

WAREHOUSE LAYOUT

FOR MICROSOFT DYNAMICS® 365 FOR FINANCE
AND OPERATIONS



Course Details	3
Audience	3
At Course Completion	3
Registration and Payment	3
Refund Policy	3
Prerequisites	3
Participant Requirements	3
Technology Requirements	4
Course Outline	5
Module: Warehouse Setup	5
Module: Warehouse Detail and Layout	5
Module: Location Types	5
Module: Location Formats	5
Module: Dock Management Profile	6
Module: Location Profiles	6
Module: Zones and Zone Groups	6
Module: Locations	6
Module: Location Stocking Limits	6

Course Details

This eLearning course is designed to discuss the layout of a typical warehouse and the use of the elements in Microsoft Dynamics 365 for Finance and Operations to set up and categorize warehouse functionality.

AUDIENCE

- Warehouse manager
- Warehouse worker
- Materials manager
- Shipping and receiving

AT COURSE COMPLETION

At course completion, participants will have an understanding of:

- The features and layouts of warehouses.
- Using warehouse management to create warehouses.
- How to set up location types, forms, and profiles.
- Working with zones and zone groups.

REGISTRATION AND PAYMENT

You can register for a course online at academy.rsmus.com by browsing the catalog and selecting courses to add to your cart. You can also email your request to academy@rsmus.com.

Payment must be received and verified before you can gain access to the course content. When purchasing through our website, all payments are made through PayPal. You can use an existing PayPal account to pay with your credit card or other method of payment configured in your PayPal account. If you do not have a PayPal account, you can use the guest check out feature to use your credit card to pay. If you prefer to pay by using another method of payment, please contact us at academy@rsmus.com to make arrangements. We cannot guarantee all methods of payment will be accepted but we will try to accommodate your requests.

REFUND POLICY

Once an eLearning course has been purchased, no refunds will be provided. If you have any questions about this policy, you may contact us at by clicking the Support button on our site or email us at academy@rsmus.com. Formal complaints or errors found in the content should be reported in writing to academy@rsmus.com. Complaints will be reviewed to determine what action needs to be taken.

Prerequisites

PARTICIPANT REQUIREMENTS

Students attending this section of the course should have a basic understanding of:

- General knowledge of Microsoft® Windows®
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- General knowledge of basic navigation within Dynamics 365 for Finance and Operations
- Basic knowledge of warehouse management concepts

TECHNOLOGY REQUIREMENTS

- The site has been optimized for Internet Explorer. Although other browsers may work, it is recommended that you use Internet Explorer for the best experience.
 - Silverlight must be installed in order to use the practices.
 - A screen resolution with a minimum of 1024x768 is recommended. You can use full screen icons within the eLearning to maximize your view. A smaller resolution may result in content being cut off from your screen.
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Course Outline

MODULE: WAREHOUSE SETUP

Before you can begin to use the new warehouse management functionality, you must enable the warehouse management processes. After you have enabled the warehouse management processes, additional setups can be completed for general parameters, number sequences, locations, work, and so on. Please note that traditional warehousing where no automatic pick and put away rules exist do not require this step for warehouse setup.

Lessons

- Sample warehouse layout

MODULE: WAREHOUSE DETAIL AND LAYOUT

This lesson explains how to set up the parameters that are used to create a warehouse location, such as location types, location formats, dock management profiles, location profiles, and warehouse zones.

Lessons

- Warehouse details and layout

MODULE: LOCATION TYPES

Location types are used to describe or define the locations your warehouse will be using.

Lessons

- Location types

MODULE: LOCATION FORMATS

Location formats allow you to define the numbering system for your warehouse. In the Warehouse layout diagram that we reviewed with our case, you saw that there are several different locations, and we have defined those in our location types. These can have a unique formatting depending on whether you use aisles, racks, bins, and/or shelves.

Lessons

- Create location formats
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MODULE: DOCK MANAGEMENT PROFILE

Dock management profiles are optional and we will not create any for our case study. However, you can set up a dock management profile and assign it to a location profile to manage the mixing of inventory at specific warehouse locations. For example, when you stage product into a staging location, may you only want one order to be staged in each staging lane. You can define a dock management profile to allow this. Other options include segregating by shipment ID, load ID, order number, wave ID, and work order type.

Lessons

- Create dock management profile

MODULE: LOCATION PROFILES

Location profiles allow you to define attributes for a group of locations such as license plate control. The location allows you to select if mixed items, mixed inventory status, and mixed batches can be present, and it also controls whether cycle counting is allowed.

Lessons

- Create location profiles

MODULE: ZONES AND ZONE GROUPS

Warehouse management uses a concept of zones which allows you to categorize or group like locations into a zone. Zones can be particularly useful for allocating product based off a zone area. You can also group zones together for reporting purposes.

Lessons

- Create zones and zone groups

MODULE: LOCATIONS

Inventory locations are used to track the whereabouts of your inventory in the warehouse. You can manually create locations or use a wizard to generate locations en masse. Use the Locations form to create a warehouse location. The Locations form for Advanced Warehouse Management is different from the Locations form used in Warehouse Management II available in previous releases of Dynamics 365 for Finance and Operations.

Lessons

- Create locations manually
- Create locations with Location wizard

MODULE: LOCATION STOCKING LIMITS

You can create location stocking limits to define the maximum amount of product that can be stored in a particular location. For example, bulk locations can hold three pallets, while picking locations can hold ten cases, and dock doors and staging locations have no limits.

Lessons

- Create location stocking limits
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