



End User Training Summary

An overview of Warehouse Insight for End Users

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1 Overview

The end user training for the Insight Works' Warehouse Insight add-on for Dynamics 365 Business Central will provide an overview of the various modules within the software, with the aim of allowing end users to begin testing and using the software immediately after completion of the training. A Typical training session will run for two hours.

This will include a walk through on:

- Receiving against Purchase Orders, Transfer Orders and Warehouse Receipts
- Shipping from a Sales Order or warehouse shipment
- Picking an order prior to shipping
- Putting away an order after it has been received
- Moving items from bin to bin within the warehouse
- Palletizing items together for adding to documents in bulk
- Looking up additional information relating to both Items and Bin Contents

These topics provide a basic set of procedures to follow to be able to use the scanners to record information directly onto the various Business Central documents and gives end users a starting point to begin testing the software using their normal warehouse processes.

Further training is also available for the Inventory Count module upon request.

2 Training Breakdown

- Introduction – 15 Minutes
- Item/Bin Inquiry – 10 Minutes
- Receiving – 20 Minutes
- Put-Aways – 15 Minutes
- Movements – 15 Minutes
- Picking - 10 Minutes
- Shipping - 5 Minutes
- License Plating - 15 Minutes
- Consumption / Output - 15 Minutes
- Inventory Count (as time permits)

Due to variances in installations, not all topics may require discussion and some topics may require additional time due to specific questions and needs. If required, additional training can be scheduled.

2.1 Introduction

Users will be shown the relationship between the PDA Configuration and how the scanner behaves, how to configure the scanner to point to different Locations, as well as the various sections of the Warehouse Insight product within Business Central. Customization options will also be discussed, as well as barcoding formats for the warehouse.

2.2 Item / Bin Inquiry

A demonstration relating to the Inquiry module will focus on how to get quick information on Items within the warehouse, as well as Bin Contents, right from the scanner, and the drilldown capability from the other modules.

2.3 Receiving

Information on how the Receiving module ties back to the different types of Business Central Receiving documents will be discussed. A demonstration to fully receive a Purchase Order or Warehouse Receipt using the scanner will be performed, followed by a review of further configuration options available within the module.

2.4 Put-Aways

After goods have been received into the warehouse, a demonstration of how to put those goods away will be given, which will include showing the configuration options available within the module.

2.5 Movements

A bin to bin move will be demonstrated as well as a brief discussion on best practices and common issues that may arise as it relates to batch naming within the Reclass Journal.

2.6 Picks

Once a Pick document has been created from within Business Central, users will be shown how to pick items for shipping, using the scanner. Various ways to customize the Pick process such as changing bins, or splitting a line will also be discussed, as well as further configuration options available within the module.

2.7 Shipping

A short demonstration on the shipping process will be given, followed by a discussion relating to configuration options for the module including streamlining the shipping process when shipping and picking are not separated within the warehouse.

2.8 License Plating

Configuring License Plating within Business Central will be touched on, as well as a demonstration on using a License Plate directly from the scanner and from within some of the other modules. Users will then be shown how to Move a License Plate within the warehouse.

2.9 Consumption / Output

For instances where the Production module will be used, a brief demonstration of recording both Consumption and Output will be given.

2.10 Inventory Count

Training for the Inventory Count module is generally handled in a separate one hour training session. However, if time permits, a brief overview of the module will be demonstrated.