

User guide

Dyneria Smart Attributes

Part of DYNERIA SMART SUITE product line

Version 1.0

TABLE OF CONTENTS

1 INTRODUCTION3

1.1 TERMINOLOGY3

1.2 PRODUCT OVERVIEW.....3

1.3 SETUP AND PREREQUISITES.....3

2 HOW TO USE3

2.1 SUPPORTED SEARCH OPTIONS.....4

2.2 SEARCH FOR RELEASED PRODUCTS BY ATTRIBUTE5

2.3 FILTER BY ATTRIBUTES WHEN ADDING PRODUCTS TO PURCHASE REQUISITION9

2.4 FILTER BY ATTRIBUTES WHEN ADDING PRODUCTS TO PURCHASE OR SALES ORDER12

2.5 ADVANCED FILTERING BY PRODUCT ATTRIBUTES IN THE ON-HAND LIST AND TRANSACTIONS INQUIRY FORM15

3 SUPPORT INFORMATION18

1 Introduction

The document describes how to use Dyneria Smart Attributes for product search and filtering in Microsoft Dynamics 365 Finance and Operations.

This guide is for end-users who already have general understanding and knowledge on product management, procurement and sales processes in Microsoft Dynamics 365 Finance and Operations / Microsoft Dynamics D365 Supply Chain Management.

1.1 Terminology

Term	Description
D365 F&O	Microsoft Dynamics 365 Finance and Operations
D365 SCM	Microsoft Dynamics 365 Supply Chain Management
Product Attributes / Attributes	Functionality in D365 F&O/SCM, that allows to configure and assign additional characteristics to a category of products

1.2 Product overview

Out-of-the-box Product Attributes is a great way of maintaining additional configurable details on certain products. However, as is the functionality does not allow to easily see or search by product attributes. With Dyneria Smart Attributes it is possible to filter products in various modules of the system by one or several attributes. In the light version the advanced filtering is available in the following forms:

- Released products
- Purchase requisition
- Purchase order
- Sales order
- On-hand list
- Transactions

1.3 Setup and prerequisites

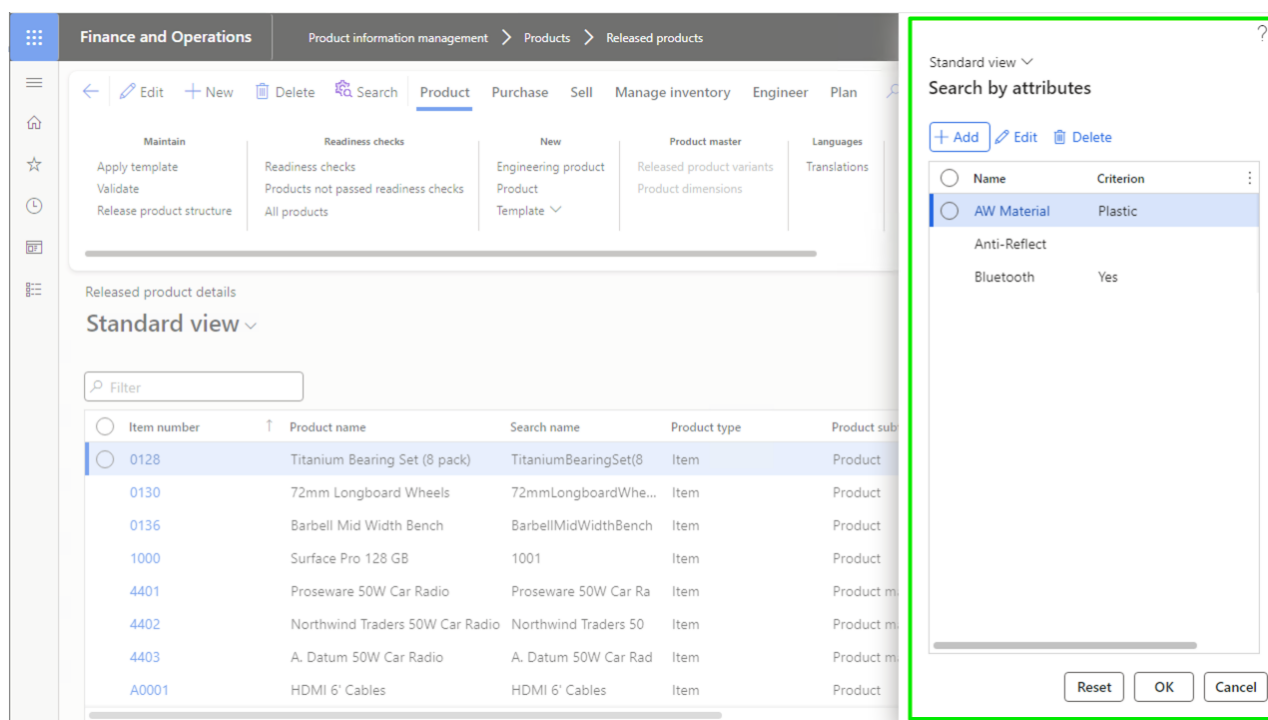
Dyneria Smart Attributes product does not require specific configuration and is ready to use as soon as the package is installed. Nevertheless, the product is based on out-of-the-box Attributes functionality in D365 F&O/SCM, thus attributes should be created and assigned to products for a great user experience.

Important! Attributes configuration is not part of this user guide document. Refer to [Microsoft documentation](#) for more details.

2 How to use

Dyneria Smart Attributes product includes a new slider form called **Search by attributes**, that may be accessed from several places in the system. The form has a grid where user-defined filtering criteria are listed as well as the following functions:

- **Add** – click this function to specify new search/filtering criterion. This will open another form where product attribute and filtering condition can be specified. Each added criterion will appear as a single line in the grid for an easy overview.
- **Edit** – any previously added criterion may be modified. To do this make sure you placed the cursor on needed line in the grid and click this function.
- **Delete** – use this function to delete any criteria line from the grid. The line in focus will be removed.
- **Reset** – allows to clear all criteria lines at once and start over. The results of previous filtering will be reset right away.
- **OK** – once all criteria are in place, click this button and products where all conditions apply will be shown.
- **Cancel** – clicking this button will close the **Search by attributes** form without applying added or modified filtering criteria. The changes, however, will be saved and shown next time the form is opened.



Note: In the light version of Dyneria Smart Attributes applied filtering conditions are reset automatically once related list page or view is refreshed. The extended version of the product will suggest additional functionality including a way of saving user-defined filters.

2.1 Supported search options

When adding or editing a filtering criterion the **Add filtering attribute** form will appear with a set of fields and buttons **OK** and **Cancel** at the bottom. First you need to choose an attribute from the list.

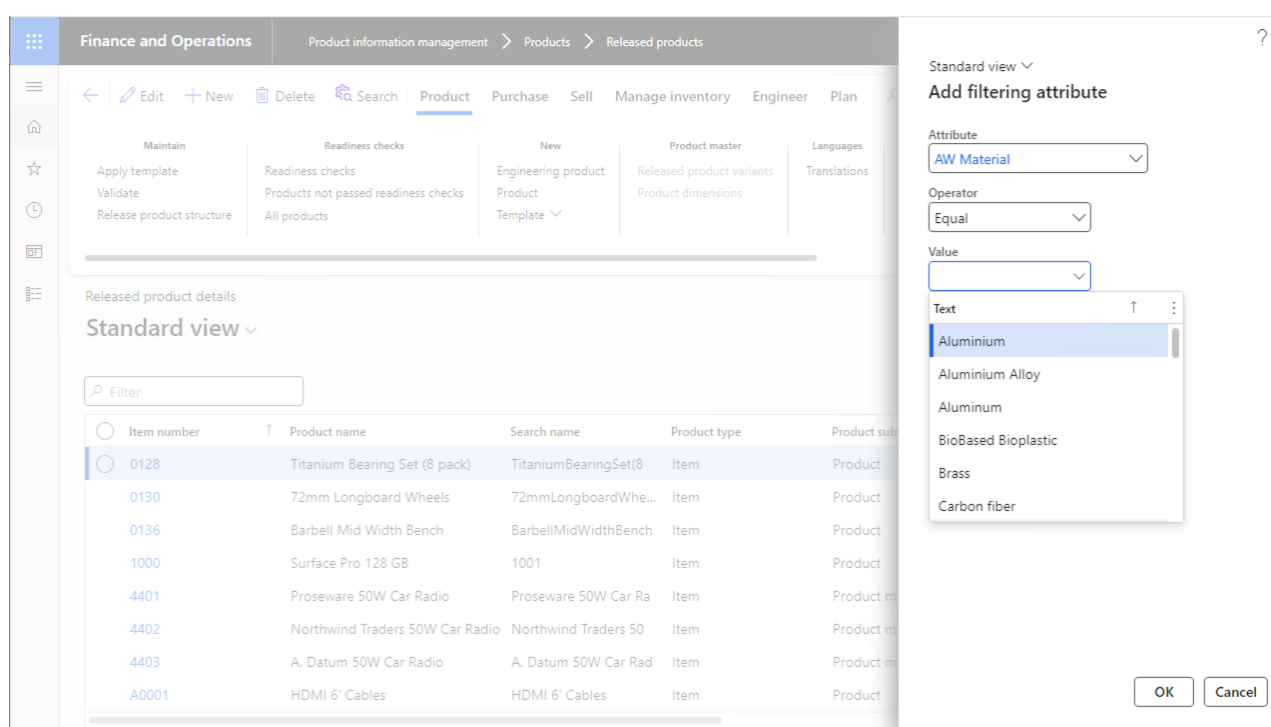
Depending on the type of product attribute different operations are available to build a search query with.

For example, only operations *Exists* and *Equal* are applicable to simple Boolean (Yes/No) attribute. *Exists* should be used to find products where specific attribute is assigned without looking further into its value. *Equal* will return only list of products where an attribute has specific value (either Yes or No).

Attributes of type Integer, that represent a numeric value, have more options that could be used to define search criterion – *Exists*, *Equal*, *Not equal*, *<=*, *>=*, *<*, *>*, *Range*.

Complete list of operations will appear in respective drop-down automatically based on type of selected attribute.

Additional fields to enter a value or a range may need to be populated. User interface is dynamic to eliminate any logical mistakes.

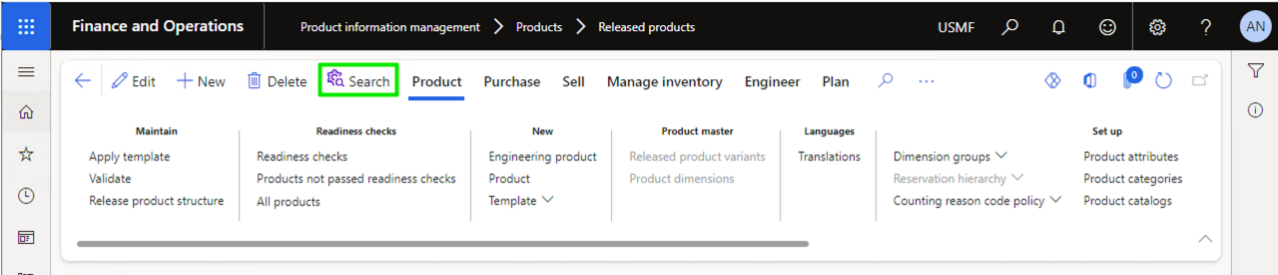


2.2 Search for released products by attribute

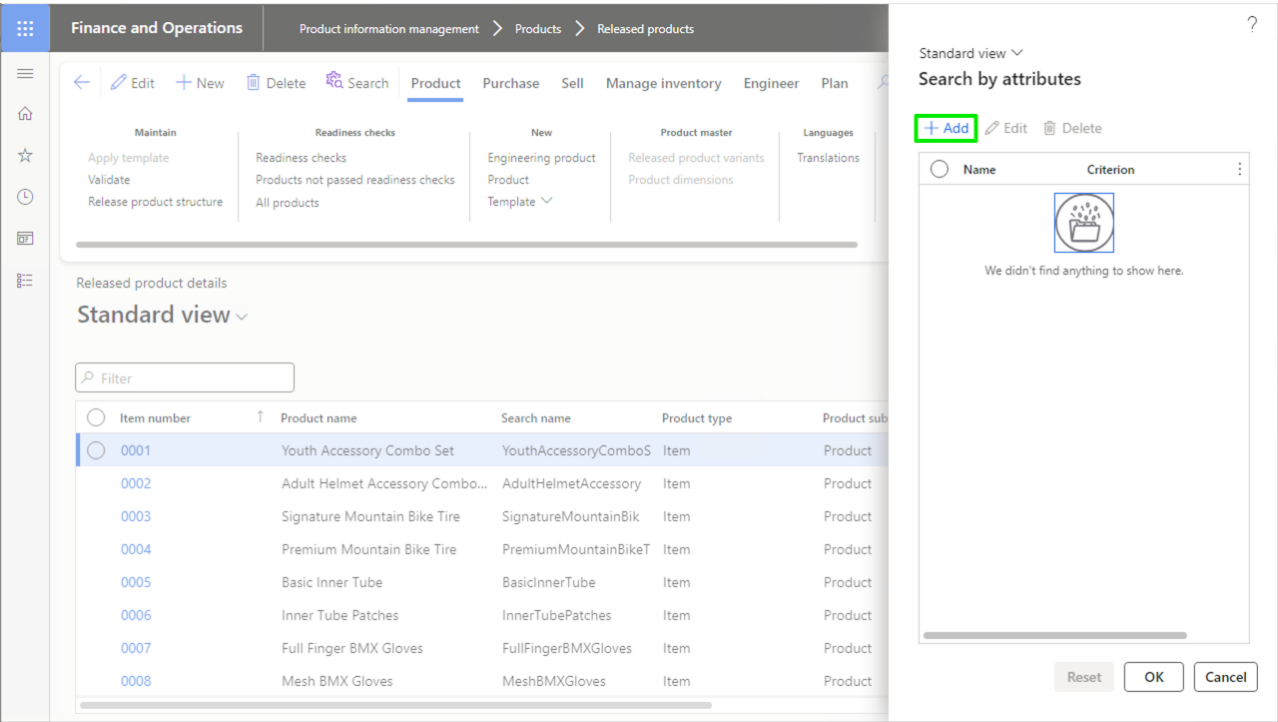
In Microsoft Dynamics D365 F&O/SCM it is possible to personalize any view or filter by almost any column in a grid. However, when it comes to product attributes, the options are quite limited. Users may see attribute values assigned to a product, but not look up for a product with specific attributes or attribute values. This will change with Dyneria Smart Attributes!

Use case scenario: Andrea is a sales manager in retailing company. Doing research, she needs to get a list of highly rated products by brand. She decided to start with “Alpine Ski House” products. Andrea will need to follow these steps in Microsoft Dynamics D365 F&O to complete her task:

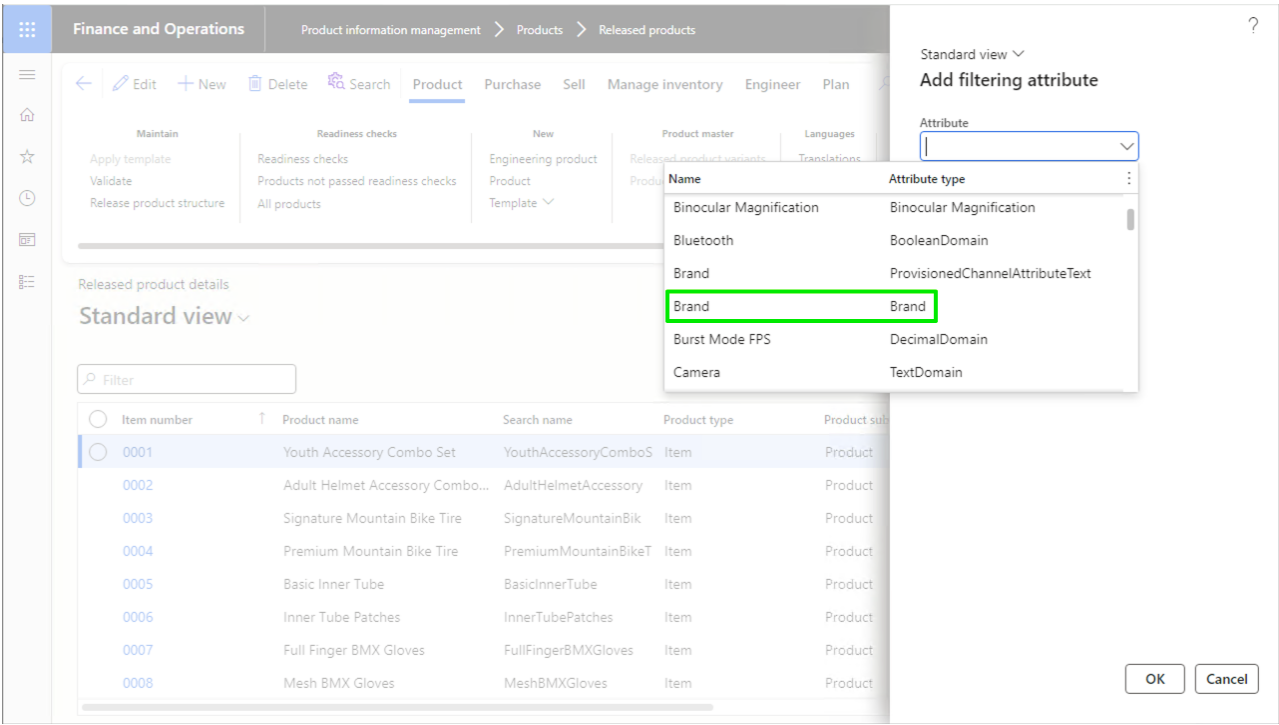
1. Navigate to PRODUCT INFORMATION MANAGEMENT > PRODUCTS > RELEASED PRODUCTS.
2. Click **Search**.



3. Click **Add**.



4. In the **Attribute** drop-down select “Brand”.



5. Leave **Operator** to be “Equal” and in the **Value** drop-down select “Alpine Ski House”.

Standard view ▾

Add filtering attribute

Attribute: Brand ▾

Operator: Equal ▾

Value: Alpine Ski House

Text: Litware, Inc., Microsoft, Microsoft Arc, Northwind Traders, Wide World Importers

OK Cancel

Item number	Product name	Search name	Product type	Product sub-type
0001	Youth Accessory Combo Set	YouthAccessoryComboS	Item	Product
0002	Adult Helmet Accessory Combo...	AdultHelmetAccessory	Item	Product
0003	Signature Mountain Bike Tire	SignatureMountainBik	Item	Product
0004	Premium Mountain Bike Tire	PremiumMountainBikeT	Item	Product
0005	Basic Inner Tube	BasicInnerTube	Item	Product
0006	Inner Tube Patches	InnerTubePatches	Item	Product
0007	Full Finger BMX Gloves	FullFingerBMXGloves	Item	Product
0008	Mesh BMX Gloves	MeshBMXGloves	Item	Product

6. Click **OK** to save the record.

7. In the *Search by attributes* form click **Add** again and set up another criterion to filter by “Rating” attribute being equal to “5 star”.

Standard view ▾

Add filtering attribute

Attribute: Rating ▾

Operator: Equal ▾

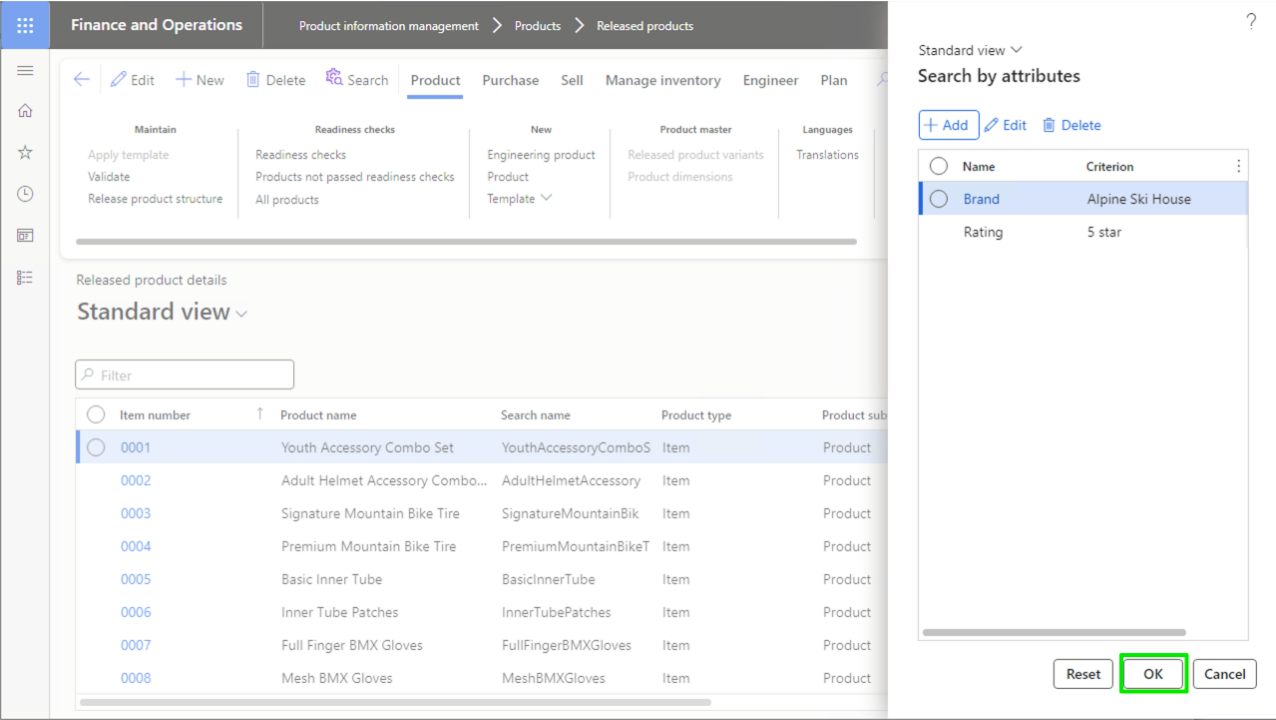
Value: 5 star ▾

OK Cancel

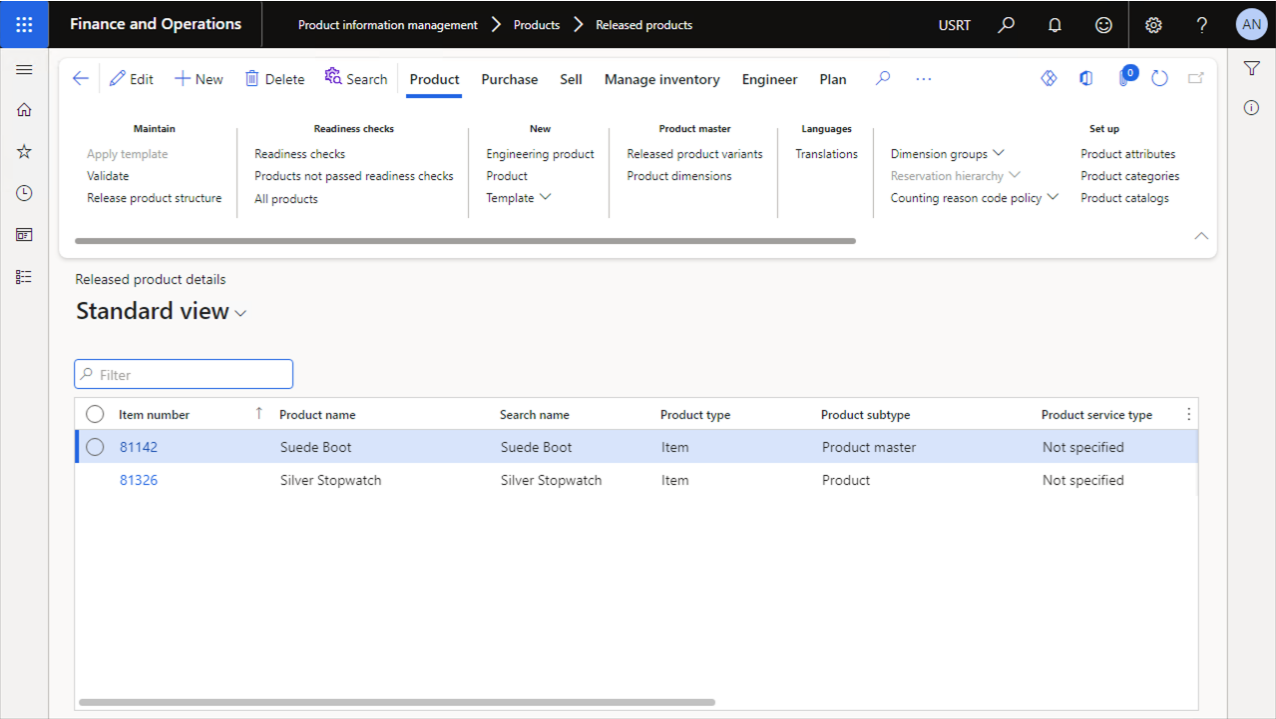
Item number	Product name	Search name	Product type	Product sub-type
0001	Youth Accessory Combo Set	YouthAccessoryComboS	Item	Product
0002	Adult Helmet Accessory Combo...	AdultHelmetAccessory	Item	Product
0003	Signature Mountain Bike Tire	SignatureMountainBik	Item	Product
0004	Premium Mountain Bike Tire	PremiumMountainBikeT	Item	Product
0005	Basic Inner Tube	BasicInnerTube	Item	Product
0006	Inner Tube Patches	InnerTubePatches	Item	Product
0007	Full Finger BMX Gloves	FullFingerBMXGloves	Item	Product
0008	Mesh BMX Gloves	MeshBMXGloves	Item	Product

8. Click **OK** to save.

9. With both conditions configured click **OK** in the *Search by attributes* form to apply the filter.



10. Released products are filtered.



- 11. Once the information is noted, click **Search** again.
- 12. Mark the Brand condition line and click **Edit**.
- 13. Change Value field to another brand and click **OK**.
- 14. Click **OK** in the *Search by attributes* form to apply updated filter.

2.3 Filter by attributes when adding products to purchase requisition

With many products set up in the system it may be challenging to identify the right product code (Item number) for a purchase requisition entry. *Add products* function allows to see products filtered by single procurement category, but not by product attributes which may repeat for different categories. Dyneria Smart Attributes enhance product filtering capabilities for purchase requisition entry to filter across procurement categories.

Use case scenario: Adriana is an office manager assistant and one of her responsibilities is to make sure employees have office equipment they need. With recent office policy changes all workplaces in the Sales department should have a web camera, so Adriana will need to create a purchase requisition to buy additional webcams. She will need to follow steps below in Microsoft Dynamics D365 F&O to complete her task.

Note: Several new released products were created beforehand including the following important configuration points:

- Vendor is populated on released product page.
- Product is added to procurement category which has attributes 'Brand', 'Bluetooth', 'Currency' and 'Resolution' assigned.
- Attribute values are populated on released product level.

1. Navigate to **PROCUREMENT AND SOURCING > PURCHASE REQUISITIONS > ALL PURCHASE REQUISITIONS**.
2. Click **New** and populate requisition details.
3. In the *Purchase requisition lines* section click **Add products**.

The screenshot displays the 'Finance and Operations' application window. The breadcrumb trail at the top indicates the path: 'Procurement and sourcing > Purchase requisitions > All purchase requisitions'. The main title bar shows '000107 : New webcams' with a 'Draft' status. Below the title, there are tabs for 'Lines' and 'Header'. The 'Lines' tab is active, showing a 'Purchase requisition header' section and a 'Purchase requisition lines' section. In the 'Purchase requisition lines' section, there is a toolbar with buttons: '+ Add line', '+ Add products' (highlighted with a green box), 'External catalogs', 'Cancel', 'Remove', 'Purchase requisition line', 'Financials', 'Inventory', and 'Engineering change'. Below the toolbar, there is a table with columns: 'Line', 'Requester', 'Buying legal e...', 'Receiving operating unit', 'Item number', and 'Procurement category'. The table is currently empty, and a message at the bottom of the table area says 'We didn't find anything to show here.'.

4. Under **SELECT FROM FILTERED LIST** in the middle section of the page click **Search**.

5. In the opened form click **Add**.
6. Select “Resolution” in the **Attribute** field.

Tip: Place cursor to the Attribute field and start typing to get suggested values to choose from.

7. Leave **Operator** as “Equal” and choose **Value** “720p”.
8. Click **OK** to save filter condition.
9. In the *Search by attributes* form click **Add** again and set up similar condition with Brand attribute to be equal to “Microsoft”. Click **OK** to save.

10. Once both conditions are set click **OK** to apply.

Standard view ▾
Add products to purchase requisition

Requester: Buying legal entity: Receiving operating unit:

SET PROCUREMENT CATEGORY FILTER
Find procurement category node:

SELECT FROM FILTERED LIST
Search Add unlisted product to lines ▾
Filter:

CORP PROCUREMENT CATEGORIES (OFFICE EQUIP
WORKPLACE SERVICES (WORKPLACE SERVICES)
OFFICE MACHINES (Office machines and their sup
VEHICLES (Vehicle Expenses)
OFFICE AND DESK ACCESSORIES (OFFICE AND DE

0128 Titanium Bearing Set (8 pack)
20.99 USD
+ Add to lines

0130 72mm Longboard Wheels
23.99 USD
+ Add to lines

0136 Barbell Mid Width Bench
77.99 USD
+ Add to lines

Search by attributes
+ Add Edit Delete
Name Criterion
Resolution 720p
Brand Microsoft
Reset OK Cancel

11. Review filtered results and click **Add to lines** from required product record for it to appear in the LINES TO ADD TO PURCHASE REQUISITION section on the right.

Standard view ▾
Add products to purchase requisition

Requester: Buying legal entity: Receiving operating unit:

SET PROCUREMENT CATEGORY FILTER
Find procurement category node:

SELECT FROM FILTERED LIST
Search Add unlisted product to lines ▾
Filter:

CORP PROCUREMENT CATEGORIES (OFFICE EQUIP
WORKPLACE SERVICES (WORKPLACE SERVI
OFFICE MACHINES (Office machines and the
VEHICLES (Vehicle Expenses)
OFFICE AND DESK ACCESSORIES (OFFICE AI

C0004 Lifecam HD 5000
0.00 USD
+ Add to lines

LINES TO ADD TO PURCHASE REQUISITION
Remove Dimensions ...
Item number Product
Details Dimensions
Item number
Category
OK Cancel

12. To find more products, use *Search* function again, alter filtering criteria and get new results.

13. Once needed products are found and moved to the LINES TO ADD TO PURCHASE REQUISITION section, click OK to create lines.

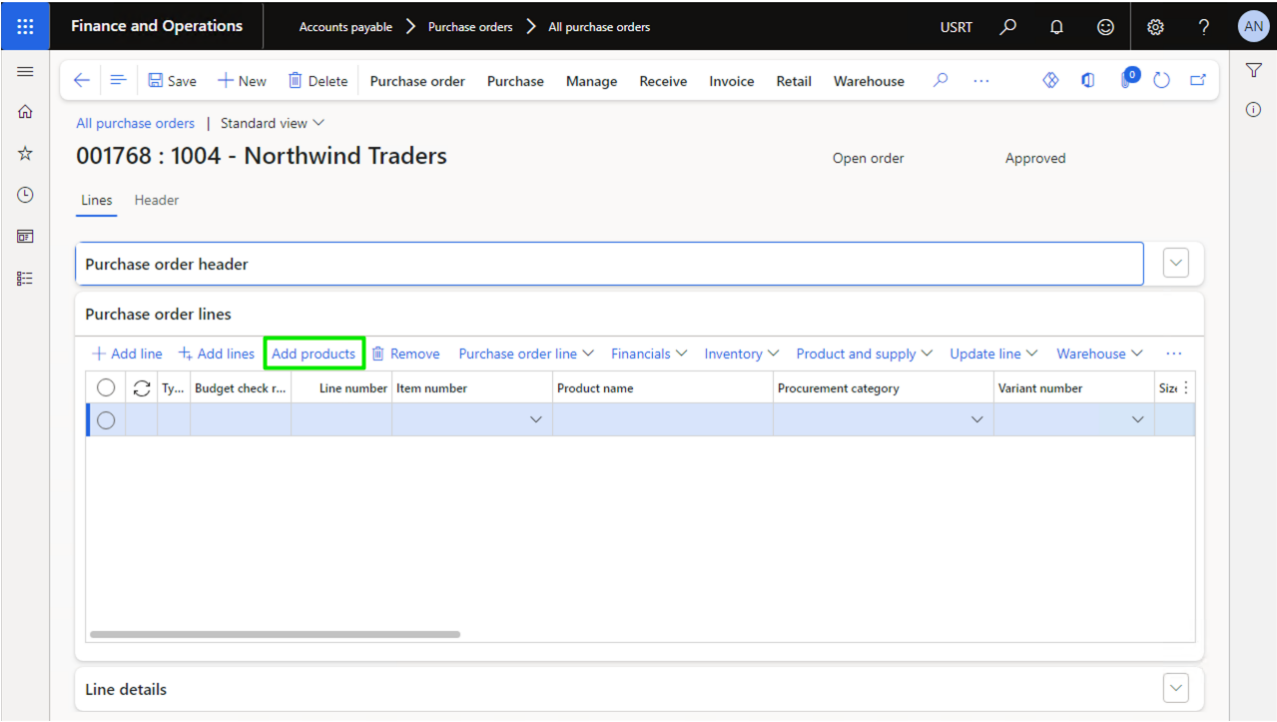
14. Continue with standard process to complete purchase requisition approval and generate a purchase order.

2.4 Filter by attributes when adding products to purchase or sales order

Various types of category hierarchies allow product groupings by different criteria or for different purpose which allows to streamline purchasing and selling processes. Entering purchase or sales orders users do not need to remember product codes but use the *Add products* function and look up for needed product codes by categories in chosen hierarchy. However, if the task is to find products by specific attribute navigating through categories may not be efficient. Dyneria Smart Attributes suggests new way of search to help.

Use case scenario: Nathan is a store manager in a retailing company. Preparing winter season assortment, he needs to order various clothing made of wool. Searching for new products available this year Nathan will need to follow below steps in Microsoft Dynamics D365 F&O to complete the task:

- 1. Navigate to PROCUREMENT AND SOURCING > PURCHASE ORDERS > ALL PURCHASE ORDERS (alternatively, ACCOUNTS PAYABLE > PURCHASE ORDERS > ALL PURCHASE ORDERS).
- 2. Click **New** and populate purchase order header details.
- 3. In the *Purchase order lines* section click **Add products**.



4. Under AVAILABLE PRODUCTS section in the middle of the page click **Search**.

Standard view ▾
Add products

FILTERS
Filter the list of products by category
Hierarchy
Retail Product Category ▾
ALL (ALL)
Fashion (Fashion)
Adventure Works (Adventure Works)
Team Sports (Team Sports)
Apparel and Footwear (Apparel and Footwear)
Electronics (Electronics)
Exercise (Exercise)
Action Sports (Action Sports)

Item group ▾
Buyer group ▾
Vendor account ▾

AVAILABLE PRODUCTS
Search + Add + Add variants ...

Product nu...	Product name
0001	Youth Accessory Combo Set
0002	Adult Helmet Accessory Combo...
0003	Signature Mountain Bike Tire
0004	Premium Mountain Bike Tire
0005	Basic Inner Tube
0006	Inner Tube Patches
0007	Full Finger BMX Gloves
0008	Mesh BMX Gloves
0009	Premium Full Finger Gloves
0010	Signature BMX Gloves
0011	Curved Grind Rail
0012	Straight Grind Rail
0013	Adult Baseball Infield Glove

ADD SELECTED PRODUCTS
Remove Dimensions

Product number Product name

We didn't find anything to show here.

OK Cancel

5. In the opened form click **Add**.
6. Select "Fabric" in the **Attribute** field.
7. Leave **Operator** as "Equal" and choose **Value** "Cashmere".

Standard view ▾
Add products

FILTERS
Filter the list of products by category
Hierarchy
Retail Product Category ▾
ALL (ALL)
Fashion (Fashion)
Adventure Works (Adventure Works)
Team Sports (Team Sports)
Apparel and Footwear (Apparel and Footwear)
Electronics (Electronics)
Exercise (Exercise)
Action Sports (Action Sports)

Item group ▾
Buyer group ▾
Vendor account ▾

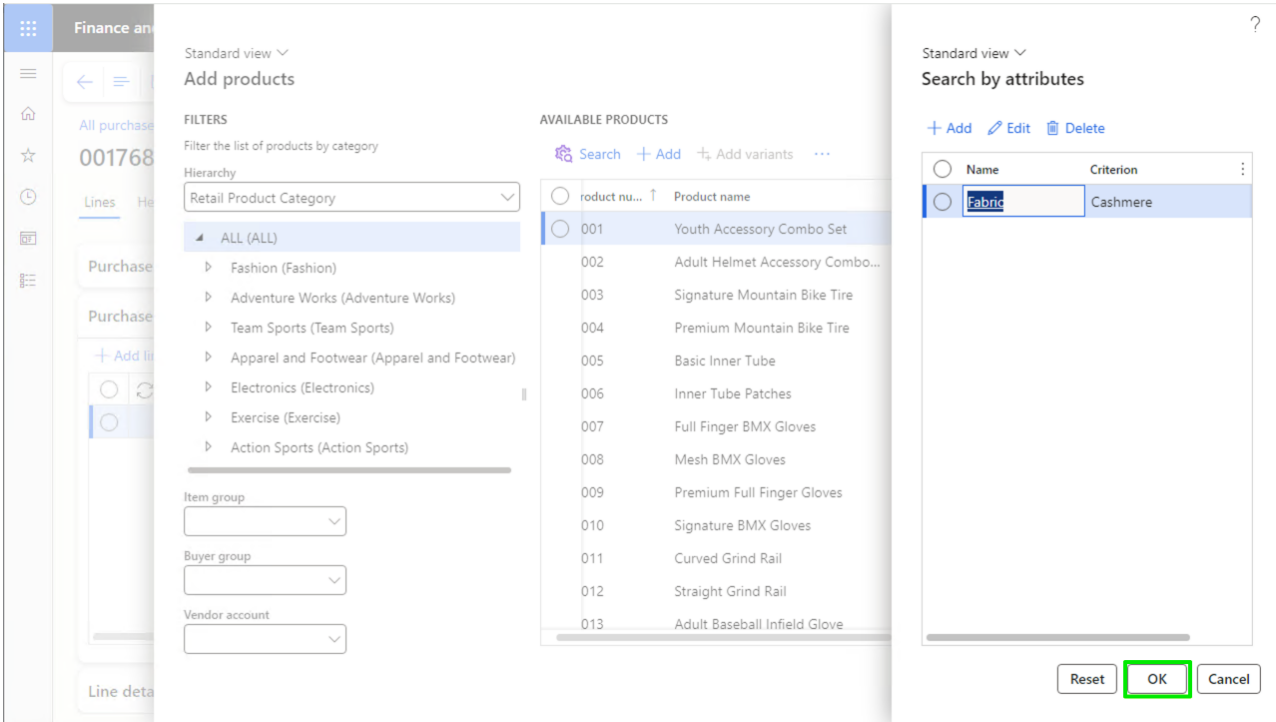
AVAILABLE PRODUCTS
Search + Add + Add variants ...

Product nu...	Product name
001	Youth Accessory Combo Set
002	Adult Helmet Accessory Combo...
003	Signature Mountain Bike Tire
004	Premium Mountain Bike Tire
005	Basic Inner Tube
006	Inner Tube Patches
007	Full Finger BMX Gloves
008	Mesh BMX Gloves
009	Premium Full Finger Gloves
010	Signature BMX Gloves
011	Curved Grind Rail
012	Straight Grind Rail
013	Adult Baseball Infield Glove

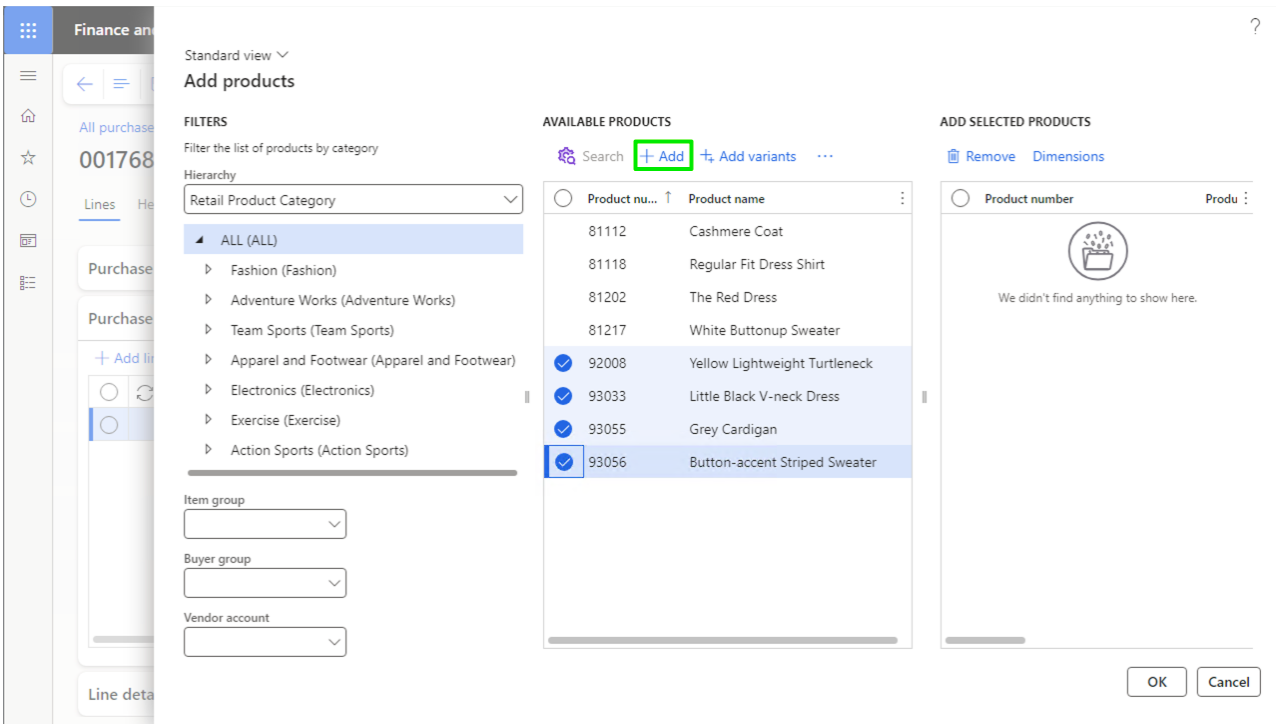
ADD FILTERING ATTRIBUTE
Attribute
Fabric ▾
Operator
Equal ▾
Value
Cashmere ▾

OK Cancel

8. Click **OK** to save filter condition.
9. In the *Search by attributes* form **OK** to apply the filter.

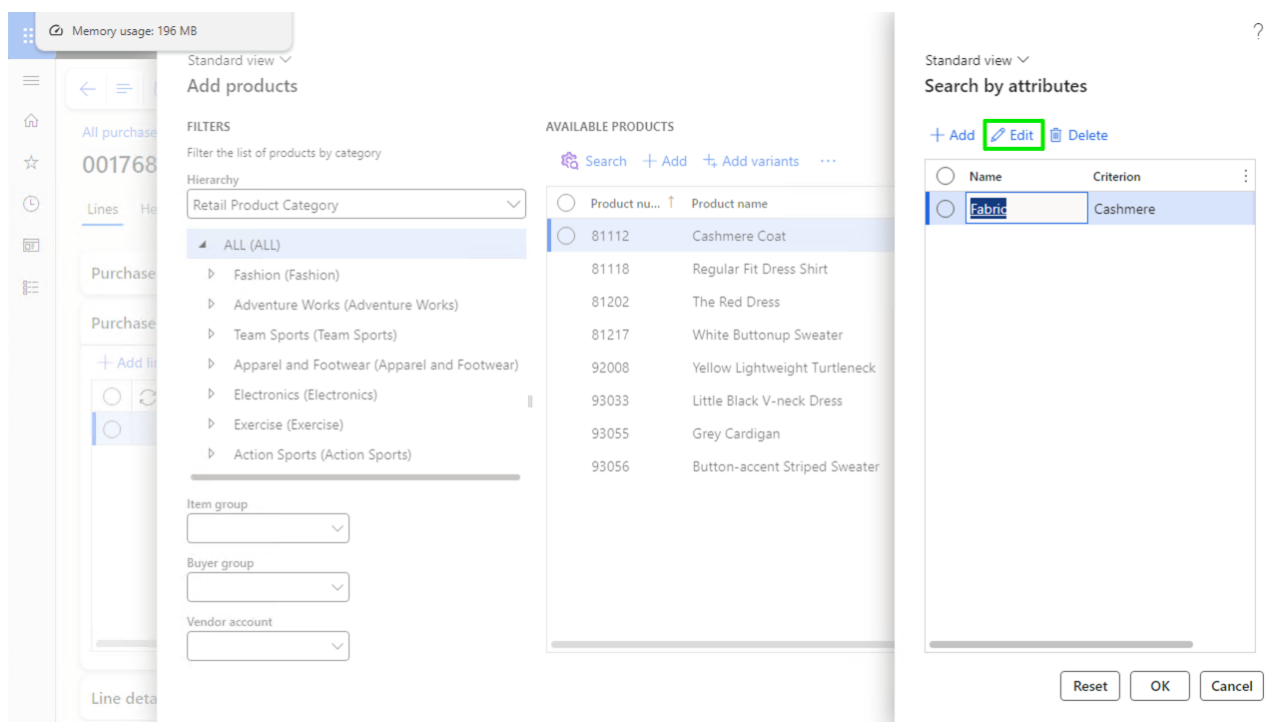


10. Review filtered results, mark needed products and click **Add** for them to appear in the ADD SELECTED PRODCUTS section on the right.



11. Click **Search** in the AVAILABLE PRODUCTS section again.

12. Alter filtering criteria by clicking **Edit** and changing attribute value from “Cashmere” to “Wool blend”.



13. Apply modified filtering criteria, review new results, and select more products.

14. Once all needed products are added to the ADD SELECTED PRODUCTS section, check quantities, and click **OK** to create lines.

15. Continue with standard process to confirm and process a purchase order.

Similar steps may be followed when entering a sales order under:

- SALES AND MARKETING > SALES ORDERS > ALL SALES ORDERS or
- ACCOUNTS RECEIVABLE > ORDERS > ALL SALES ORDERS

2.5 Advanced filtering by product attributes in the On-hand list and Transactions inquiry form

On-hand list is a quick way to check stock levels. D365 F&O/SCM allows to inquire on inventory quantities per product overall, per product within specific warehouse or even more detailed level including storage and tracking dimensions. Users may even check quantities per product dimension as Size or Color, but not per product attribute information. Dyneria Smart Attributes product fills in this gap and adds another layer of information available to be filtered on from On-hand list and Transactions.

Use case scenario: Naomi is a sales manager in a fashion industry company. She monitors inventory levels of products stored in all company warehouses regularly for procurement and analysis. Head of department sent a request about current inventory levels for any Litware products that may be in stock as well as what products of the Litware brand were purchased and received to San Francisco warehouse in August 2019. To provide the information Naomi should follow these steps in Microsoft Dynamics D365 F&O:

1. Navigate to INVENTORY MANAGEMENT > INQUIRIES AND REPORTS > ON-HAND LIST.

- On the right leave all filters blank and click **Apply** to get the data.
- On the action pane click **Dimensions**, make sure *Site*, *Warehouse*, *Item number* and *Quantity <> 0* options are selected and click **OK**.
- Click **Search** on the action pane.

The screenshot shows the 'On-hand list' in Microsoft Dynamics 365. The 'Search' button in the top navigation bar is highlighted with a green box. Below the navigation bar, there's a 'View' section with 'Counting history' and 'Consolidated on-hand' options. The main table, titled 'On-hand', shows a list of items with columns: Item number, Product name, Search name, Site, Warehouse, and Ph. The first row is highlighted. To the right of the table is a 'Filters' pane with fields for 'Item number begins with', 'Site begins with', 'Warehouse begins with', and 'Serial number'. The 'Apply' and 'Reset' buttons are at the bottom of the filters pane.

- In the *Search by attributes* form click **Add**.
- In the **Attribute** drop-down select "Brand", leave **Operator** to be "Equal" and in the **Value** drop-down select "Litware, Inc."

The screenshot shows the 'Add filtering attribute' dialog box. The 'Attribute' dropdown is set to 'Brand', the 'Operator' dropdown is set to 'Equal', and the 'Value' dropdown is set to 'Litware, Inc.'. The background shows the 'On-hand list' table with the first row highlighted. The 'OK' and 'Cancel' buttons are at the bottom right of the dialog.

- Click **OK** to save the record, then click **OK** in the *Search by attributes* form to apply the filter.
- Review filtered information and export.

Finance and Operations | Inventory management > Inquiries and reports > On-hand list

View: Counting history, Consolidated on-hand

On-hand

Standard view * v

Filter: Inventory quantities

Item number	Product name	Search name	Site	Warehouse
81137	Straight Leg Jeans	Straight Leg Jeans	CENTRAL	HOUSTON
81230	Jeggings	Jeggings	WEST	DC-West
81327	Black Wireframe Sunglasses	Black Wireframe Sung	CENTRAL	DC-Central
81327	Black Wireframe Sunglasses	Black Wireframe Sung	CENTRAL	HOUSTON
81327	Black Wireframe Sunglasses	Black Wireframe Sung	CENTRAL	SANANTO
92075	Men's Boat Shoes	Men's Boat Shoes	CENTRAL	DC-CENTRAL
92075	Men's Boat Shoes	Men's Boat Shoes	WEST	SANFRANCIS
92084	Traditional Canvas Sneaker	Canvas Sneaker	CENTRAL	DC-CENTRAL
92084	Traditional Canvas Sneaker	Canvas Sneaker	WEST	SANFRANCIS

Filters: Item number begins with, Site begins with, Warehouse is exactly, Serial number. Apply, Reset.

- Navigate to INVENTORY MANAGEMENT > INQUIRIES AND REPORTS > TRANSACTIONS.
- Click **Display dimensions** from the action pane and make sure *Warehouse* is included.
- Click **Search** on the action pane.

Finance and Operations | Inventory management > Inquiries and reports > Transactions

Inventory transactions

Standard view v

Filter: Transaction filter: Display all

Item number	Physical date	Financial date	Reference	Number	Receipt	Issue
82000			Transfer order receive	000006		Reserver
82000			Transfer order receive	000006	Ordered	
82000			Transfer order receive	000006	Ordered	
82000			Transfer order receive	000006	Ordered	
0005			Purchase order	001744	Ordered	
0006			Purchase order	001744	Ordered	
0005			Purchase order	001745	Ordered	
0006			Purchase order	001745	Ordered	
7003			Sales order	012551		Reserver
7003			BOM	00046	Ordered	
81122			BOM line	00046		On orde
81137			BOM line	00046		On orde
81145			BOM line	00046		On orde

- In the *Search by attributes* form use **Add** function to set up filtering criterion for "Litware, Inc." brand as described earlier and then click **OK** to apply.

13. Once transaction lines are filtered, move to the *Warehouse* column and filter by SANFRANCIS.
14. Move to the *Physical date* column and apply additional filter for dates to be between 8/1/2019 and 8/31/2019.
15. Review the information and export for further analysis.

3 Support information

For additional support, email to info@dyneria.com or visit <https://www.dyneria.com/#contacts> .