



2026  
**DYNAMICS**  
**CON**  
*Vegas*



**“Pick” simplicity, “Put”  
complexity aside:  
Warehouse Simplified**



# Andrew Trochinski

## Senior Consultant

## Tasklet Factory

[awt@taskletfactory.com](mailto:awt@taskletfactory.com)

[linkedin.com/in/troski/](https://linkedin.com/in/troski/)



# About Me...

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Started at 5 years old going to work with my dad in a warehouse full of office supplies and machines

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15 + years in the AX/F&O space; my first project was a 4.0 implementation in the distribution space

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20+ years working with Inventory/Warehouse/Logistics (not counting when I was 5 years old)

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My first Warehouse efficiency project took the cost per collate from \$1.10 down to \$0.76 (totals savings of approx. \$10,000 a day or \$2.5 million a year)

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I've worked in distribution, discrete production, process manufacturing, retail and everything in-between

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My passion is Inventory & Warehouse Management and helping businesses achieve success through efficient, simple business processes



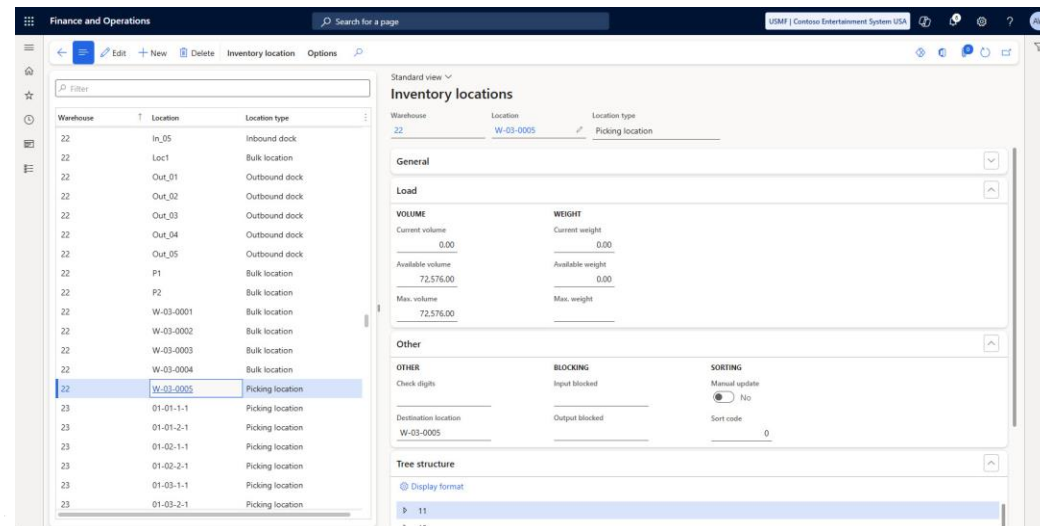
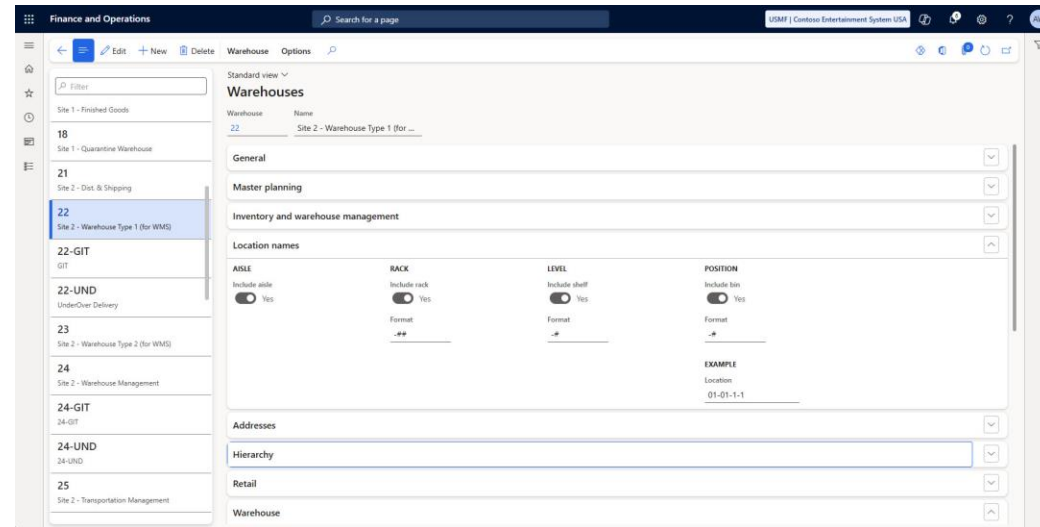
# Agenda

- Difference between Standard & Advanced
- What it takes to implement Standard vs. Advanced
- Resources to operate in Standard vs. Advanced
- Training and usage of Standard Warehouse Management
- Some real-life examples
- Tips & Tricks for success
- Making the right choice
- Q&A/Open Discussion



# Difference Between Standard & Advanced

- Easy Setup/Implementation
  - Warehouse
  - Aisles
  - Locations
- Easy to Train
- Ease of Maintaining
- Easy to Add New Locations & Warehouses
- Great starting spot your F&O journey



# Difference B

- Complex

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# Resources...

- Total Set up – 54 hours FTE – 2.5
- Warehouse Parameter Setup – 8 hours
- Warehouse Setup – 10 hours
- Receiving/Inbound Setup – 12 hours
- Shipping/Outbound Setup – 16 hours
- Inventory Count Setup – 8 hours



# Resources...

- Total Setup – 560 hours FTE – 5.5
- Warehouse Parameter Setup – 40 hours
- Warehouse Setup – 60 hours
- Receiving/Inbound Setup – 60 hours
- Shipping/Outbound Setup – 100 hours
- Inventory Counts Setup – 40 hours
- Template & Other Automation Setup – 180 hours
- Mobile Setup – 80 hours



# Training and usage...

- Time for training of standard – 15 hours total (approx..)
  - Warehouse workers
    - No real system interaction
    - Session on how new paperwork looks
  - Office/Admin worker
    - Session for generating pick lists
    - Session for posting pick lists
    - Session for correcting pick lists/unpicking
    - Session for generating packing slips
    - Session for correcting/canceling packing slips
  - Support
    - Session on setup of warehouses
    - Session on setup of items



# Training and usage...

- Time for training of advanced – 35 hours total time (approx..)
  - Warehouse workers
    - Lots of system interaction
    - Pretty ridged rules to follow
    - Must be very disciplined on keeping inventory accurate
  - Office/Admin worker
    - Need to understand how location directives work
    - Need to make sure inventory is accurate
    - Need to know how to deal with failed work
  - Support
    - In depth knowledge of warehouse management setups

# Training and usage...

- Defaults on Items

The screenshot displays the Microsoft Dynamics 365 Finance and Operations user interface. The top navigation bar includes 'Finance and Operations', a search bar, and the user profile 'USMF | Contoso Entertainment System USA'. The main menu shows 'Manage inventory' selected, with sub-menus for 'Warehouse', 'Quality', 'Packaging', 'Batch attributes', and 'Compliance'. The 'Warehouse items' sub-menu is highlighted with a red box. Below the menu, a list of items is shown, with 'TF-014 Fire Extinguisher' selected. The right-hand pane displays the 'Warehouse items' details for 'TF-014 : FireExtinguisher'. The details are organized into sections: 'General' (Item number: TF-014, Configuration, Color, Style, COUNTING: Counting group), 'INVENTORY DIMENSIONS' (Warehouse: 22, Size: 2, Version), 'Locations' (WAREHOUSE MANAGEMENT: Default receipt location W-03-0001, Default issue location W-03-0001; PICKING LOCATIONS: Picking location), and 'Counting status' (COUNTING STATUS).

# Training and usage...

- Defaults on Warehouse

The screenshot shows the 'Warehouse Options' page in Microsoft Dynamics 365 Finance and Operations. The page is titled 'Warehouses' and shows details for warehouse '22' (Site 2 - Warehouse Type 1 (for WMS)). The left sidebar contains a list of warehouses, with '22' selected. The main content area is divided into several sections:

- Inventory and warehouse management:** Contains fields for Default receipt location (Loc1), Default production input location, Default shipment maintenance location, Work processing policy name, Default location for sorting, Default issue location (Loc1), Issue status after raw material picking (Picked), Default location for credit only returns, Default quality maintenance location, and Counting reason code policy.
- Location names:** A section with a dropdown arrow.
- Addresses:** A section with a dropdown arrow.
- Hierarchy:** A section with a dropdown arrow.
- Retail:** A section with a dropdown arrow.
- Warehouse:** Contains various settings with radio buttons:
  - Use warehouse management processes: No
  - Reserve inventory at load posting: No
  - Print BOL before confirming shipment: No
  - Reserve when orders are released by a...: No
  - Work processing policy name: (empty field)
  - Requirement for inventory reservation: Not applicable
  - Auto update shipment: On quantity decrease
  - Release rule failure option for auto rel...: Warning and skip line
  - RESERVATIONS: (empty field)
  - NEGATIVE INVENTORY: (empty field)
  - CYCLE COUNTING: Allow license plate moves during cycle...: No
  - CHECK DIGITS: Use unique check digits: No
  - REDUCE PICKED QUANTITY: Decrement load line: No
  - INVENTORY STATUS CHANGE: Remove reservations and markings: None; Remove inventory blocking: No
  - LABOR STANDARDS: Allow labor standards: No; Enable quality order for warehouse pr...: (empty field)
  - PRODUCTION ORDERS: Backflush must use reserved quantities: No; Posting method: Inherit
  - HAZARDOUS GOODS REPORT LANGUAGE: Hazardous goods domestic report lan...: (empty field); Hazardous goods export report langu...: (empty field)

**Making the right choice...**

**But what if...**



**Making the right choice...**

There may be hope...



# Making the right choice...

- Make sure you are going down the right path
  - Change management
  - The right people in the right place
  - The right amount of time
  - The right plan
  - The right budget
  - The right drinks!



# Making the right choice...

- Set your items and dimensions up for success
  - Storage dimensions

Finance and Operations

Standard view

### Storage dimension groups

Name	Description
Ware	Warehouse Management Proce...

#### Storage dimensions

Name	Active	Blank receipt a...	Blank issue all...	Physical invent...	Finan
Site	✓			✓	✓
Warehouse	✓			✓	
Location	✓			✓	
Inventory status	✓			✓	
License plate	✓	✓	✓	✓	

#### Warehouse specific setup

Use warehouse management processes  Yes

**WAREHOUSE SPECIFIC SETUP**

Mandatory  No

Primary stocking  Yes

Left sidebar: Site, SiteWH, SiteWHLoc, SWL-bl, test, Ware (selected), Склад, Сайт

Finance and Operations

Standard view

### Storage dimension groups

Name	Description
SiteWHLoc	Site Warehouse Location

#### Storage dimensions

Name	Active	Blank receipt a...	Blank issue all...	Physical invent...	Financial inven...	Coverage plan ...	For purchase p...	For sales prices
Site	✓			✓	✓	✓	✓	✓
Warehouse	✓			✓		✓	✓	✓
Location	✓			✓				
Inventory status								
License plate								

#### Warehouse specific setup

Use warehouse management processes  No

**WAREHOUSE SPECIFIC SETUP**

Mandatory  No

Primary stocking  No

Left sidebar: Site, SiteWH, SiteWHLoc (selected), SWL-bl, test, Ware, Склад, Сайт

# Making the right choice...

- Set your items and dimensions up for success
  - Reservation hierarchy

The screenshot displays the SAP S/4HANA Finance and Operations interface. The main window shows the product details for 'TF-010 : Marabou 70% Orange'. The interface is divided into several sections: 'General', 'Purchase', and 'Inventory reservation hierarchies'.

**General Section:**

- IDENTIFICATION:** Product type (Not specified), Item (TF-010), Product subtype (TF-010).
- Product service type:** Not specified.
- Product number:** TF-010.
- FURTHER IDENTIFICATION:** Product name (Marabou 70% Orange), Search name (Marabou 70% Orange), Description (Milk chocolate with orange flavour).
- ADMINISTRATION:** Storage dimension group (SiteWHLoc), Tracking dimension group (None).
- Item model group:** FIFO.
- Reservation hierarchy:** (Empty field)

**Purchase Section:**

- PURCHASE ORDER:** Unit (pcs), Underdelivery (50.00), Intercompany stopped (No), Overdelivery (50.00).
- PRICE UPDATE:** Latest purchase price (10.00), Date of price (11/8/2022).
- PRICES:** Price (10.00), Price quantity (1.00).
- CHARGES:** Price charges (0.00), Charges quantity (0.00).
- Charges group:** (Empty field).
- DISCOUNTS:** Line discount group (Empty field).

**Inventory reservation hierarchies Section:**

Name	Reservation h...	Allow reservati...
Site	1	<input checked="" type="checkbox"/>
Warehouse	2	<input checked="" type="checkbox"/>
Inventory status	3	<input checked="" type="checkbox"/>
Location	4	<input checked="" type="checkbox"/>
License plate	5	<input checked="" type="checkbox"/>
Batch number	6	<input checked="" type="checkbox"/>

# Real-World Examples...

- Company A was a mess
  - CEO saw something new and shiny!!!
  - Warehouse manager was overzealous with locations
  - The plant manager at plant A didn't want a new system
  - The plant manager at plant B wanted every operation scanned
  - No one ever wants to stop their plant for preventative maintenance
  - Every maintenance manager keeps every piece of equipment in a warehouse even from 1936...just in case
  - No one knows what happens on the shipping dock
  - Truckers don't want to wait for their appointment times
  - Inventory was used to "true up" their inventory, not as a pro-active way to prevent inventory outages or identify inventory issues.



# Real-World Examples...

- My next company
  - Dedicated project team
  - Set up AX with all the right setups
  - Testing went great
  - Integrations went well
  - Data conversion went great
  - Then it came to training
    - 2 hours with the warehouse and shipping is not enough time
    - Unions will not agree to support a system when there wasn't one to start with



# Real-World Examples...

- My last company
  - This doesn't work –Customize
  - That won't work for us – Customize
  - We need it to do this – Customize
  - It really should work like this – Customize
  - Our old system did it this way – Customize
  - NONE OF THIS IS WORKING FOR US!!!!!!!!!!!!!!!
  - Company is sold
  - Project has cost way over budget
  - Shut down project and move to SAP
  - Andrew exits company!



Now what?...

# Open Discussion on Standard vs. Advanced





“Pick” simplicity. “Put” complexity aside: Warehouse Simplified

# Q&A

# Please share your feedback.



**Still have more questions?**

**See me after the session, email me, or  
find me on LinkedIn!**

**I'm always happy to discuss Inventory  
& Warehouse Management**

**[awt@taskletfactory.com](mailto:awt@taskletfactory.com)**

**[linkedin.com/in/troski/](https://www.linkedin.com/in/troski/)**

