



Deep Dive into New Warehouse Management Functionality in R3

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Customer Connect 2014

Innovate. Invigorate. Inspire.

Agenda

WMS Feature Overview

WMS Setup Overview

WMS Functionality Demonstrations



Objectives

- **Review Microsoft Dynamics Warehousing (& Transportation) modules**
 - New for 2012 R3 – IP was acquired from Microsoft partner
 - Brings best-of-breed functionality to AX for warehousing and transportation management
- Provide a “**HIGH LEVEL**” overview of the AX Warehousing modules to introduce some of the system capabilities prior to gathering requirements.
- **The result of this overview should be to give you a better understanding of the capabilities of base WMS functionality**
 - A key take-away is the vocabulary / terms used in Warehouse Management
 - Understand the various modules / ISV's that support distribution and fulfillment operations



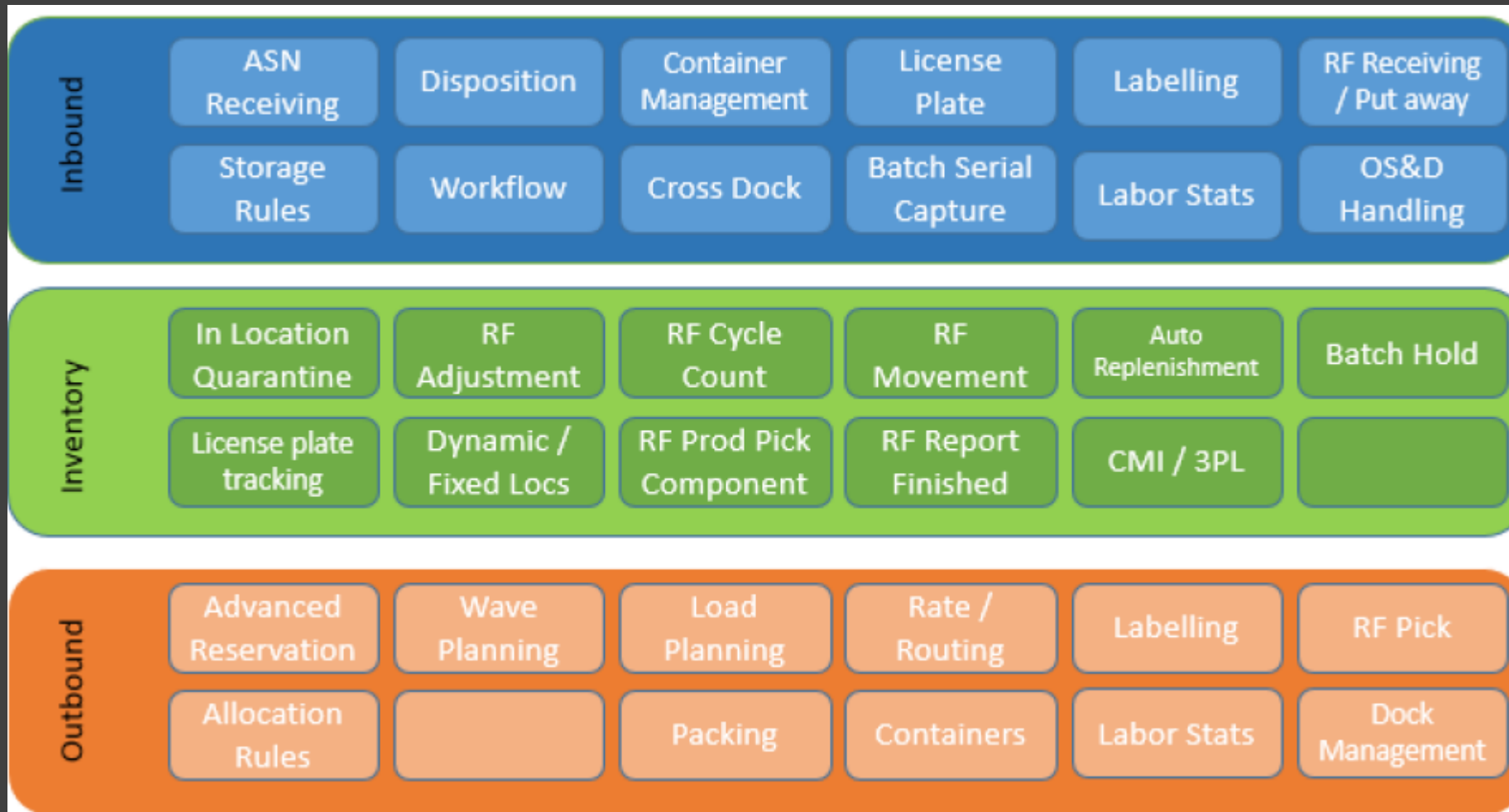
Session Sponsor Introduction – MT Mobility



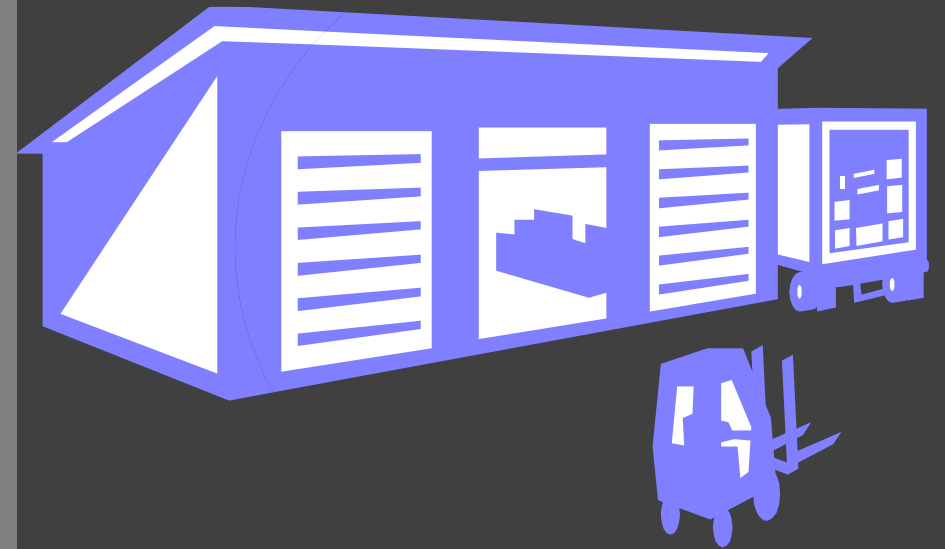
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Overview of WMS & TMS Functionality



WAREHOUSE SETUP IN AX



Warehouse Setup

General Warehouse Parameters

- Number Sequences for Warehouse Management

Warehouse Setup (Locations)

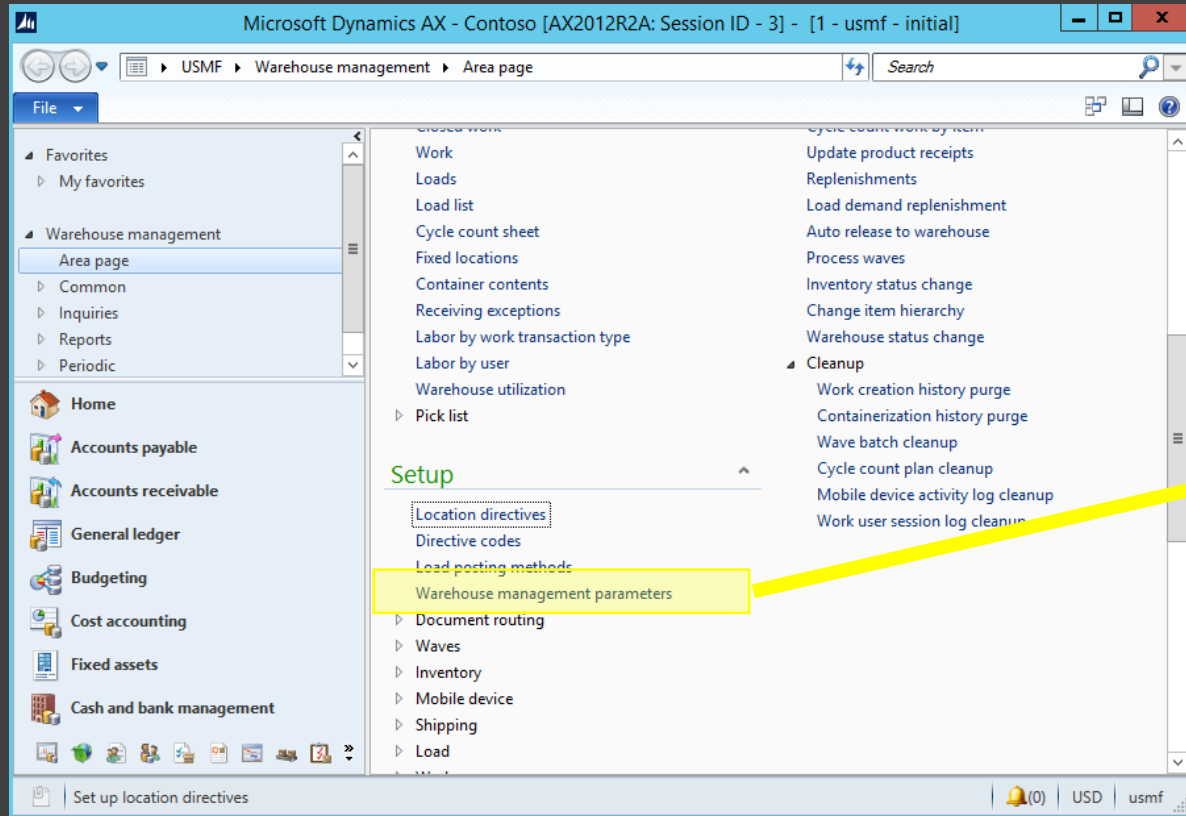
- Set up parameters to create locations

Other configurations

- Reservation Hierarchies
- Unit Sequence Groups
- Work Pools
- Label Printing
- Work Templates
- Location Directives



Warehouse Parameters Setup



Warehouse management parameters (1 - usmf)

File > General

Set up parameters for Warehouse management

Company information

GS1 company prefix:

Location profiles

User location:

Location types

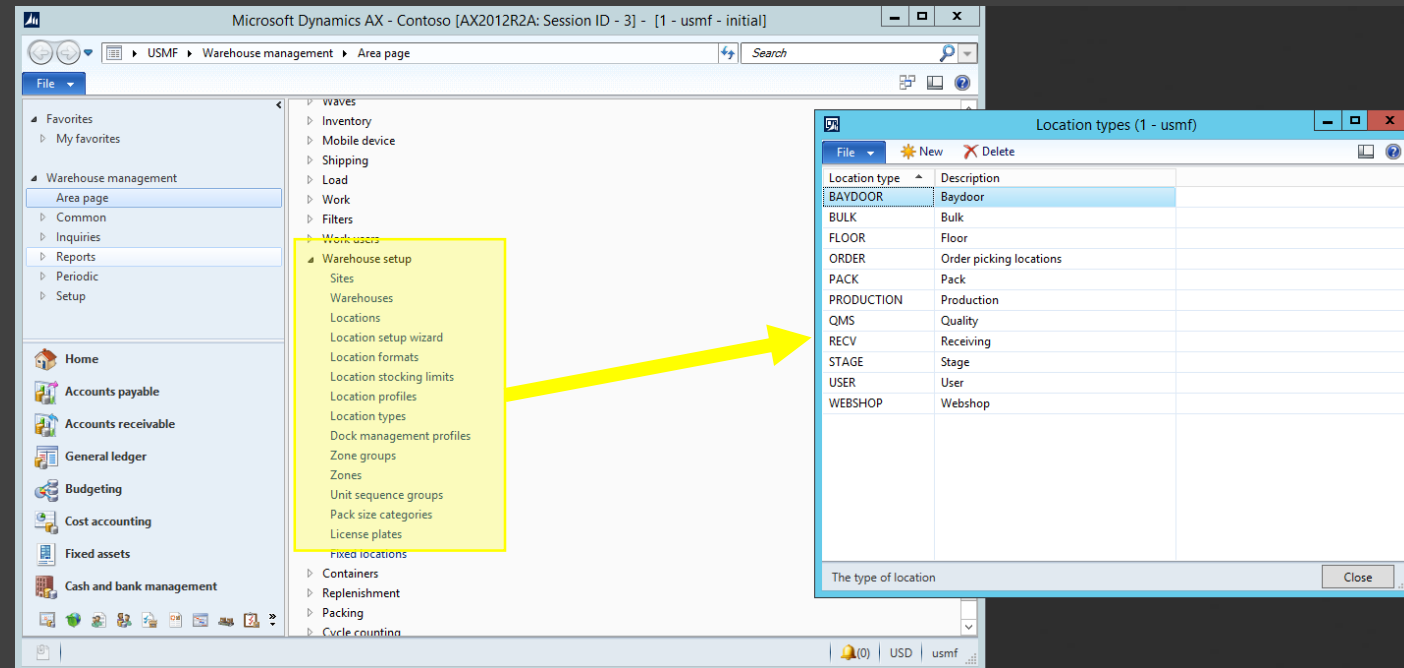
Staging location type:

Final shipping location type:



Warehouse Setup - Locations

- Location Types
 - Two mandatory (Stage / Shipping)
- Location Format
- Dock Management Profile
 - Assigned to location profiles
- Location Profile
 - Specify attributes of locations
- Warehouse Zone / Zone Groups
 - Mainly for reporting
- Create Locations
 - Check digits

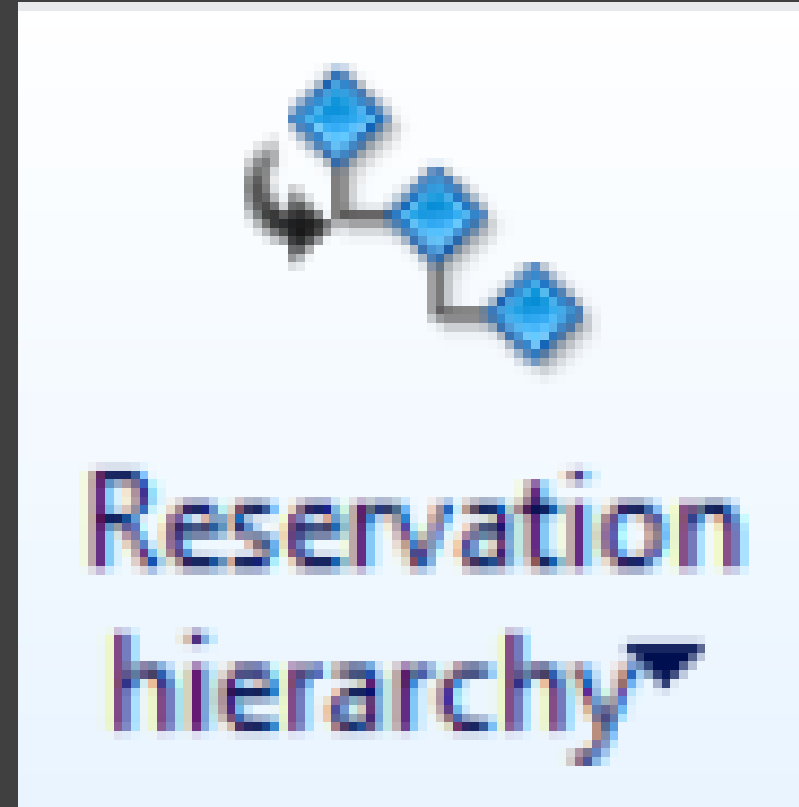


WMS ITEM SETUP



Item Setup - Reservation Hierarchy

- Automatic information retrieval
- Order elements in hierarchy
- Dimensions required by order entry
- Inventory reservation hierarchy
- Assigning to released products
- Changing for items w/ transactions
- Storage dimension groups
- (Opt) Tracking dimension groups



Item Setup – Unit Sequence Group

- P.I.M. maintains primary unit
- Within WMS, manage sequence
- Define how product should be grouped on license plates
 - Example of receiving 220
 - 1 each, 10 / case, 100 / pallet
- Define unit for cycle counting
- P.I.M. WMS setup

The screenshot shows a software window titled "Unit sequence groups (1 - usmf)". It has a menu bar with "File", "New", and "Delete". Below the menu bar is a table with two columns: "Unit sequence group ID" and "Name". The table contains three rows: "Ea PL", "Ltr PL", and "Pcs". The "Ea PL" row is selected. To the right of the table are two input fields: "Unit sequence group ID:" and "Name:", both containing "Ea PL". Below these is a section titled "Line details" with a sub-menu bar containing "New" and "Delete". Inside this section is a table with three columns: "Line number", "Unit", and "License pl:". The table contains two rows: "1.0000000000" with "ea" and "0", and "2.0000000000" with "PL" and "0". At the bottom of the window is a status bar with the text "The ID of the unit sequence group" and a "Close" button.

Unit sequence group ID	Name
Ea PL	Ea PL
Ltr PL	Ltr PL
Pcs	Pcs

Unit sequence group ID: Ea PL
Name: Ea PL

Line details

Line number	Unit	License pl:
1.0000000000	ea	0
2.0000000000	PL	0

The ID of the unit sequence group

Close



WORK POOLS & TEMPLATES, MOBILE DEVICE SETUP, & OTHER SETUPS



Work Pools & Work Templates

WORK POOLS

- Work pools help organize work into groups
 - For all work types except counting, we can assign a pool to a template
- If you use work templates to create work, the work pool is automatically assigned
 - Mobile device (user setup)
- Work pools can also be assigned using “LOCATION DIRECTIVES”

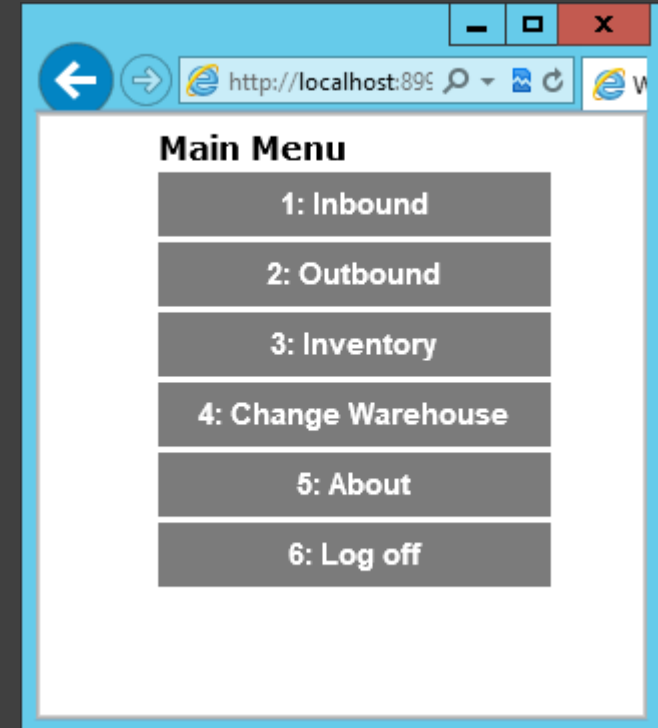
WORK TEMPLATES

- Used to create and process work
 - Should be specified in pairs (e.g. pick and put)
- Typically setup for:
 - Inbound transactions
 - Picking
 - Inventory transfers
 - Replenishments



Mobile (RF) Device Setup

- Define work classes
- Setup mobile device menus
- Setup users for mobile access



Label Printing

- Enable workers to print or reprint labels
- Must setup one or more document routing layouts
- Print commands for printing barcodes (e.g. ZPL, ZPL II)
- Document routing manages creation of paperwork with work
 - Document routing defines several factors
- Can add print step to work templates for each type of work order
- Allowing mobile devices to print / reprint labels
 - NOTE: if print label is selected in work template, labels are always printed



Location Directives



- Location Directives (Rules) help dictate how:
 - Incoming product is put away
 - How outbound product is picked and staged
 - How replenishment of forward pick locations will occur
- Pre-Req's:
 - Using Warehouse Mgmt Processes
 - Create Locations, Location Types, Location Profiles, Location Formats
 - Create Sites, Zones, Zone Groups



DAY IN THE LIFE WITH WAREHOUSE MANAGEMENT



Main Warehouse Operations Support

- Inbound Operations & Put Away
 - Purchase Orders
 - Return Orders
 - Transfer Orders
 - Production Orders and Kanban (not covered in this session)
- Outbound Operations Picking
 - Sales orders
 - Transfer orders
 - Production orders and Kanban (not covered in this session)
- Inventory Operations
 - Movements
 - Replenishment (Min / Max & and On-Demand at Order Release)
 - Cycle Counting (Schedule Plans & Thresholds, e.g. Zero Qty Cycle Counts)
 - Adjustment
 - Inventory Status Change - Blocking



Summary of New Feature Sets

- License plate (LP) – Inbound, Outbound, Inventory
 - Replaces Pallet ID
- Location Directives – Inbound, Outbound, Inventory
- Wave Templates – Outbound
- Work Templates – Inbound, Outbound, Inventory
- RF Menu Configurations – Inbound, Outbound, Inventory
- Replenishment templates – Inventory
- Load Planning Workbench – Inbound, Outbound
- Inventory Status Dimension – Inbound, Outbound, Inventory



DEMONSTRATIONS



OPEN FORUM / QUESTIONS?

