Introduction
The purpose of this script, which is targeted at Sammy (Shipping), is to provide an easy-to-follow demo process of the usability/navigation/user interface enhancements specifically within the Dynamics GP 10.0 Action Pane and List Views in relation to the “Pick”, “Pack” and “Ship” process within the Microsoft Dynamics GP 10.0 Advanced Distribution modules.

Designed to meet the full range of business management needs, Microsoft Dynamics GP 10.0 offers a solution that is both broad and deep. New features and functionality cover the entire spectrum of your business operations, giving you the power you need to streamline business processes, improve business insight, accelerate productivity, and make the most of existing technology investments.

This demo will highlight the following:

Demonstrate how the user interface changes associated with the new Microsoft Dynamics GP 10.0 Action Panes and List Views in relation to the “Pick”, “Pack” and “Ship” process within Microsoft Dynamics GP 10.0 Advanced Distribution can fulfill basic needs and pain points experienced when working in the Shipping and Receiving Department.
**Demo Setup:**
- Login as Sammy with a password of pass@word1
- Company: Fabrikam

**Demo Scenario (Example)**

<table>
<thead>
<tr>
<th>What to do</th>
<th>What to say</th>
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<tbody>
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<td></td>
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<tr>
<td>What to do</td>
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**Typical Persona Needs**

When challenges arise, Sammy is looking for a software solution which makes problems easier to solve.

Like most team members, Sammy is also interested in improving overall operational efficiency. Sammy is always looking for opportunities to improving shipping processes and procedures.

Sammy is a busy team member. He does not have the time to learn a complex software solution. The company purchases software to improve overall operational efficiency, not hinder it.

Meeting service level agreements, shipping on time and shipping the right quantity of inventory is also important to Sammy and the Shipping and Receiving department.

Minimizing back-orders and maximizing the number of complete orders is also an important need for any shipping receiving department. Complete orders reflect Sammy’s ability to analyze distribution data from all angles. It will be imperative for any software solution to provide the ability to report “stock-outs” or pack orders on time.
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<tr>
<td></td>
<td>Overall, one of the most important software solution needs for Sammy is his ability to make sure that his warehouse workers are trained appropriately and are completing their jobs as efficiently as possible.</td>
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<tr>
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**Typical Persona Pain-Points**

Sammy has been working in Shipping and Receiving for many years. He knows customer inquiries and determining the present state of their specific order can be quite a challenging process.

Organizational growth while shipping quality products on time is another typical pain point for Sammy. He certainly welcomes the growth but is struggling to meet stated service level agreements with quality products.

Last minute requests are also a frequent pain point for Sammy. In the past, customary shipping and receiving processes and procedures have been fairly complex. For this reason, Sammy’s organization has struggled to fulfill exceptions to their standard shipping and receiving process.

Finally, shipping prioritization has been a consistent pain point for Sammy. It has always been a challenge to determine what to ship first.

**Demo**

Go-to >Sales (Button in the Dynamics GP 10.0 Navigation Pane.) > Within the Navigation Pane, select the Sales Order Transaction List > and then Advanced Distribution Transactions

Sammy just received a call from Nancy in Sales. Nancy states that Aaron Fitz Electric has just placed a Sales Fulfillment Order that needs to be shipped out today. Sammy assures Nancy that the order will go out today!
### What to do

1. Mark the Checkbox next to FULORD1000
2. Point out the various Action Pane Commands that are now enabled. This is defined per user and per document record type.
3. In the Advanced Distribution Section of the Action Pane, select “Print Picking Ticket”

### What to say

Astonished that the shipping department can turn around this order in a matter of hours, Nancy thanks Sammy and tells him she will confirm with the customer that the order will ship today. Little does Nancy know that Sammy’s shipping and receiving processes have been immensely streamlined with their upgrade to Dynamics GP 10.0. In the past, the “Pick”, “Pack” and “Ship” process took over 40 different mouse clicks to complete the process within Dynamics GP 9.0. Today, with Dynamics GP 10.0, this process has been greatly reduced. With a grin, Sammy begins the Sales Fulfillment workflow process.

In Dynamics GP 10.0 Sammy uses the new List functionality to obtain all of his shipping data into an easy and manageable view. If he chooses, he can further filter the data in the List views. Sammy quickly sees the fulfillment order for Aaron Fitz Electrical.

Sammy now selects the Fulfillment Order for Aaron Fitz Electrical by selecting the FULORD 1000 check box. The first thing Sammy needs to do is print the Picking Ticket for this fulfillment order so John (Warehouse Worker) can retrieve the ordered items from the warehouse. Sammy
Once the Pick Ticket has been printed, take notice of the Information Bar telling Sammy what has transpired.

Once everything is complete, hit the refresh button on the information bar. If the document processes successfully, this message can be deleted or kept for informational purposes. This will cycle the transaction record to the next

What to do

proceeds to print the pick ticket for John by selecting Print Picking Ticket in the Advanced Distribution section of the Microsoft Dynamics GP 10.0 Action Pane.

Once the Pick Ticket has been printed, take notice of the Information Bar telling Sammy what has transpired.

What to say

John has now returned with the items from the warehouse and the associated pick ticket.

At the loading dock, Sammy confirms the items have been picked. He then enters into Dynamics GP 10.0 that he confirmed the Pick by clicking on the Confirm Pick button in the Advanced Distribution Action Pain. Sammy is happy to note there were no exceptions on the Sales Bulk Exception Report.

Now, the items ordered by Aaron Fitz Electrical are ready so he can print the packing slip and have the items packed and readied for shipment. Using Microsoft Dynamics GP 10.0, Sammy selects FULORDER1000 and selects the Print Packing Slip button within the Advanced Distribution Action Pane. The Information Bar tells Sammy that the process completed successfully. He then gives the Packing Slip to John.

Once John is finished packing the items for shipment, he also includes the packing slip for the order. At this point, the item is waiting to be picked.
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<td>stage in the Sales Fulfillment Workflow</td>
<td>up by the currier. Sammy would now consider this order as being shipped.</td>
</tr>
<tr>
<td>Once the refresh button has been selected on the Information Bar, notice the status of the FULORD1000 Status has changed to Unconfirmed Pick</td>
<td>A short while later, the currier arrives at the Warehouse. Sammy gives the package to the currier. He then confirms (by clicking on the Confirm Ship button) within Dynamics GP 10.0 that the item has been shipped to Aaron Fitz Electrical. There were no Sales Bulk Confirmation Exceptions and the document is ready to be posted within Dynamics GP 10.0. Sammy will leave that to the Accounting team! Another successful order shipped from the Warehouse Department!!</td>
</tr>
<tr>
<td>Select FULORD1000 by marking the checkbox. Notice the Confirm Pick has now been enabled in the Advanced Distribution Action Pane now select Confirm Pick.</td>
<td></td>
</tr>
<tr>
<td>A Sales Bulk Confirmation Exceptions Report should print. There should be no exceptions on the report. The Information Bar will update the progress. There should be no errors</td>
<td></td>
</tr>
<tr>
<td>Select FULORD1000 and select the Print Packing Slip button within the Advanced Distribution Action Pane</td>
<td></td>
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</table>
The Packing Slip for the order will print

Notice the Information Bar tells Sammy the Packing Slip Printed Successfully
What to do | What to say
---|---
Press the Confirm Ship Button to confirm the order has been shipped

The Sales Bulk Confirmation Exceptions Report will print
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<td><img src="image1.png" alt="Image" /></td>
<td>The process is now complete. Accounting will need to post the document to update the General Ledger.</td>
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</tbody>
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