, SD Stores Manager assigns the first Job it finds to the worker, sets the Status on the Job to In Progress and prints the Pick Instruction for the Job.

Figure 8-12

8.7 Generating Picks

The **Generate Picks** action can be accessed from the **SD Stores Manager Role Centre**. In the **Stores Picking** menu group, choose **Generate Picks**. The **Generate Picks Report** request page opens *(Figure 8-13)*. Enter the **Shipment Date** for which you want to generate picks. You can also enter additional filters on the Sales Header to filter on the sales orders for which you want to generate the picks.

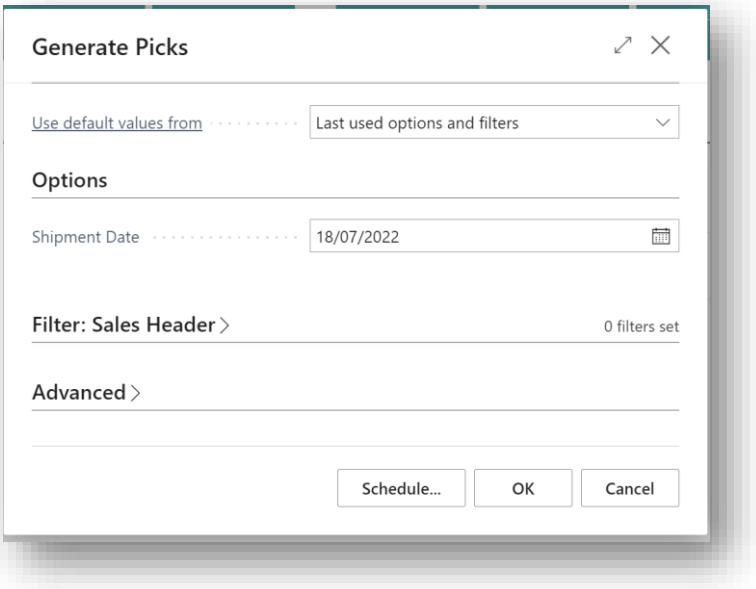


Figure 8-13

The **Generate Picks** Report searches through the sales orders with a Status of Released, for lines of type item, with an Outstanding Quantity greater than 0, and with a Shipment Date up to and including the Shipment Date entered on the Report Preview Page. Using the Pick Generation Method as specified on the SD Stores Manager Setup, new Job Headers with a Type of Pick, and a Status of Pending are created.

The Route Priority on the Job Header is calculated using the setup on the Pick Priority Mapping table. If no priority exists for the Shipping Agent Code/Location combination, then the Default Priority on the Setup is used. The Customer Priority on the Job Header is set to the Customer Priority field from the Customer Card for the Sell-To Customer on the Job Header's Source Document.

For those Source Documents that have varying shipment dates on the individual Source Document Lines, picks are broken out/created for the different Shipment Dates.

For those Source Documents that have varying shipping agent codes on the individual Source Document Lines, picks are broken out/created for the different Shipping Agents (Routes).

Where the Pick Generation Method on the SD Stores Manager Setup has been set to **Order**, when the picks are generated by the store manager, the Job Header is not stamped with the location from the Source Document, and a separate pick is not created for each separate location on the Sales Order Lines.

Where the Pick Generation Method on the SD Stores Manager Setup has been set to **Order/Location**, when the picks are generated by the store manager, a separate pick is created for each separate location on the Source Document Lines, and you pick the locations separately.

Where the Pick Generation Method on the SD Stores Manager Setup has been set to **Order/Location/Zone**, when the picks are generated by the store manager, a Location Code and Bin Code must exist on each Source Document Line. The Zone Code is taken from the Bin table, where the Location and Bin Code equals that on the Source Document Line, and a separate Pick Job is created for each distinct Location/Zone combination on the Source Document Lines.

Where the Pick Generation Method on the SD Stores Manager Setup has been set to **Order/Location/Bin Prefix**, when the picks are generated by the store manager, a Bin Prefix Size must exist on the SD Stores Manager Setup, and a Location Code and Bin Code must exist on each Source Document Line. Using the length specified in the Bin Prefix Size, SD Stores Manager takes the length of the characters of the Bin Code on the Document Line and creates Jobs grouped/split by the substring in the Bin Code. This allows users to complete a "Zonal Pick" using the information on the Bin Code.

Where the Pick Generation Method on the SD Stores Manager Setup has been set to **Order/Location/Bin**, when the picks are generated by the store manager, a Location Code and Bin Code must exist on each Source Document Line, and a separate Pick Job is created for each distinct Location/Zone combination on the Source Document Lines.

Once the Job Header and Job Lines have been created, SD Stores Manager determines whether there are any Jobs that can be auto assigned to a worker.

Using the details entered in the Pick Worker Mapping List SD Stores Manager searches through the picks to auto-assign a worker to those Jobs that have the Location Code/Shipping Agent Code combination as specified in the **Pick Worker Mapping List** and that have a shipment date on or after the **Take Effect** date. If there is no combination specified in the Pick Worker Mapping List that matches the Job Header, then a worker is not auto assigned to the Job. Jobs can be manually assigned to a worker when a store manager chooses to assign a Job to a worker from the Job List Page or when a worker requests a Job.

Once the Picks have been generated and the Pick Jobs created, the store manager can view and drill down on the picks from the **Job Summary Cues** or from the **Route Overview** action in the **SD Stores Manager Role Centre.**

8.8 The Route Overview

The **Route Overview** *(Figure 8-14)* can be accessed from the **SD Stores Manager Role Centre** or by searching the **Tell Me** and provides a hub from which a store manager can manage, assign and process Pick Jobs and Shipping Routes.

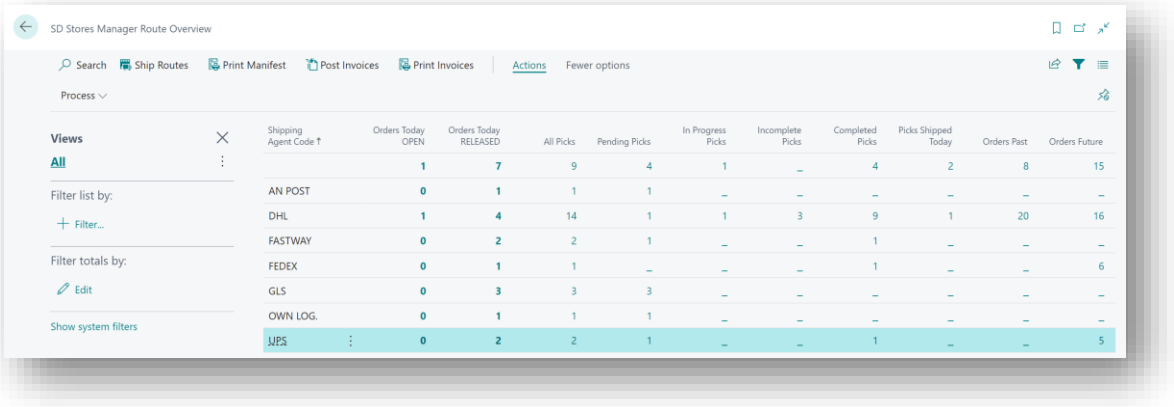


Figure 8-14

In the Route Overview the **Orders Today Open**, **Orders Today Released**, **Orders Past** and **Orders Future** can be easily filtered to show order by future or past dates *(Figure 8-15)*.

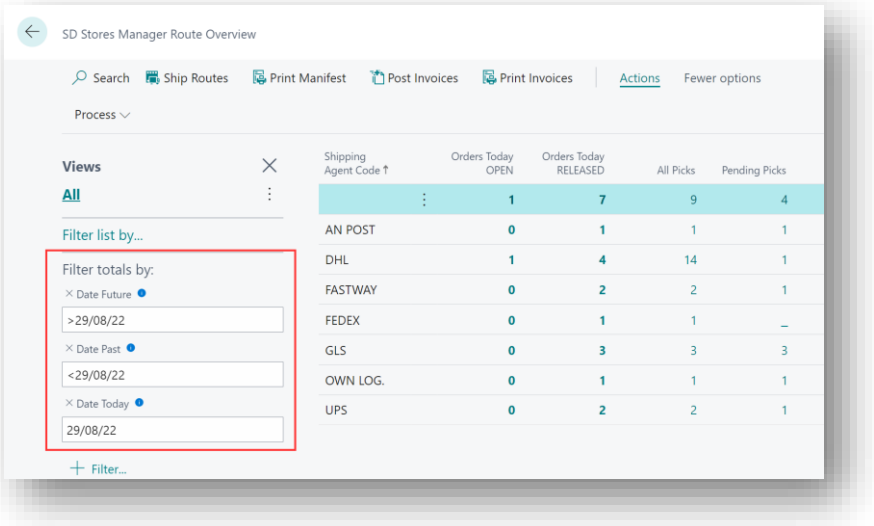


Figure 8-15

The following fields are available in the **Route Overview**:

- **Shipping Agent Code** – This field displays the Shipping Agent Code (the Route) for the Jobs.

- **Orders Today Open**– This field displays a count of the sales orders from the Sales Header Table, which have a Status of Open, a Shipment Date of today and that exist for the current Shipping Agent Code (Route).

- **Orders Today Released** – This field displays a count of the sales orders from the Sales Header Table, which have a Status of Released, a Shipment Date of today and that exist for the current Shipping Agent Code (Route).

- **All Picks** – This field displays a count of all the picks from the SD Stores Manager Job Header Table that exist for the current Shipping Agent Code (Route).

- **Pending Picks** – This field displays a count of the picks from the SD Stores Manager Job Header Table, which have a Status of Pending, and that exist for the current Shipping Agent Code (Route).

  A Pick Job is set to Pending when first created. If the Stores Manager chooses the **Assign to Worker** action from the Job Header List Page, the Status of the Pick Job remains at Pending.

- **In Progress Picks** – This field displays a count of the picks from the SD-SM Job Header Table, which have a Status of In Progress, and that exist for the current Shipping Agent Code (Route).

  A Pick Job is set to In Progress when a picker requests a new Job using the **Request/Confirm Job** action in the SD Stores Manager Worker Role Centre.

- **Incomplete Picks** – This field displays a count of the picks from the SD-SM Job Header Table, which have a Status of Incomplete, and that exist for the current Shipping Agent Code (Route).

  A Pick Job has a Status of Incomplete when there is a Qty. Outstanding on any of its Job Lines.

- **Completed Picks** – This field displays a count of the picks from the SD-SM Job Header Table, which have a Status of Completed, and that exist for the current Shipping Agent Code (Route).

A pick has a Status of Complete when all Job Lines on the Job have a Qty. Outstanding of 0.

From the Route Overview, you can choose from the following menu actions *(Figure 8-16)*:

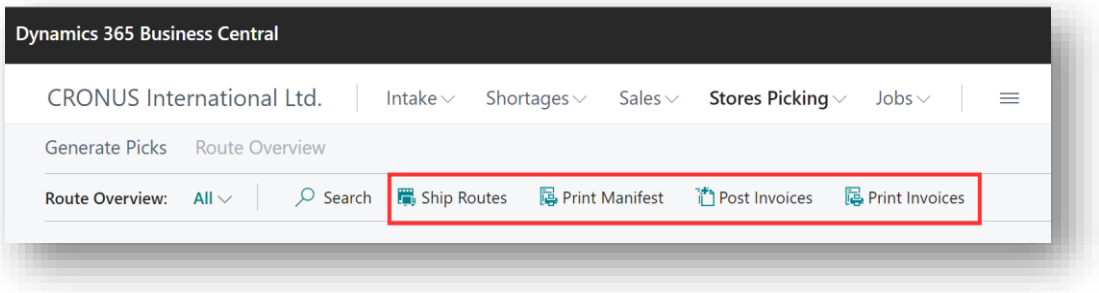


Figure 8-16

8.8.1 Ship Routes

Choosing this action will process the Pick Jobs that have a Status of Complete, or Incomplete, for the selected Shipping Agent Code (Route). Users can choose to ship Incomplete Jobs on the route.

The Qty. to Ship on the Source Document Line is set to the Qty. Handled on the Job Line, the Ship Flag on the Source Document is set to True and the standard Microsoft Dynamics 365 Business Central Sales-Post Codeunit is called.

The Job Header and Job Lines are archived and written to the Job History Header and Job History Line.

8.8.2 Print Manifest

Choosing this action will print the Manifest for the Sales Orders (irrespective of the Status of the pick) for the selected Shipping Agent Code (route).

8.8.3 Post Invoices

Choosing this action calls the standard Microsoft Dynamics 365 Business Central Batch Post Sales Orders Report for the sales orders for the selected Shipping Agent Code (route).

8.8.4 Print Invoices

Choosing this action will Print the Sales Invoices for the current Shipping Agent Code (route) as per the standard Microsoft Dynamics 365 Business Central functionality on the Sales Invoice Header table.

8.9 Working with Picks - Manager

The **Job List** can also be accessed from the SD Stores Manager Role Centre by drilling through on the cues in the SD Stores Manager **Job Activities** cue group *(Figure 8-17)*.

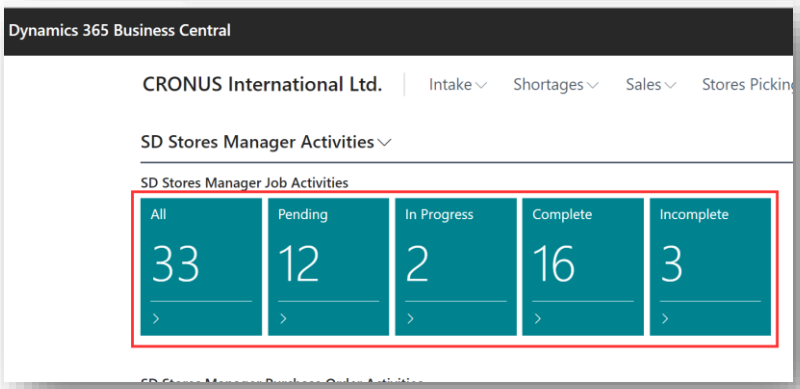


Figure 8-17

The following fields are available in the **SD Stores Manager Job List** *(Figure 8-18)*:

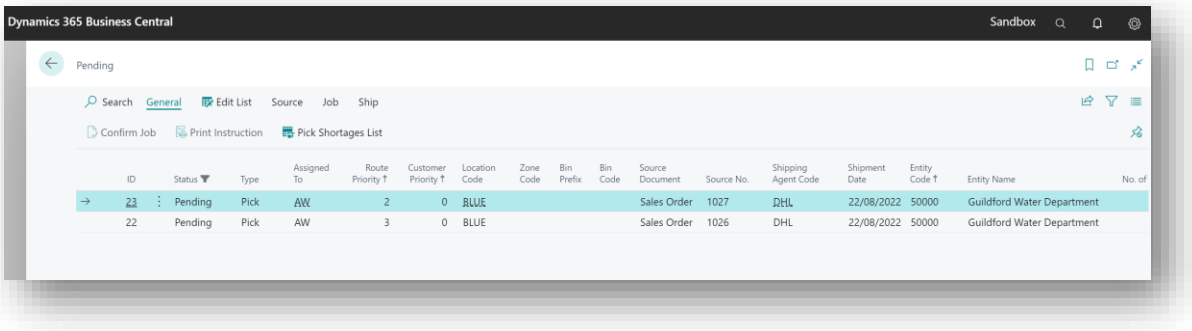


Figure 8-18

- **ID** – Displays a unique id to identify the Job.

- **Status** – Displays the Status of the Job Header. Options are **Pending**, **In Progress**, **Incomplete**, **Complete**.

  A Pick Job is set to **Pending** when first created. If the store manager chooses the **Assign to Worker** action from the Job Header List Page, the Status of the Pick Job remains at Pending.

  A Pick Job is set to **In Progress** when a picker requests a new Job using the **Request/Confirm Job** action in the **SD Stores Manager Worker Role Centre**.

A pick is **Incomplete** when there is a Qty. Outstanding on any of its Job Lines.

A pick is set to **Complete** when all Job Lines on the Job Header have a Qty. Outstanding of 0.

- **Type** – Displays the Type of Job. The Job Type is **Pick**.
- **Assigned To** - Displays the worker who is assigned to the Job. (The worker who is assigned to pick the Job).
- **Route Priority** - Displays the Route Priority of the Job. (Please see the sections on **Generating Picks** and **Pick Priority Mapping** in this document on how the Route Priority is calculated in SD Stores Manager).
- **Customer Priority** - Displays the Customer Priority. On Pick Generation, this field is set to the Customer Priority of the Sell-To Customer on the Job's Source Document (sales order).
- **Location Code** - Displays the Job Header's Location Code.
- **Zone Code** - Displays the Job Header's Zone Code.
- **Bin Prefix** - Displays the Job Header's Bin Prefix.
- **Bin Code** - Displays the Job Header's Bin Code.
- **Source Document** - The Job's Source Document, in this instance, the sales order.
- **Source No.** - The Job's Source Document, in this instance, the Sales Order No.
- **Shipping Agent Code** - The Job's Shipping Agent Code (Route).
- **Shipment Date** - The Job's Shipment Date.
- **Entity Code** - The Job's Entity Code, in this instance, the sales order's Sell-to Customer No.
- **Entity Name** - The Job's Entity Name, in this instance, the sales order's Sell-to Customer Name.
- **No. of Lines** - A flowfield count of the number of Job Lines for this Job Header.

- **Incomplete Lines** - A flowfield count of the number of Job Lines, with a status of Incomplete, for this Job Header.

- **Complete Lines** - A flowfield count of the number of Job Lines, with a status of Complete, for this Job Header.

- **Assigned** - A Date-Time stamp stamped when a worker is assigned to the Job by a store manager.

- **Issued** - A Date-Time stamp stamped when a worker is assigned to the Job by a store manager or when a worker is assigned a Job by choosing to **Request/Confirm Job** from the Worker Role Centre.

- **Completed** - A Date-Time stamp stamped when the Job Status is set to Complete.

- **No. Printed** - A flowfield count of the number of times that the Pick Instruction for this Job has been printed.

There are a number of actions that can be chosen from the **General** menu group on the Job List Page *(Figure 8-19)*:

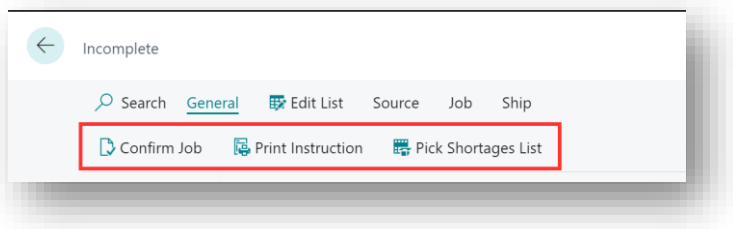


Figure 8-19

8.9.1 Confirm Job

This action is enabled for Jobs with a Status of **In Progress**, **Incomplete** or **Complete**. Choosing this action opens the **Confirm Job** page for the selected Job Header.

8.9.2 Print Instruction

This action is enabled for Jobs with a Status of **In Progress** or **Incomplete**. Choosing this action prints the Pick Instruction for the selected Job(s).

8.9.3 Pick Shortage List

Choose this action to print a list of the shortages on Jobs in the Job History. Jobs are moved to history when the Job is shipped.

8.9.4 View Document

This action is enabled for Jobs with a Status of **In Progress** or **Incomplete**. Choose this action to view the sales order, for which this Job of Type Pick was created.

Choosing this action opens the standard Microsoft Dynamics 365 Business Central Sales Order Page (Page ID 42). As the Sales Order Document has a Status of Released (the Sales Order Status must be Released for a pick to have been generated for the Source Document), as per standard Microsoft Dynamics 365 Business Central Users cannot amend certain fields on the released Sales Order Document.

8.9.5 Reopen Document

This action is enabled for Jobs with a Status of **Pending**. Choose this action to Re-Open the sales order, that this Job of Type Pick is created for.

Choosing to reopen the document deletes the Job Header(s), and its associated Job Lines and sets the Status on the Document to Open. If needed, the Document can then be modified, and a new pick can be generated for the document when the necessary changes have been made to the sales order and the Document has been Released.

8.9.6 View Detail

This action is enabled for all Jobs. Choosing this action opens the **SD Stores Manager Job Line List** and displays the details of the Job Lines *(Figure 8-20)*.

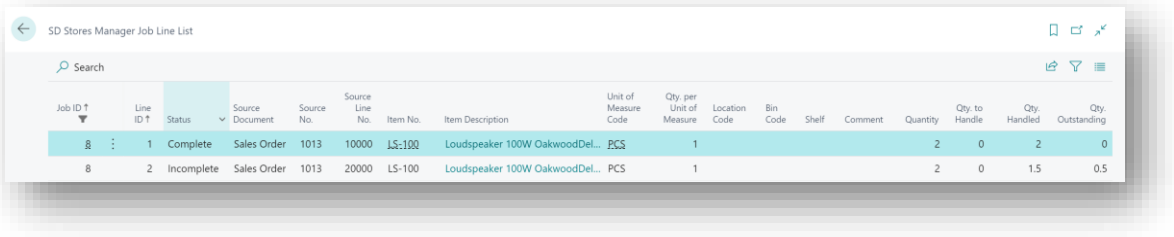


Figure 8-20

- **Job ID** – Displays the Job ID of the Job Header.

- **Line ID** - Displays a code to identify the Job Line for the Job. ID.

- **Status** – Displays the Status of the Job Line. The Status of a Job Line can be **Pending**, **In Progress**, **Incomplete**, or **Complete**.

  The Status of the Job Line is set to **Pending** when the Job Line is created. If the store manager chooses the **Assign to Worker** action from the Job Header List Page, the Status of the Pick Job remains at Pending.

  The Status of the Job Line is set to **In Progress** when a picker requests a new Job using the **Request/Confirm Job** action in the **SD Stores Manager Worker Role Centre**.

  The Status of the Job Line is set to **Incomplete** when there is a Qty. Outstanding greater than or equal to 0 on the Job Line.

  A pick is set to **Complete** when there is a Qty. Outstanding of 0 on the Job Line.

- **Source Document** - Displays the Source Document of the Job Line, in this instance, Sales Order.

- **Source No.** - Displays the Source No. of the Job Line, in this instance, the Sales Order No.

- **Source Line No.** - Displays the Source Line No. of the Job Line, in this instance, the Sales Order Line No.

- **Item No.** - Displays the Item No. of the Job Line.

- **Unit of Measure Code** - Displays the Unit of Measure Code on the Job Line.

- **Qty. per Unit of Measure** - Displays the Qty. per Unit of Measure for the Job Line.
- **Location Code** - Displays the Location Code of the Job Line.
- **Bin Code** - Displays the Bin Code of the Job Line.
- **Shelf** - Displays the Shelf of the Job Line.
- **Comment** – SD Stores Manager extends the standard Microsoft Dynamics 365 Business Central Sales Line page and table with an SD Stores Manager Comment field. This field is copied to the Comment field on the Job Line. If a Reason Code is entered on the Job Line, the Reason Code, Worker Code and Job ID are stamped to this Comment field back on the Sales Line.
- **Quantity** – This field displays the Quantity of the Job Line.
- **Qty. to Handle** – Displays the Quantity to Handle of the Job Line.
- **Qty. Handled** - Displays the Quantity that has already been handled/counted for the Job Line in this Pick.
- **Qty. Outstanding** – Displays the Outstanding Quantity that is yet to be picked for the Line (Quantity – Qty. Handled).
- **Reason Code** - Displays the Reason Code that was entered on the Job Line.
- **Assigned** - Displays the Date/Time Stamp of when the Pick Job was assigned to the worker/picker.
- **Issued** - A Date-Time stamp stamped when a worker is assigned to the Job by a store manager or when a worker is assigned a Job by choosing to **Request/Confirm Job** from the Worker Role Centre.
- **Completed** - A Date-Time stamp stamped when the Job Status is set to Complete.

8.9.7 Set to Pending

This action is enabled for Jobs with a Status of **Pending**, where a worker has been assigned, or for Jobs with a Status of **In Progress**. A Job is **In Progress** when a worker has requested a Job but has not Confirmed the Job.

Choosing this action sets the Status of the selected Job Header and Lines back to Pending and clears the **Assigned To** and **Assigned** fields on the Job Header and Job Lines.

8.9.8 Assign to Worker

This action is enabled for Jobs with a Status of **Pending**. Choose this action to Assign a worker/picker to the Job or to change an already assigned worker/picker on a Pending Job.

Select a worker to assign to the Job from a list of workers.

If a Job has a Location Code specified in the Job Header, you can only assign a worker to the Job if the worker has the same Location Code specified in the **Worker Setup**. A Blank Location Code on the worker table means that the worker can work in any Location.

To assign a Job, without a Location Code specified in the Job Header, to a worker, the worker must have no Location Code (a blank Location Code), specified in the **Worker Setup**.

8.9.9 Update Priorities

This action is enabled for Jobs with a Status of **Pending**. Choose this action to update the Route Priority on a selected range of Pending Job Header Lines at once.

Enter the Route Priority in the displayed window and choose OK to apply across all selected lines.

8.9.10 Apply Default Priorities

This action is enabled for Jobs with a Status of **Pending**. Choose this action to re-calculate the Route Priority and apply the recalculated priority to the Job Header.

If, when calculating the Route Priority of a pick, there is no Priority specified in the Pick Priority Mapping Setup for the pick's Location Code/Shipping Agent Code combination, then the Default Pick Priority from the Stores Setup is used.

8.9.11 Delete Job

This action is enabled for Jobs with a Status of **In Progress**, **Incomplete**, **Complete**.

Choosing this action deletes the Job from the Job Header and Job Lines.

To delete a **Pending** Job, you can choose the **Reopen Document** action as detailed above.

8.9.12 Ship Job

This action is enabled for Jobs with a Status of **Complete** or **Incomplete**.

Use this action to ship the selected Job only. When this action is chosen for an Incomplete Job, Users are prompted that the Job is incomplete and asked to verify that they want to "Ship anyway?". On choosing to "Ship anyway", for all lines on the Job, the Qty. to Ship on the corresponding Source Document Line, in this instance the Sales Line, is set to the Qty. Handled on the Job Line.

The Ship flag on the Source Document Header is set to True, and the standard 365 Business Central Sales-Post Codeunit is called for the Source Document creating a Shipment.

The Job Header and Job Lines are then archived to the Job History Header and Job History Lines tables and the Job (including any incomplete/outstanding Job Lines on the Job) is deleted.

A new pick can be generated for any Outstanding Quantities that remain on the Sales Order after the Shipment has posted.

8.9.13 Ship Document

This action is enabled for Jobs with a Status of **Complete**, **Incomplete**. This action allows you to ship all Jobs created for the Source Document at once (i.e., for instances where multiple Pick Jobs have been generated for a single sales order).

All Jobs for the Source Document must have a Status of **Complete** or **Incomplete**.

If **Incomplete** Jobs exist, then users are prompted that not all Jobs for the Source Document are complete, and the user is asked to verify that they want to "Ship anyway?".

On choosing to "Ship anyway", for all lines on each Job associated with the Source Document, the Qty. to Ship on the corresponding Source Document Line, in this instance the Sales Line, is set to the Qty. Handled on the Job Line.

The Ship flag on the Source Document Header is set to True, the standard 365 Business Central Sales-Post Codeunit is called for the Source Document creating a Shipment for each Job Header.

The Job Header and Job Lines are then archived to the Job History Header and Job History Lines tables and the Job (including any incomplete/outstanding Job Lines on the Job) is deleted.

A new pick can be generated for any Outstanding Quantities that remain on the Sales Order after the Shipment has posted.

8.10 Working with Picks – Worker

8.10.1 Request/Confirm Job

To request or confirm a Pick Job, the stores workers chose the **Request/Confirm Job** action cue in the **SD Stores Manager Worker Role Centre** *(Figure 8-21)*.

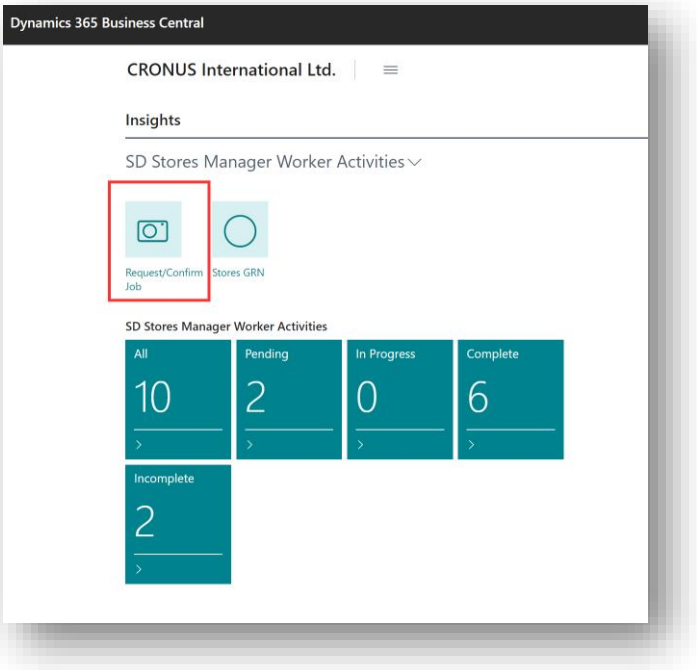


Figure 8-21

On choosing the **Request/Confirm Job** users are prompted to scan the barcode from their **Worker Badge** *(Figure 8-22)*.

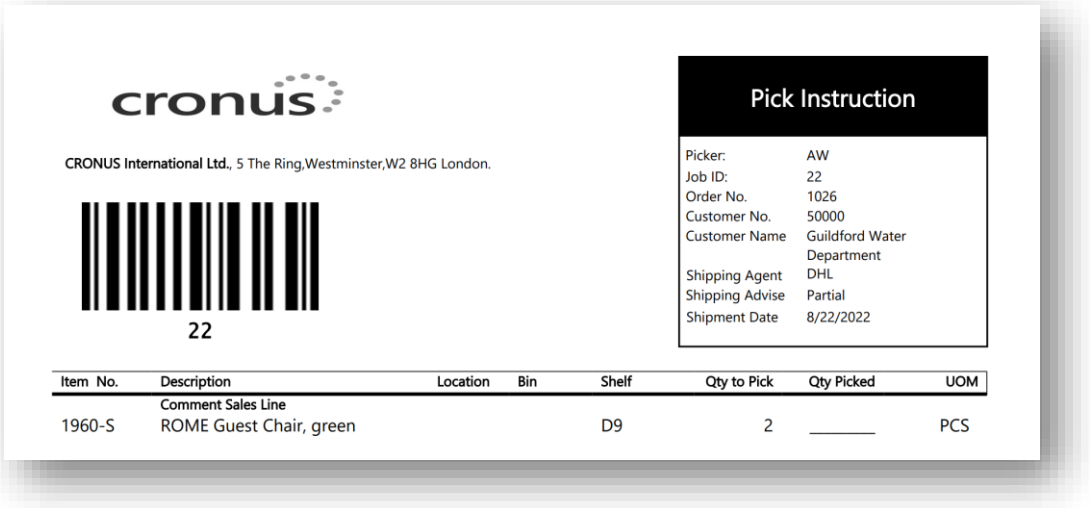
Figure 8-22

When the worker scans his **Worker Badge**, SD Stores Manager will search for any Jobs with a Status of In Progress that are assigned to the worker. If a Job with a Status of In Progress assigned to the worker is found, the Pick Instruction can be re-printed.

If there are currently no In Progress Jobs assigned to the worker, SD Stores Manager searches through the Job Header for Pending Jobs that have been already assigned to the worker (either on pick generation or manually by the store manager). Ordering these Jobs by Route Priority, Customer Priority and Entity Code, SD Stores Manager sets the Status on the first Job it finds to In Progress and prints the Pick Instruction for the Job.

If there are no pre-assigned Pending Jobs for the worker, SD Stores Manager searches through the Job Header for Pending Jobs that have a location code as set on the location code in the worker table. Again, ordering these Jobs by Route Priority, Customer Priority and Entity Code, SD Stores Manager sets the Status on the first Job it finds to In Progress, assigns the Job to the worker, and prints the Pick Instruction for the Job.

The Pick Instruction is printed with a barcode *(Figure 8-23)*. The stores worker then goes and gathers the pick.


cronus

CRONUS International Ltd., 5 The Ring,Westminster,W2 8HG London.

22

Pick Instruction

Picker:	AW
Job ID:	22
Order No.	1026
Customer No.	50000
Customer Name	Guildford Water Department
Shipping Agent	DHL
Shipping Advise	Partial
Shipment Date	8/22/2022

Item No.	Description	Location	Bin	Shelf	Qty to Pick	Qty Picked	UOM
	Comment Sales Line						
1960-S	ROME Guest Chair, green			D9	2	_____	PCS

Figure 8-23

Having gathered the pick, the stores worker then scans the barcode on the Pick Instruction. The **Confirm** page is then launched opening the Job Header for the scanned barcode and allows the worker to input what has been physically picked and update the Job Lines. The **Confirm** page contains the following fields *(Figure 8-24)*:

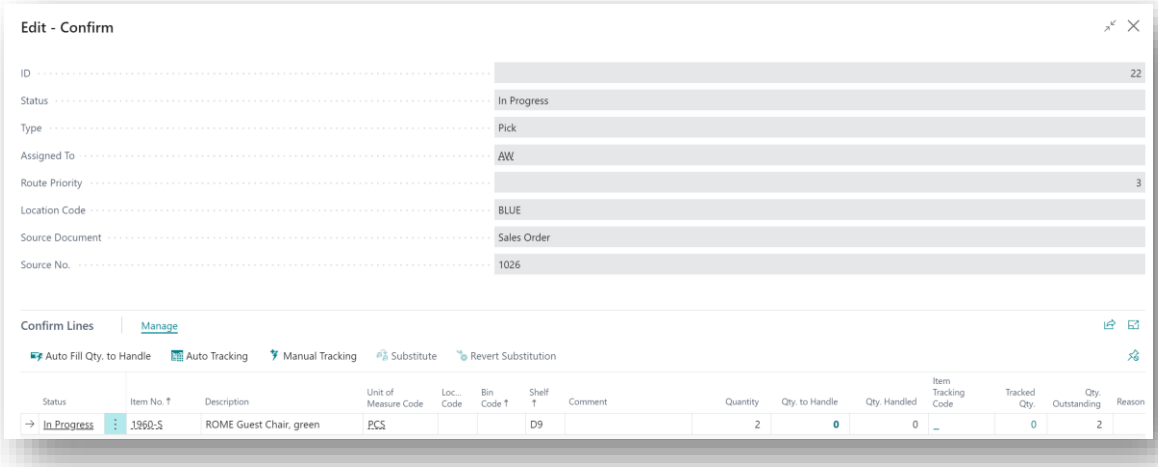


Figure 8-24

General FastTab:

- **ID** - Displays the Job ID of the Job Header.

- **Status** – Displays the Status of the Job. The Status of a Job can be **Pending**, **In Progress**, **Incomplete**, or **Complete**.

  The Status of the Job is set to **Pending** when the Job is created. If the store manager chooses the **Assign to Worker** action from the Job Header List Page, the Status of the Pick Job remains at Pending.

  The Status of the Job is set to **In Progress** when a picker requests a new Job using the **Request/Confirm Job** action in the SD Stores Manager Worker Role Centre.

  The Status of the Job is set to **Incomplete** when there is a Qty. Outstanding greater than or equal to 0 on any of the Job Lines.

  The Status of the Job is set to **Complete** when there is a Qty. Outstanding of 0 on all the Job Lines.

- **Type** – Displays the Type of the Job.

- **Assigned To** - Displays the worker/picker that is assigned to the Pick Job.

- **Route Priority** - Displays the Route Priority of the Job.

- **Location Code** - Displays the Location Code of the Job.

- **Source Document** - Displays the Source Document of the Job, in this instance, Sales Order.

- **Source No** - Displays the Source Document No. of the Job, in this instance, Sales Order No.

Confirm Lines FastTab:

- **Status** – This field displays the status of the Job. The Status of a Job can be Pending, In Progress, Incomplete, or Complete.

  The Status of the Job Line is set to **Pending** when the Job Line is created. If the store manager chooses the **Assign to Worker** action from the Job Header List Page, the Status of the Pick Job remains at Pending.

  The Status of the Job Line is set to **In Progress** when a picker requests a new Job using the **Request/Confirm Job** action in the SD Stores Manager Worker Role Centre.

  The Status of the Job Line is set to **Incomplete** when the Qty. Outstanding on the Job Line is greater than or equal to 0.

  The Status of the Job Line is set to **Complete** when there is a Qty. Outstanding of 0 on the Job Line.

- **Item No.** – This field displays the Item No. on the Job Line.

- **Description** – This displays the Item Description of the Item in Item No.

- **Unit of Measure** - Displays the Unit of Measure Code on the Job Line.

- **Location Code** - Displays the Location Code of the Job Line.

- **Bin** - Displays the Bin Code of the Job Line.

- **Shelf** - Displays the Shelf of the Job Line.

- **Comment** – SD Stores Manager extends the standard Microsoft Dynamics 365 Business Central Sales Line page and table with an SD Stores Manager Comment field. This field is copied to the Comment field on the Job Line. If a Reason Code is entered on the Job Line, the Reason Code, Worker Code and Job ID are stamped to this Comment field back on the Sales Line.

- **Quantity** – This field displays the Quantity of the Job Line.

- **Qty. to Handle** – Here the worker/picker enters the Quantity that the worker has physically picked for the Job Line.

- **Qty. Handled** - Displays the Quantity that has already been handled/counted for the Job Line in this pick.

- **Item Tracking Code** – Applicable if the item on the Job Line is item tracked. Displays the Lot Nos. series code that is used to assign lot numbers to the item on the Job Line.

- **Tracked Qty.** – Applicable if the item on the Job Line is item tracked. Displays the Tracked Qty. for the item. This field is updated when the lots are assigned to the Job Line.

- **Qty. Outstanding** – Displays the Outstanding Quantity that is yet to be picked for the Job Line (Quantity – Qty. Handled).

- **Reason Code** - Here the worker/picker can enter a reason code on the Job Line. This reason code can be used to log and track why a particular action was taken for a Job Line during the picking process.

- **Defer Pick** – If for some reason a line on the pick cannot be picked workers need to be able to defer the pick line and pick the rest of the order. Pickers can choose the **Defer Pick** checkbox on the Job Lines for those lines that cannot be picked and then choose the **Create Deferred Pick** action. This creates a new pick for the lines that have been flagged as defer pick and the deferred lines are removed from the original pick.

Users can over pick on the lines if **Allow Over Pick** on the SD Stores Manager Setup is enabled. A reason code must be entered on the line to track the reason for over picking. If a line is over picked, the quantity and value on the sales order are updated.

Users can also under pick on the lines and record a shortage. Again, a reason code must be entered on the line to record a reason for the shortage. When a line is under picked and the Job is shipped, the Qty. to Ship on the sales order line is updated to reflect the shortage.

When the worker has finished entering the quantities physically picked on the **Confirm** page choose OK to exit.
On exiting the Confirm page, if Qty. to Handle is less than the Qty. Outstanding on a Job Line, the user is prompted that incomplete lines exist.

Choosing yes to close the page closes the Confirm page, updates the Job with the Qty. to Handle, updates the status of the Job Lines and of the Job, and returns to the Role Centre where the barcode scan prompt will prompt for another **Worker Badge** or **Pick Barcode**.

A pick with incomplete lines is marked as **Incomplete**.

When a Job is deemed to be fully picked the store manager can choose the **Ship Job** action (as detailed in the section on **The Route Overview** in this document).

From the **Confirm** page, you can choose the following actions *(Figure 8-25)*:

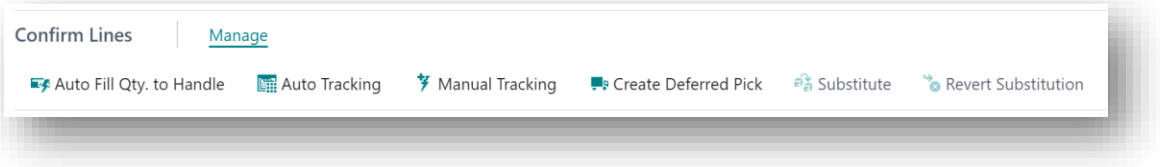


Figure 8-25

8.10.2 Auto Fill Qty. to Handle

When the Status of the Pick is **In Progress** or **Incomplete**, choose this action to automatically set the Qty. to Handle on the Job Line to the value in the Qty. Outstanding column.

8.10.3 Auto Tracking

Enter the Qty. to Handle and then choose this action to auto fill the lots for items on the Job Line that are item tracked and require lot numbers. The Tracked Qty. on the Job Line is updated. To use the Auto Tracking action, you must have specified a value in the **Auto Assign Lot No. Series** in the **SD Stores Manager Setup** that matches the Lot Nos. field on the Item card.

8.10.4 Manual Tracking

Enter the Qty. to Handle and then choose this action to manually enter lot numbers for items on the Job Line that are item tracked and require lot numbers. The Tracked Qty. on the Job Line is updated.

8.10.5 Create Deferred Pick

If for some reason a line on the pick cannot be picked, workers need to be able to defer the pick line and pick the rest of the order. Pickers can choose the **Defer Pick** checkbox on the Job Lines for those lines that cannot be picked and then choose the **Create Deferred Pick** action. This creates a new pick for the lines that have been flagged as defer pick and the deferred lines are removed from the original pick.

8.10.6 Substitute

This action allows you to substitute an item on the job line for another item. The line that the shortage existed for and that had an item substituted in its place is set to red font and the newly created line for the substitution item is set to green font *(Figure 8-26)*. The Qty. to handle on each job line is updated and the details of the substitution are updated on the sales order *(Figure 8-27)*.

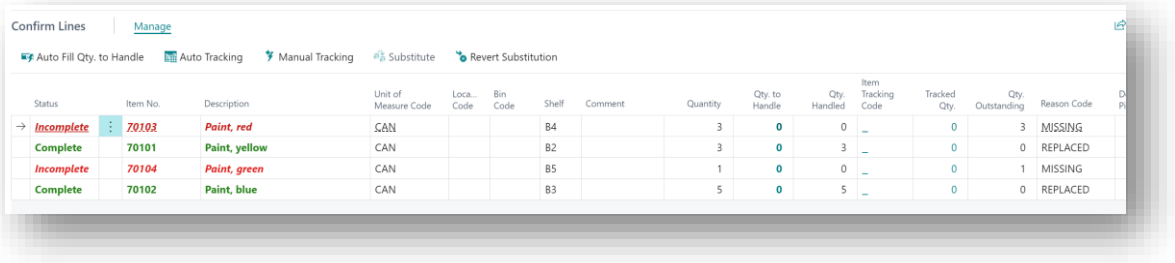


Figure 8-26

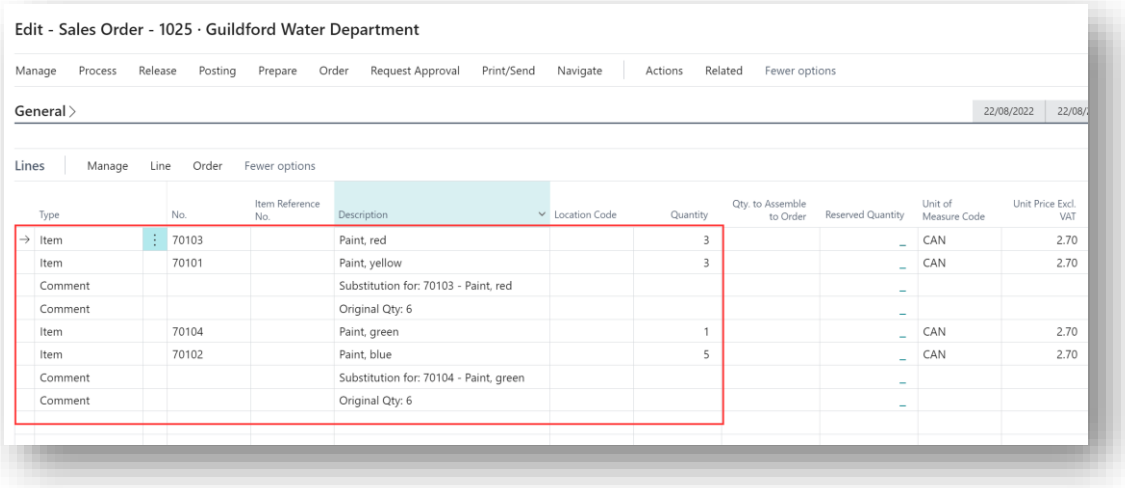


Figure 8-27

8.10.7 Revert Substitution

Choosing this action reverses the substitutions made on the Confirm Job.

8.11 Job History

When the Jobs are shipped, they are archived to the Job History. The Job History table records details of the Jobs that were shipped, allowing the store manager to query pick information such as viewing how many picks were completed in a day. The amount of Pick Shorts/Pick Issues over a certain time frame can also be determined from the Job History*(Figure 8-28)*.

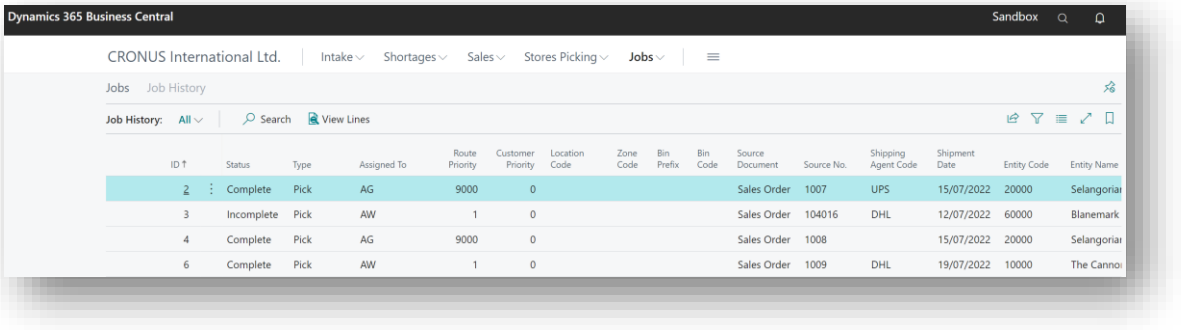


Figure 8-28

The **View Lines** action can be chosen from the menu on the Job List Page *(Figure 8-29)*.

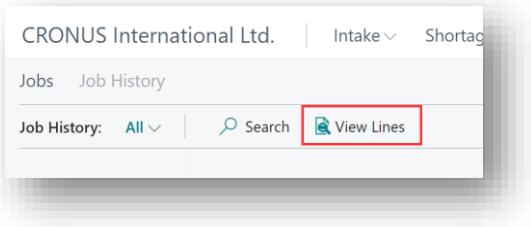


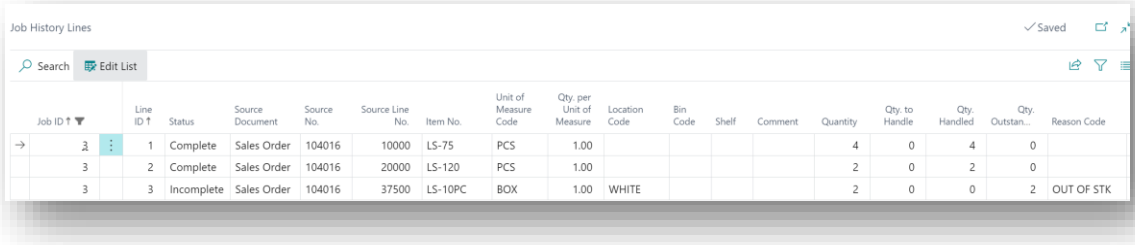
Figure 8-29

8.11.1 View Lines

Choose this action to display the Archived Job Lines for the corresponding Archived Job Header *(Figure 8-30)*.

The store manager can log and track any Pick Issues that may have happened on the Pick Lines and record the Solution to the Pick Issue.

The logged Error Reasons and the Solution Reasons are used to provide report metrics for reports on Pick Errors by Customer, Pick Errors by Item, Pick Errors by Picker, and Pick Errors by Reason Code.



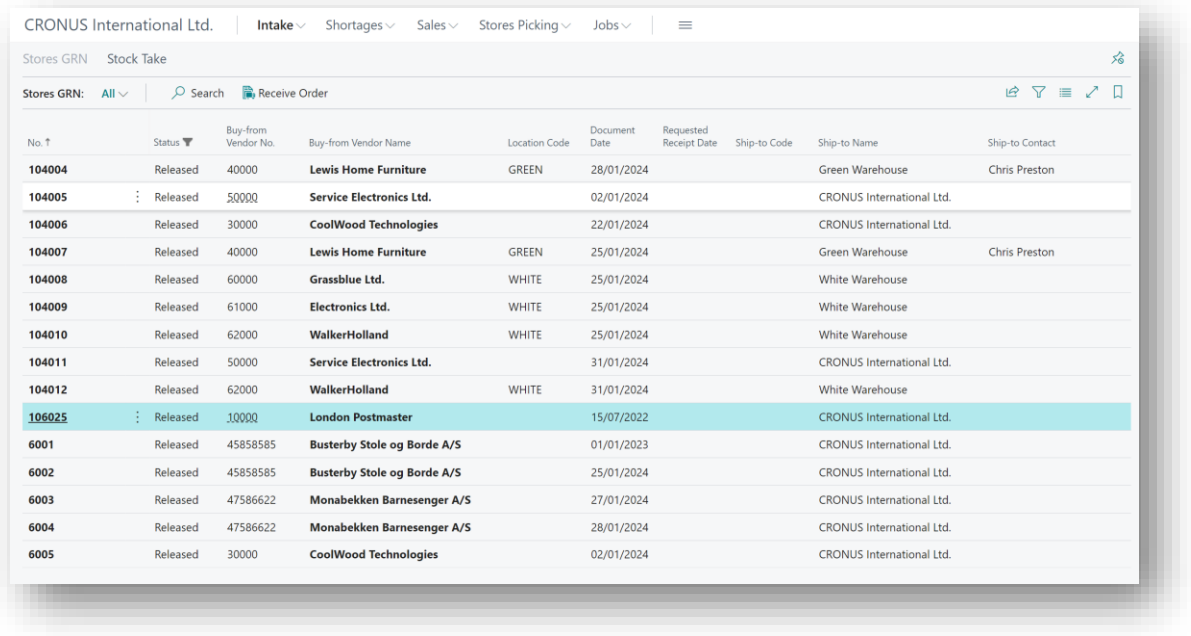
Job ID	Line ID	Status	Source Document	Source No.	Source Line No.	Item No.	Unit of Measure Code	Qty. per Unit of Measure	Location Code	Bin Code	Shelf	Comment	Quantity	Qty. to Handle	Qty. Handled	Qty. Outstan...	Reason Code
3	1	Complete	Sales Order	104016	10000	LS-75	PCS	1.00					4	0	4	0	
3	2	Complete	Sales Order	104016	20000	LS-120	PCS	1.00					2	0	2	0	
3	3	Incomplete	Sales Order	104016	37500	LS-10PC	BOX	1.00	WHITE				2	0	0	2	OUT OF STK

Figure 8-30

8.12 Stores GRN

The **SD Stores Manager Purchase List** is accessed from the **SD Stores Manager** Role Centres or by searching the **Tell Me**. To view only released purchase orders in this list, select the **List Only Released POs** option in the **SD Stores Manager Setup**.

The following standard fields from the Microsoft Dynamics 365 Purchase Header Table are displayed on the **SD Stores Manager Purchase List** *(Figure 8-31)*:



No.	Status	Buy-from Vendor No.	Buy-from Vendor Name	Location Code	Document Date	Requested Receipt Date	Ship-to Code	Ship-to Name	Ship-to Contact
104004	Released	40000	Lewis Home Furniture	GREEN	28/01/2024			Green Warehouse	Chris Preston
104005	Released	50000	Service Electronics Ltd.		02/01/2024			CRONUS International Ltd.	
104006	Released	30000	CoolWood Technologies		22/01/2024			CRONUS International Ltd.	
104007	Released	40000	Lewis Home Furniture	GREEN	25/01/2024			Green Warehouse	Chris Preston
104008	Released	60000	Grassblue Ltd.	WHITE	25/01/2024			White Warehouse	
104009	Released	61000	Electronics Ltd.	WHITE	25/01/2024			White Warehouse	
104010	Released	62000	WalkerHolland	WHITE	25/01/2024			White Warehouse	
104011	Released	50000	Service Electronics Ltd.		31/01/2024			CRONUS International Ltd.	
104012	Released	62000	WalkerHolland	WHITE	31/01/2024			White Warehouse	
106025	Released	10000	London Postmaster		15/07/2022			CRONUS International Ltd.	
6001	Released	45858585	Busterby Stole og Borde A/S		01/01/2023			CRONUS International Ltd.	
6002	Released	45858585	Busterby Stole og Borde A/S		25/01/2024			CRONUS International Ltd.	
6003	Released	47586622	Monabekken Barnesenger A/S		27/01/2024			CRONUS International Ltd.	
6004	Released	47586622	Monabekken Barnesenger A/S		28/01/2024			CRONUS International Ltd.	
6005	Released	30000	CoolWood Technologies		02/01/2024			CRONUS International Ltd.	

Figure 8-31

- **No.** – The Purchase Order No., as per standard Microsoft Dynamics 365 Business Central.
- **Status** – The Status of the Purchase Order. Options are as per standard Microsoft Dynamics 365 Business Central - **Open**, **Released**, **Pending Approval**, **Pending Prepayment**.
- **Buy-from Vendor No.** – The Buy-from Vendor No. on the Purchase Order.
- **Buy-from Vendor Name** – Displays the Name of the Buy-from Vendor No. on the Purchase Order.
- **Location Code** - Displays the Location Code on the Purchase Order.
- **Document Date** - The Document Date on the Purchase Order.

- **Requested Receipt Date** - The Requested Receipt Date on the Purchase Order.
- **Ship-to Code** - The Ship-to Code on the Purchase Order.
- **Ship-to Name** - The Ship-to Name on the Purchase Order.
- **Ship-to Contact** - The Ship-to Contact on the Purchase Order.
- **Purchaser Code** - The Purchaser Code on the Purchase Order.
- **Assigned User ID** - The Assigned User ID on the Purchase Order.

The following action is available on the **SD Stores Manager Purchase List** *(Figure 8-32)*.

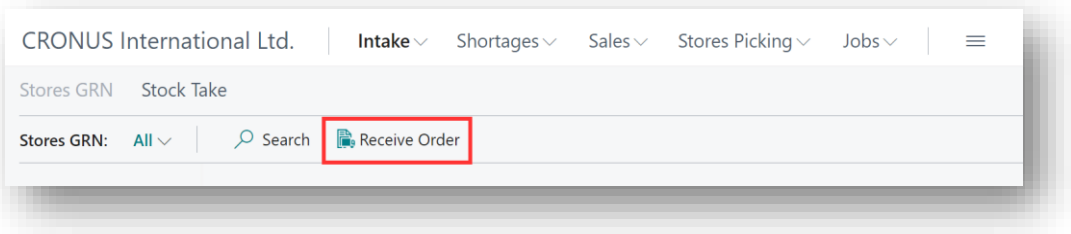


Figure 8-32

8.12.1 Receive Order

Choosing this action opens the **SD Stores Manager Purchase Order** which is a simplified version of the standard Microsoft Dynamics 365 Business Central Purchase Order page. This page has a reduced number of fields and FastTab groups and displays only the fields and FastTab groups of relevance to stores personnel.

In this page, on the purchase header, users can only update the Vendor Order No, the Vendor Shipment No, the Posting Date and the Location Code.

On the purchase lines users can only update the Qty. to Receive, the Location Code and the Bin Code from this page. Users cannot add additional lines to the purchase order or change the Item Nos on the purchase lines.

The fields and functionality in in the **SD Stores Manager Purchase Order** are as per standard Microsoft Dynamics 365 Business Central.

8.13 Stock Take

The standard Microsoft Dynamics 365 Business Central **Physical Inventory Journal** can be accessed from the **SD Stores Manager Role Centre**. From the **Intake** menu group, choose **Stock Take** *(Figure 8-33)*.

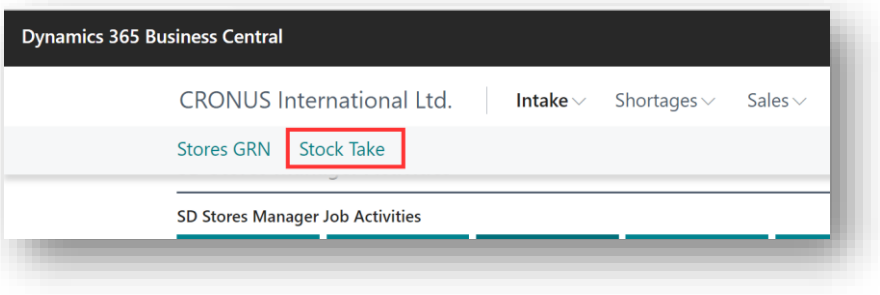


Figure 8-33

8.14 SD Stores Manager Reports and KPI pages

The following reports and pages are available from the **SD Stores Manager – Manager Role Centre,** from the **Shortages** menu group *(Figure 8-34)*.

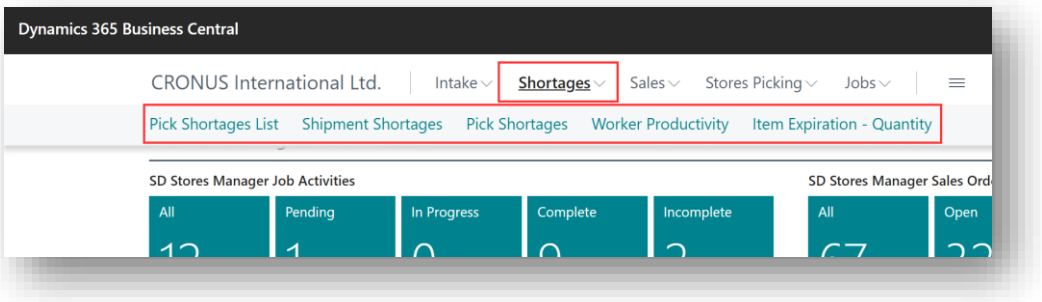
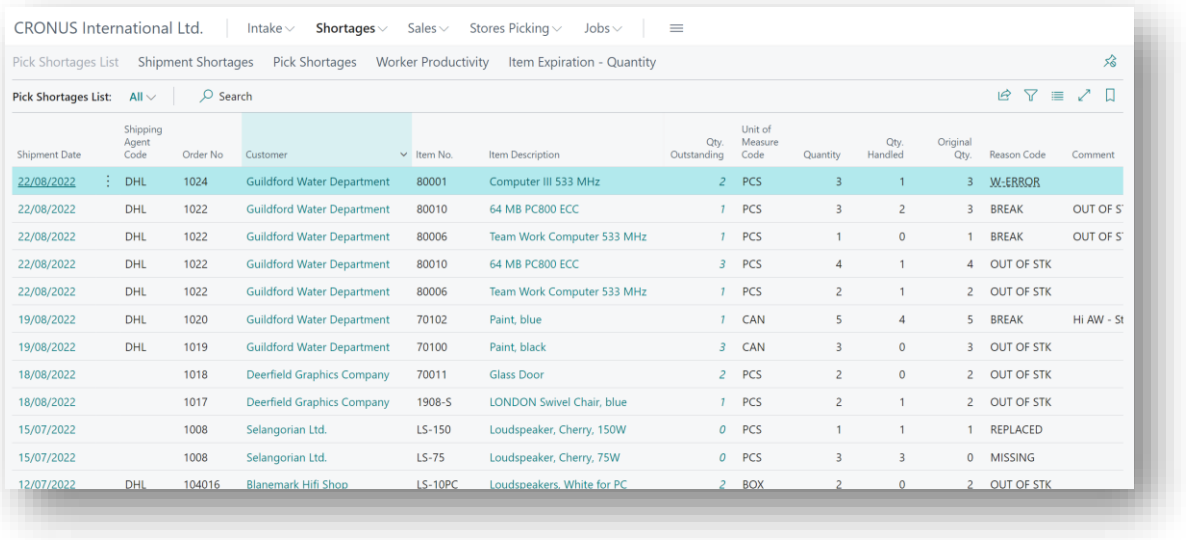


Figure 8-34

8.14.1 Pick Shortages List

Choosing this action opens the Pick Shortages List. This page displays details from the Job History line and details of shortages and substitutions on picks are displayed *(Figure 8-35)*.



Shipment Date	Shipping Agent Code	Order No	Customer	Item No.	Item Description	Qty. Outstanding	Unit of Measure Code	Quantity	Qty. Handled	Original Qty.	Reason Code	Comment
22/08/2022	DHL	1024	Guildford Water Department	80001	Computer III 533 MHz	2	PCS	3	1	3	W-ERROR	
22/08/2022	DHL	1022	Guildford Water Department	80010	64 MB PC800 ECC	1	PCS	3	2	3	BREAK	OUT OF S
22/08/2022	DHL	1022	Guildford Water Department	80006	Team Work Computer 533 MHz	1	PCS	1	0	1	BREAK	OUT OF S
22/08/2022	DHL	1022	Guildford Water Department	80010	64 MB PC800 ECC	3	PCS	4	1	4	OUT OF STK	
22/08/2022	DHL	1022	Guildford Water Department	80006	Team Work Computer 533 MHz	1	PCS	2	1	2	OUT OF STK	
19/08/2022	DHL	1020	Guildford Water Department	70102	Paint, blue	1	CAN	5	4	5	BREAK	Hi AW - St
19/08/2022	DHL	1019	Guildford Water Department	70100	Paint, black	3	CAN	3	0	3	OUT OF STK	
18/08/2022		1018	Deerfield Graphics Company	70011	Glass Door	2	PCS	2	0	2	OUT OF STK	
18/08/2022		1017	Deerfield Graphics Company	1908-S	LONDON Swivel Chair, blue	1	PCS	2	1	2	OUT OF STK	
15/07/2022		1008	Selangorian Ltd.	LS-150	Loudspeaker, Cherry, 150W	0	PCS	1	1	1	REPLACED	
15/07/2022		1008	Selangorian Ltd.	LS-75	Loudspeaker, Cherry, 75W	0	PCS	3	3	0	MISSING	
12/07/2022	DHL	104016	Blanemark Hifi Shop	LS-10PC	Loudspeakers, White for PC	2	BOX	2	0	2	OUT OF STK	

Figure 8-35

8.14.2 Shipment Shortages

Choosing this action prints a report that details the shipment shortages by identifying incomplete lines on the Job History Detail.

8.14.3 Pick Shortages

Choosing this action prints a report that details the pick shortages by reporting on incomplete lines on the Job Lines. This report is based on current Job Lines.

8.14.4 Worker Productivity

Choosing this action prints a report that details the worker's productivity.

The following reports and pages are available from the **SD Stores Manager – Manager Role Centre,** from the **Stores Picking** menu group *(Figure 8-36)*.

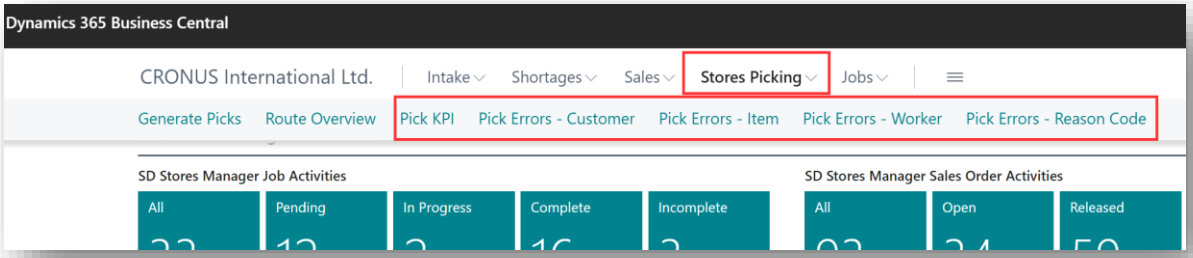


Figure 8-36

8.14.5 Pick KPI

Choosing this action opens the Pick KPI List. This page allows you to query information on the Picks Created, Picks Completed and Picks Shorted by location code. You can enter a Start Date and End Date to filter on the records returned.

8.14.6 Pick Errors – by Customer

Choosing this action runs a report detailing pick errors grouped by Customer.

8.14.7 Pick Errors – by Item

Choosing this action runs a report detailing pick errors grouped by Item.

8.14.8 Pick Errors – by Worker

Choosing this action runs a report detailing pick errors grouped by Worker.

8.14.9 Pick Errors – by Reason Code

Choosing this action runs a report detailing pick errors grouped by Reason Code.

9 Third Party Integration - Published Events in SD Stores Manager

There are five Business Events published in SD Stores Manager:

a. OnBeforeCreatePickJobHeader
b. OnAfterCreatePickJobHeader
c. OnBeforeAppendPickJobLine
d. OnAfterAppendPickJobLine
e. OnBeforeRequestCinfirmJob

Dynamics Shop

IT Simply Makes Business Sense with Microsoft Dynamics 365

Simply Dynamics has been delivering complex and custom Dynamics 365 Projects and Support since 2007. Now servicing clients in over 18 countries.

DynamicsShop delivers Dynamics 365 enhancements through App's and as SAAS solutions to bring next level automation to your Dynamics 365 Solution.

DynAzure delivers cloud only, low cost & standardised model rapid deployment Dynamics 365 Projects and support utilising standard features and enhanced Apps.

Dublin Location

Unit 4, 4075 Kingswood Rd,
Citywest Business Campus,
Dublin, D24 H972, Ireland
Get Directions

+353 1 687 6600

info@simplyd.ie