Smart reservation

Standard and Enterprise features

**for
Dynamics 365 for Supply Chain Management**

White Paper

Document version: 1.0

Document status: Final

Valid as of: June-20-2021

Smart reservation – Standard edition key features

- Real-time ever running ATP component to instantly calculate optimal allocation for sales orders. Any change in sales orders, purchase orders, production orders, etc. is caught instantly and incorporated in the allocation profile.
- Visualization of sales order allocation using traffic light colors supported by detailed information on best possible partial delivery dates and quantities. In case of shortage first possible delivery date is provided.
  Green means: Allocated against physical on-hand or physical reserved.
  Yellow means: Allocated against incoming receipts that are expected in time to meet the delivery date.
  Red means: Could not allocate against receipts (physical or incoming) in time to meet the delivery date.
- Advanced *Allocation center* to visualize the complete allocation and priorities across multiple sales orders. Extensive tools to manipulate with the allocation supported by full overview of free/unallocated quantities on future receipts and their availability dates.
- Priority rules for allocation are available at customer level, sales order level and order pool level. This allows for generally having groups of sales orders or customers prioritized higher than others.
- Intercompany allocation allows for allocation of Intercompany sales orders against receipts and on-hand levels in the sourcing company. Cross company allocation allows for full allocation across legal entities.
- Automatic Background reservation to apply reservations for sales orders that have been granted access to physical on-hand levels by the ATP component. The background reservation works on a time-fence controlled approach allowing for reservations to first kick in close to the time of picking e.g., two days before ship date.
- Automatic delivery date handling is a fully automated process to postpone the delivery date for sales orders that according to the ATP calculation cannot be delivered on the specified delivery date. The functionality generates a log for all postpone actions.
- Full integration with Batch disposition codes to ensure that unavailable batches are not included in the allocation of sales orders. Once an unavailable batch becomes available it will instantly be included in the allocation.
- Extended on-hand levels enriched with traffic light information allowing users to see "Free available on-hand" and explore how much is free to ship right now. Similar information is available in the "Add lines" functionality in the Sales order details UI so that "what is *really* free to sell" is visualized.
- Quick tools to prepare and reserve as much free/unallocated quantity as possible for immediate partial delivery for sales order lines or complete sales orders.
- Mass reprioritize tool to raise priority for multiple complete sales orders. This tool also allows for recurrent batch execution with more generic query ranges to target specific groups of sales orders and automatically raise their priority.
- Replication of on-hand levels enriched with traffic light information, such as "Free available physical" and "Next free coming receipt date and quantity", is a fully automated process that maintains the complete on-hand picture. These data are designed for direct population in web shops, BI tools, etc.
- Replication of red sales orders and red sales order lines with full traffic light information.

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Smart reservation – Enterprise edition key features

- All features in the Standard edition.
- Extended traffic light information provides further allocation details with additional Black and Blue colors. The Red color in Standard edition is split into Red and Black where Red means actual allocation against one or more receipts, but where the receipt date is late, while Black represents quantities that could not be allocated at all.
  The Blue color means that the line remains unallocated because the delivery date in beyond lead time.
- Traffic light allocation of transfer orders including complete visualization in the Transfer orders UI and full access to the Allocation center for manipulation. With transfer orders enabled for allocation the Allocation center is capable of displaying a mix of sales order and transfer order lines in prioritized order.
- Warehouse specific activation and control where warehouse behavior in Smart reservation can be configured.
- Cross warehouse allocation from distributed warehouses against refill warehouses including transport times and priority rules.
- Full integration to order hold codes where setup decides if sales orders on hold should be allocated and/or reserved by the background reservation.
- Extended replication including full traffic light profile for all open lines, detailed allocation for all open lines, red transfer orders, red transfer order lines with, black transfer orders and black transfer order lines, all with full traffic light information.