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Quality Management with WMS in D365 F&SC

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Agenda

- Introduction
- Quality management with WMS scenarios
- Walk through configuration of scenarios
- Demo scenarios in Dynamics 365
- Q&A



Introduction



D365 Quality Management Processes



[Source: Microsoft Learn](#)

Scenarios

- Receipt requires mandatory quality order
- Receipt requires quality check, order on failure
- Receipt requires inventory segregation, no QMS in use



Mandatory quality order on receipt

WMS Configurations

- Quality item sampling (to QA)
- Quality order (from QA)

For both:

- Work classes
- Work templates
- Locations
- Location directives
- Mobile device menu items
- *Mobile device menu*

- Warehouse

QMS Configurations

- Test(s)
- Test variable(s)
- Test group(s)
- Item sampling(s)
- Quality association
- Test instruments (optional)



Configurations

Filter

Reference type	Item code	Item
Purchase	Group	Purchase
Production	Group	Production

Quality associations

Reference type	Item code	Item
Purchase	Group	Purchase

Conditions

Site	Account selection
2	<input type="text"/>
Applicable warehouse type	Resource code
Quality management for wareh...	All
Account code	Resource
All	<input type="text"/>

Process

Quality order process

Specifications

Test group	Effective
PASS/FAIL	<input type="text"/>
Item sampling	Expiration
100%	Never
Acceptable quality level	<input type="text"/>
100.00	



Configurations

Standard view ▾

Warehouses

Warehouse	Name
24	Site 2 - Warehouse Management

Hierarchy

Retail

Warehouse

Use warehouse management processes

Yes

Print BOL before confirming shipment

No

Work processing policy name

Auto update shipment

On quantity decrease

RESERVATIONS

Reserve only warehouse in production...

No

Reserve when orders are released by a...

Yes

Requirement for inventory reservation

Allow partial reservation

NEGATIVE INVENTORY

Financial negative inventory

No

Physical negative inventory

No

CYCLE COUNTING

REDUCE PICKED QUANTITY

Decrement load line

No

INVENTORY

Default inventory status ID

Available

Default container type

INVENTORY STATUS CHANGE

Remove reservations and markings

None

LABOR STANDARDS

Allow labor standards

No

Enable quality order for warehouse pr...

Yes

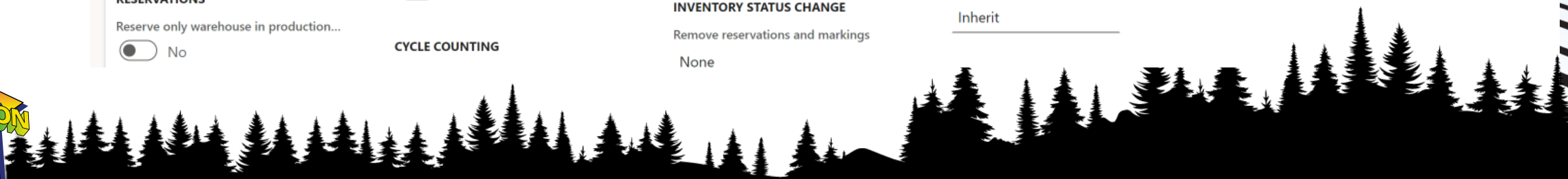
PRODUCTION ORDERS

Backflush must use reserved quantities

No

Posting method

Inherit



Configurations

Work templates

Standard view ▾

Work order type

Quality item sampling ▾

- Sales orders
- Raw material picking
- Finished goods put away
- Co-product and by-product put away
- Transfer issue
- Transfer receipt
- Inventory movement
- Canceled work
- Cycle counting
- Replenishment
- Return orders
- Kanban put away
- Kanban picking
- Counting discrepancies accepted
- Packed container picking
- Sorted inventory picking
- Cross docking
- Quality in quality check
- Quality item sampling
- Quality order

Work template description

QA SAMPLING

Work type Custom work type

↓ Move down Work line breaks

Filter

Work order type

Quality item sampling ▾

- Purchase orders
- Sales orders
- Raw material picking
- Finished goods put away
- Co-product and by-product put away
- Transfer issue
- Transfer receipt
- Inventory movement
- Canceled work
- Cycle counting
- Replenishment
- Return orders
- Kanban put away
- Kanban picking
- Counting discrepancies accepted
- Packed container picking
- Sorted inventory picking
- Cross docking
- Quality in quality check
- Quality item sampling
- Quality order

Standard view ▾

Location directives

Sequence number Name

1 Quality item sampling

Location directives

Work type Directive code

Put

Warehouse selection

Warehouse selection

All ▾

Lines

+ New Delete Move up Move down

	Sequence num...	From quantity	To quar
	1	0.00	999,999



Demo mandatory quality order



Quality Check on Receipt

WMS Configurations

- Quality in quality check
- Configurations needed:
- Quality check template
 - Work class
 - Work templates
 - QA check
 - Work template for PO or production
 - Location
 - Location directive
 - Mobile device menu item
 - *Mobile device menu*

QMS Configurations (optional if work only)

- Test(s)
- Test variable(s)
- Test group(s)
- Item sampling(s)
- Quality association (optional)
- Test instruments (optional)



Configurations

Filter

Work order type
Quality in quality check

Warehouse

Standard view

Location directives

Sequence number	Name
1	QA Check

Location directives

Work type	Directive c
Put	

Work templates

Standard view

Work order type
Quality in quality check

Overview General

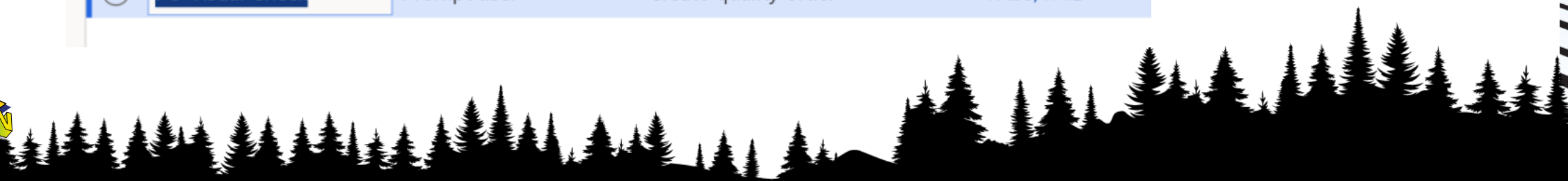
Sequence num...	Work template	Work template description
0	QA Check	

Quality check template

Standard view *

Filter

Quality check templa...	Acceptance policy	Quality processing policy	Test group
PO Visual Check	Prompt user	Create quality order	PASS/FAIL



Configurations

Standard view ▼

Work order type

Purchase orders ▼

Overview General

<input type="radio"/>	Sequence num...	Work template	Work template description	Valid	Automatically ...	Work pool ID	Work priority
<input checked="" type="checkbox"/>	5	24 PO Receipt with Q	24 PO Receipt with QA Check	✓			0
	6	24 PO Receipt	24 PO Receipt	✓			0

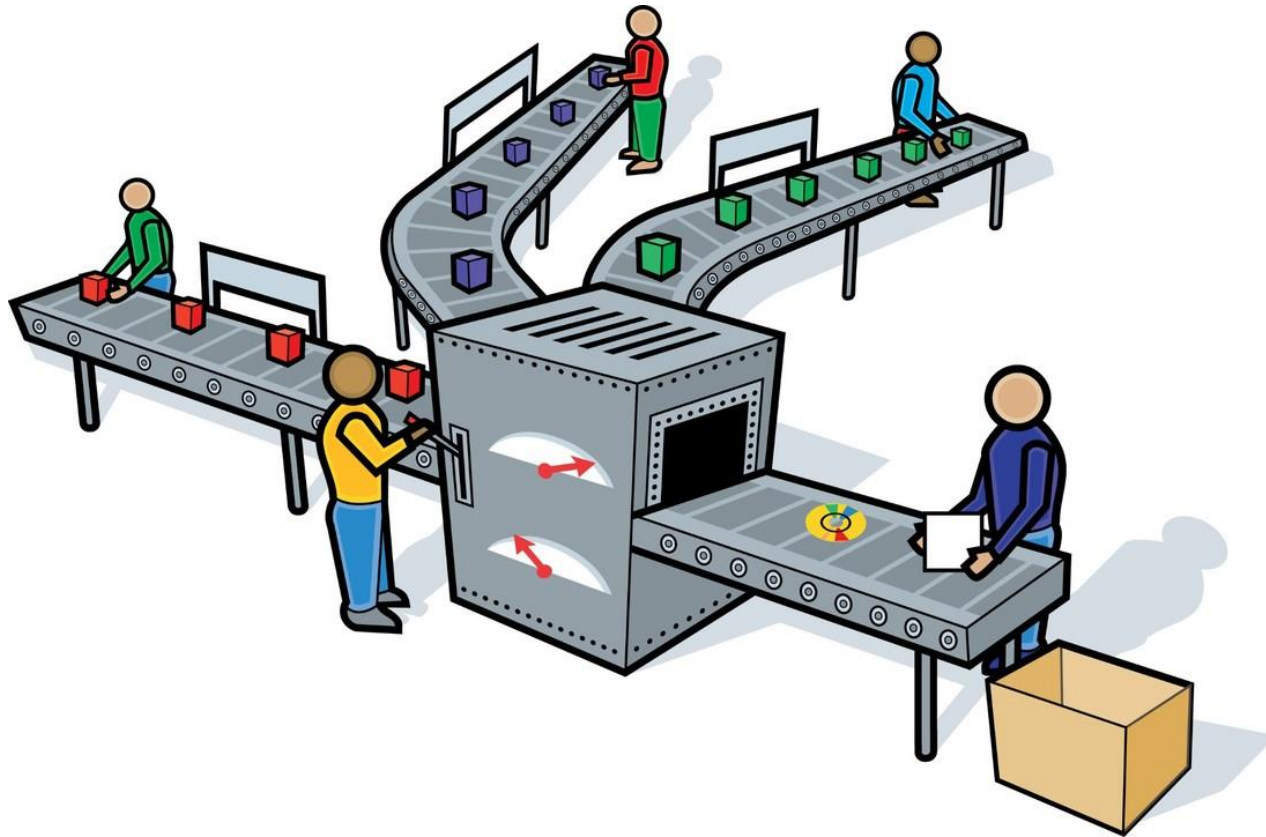
Work Template Details

[+ New](#) [Delete](#) [Move up](#) [Move down](#) [Work line breaks](#)

<input type="radio"/>	Line number	Work type	Custom work type	Mandatory	Stop work	Freeze	Directive code	Work class ID	Quality check template name
<input type="checkbox"/>	1.0000000000	Pick		✓				Purchase	
<input type="checkbox"/>	2.0000000000	Quality check		✓				Purchase	PO Visual Check
<input type="checkbox"/>	3.0000000000	Put		✓				Purchase	



Demo quality check during receipt



Receipt requires inventory segregation

WMS Configurations

- Work classes & templates are for normal PO or production receipt
- Inventory status
- Disposition code
- Mobile device menu item
- Location
- Location directive
- *Mobile device menu*



Configurations

Disposition codes

Standard view * ▾

Filter

Disposition code	Inventory status	Work template	Return disposition code
Available	Available		
QA Review	Quarantine		

Filter

Work order type

Purchase orders ▾

Warehouse

Sequence ... ↑ Name

- 2 24 QMS
- 3 24 PO Stage
- 4 24 PO Direct

Standard view ▾

Location directives

Sequence number Name
2 24 QMS

Location directives

Work type

Put

Directive code

Locate by

Item

Applicable disposition code

Exact match


Disposition code

QA Review

Scope

All

Configurations

Standard view 

Mobile device menu items

Menu item name	Title	Mode	Use existing work
Purchase Receive	Purchase Receive	Work	<input type="checkbox"/> No

General

Use default data

No

Work creation process

Purchase order item receiving

Use process guide

No

Barcode data policy

License plate grouping policy

License plate grouping

Generate license plate

Yes

Work template

Display disposition code

Yes

Display batch disposition code

No

Print label

Yes

Block receiving with ASN item informa...

No

Display container type

No

Assign putaway cluster

No

Deferred receiving policy ID



Demo disposition on receipt



Things to consider

- QA Check must be performed during the put-away work execution (LP grouping cannot be used for receive & put-away option)
- If <100% Sampling for quality order, work will be split between regular put-away and QA work
- Full blocking cannot be selected for quality associations set to quality management for warehouse processes (100% sampling would achieve the same)
- Quality order work does not allow “Consolidate” strategy





Questions?



Thank you!

Contact me at carol.sikes@argano.com