



License Plating

Megan De Freitas - 2024-11-22 - Miscellaneous

Overview

License plating (*often referred to as "Palletizing" or "Palletization"*) is a method of grouping items under a single moniker, allowing them to be processed as a group without having any of their properties adjusted. This speeds up data entry for larger transactions if a group of items all need to undergo the same action, but they do not have anything linking them together.

While you can process inventory transactions that utilize license plates within Microsoft Dynamics GP, it is highly recommended that all inventory transactions be completed within Inventory Manager if license plates are in use. Affecting inventory levels in GP will not update the records for license plates and could create instances where transactions against a license plate will not have adequate inventory to be completed. If you have run into this situation, a reconciliation method is provided to fix these instances, but it must be manually run.

Settings & Securities

Before getting started with License Plating, there are a few new settings & securities that you will need to enable:

- *License Plate Maintenance*
- *Mobile License Plate Maintenance*
- *Print License Plate Labels*



There are also a handful of new settings that have been added for use with License Plating:

- *License Plate Number Generation Format* - Set the pattern for generating license plate numbers. Uses standard C# string formatting rules. Defaults to "LP{0:000000000}"
- *Require License Plate On Submit* - Determines if the mobile receiving screen requires a license plate to be specified in order to submit. Defaults to "False"
- *SSCC GS Company Prefix* - Sets the prefix used to generate SSCC numbers. GS Company prefixes are not assigned by SalesPad
- *SSCC Starting Serial Value* - Sets the starting value for SSCC serial numbers for use in generating SSCC numbers. Defaults to "1000"

- *Switch to Add After Create* - Determines if the Mobile License Plate Maintenance screen switches the action to Add after creating a new license plate. This removes some fields from the screen to allow for more items to be added to the new license plate. Defaults to "True"

Additional Setup

To make use of license plates within transactions from an iOS or Android device, that option must be enabled from the Mobile Layout Manager. Open the manager and select a layout to make changes to then check the box for Allow License Plates on the desired screens in the middle grid. The column may need to be added to the grid to see this option. Right-click the column headers, click Column Chooser and drag the header onto the grid.

License Plate Maintenance

The License Plate Maintenance screen allows users to view and modify license plates using the Inventory Manager Console. The License Plate Maintenance screen can be accessed from both the Inventory Manager Console, and your mobile device.

Inventory Manager Console

License Plate Maintenance within the Inventory Manager Console is found on the ribbon menu across the top of the Inventory Manager Console window, in the Inventory section of the Application tab.



A variety of search options are available along the top of the screen. Click the Search button to display the results in the grid below the search fields. Click on a license plate to highlight it and view the details on the bottom grid.

Creating & Deleting a License Plate

To add a new license plate, click the "New" button above the license plate grid. In the window that pops up, enter the desired information before clicking OK to finalize. Of note, clicking on the + button in the license plate number field will generate the next unique license number based on the settings described above.

To delete a license plate, select the license plate within the grid and click the "Delete" button. Click "Yes" on the resulting confirmation prompt to permanently delete the license plate.

Editing a License Plate

To edit an existing license plate, simply click the cell on the grid you wish to edit and enter a new value. Tab off and the new value is instantly saved.

Adding & Deleting License Plate Details

To add an item, or detail, select the license plate on the grid. Click the "New" button at the top of the grid, and the 'New License Plate Item' window will display. Enter the item number, qty, and serial or lot number if needed, and click "OK" to add the item to the license plate.

To delete an item, or detail, select the license plate, then highlight the detail you'd like to delete and click the "Delete" button. Click "Yes" on the resulting confirmation prompt to permanently remove the item from the license plate.

Inventory Manager Mobile

When opening Inventory Manager, you will see the License Plate Maintenance screen. This allows you to perform the same actions that are available within the Inventory Manager Console, directly from a mobile device.

Mobile License Plate Maintenance

License Plate Maintenance within Inventory Manager is found on the main menu:



The License Plate Maintenance screen allows for 5 different actions to be completed: adding items to a license plate, removing items from a license plate, creating a new license plate, updating a pre-existing license plate, and deleting a license plate.

Because each of these actions requires different information, when opening the screen you will be asked to pick an action from that list and then you will be taken to the appropriate screen from there.

Adding & Removing Items

Within these screens, you can add or removes items from an existing license plate (*other changes to the license plate cannot be made here*). Added items will be validated against inventory in the system. Removed items are validated against the known details of the items in the license plate.

Creating, Updating & Deleting a License Plate

Creating a new license plate allows for any input into the License Plate field, it will validate that the license plate number is unique before creating (*there is also a button to get the next available license plate number from the server*).

When creating a new license plate, an item can be added to the license plate at the same time, but is not required. All fields associated with a license plate can be set here; Site, Bin, Tracking Number, Barcode, etc.

Updating a license plate allows you to change fields (*such as: Tracking Number and Barcode*) on a previously created license plate; however, you cannot add new items or

make changes to locations here.

Deleting a license plate simply removes all records of the license plate from the system; this does not affect inventory levels. Deleting does not delete any nested license plates.

Other Mobile Screens

License plates can help speed up transaction entry on other mobile screens since they are already configured. Currently, the screens that Inventory Manager supports license plates on are: Picking, Bin Transfers, Inventory Adjustments, Inventory Lookup, Packing, Receiving, Site Transfers, and Stock Counts.

For general use, all screens act the same in the following regards:

- The license plate number is entered into the item number field (*rather than an item number*)
- Once the license plate number has been added, the serial/lot/non-tracked field will change to "License Plate"
- Some fields may become read-only after adding a license plate, as the license plate will contain all of the necessary data for the transaction (*Qty and UofM don't apply for license plate transactions*)
- Nested license plates are all processed along with the parent license plate

Additionally, any transaction being attempting to be completed without a license plate will prevent inventory levels from "breaking" license plates. This means that if a bin transfer is attempted for an item, but all of the quantity of that item in the bin belongs to license plates, the transfer will fail. In this scenario, completing the transfer would require that the license plate to be transferred as a whole, or the items be removed from the license plate before transferring.

Special Cases

Inventory Adjustments

During Inventory Out transactions, the license plate is deleted upon submit (*a prompt will appear on screen before this happens*).

Receiving

There are two main uses for license plates during the receiving process: a quick transaction to receive all items at once, or, adding items to a license plate as they are received individually. As such, there is now an additional field for license plate number on the receiving screen.

The License Plate field is for adding items to a plate and the Item Number field is still used for completing the transaction against all the items in a license plate. Using both nests the

license plate (*Item Number*) under the parent plate (*License Plate*).

- Receiving a pre-made license plate
 - Qty field is replaced with a selection field with supplemental text “Click to view license plate items”. This will display the sum of each item included in the license plate (*in base UofM*), as well as any nested license plates
 - If a value is entered into the license plate field, that value will be used as the parent license plate number (*this will create a new license plate if needed*). This field also has a button which will generate the next unique license plate number in sequence
- Receiving individual items into a license plate
 - The receiving process works as normal, however, before you submit you can enter (*or search*) a license plate number to receive the inventory into. You are able to submit multiple times during this process to receive all items

Picking and Packing

A license plate can only be picked or packed for a document if all items within the license plate (*including all nested items*) are on the document, and the total quantity required for each item on the document meets or exceeds the quantity in the plate.