

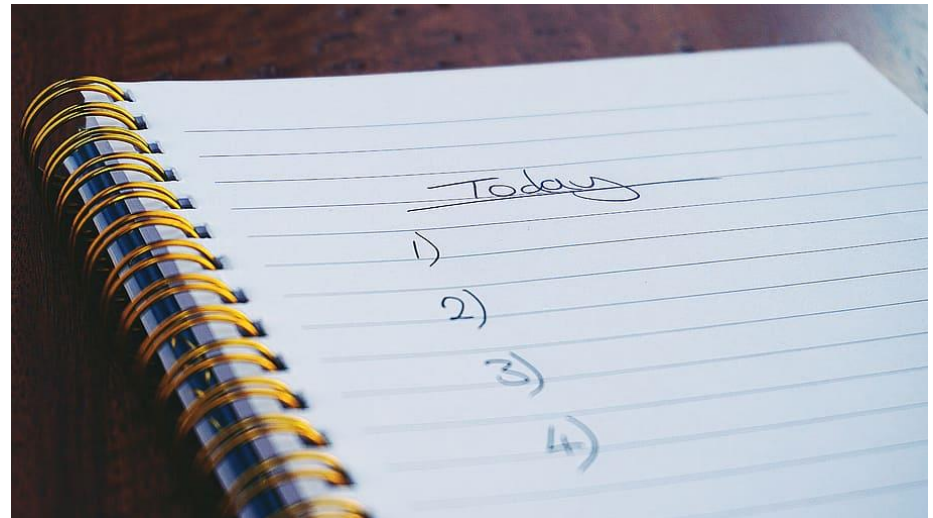
Dyneria Smart Attributes

Overview

January 18th, 2024

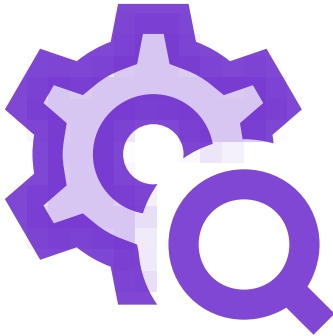
Agenda

- Purpose
- Benefits
- Configuration
- Functionality overview
 - General rules
 - How to access and use enhanced product search by attributes



Purpose

- *Dyneria Smart Attributes* is one of the products in Dyneria Smart Suite product line for D365 Finance and Operations/ D365 Supply Chain Management.



- We created Dyneria Smart Attributes to:
 - Make product search in D365 more efficient;
 - Fulfill a gap in out-of-the-box functionality;
 - Enhance user experience with product attributes.

Benefits

- Product search and inquiry – extended search by product attributes:
 - Released product
- Order entry improvements – allows multi-line search and insert based on any given number of attributes:
 - Purchase requisition
 - Purchase order
 - Sales order
- On-hand and transaction inquiry – filter by attributes can be applied on top of standard views:
 - On-hand list
 - Inventory transactions
- Supports all types of product attributes
- Easy to use



Configuration

- Grab and go! No special configuration required!

💡 Note: Product attributes must be created and assigned to be available for enhanced search functionality. Refer to Microsoft documentation on how to configure them.

Functionality – General rules

- One or more filters may be applied at a time:
 - Filtered results will show products where ALL conditions apply.
 - Any condition may be modified – just select it and click *Edit*.
 - To delete any condition – select and click *Delete*.
- To apply filter, click *OK*.
- To reset filter (remove all conditions at once), click *Reset*.
- *Cancel* will close the form without applying added/modified conditions (the change in conditions will be saved, but not applied).

The screenshot shows a 'Search by attributes' dialog box. At the top, it says 'Standard view' with a dropdown arrow. Below that is the title 'Search by attributes'. There are three action buttons: '+ Add' (blue), 'Edit' (pencil icon), and 'Delete' (trash icon). Below these is a table with two columns: 'Name' and 'Criterion'. The table has three rows: 'Bluetooth' (selected with a blue highlight), 'Amplifier', and 'Brand'. The 'Criterion' column has values 'Yes', 'Yes', and 'Wide World Importers' respectively. At the bottom of the dialog are three buttons: 'Reset', 'OK', and 'Cancel'.

Name	Criterion
Bluetooth	Yes
Amplifier	Yes
Brand	Wide World Importers

Functionality – General rules

Standard view ▾

Add filtering attribute

Attribute

Bluetooth ▾

Operator

Equal ▾

Equal

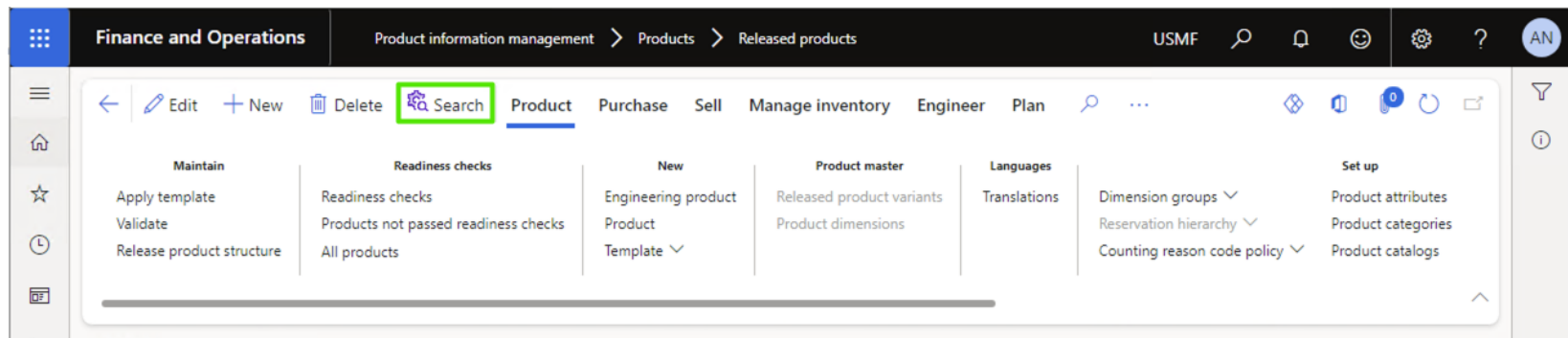
Exists

OK Cancel

- Logical operations available within each condition depend on type of attribute searched by – e.g., for attribute of type Boolean available options are Exists and Equal while for Integer type it will be Equal, Not equal, Exists, $\geq$, $\leq$, $>$, $<$ and Range.

Functionality – Released products

- New function  *Search* appears on the Released product page:
 - Navigate to Product information management > Products > Released products.



Functionality – Purchase requisition

- To access Dyneria Smart Attributes search functionality from a Purchase requisition, navigate to Procurement and sourcing > Purchase requisitions > All purchase requisitions. Create new or open existing purchase requisition and click *Add products* in the lines area.

The screenshot displays the Dyneria Smart Attributes interface for a Purchase requisition. The top navigation bar shows 'Finance and Operations' and the breadcrumb 'Procurement and sourcing > Purchase requisitions > All purchase requisitions'. The main header includes 'USMF', search, and notification icons. The left sidebar contains navigation icons. The main content area shows the 'Purchase requisitions' section with a 'Standard view' dropdown. The title '000081 : Sound system parts' is displayed, along with a 'Draft' status. Below the title, there are tabs for 'Lines' and 'Header'. The 'Purchase requisition header' section is visible. The 'Purchase requisition lines' section shows a table with columns: 'Line', 'Requester', 'Buying legal e...', 'Receiving operating unit', 'Item number', and 'Procurement category'. The 'Add products' button is highlighted in the 'Purchase requisition lines' section.

Line	Requester	Buying legal e...	Receiving operating unit	Item number	Procurement category
+	Va...				

Functionality – Purchase requisition

- New function will appear in the SELECT FROM FILTERED LIST section as shown below.

The screenshot displays the 'Add products to purchase requisition' interface. The top section shows the 'Standard view' and the title 'Add products to purchase requisition'. Below this, there are three dropdown menus: 'Requester' (Adriana Giorgi), 'Buying legal entity' (USMF), and 'Receiving operating unit' (Client Services). The 'SET PROCUREMENT CATEGORY FILTER' section includes a 'Find procurement category node' input field. The 'SELECT FROM FILTERED LIST' section features a 'Search' button (highlighted with a green box) and a dropdown menu 'Add unlisted product to lines'. Below this is a 'Filter' input field. The product list is organized into categories: 'CORP PROCUREMENT CATEGORIES (OFFICE EQUIP)', 'WORKPLACE SERVICES (WORKPLACE SERVICES)', 'OFFICE MACHINES (Office machines and their sup', 'VEHICLES (Vehicle Expenses)', and 'OFFICE AND DESK ACCESSORIES (OFFICE AND DI'. The 'CARS' category is expanded, showing items like '0128 Titanium Bearing Set (8 pack)' (0.00 USD) and 'C0004 Lifecam HD 5000' (39.95 USD). The 'COMPUTERS' category is also expanded, showing 'C0001 Microsoft Natural Keyboard ...' (39.95 USD). The right-hand panel, titled 'LINES TO ADD TO PURCHASE REQUISITION', includes a 'Remove' button, a 'Dimensions' dropdown, and a table with columns 'Item number' and 'Produc'. Below the table are tabs for 'Details' and 'Dimensions', and input fields for 'Item number', 'Category', and 'Item description'. At the bottom right, there are 'OK' and 'Cancel' buttons.

Functionality – Purchase order

- To perform product search by attributes from a Purchase order, navigate to Procurement and sourcing > Purchase orders > All purchase orders (or Accounts payable > Purchase orders > All purchase orders). Create new or open existing purchase order and click *Add products* in the lines area.

The screenshot displays the Dyneria Smart Attributes interface for a Purchase order. The breadcrumb navigation at the top indicates the path: Procurement and sourcing > Purchase orders > All purchase orders. The main header shows the purchase order number '000035 : US-111 - Contoso office supply' and its status as 'Open order' and 'Approved'. Below the header, the 'Purchase order lines' section is visible, featuring a table with columns for Line number, Item number, Product name, Procurement category, Variant number, and Site. The 'Add products' button is highlighted in green, indicating the next step in the process. The table shows one line item with Line number 1, Item number 1, and Product name 'PLL1910M 19in 1280x1024 DVI ...' under the category 'OFFICE AND DESK ACCESSORIES'.

Line number	Item number	Product name	Procurement category	Variant number	Site
1	1	PLL1910M 19in 1280x1024 DVI ...	OFFICE AND DESK ACCESSORIES		

Functionality – Purchase order

- New function will appear in the AVAILABLE PRODUCTS section as shown below.

The screenshot displays the 'Add products' dialog in the Dyneria Smart Attributes application. The interface is divided into several sections:

- Filters:** Includes a 'Hierarchy' dropdown set to 'Retail Product Category' and a list of categories: ALL (ALL), Fashion (Fashion), Adventure Works (Adventure Works), Team Sports (Team Sports), Apparel and Footwear (Apparel and Footwear), Electronics (Electronics), Exercise (Exercise), and Action Sports (Action Sports).
- Item group:** A dropdown menu.
- Buyer group:** A dropdown menu.
- Vendor account:** A dropdown menu.
- AVAILABLE PRODUCTS:** A list of products with columns for 'Product number' and 'Product name'. The 'Search' button is highlighted with a green box. The list includes:
 - 0128 Titanium Bearing Set (8 pack)
 - 0130 72mm Longboard Wheels
 - 0136 Barbell Mid Width Bench
 - 4401 Proseware 50W Car Radio
 - 4402 Northwind Traders 50W Car Radio
 - 4403 A. Datum 50W Car Radio
 - D0023 Standard Speaker - Up-Sell Demo
 - D0024 High End Speaker - Up-Sell Demo
 - T0012 Soundbar
 - T0013 SurroundSoundbar
- ADD SELECTED PRODUCTS:** A table with columns for 'Product number' and 'Product name'. It contains one entry: 'M0007' with 'Standard' as the product name.

At the bottom right, there are 'OK' and 'Cancel' buttons.

Functionality – Sales order

- The enhanced search functionality is available from Sales order as well. Navigate to Sales and marketing > Sales orders > All sales orders (or Accounts receivable > Sales orders > All sales orders). Create new or open existing sales order and click *Add products* in the lines area.

The screenshot displays the Dyneria Sales order interface. The top navigation bar shows 'Finance and Operations' and 'Sales and marketing > Sales orders > All sales orders'. The main header area includes 'Sales order details | Standard view' and '000811 : Cave Wholesales'. Below this, the 'Lines' tab is selected, showing the 'Sales order header' and 'Sales order lines' sections. In the 'Sales order lines' section, the 'Add products' button is highlighted with a green box. The table below shows the current sales order lines:

	Ty...	Variant number	Item number	Product name	Sales category	CW quantity	CW unit
		VN-000240	GA0001	SpeakerSet Highline-41A			
		VN-000219	GA0002	SpeakerSet Highline-62B			

Functionality – Sales order

- New function will appear in the AVAILABLE PRODUCTS section as shown below.

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 ...

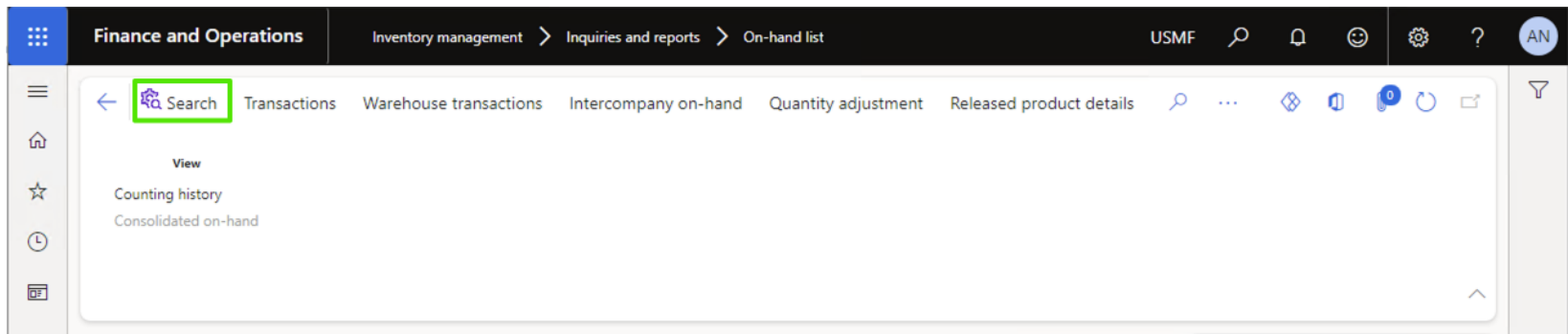
☐	Product nu...	Product name	
☐	0128	Titanium Bearing Set (8 pack)	
☐	0130	72mm Longboard Wheels	
☐	0136	Barbell Mid Width Bench	
☐	4401	Proseware 50W Car Radio	
☐	4402	Northwind Traders 50W Car Radio	
☐	4403	A. Datum 50W Car Radio	
☐	D0023	Standard Speaker - Up-Sell Demo	
☐	D0024	High End Speaker - Up-Sell Demo	
☐	T0012	Soundbar	
☐	T0013	SurroundSoundbar	

ADD SELECTED PRODUCTS

☐	↺	Product number	Product n
☐		GA0002	Speaker
☐		GA0001	Speaker

Functionality – On-hand list

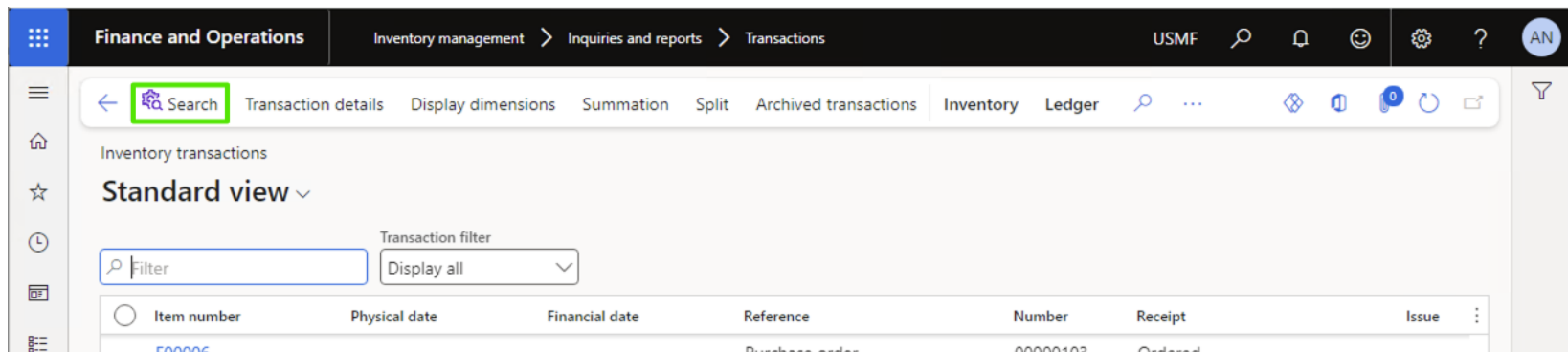
- Navigate to Inventory management > Inquiries and reports > On-hand list. New function  *Search* will appear on the top left corner of the action pane.



- Search by attributes may be used right after an empty On-hand list page opens or once standard filters are applied.

Functionality – Transactions

- Navigate to Inventory management > Inquiries and reports > Transactions.  Search function will appear first from the left on the action pane.



Summary

We hope our product will be beneficial for your business.

Please, email to info@dyneria.com with any inquiries or feedback.



Thank you!