

Purpose:

To inform the end user how to properly view on-hand inventory from multiple sources (

Revision History:

Revision	Prepared By:	Description of Change	Effective Date
A	T. Siegrist	Documented Standard Procedure & Knowledge	02-20-2024

Process(es) required to be completed prior to starting this Work Instruction:

- Review System Terminology ([D705-D365-System Terminology](#))
- Review Basic Navigation in the System ([D706-D365-Navigation Overview](#))

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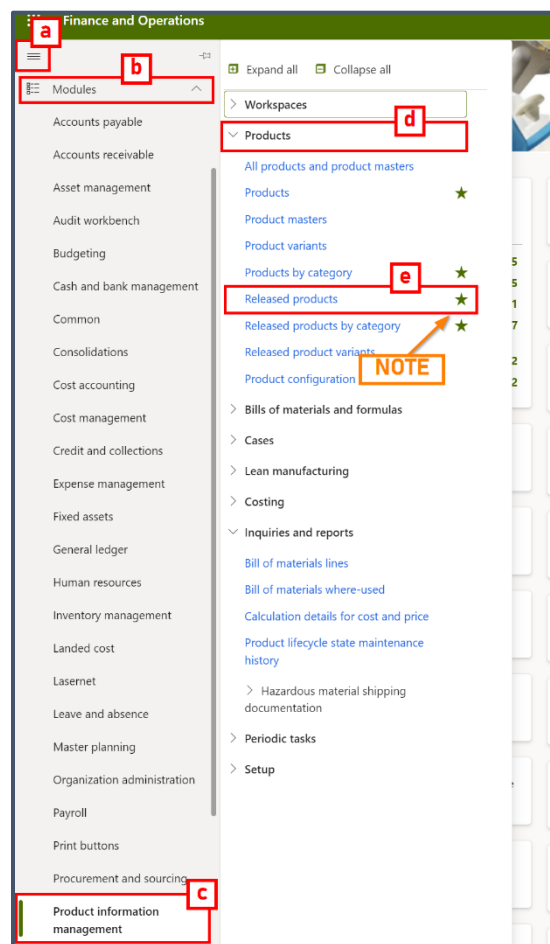
Procedure:

Released Products Navigation

1.) Navigate to Released Products

- Select the ≡ (*Navigation Pane*)
- Select the "Modules" menu
- Select the "Product Information Management" module
- Select the "Products" dropdown menu
- Select "Released Products"

NOTE: Favorite this menu for quicker navigation in the future



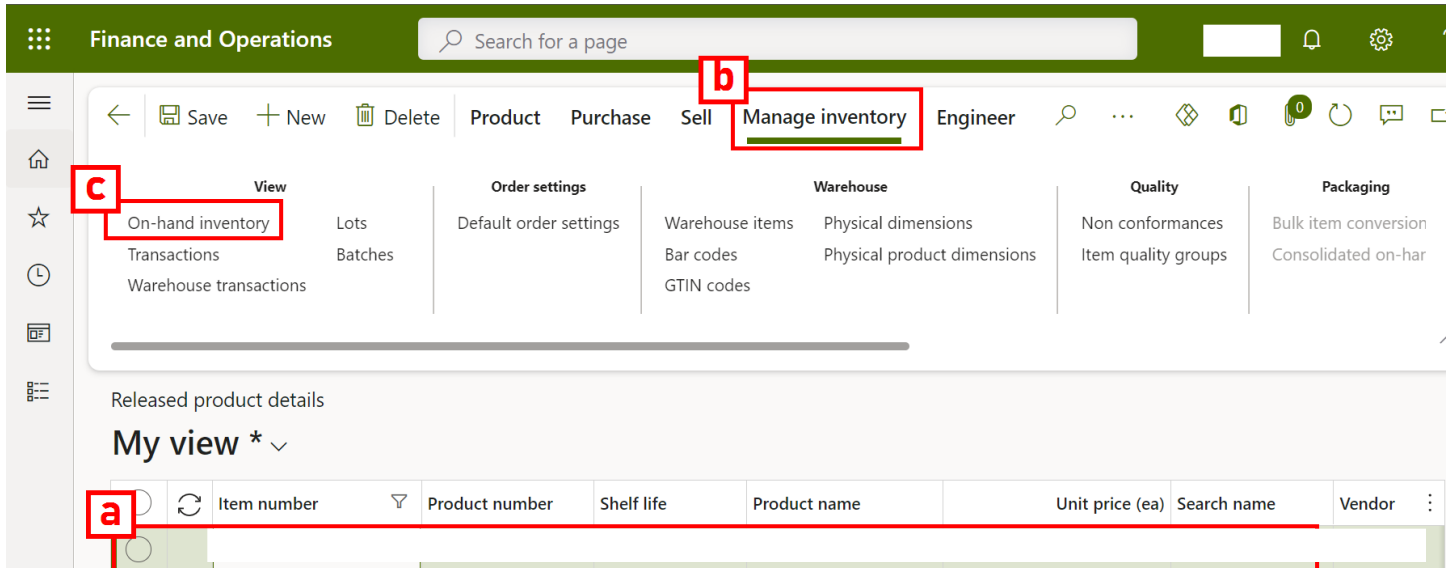
2.) Open On-Hand Inventory for the appropriate item

a. Filter to the appropriate item number

Example: OR-252FBR75

b. Select "Manage Inventory" in the ribbon

c. Select the "On-Hand Inventory" under the "View" sub-section



The screenshot shows the Dynamics 365 Finance and Operations interface. The top ribbon is labeled 'Finance and Operations'. Below it, the 'Manage inventory' ribbon is selected, with a red box 'b' highlighting it. Under the 'View' sub-section, 'On-hand inventory' is selected, with a red box 'c' highlighting it. Below the ribbon, the 'Released product details' section shows 'My view *'. A table of fields is displayed, with a red box 'a' highlighting the 'Item number' field. The table has columns for Item number, Product number, Shelf life, Product name, Unit price (ea), Search name, and Vendor.

IMPORTANT: Verify the display dimensions are appropriate when viewing on-hand List

If additional assistance is needed to set this appropriately, see "[D719-D365-Display Dimensions](#)", "[Recommended configuration for On-hand inventory at a WH level](#)", "[What do the Fields Mean](#)"

Below is the recommended configuration for On-hand inventory at a WH view level:

Dimensions display

PRODUCT DIMENSIONS
☐ License plate
 ☐ Configuration
 ☒ Inventory status
 ☐ Size
 ☐ Color
 ☐ Style

STORAGE DIMENSIONS
☒ Site
 ☒ Warehouse
 ☐ Location

TRACKING DIMENSIONS
☐ Batch number
 ☐ Serial number
 ☐ Owner

TRANSACTIONS
☒ Item number
 ☐ Closed transactions
 ☒ Quantity <> 0

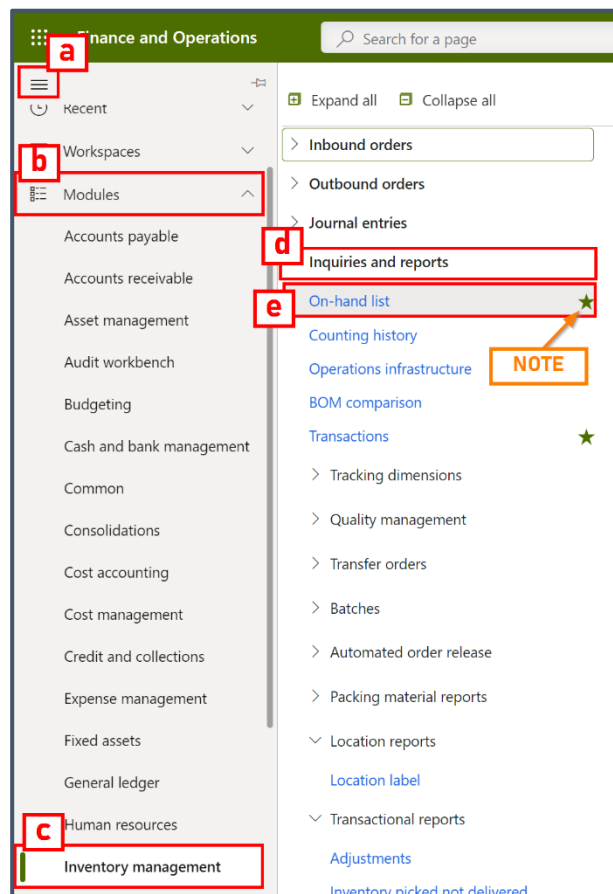
On-Hand List:

1.) Navigate to Released Products

- a. Select the ≡ (Navigation Pane)
- b. Select the "Modules" menu
- c. Select the "Inventory Management" module
- d. Select the "Inquiries and reports" dropdown menu
- e. Select "On-hand List"

NOTE: Favorite this menu for quicker navigation in the future

IMPORTANT: Verify the display dimensions are appropriate when viewing on-hand List
If additional assistance is needed to set this appropriately, see ["D719-D365-Display Dimensions"](#) , ["Recommended configuration for On-hand inventory at a WH level"](#) , ["What do the Fields Mean"](#)

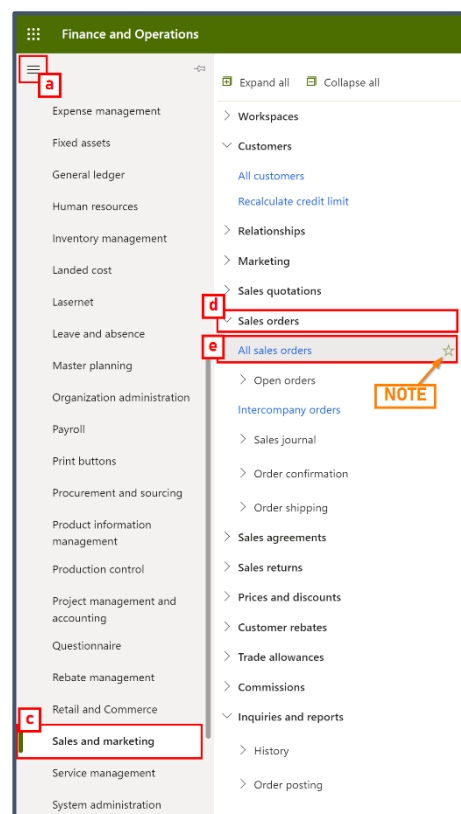


Sales Order Line Navigation

1.) Navigate to All Sales Orders

- a. Select the ≡ (Navigation Pane)
- b. Select the "Modules" menu
- c. Select the "Sales and Marketing" module
- d. Select the "Sales Orders" dropdown menu
- e. Select "All Sales Orders"

NOTE: Favorite this menu for quicker navigation in the future



2.) Open/Filter to the appropriate Sales Order Header

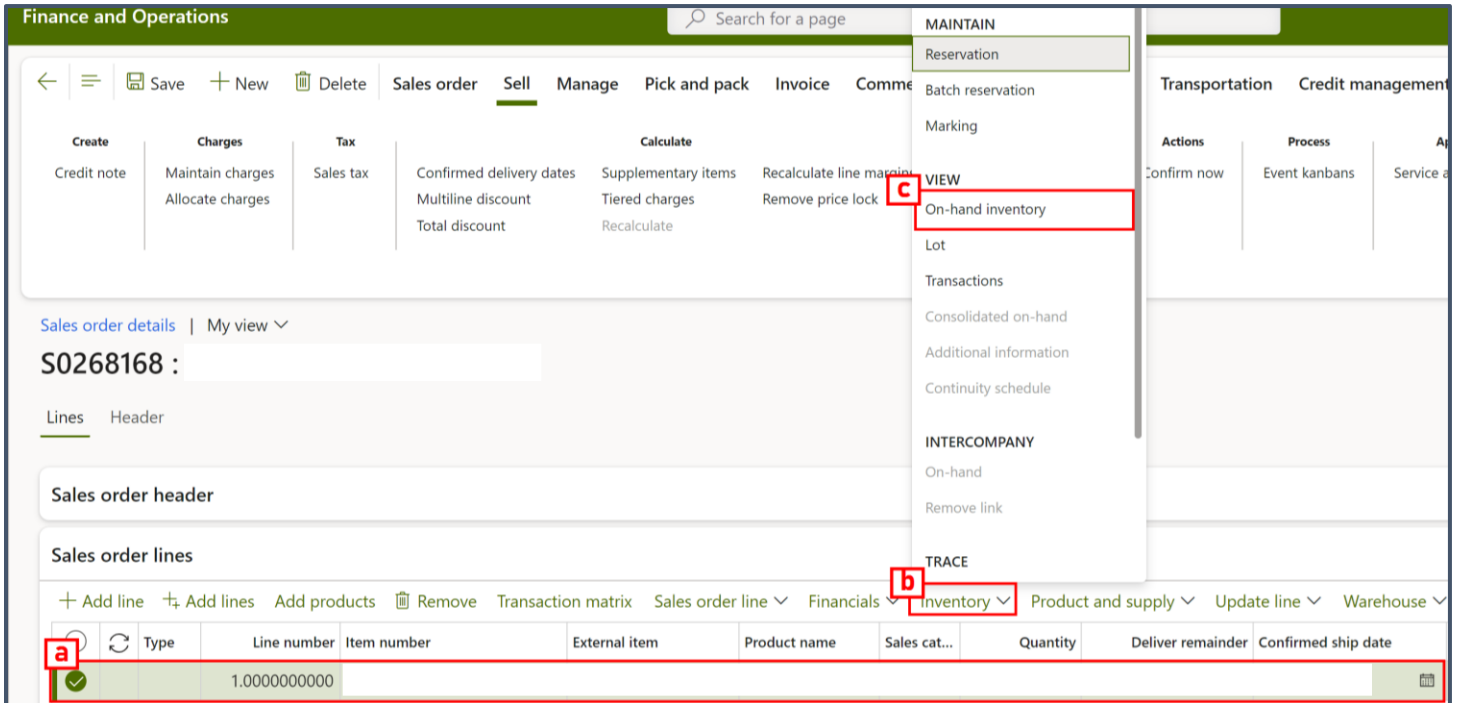
3.) Open the Inventory Overview for the sales line/item

a. Identify the appropriate item/line

Example: OR-252FBR75 (Line 1 – S0268168)

b. Select "Inventory v" under the "Sales order lines" fast tab

c. Select the "On-hand inventory" under the "View" sub-section



The screenshot shows the SAP Finance and Operations interface. The top navigation bar includes 'Sales order', 'Sell', 'Manage', 'Pick and pack', 'Invoice', and 'Comments'. The 'Sell' tab is active, and a dropdown menu is open under 'VIEW', with 'On-hand inventory' selected. The main area displays 'Sales order details' for 'S0268168'. Below this, the 'Sales order lines' section is visible, with a table showing one line item. A red box labeled 'a' highlights the line item, and a red box labeled 'b' highlights the 'Inventory v' dropdown menu. A red box labeled 'c' highlights the 'On-hand inventory' option in the 'VIEW' dropdown menu.

IMPORTANT: Use The Net Requirements to look at historical data/due dates NOT real time inventory, this menu/screen displays the data from the most recent planning refresh

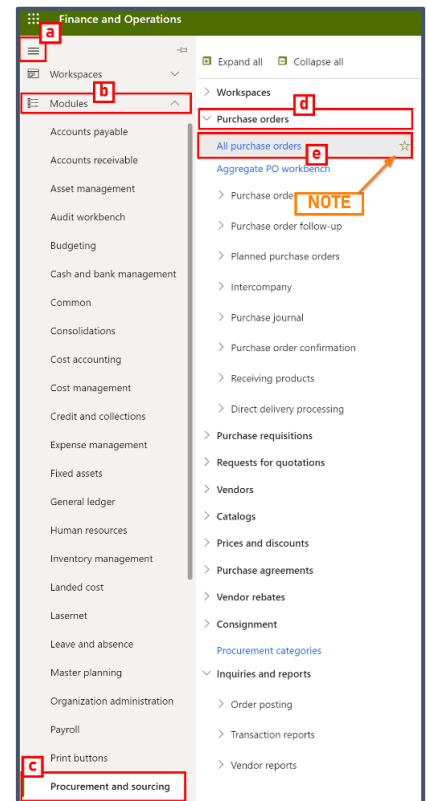
IMPORTANT: If additional assistance is needed to set understand the fields see, "[What do the Fields Mean](#)"

Purchase Order Navigation

1.) Navigate to All Purchase Orders

- Select the ≡ (Navigation Pane)
- Select the "Modules" menu
- Select the "Procurement and Sourcing" module
- Select the "Purchase Orders" dropdown menu
- Select "All Purchase Orders"

NOTE: Favorite this menu for quicker navigation in the future



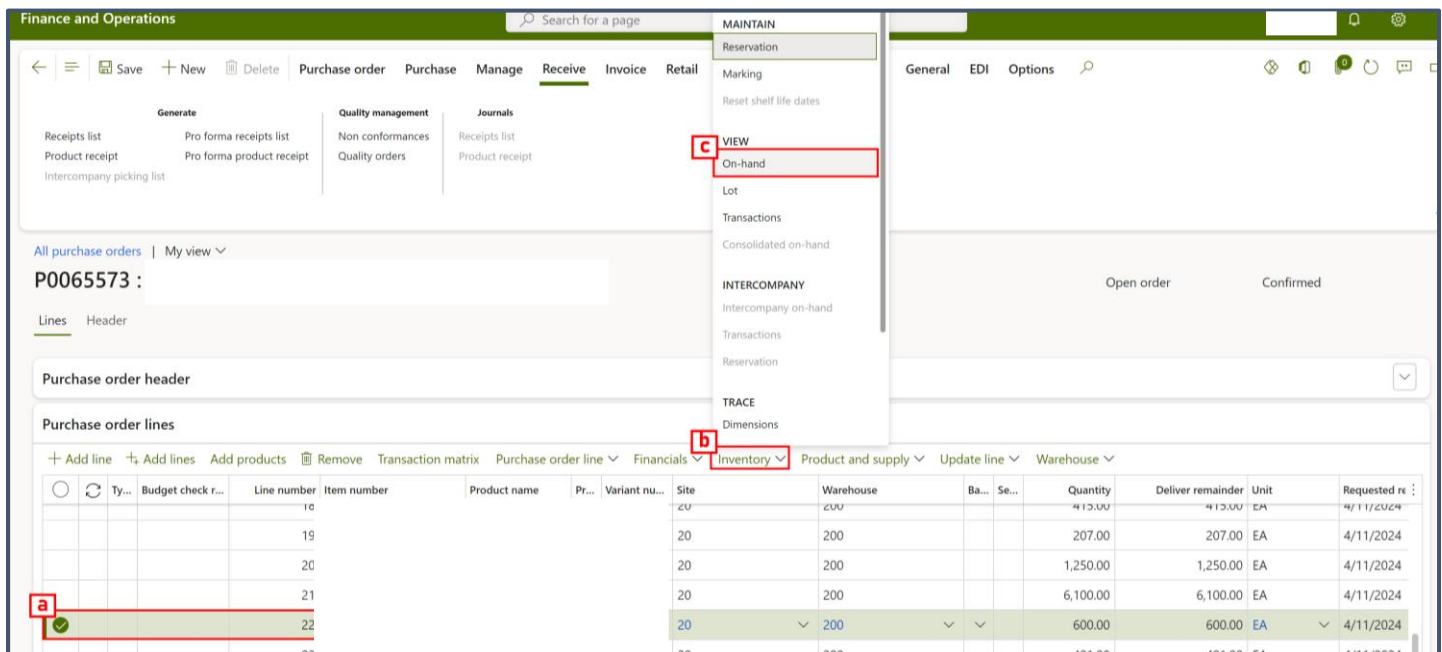
2.) Open/Filter to the appropriate the Purchase Order header

3.) Open the inventory overview for the appropriate item

- Identify the appropriate item/line

Example: OR-252FBR75 (Line 22 – P0065573)

- Select "Inventory v" under the "Purchase order lines" fast tab
- Select the "On-hand" under the "View" sub-section



Finance and Operations

Search for a page

MAINTAIN

Reservation

Marking

Reset shelf life dates

VIEW

On-hand

Lot

Transactions

Consolidated on-hand

INTERCOMPANY

Intercompany on-hand

Transactions

Reservation

TRACE

Dimensions

Inventory v

Product and supply

Update line

Warehouse

Open order

Confirmed

Purchase order header

Purchase order lines

Line number	Item number	Product name	Pr...	Variant nu...	Site	Warehouse	Ba...	Se...	Quantity	Deliver remainder	Unit	Requested re
18					200	200			413.00	413.00	EA	4/11/2024
19					20	200			207.00	207.00	EA	4/11/2024
20					20	200			1,250.00	1,250.00	EA	4/11/2024
21					20	200			6,100.00	6,100.00	EA	4/11/2024
22					20	200			600.00	600.00	EA	4/11/2024

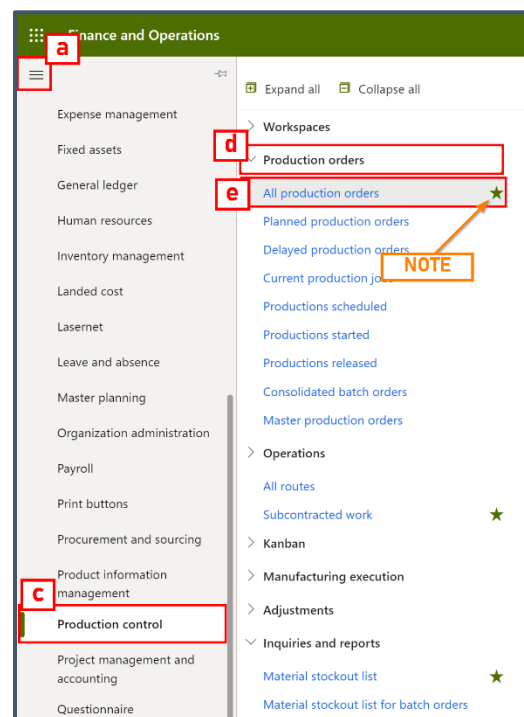
IMPORTANT: If additional assistance is needed to set understand the fields see, "[What do the Fields Mean](#)"

Production Order Navigation

1.) Navigate to All Production Orders

- Select the ≡ (Navigation Pane)
- Select the "Modules" menu
- Select the "Production Control" module
- Select the "Production Orders" dropdown menu
- Select "All Production Orders"

NOTE: Favorite this menu for quicker navigation in the future

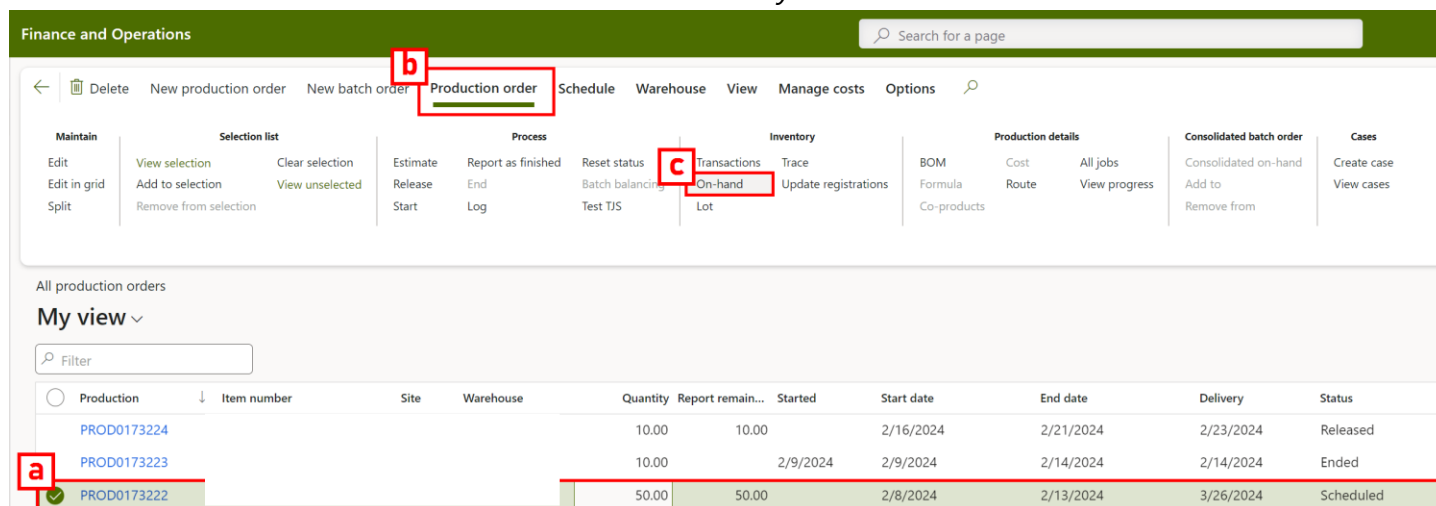


2.) Open the Inventory Overview for the appropriate item/order

- Identify the appropriate Production Order/item being produced that was updated

Example: TR-048 W/O BU (PROD0173222)

- Select "Production Order" in the ribbon
- Select the "On-hand" under the "Inventory" sub-section



Production	Item number	Site	Warehouse	Quantity	Report remain...	Started	Start date	End date	Delivery	Status
PROD0173224				10.00	10.00		2/16/2024	2/21/2024	2/23/2024	Released
PROD0173223				10.00		2/9/2024	2/9/2024	2/14/2024	2/14/2024	Ended
PROD0173222				50.00	50.00		2/8/2024	2/13/2024	3/26/2024	Scheduled

NOTE: This is the inventory for the produced items, NOT the components

IMPORTANT: If additional assistance is needed to set understand the fields see, ["What do the Fields Mean"](#)

What do the Fields Mean in Inventory Overview/Summary

Column	Description
Physical inventory	The physical quantity that is available in inventory.
Physical reserved	The total quantity that was physically reserved.
Available physical	The available (not reserved) quantity that is available in physical inventory. Available physical is a calculated field. The value equals the Physical inventory value minus the Physical reserved value.
Available physical on exact dimensions	The available physical quantity for all the dimensions that are shown in the grid.
Ordered in total	The total quantity that is included on inbound orders or that has a positive quantity in various inventory journals.
On order	The total quantity that is included on outbound orders or that has a negative quantity in various inventory journals.
Ordered reserved	The total quantity that is reserved on ordered receipts. The value in this field represents the total quantity of items in outbound transactions that have a status of <i>Ordered reserved</i> . Items that are reserved as ordered aren't physically available in inventory. Therefore, they can't be directly picked and delivered.
Available for reservation	The total quantity of on-hand inventory that can be reserved. Note: If the Reserve ordered items check box is selected on the Inventory and warehouse management parameters page, the value in this field includes expected receipts. If the check box is cleared, the value excludes expected receipts.
Total available	The total available quantity. Total available is a calculated field. The value equals the Available physical value plus the Ordered in total value minus the On order value.

IF APPLICABLE See <https://learn.microsoft.com/en-us/dynamics365/supply-chain/inventory/inventory-on-hand-list> for additional information