

TERNPOINT



USER GUIDE

# TPS Freshness Rules

TERNPOINT.SOLUTIONS





# TPS Freshness Rules

Freshness Rules are intended to restrict the receipt of inventory or the shipment of inventory that cannot be used before its intended shelf life. Preventing the shipment of items to customers that do not meet their specifications can minimize returns and discounts, as well as a poor service rating. It also ensures that the received inventory can be resold or consumed before it expires, reducing inventory adjustments and the associated disposal costs. The receipt of inventory with less than the required freshness days may be permitted based on setup and may also provide an opportunity to negotiate a better cost for this inventory with the vendor.

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## LICENSING

A companion app to manage licensing is automatically installed with the first app that is installed from Ternpoint Solutions

1. A new **Permissions Set** was added as part of the app install. **TPS LM LICENSE MGT.** Assign this permission sets to users in advance of use, on the **User Setup** card.
2. Extension Setup
  - a. Search for and open **Extension Management**.
  - b. Select **Ternpoint License Management** and open.
  - c. Ensure *Allow HttpClient Requests* is activated

The screenshot shows the 'Ternpoint License Management' configuration screen. It has a 'Group' header. Below it, there are four fields: 'App ID' with value '320dac76-d021-4827-a159-f37...', 'Publisher' with value 'Ternpoint Solutions LP', 'Name' with value 'Ternpoint License Management', and 'Allow HttpClient Requests' which is a toggle switch currently turned on.

3. Ternpoint Product Registration
  - a. Search for and open **Ternpoint Product Registration**.
    - i. On this page all subscription type Ternpoint Solutions apps that have been installed are shown. Also from this page contacting Support, viewing your subscription status, creating a trial license, applying for an extension to your trial license or requesting a full one year license can be done.
    - ii. Enter appropriate Contact Info and select **Register** in the ribbon.
      1. *If registering the app in a separate company from one already purchased, ensure the same contact information is used across all Business Central companies to avoid a second monthly subscription fee. The license fee is per Business Central tenant,*
    - iii. In the line section of the page select **Create Trial License**.
      1. A 30 day trial license will be created for evaluation purposes.
      2. If more time is needed to evaluate the app please select the **Extend License** or **Contact Support**.
      3. In order to purchase a full license please select **Request Full License**.
      4. *Email setup must be enabled in order to send emails requesting licenses or to contact support using the link.*
    - iv. In order to uninstall the app, navigate to **Extension Management**, select the app and select **Uninstall** in the ribbon.

The screenshot shows the 'Product Registration' screen. It has a 'General' section with fields for 'Subscription ID', 'Environment' (set to 'Production'), 'Registered On' (7/21/2023), and 'Verify License for Sandbox'. There is also a 'Contact Info' section with fields for 'First Name' (Jason), 'Last Name' (Sanders), 'E-Mail' (jsanders@outlook.com), 'Phone No.' (555-555-2323), and 'Contact ID'. Below this is a 'Company' section with a ribbon containing 'Applications', 'New Line', 'Delete Line', 'Create Trial License', 'Extend License', and 'Request Full License'. At the bottom, there is a table with columns: 'App ID', 'App Name', 'Subscription Type', 'Subscription Status', 'Installed On', 'Expires On', and 'Product ID'. The table contains one row with the following data: App ID '1ef529a33c-3e79-471c-b0e5-f9d680682ed9', App Name 'Vendor Certificates', Subscription Type 'Production', Subscription Status 'Active', Installed On '7/21/2023 11:41 AM', Expires On '7/21/2024 6:50 PM', and Product ID '1ec1907a7-22e1-4280-9379-629f126a930f'.

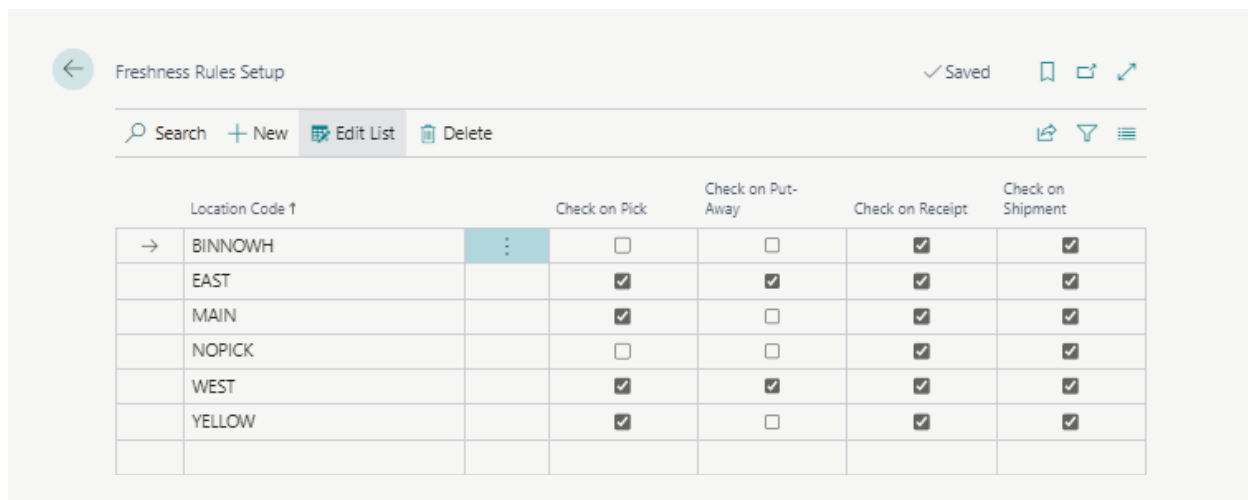


## PERMISSIONS

1. Three new Permissions Sets were added as part of the app install. TPS FRL RULES ALL, TPS FRL RULES EDIT and TPS FRL RULES READ. Assign these new permissions sets as appropriate to users in advance of use, on the User Setup card

## FRESHNESS RULES SETUP

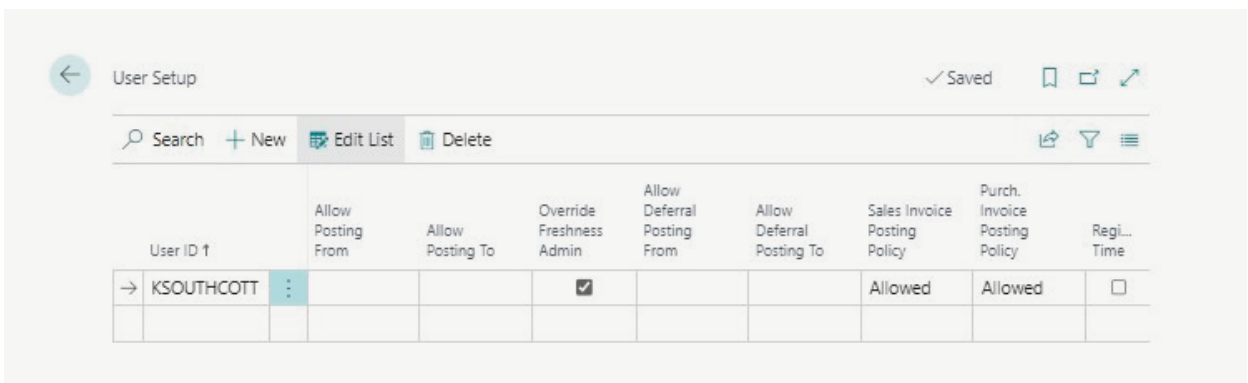
1. Search for and open **Freshness Rules Setup**. This is the area where location-based checks and override groups are setup.
2. Select **New** then select a **Location Code**. If required, select which shipping or receiving transactions where freshness rules should be enforced.



Location Code ↑	Check on Pick	Check on Put-Away	Check on Receipt	Check on Shipment
→ BINNOWH	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
EAST	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
MAIN	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
NO PICK	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
WEST	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
YELLOW	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

## USER SETUP

1. Search for and open **User Setup**. A new checkbox called **Override Freshness Admin** has been added to select which users are able to override the freshness calculation.













User ID ↑	Allow Posting From	Allow Posting To	Override Freshness Admin	Allow Deferral Posting From	Allow Deferral Posting To	Sales Invoice Posting Policy	Purch. Invoice Posting Policy	Regl... Time
→ KSOUTHCOTT			<input checked="" type="checkbox"/>			Allowed	Allowed	<input type="checkbox"/>



## CUSTOMER SETUP

1. Search for and open a **Customer Card**.
2. In the ribbon under the **Home** menu, select **Freshness Date Setup**.

C00010 · Miranda Priestly ✓ Saved  



**Freshness Date Setup** |  Search  New  Edit List  Delete | Actions  ...   









Source Type ↑ ▼	Source No. ↑ ▼	Item No. ↑	Description	Freshness
→ Customer ▼	C00010	46OZPLAINPICKLES	12 x 46oz case Kosher Pickles	200D
Customer	C00010	SPICE	Pickling Spice Blend	220D

3. Look up and select the **Item No.** then enter a date formula for the **Freshness** required on arrival (The **Requested Delivery Date on Sales Order** is used to compare to the expiration date on the inventory Lots). A number and a time parameter must be entered D=Days, M=Months, Y= Years for example.

## VENDOR SETUP

1. Search for and open a **Vendor Card**.
2. In the ribbon under the **Home** menu, select **Freshness Date Setup**.

V00010 · Spice World ✓ Saved  

**Freshness Date Setup** |  Search  New  Edit List  Delete | Actions  ...   

Source Type ↑ ▼	Source No. ↑ ▼	Item No. ↑	Description	Freshness
Vendor	V00010	SPICE	Pickling Spice Blend	180D
Vendor	V00010	1031	Pepper	365D
→ Vendor	V00010	1030	Salt	500D
Vendor	V00010	1045	Paprika Powder	365D

3. Look up and select the **Item No.** then enter a date formula for the **Freshness** required on receipt (the current date is used to compare to the expiration date entered on the lot being received). A number and a time parameter must be entered D=Days, M=Months, Y= Years for example.



## WAREHOUSE SETUP

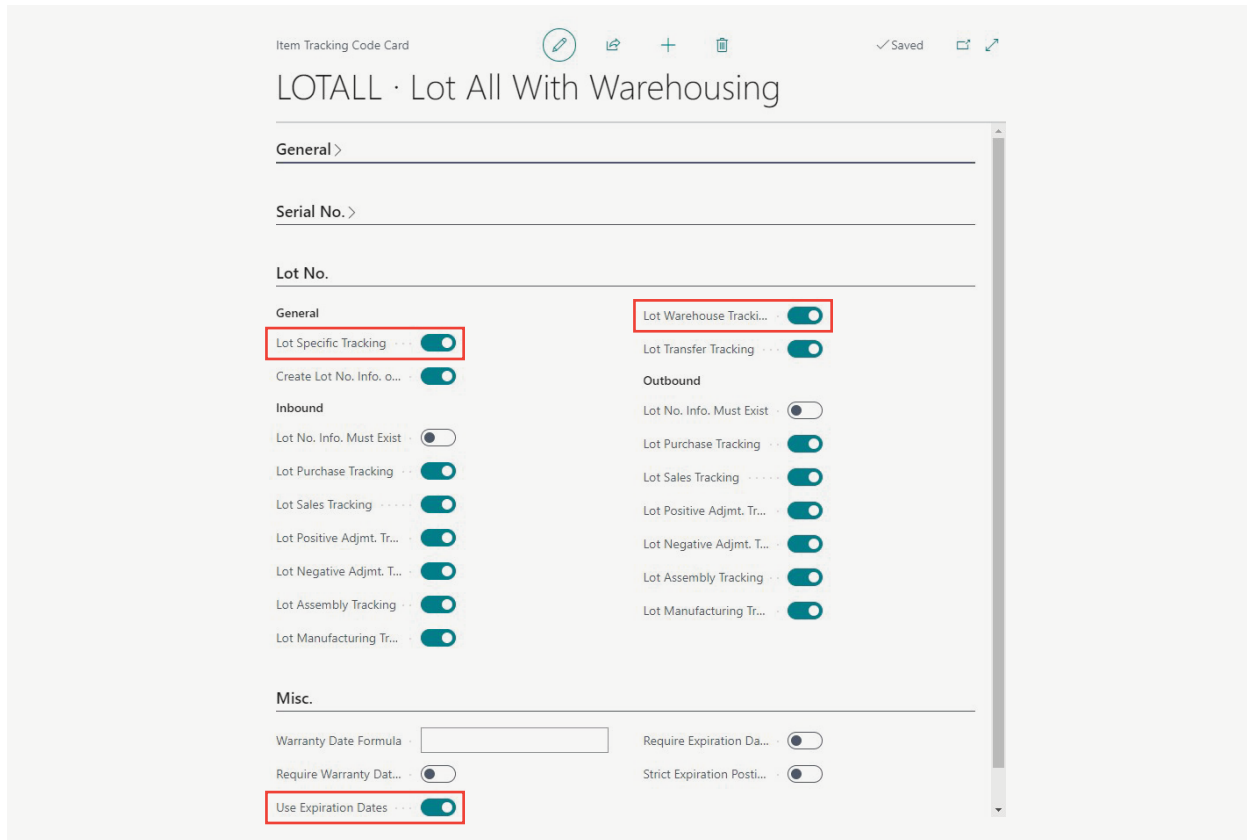
1. Search for and open a **Location Card** where picking is enabled.
2. In order to suggest Lots on a pick that meet the customer freshness rules, **Require Pick** and **Pick According to FEFO** must be enabled. If warehouse picking is not being used, then these setups can be skipped. This app has not been evaluated to work with the **Direct Put-away and Pick** configuration.

The screenshot shows the 'Location Card' for 'SC-D-100 · Sacramento Distribution Center'. The 'Warehouse' section has several toggle switches: 'Require Receive', 'Require Shipment', 'Require Put-away', 'Use Put-away Works...', and 'Require Pick' (highlighted with a red box). The 'Bin Policies' section has 'Bin Capacity Policy' set to 'Never Check Capacity', 'Allow Breakbulk' disabled, 'Put-away Template C...' set to a dropdown, 'Always Create Put-a...' disabled, 'Pick' section with 'Always Create Pick Li...' disabled, and 'Pick According to FEFO' highlighted with a red box. The 'Bins' section has 'RECEIVE' and 'SHIP' buttons.

## ITEM SETUP

1. Search for and open an **Item Card**.
2. If desired (not required to use this app) enter a no series in the **Lot No's** field on the **Item Tracking** tab, to number lots in alphanumerical order, otherwise manual lot entry is required. An **Expiration Calculation** can be useful for items to calculate an expiration date when a lot enters the system either through a purchase, production or inventory adjustment transaction.
3. The Item must have an **Item Tracking Code** that is setup for Lot tracking.
  - a. Note: The **Item Tracking Code** cannot be changed on **Items** with posted entries due to the data that exists in posted ledgers.
4. Enabling **Lot Warehouse Tracking** is recommended if advanced warehousing (Warehouse Shipments, Warehouse Receipts, Bins, Warehouse Picking etc) is being used with Lots.





Item Tracking Code Card

LOTALL · Lot All With Warehousing

General >

Serial No. >

Lot No.

General

Lot Specific Tracking ☒

Create Lot No. Info. o... ☒

Inbound

Lot No. Info. Must Exist ☐

Lot Purchase Tracking ☒

Lot Sales Tracking ☒

Lot Positive Adjmt. Tr... ☒

Lot Negative Adjmt. T... ☒

Lot Assembly Tracking ☒

Lot Manufacturing Tr... ☒

Lot Warehouse Tracki... ☒

Lot Transfer Tracking ☒

Outbound

Lot No. Info. Must Exist ☐

Lot Purchase Tracking ☒

Lot Sales Tracking ☒

Lot Positive Adjmt. Tr... ☒

Lot Negative Adjmt. T... ☒

Lot Assembly Tracking ☒

Lot Manufacturing Tr... ☒

Misc.

Warranty Date Formula

Require Warranty Dat... ☐

Use Expiration Dates ☒

Require Expiration Da... ☐

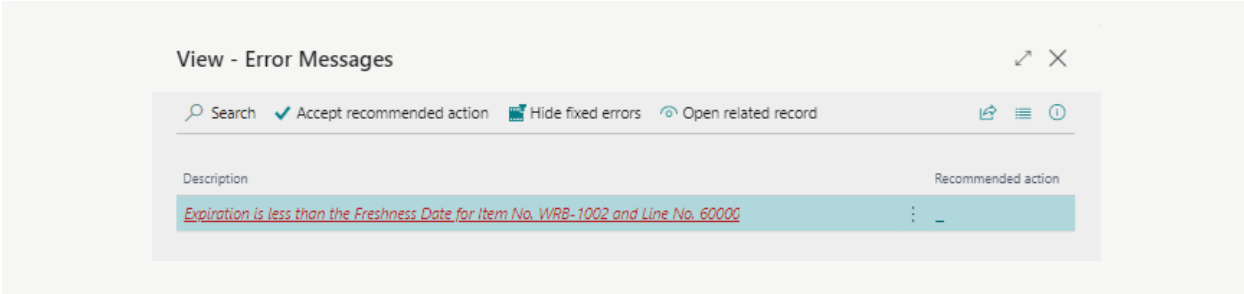
Strict Expiration Posti... ☐

5. The **Item Tracking Code** selected for the item must have **Use Expiration Dates** enabled.
6. We also recommend reviewing the **Require Expiration Date Entry** and **Strict Expiration Posting** setups to see if their use is applicable, but their setups do not affect how this app functions.
  - a. You can find training documentation from Microsoft at the following link:  
<https://docs.microsoft.com/en-us/dynamics365/business-central/design-details-item-tracking>

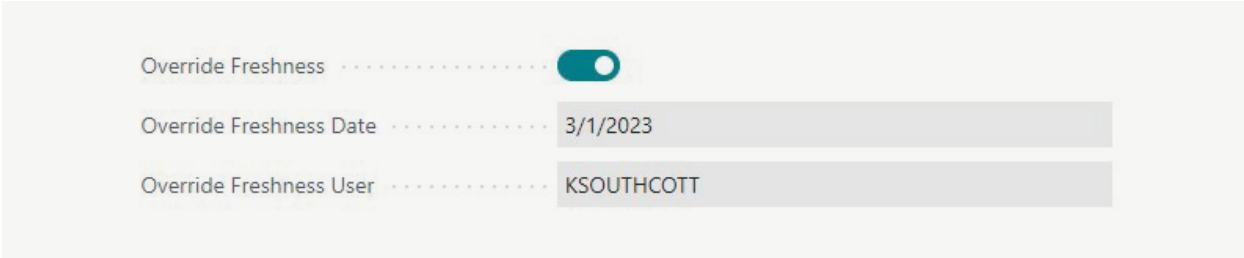
## SALES USAGE

1. When releasing a Sales Order a **Requested Delivery Date** is required after installing this app. This is the date that is used to compare to the expiration date on the available inventory as to which lots are suggested for a **Pick** (if **Warehouse Picking** is used) or whether a Lot can be post shipped on the **Warehouse Shipment** or **Sales Order**.
2. A new field for **Freshness Date** has been added to the **Sales Line**, **Warehouse Shipment Line** and **Posted Sales Shipment Line**, indicating what the required minimum expiration date on inventory is/was required for that line.
3. At the time of posting a **Warehouse Shipment** or **Sales Order** the expiration date of the Lots assigned to the order are considered using the freshness rules for that customer and item combination, and the post ship process is prevented if the Lot does not meet the minimum freshness days.



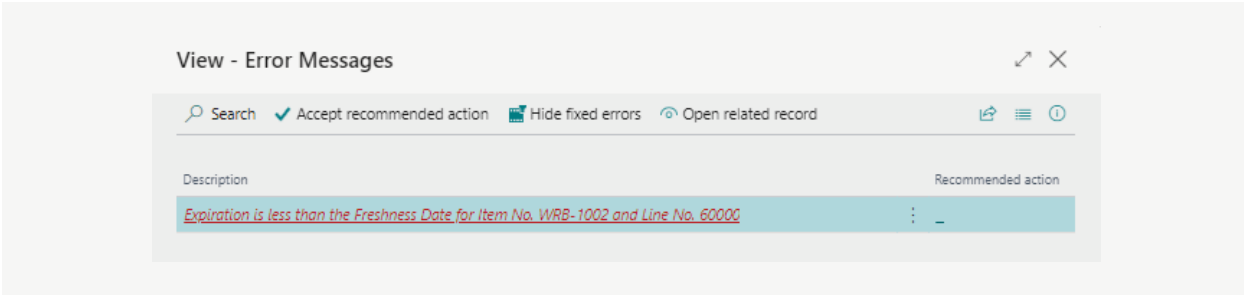


- 4. At the time of generating a pick from a **Warehouse Shipment**, the expiration date of the Lot(s) are considered when suggesting Lots for picking using the freshness rule for that customer and item combination, if **Pick According to FEFO** is enabled in the **Location Card**.
- 5. If a decision is made to ship a lot to a customer that is not within the required freshness time period, the **Override Freshness** option on the document can be used (provided the user activating it has this permission enabled in **User Setup**).



PURCHASE USAGE

- 1. At the time of post receiving a **Purchase Order** or a **Warehouse Receipt** the expiration date on the inventory is compared to today's date to ensure that the item meets the established freshness rule. If there are not the required number of days remaining, then the post receipt will be prevented.



- 2. The **Override Freshness** can be used on the **Purchase Order** or **Warehouse Receipt** to receive a Lot with less than the established freshness rules, as long as the user is permitted.

