



Microsoft Dynamics 365 Commerce

Store Operations App



Summary

The Store Operations App for Microsoft Dynamics 365 Commerce streamlines retail operations by providing an intuitive interface for store staff to manage transfer orders, purchase orders, reporting, and user administration.

Key Value:

- Developed to overcome high Microsoft licensing costs.
- Enables Store users to connect back office and store operations without per-user licensing fees.
- Significant cost savings while maintaining operational efficiency and compliance.

Features:

- Secure login and authentication.
- Barcode-enabled order processing.
- Comprehensive reporting and user management.





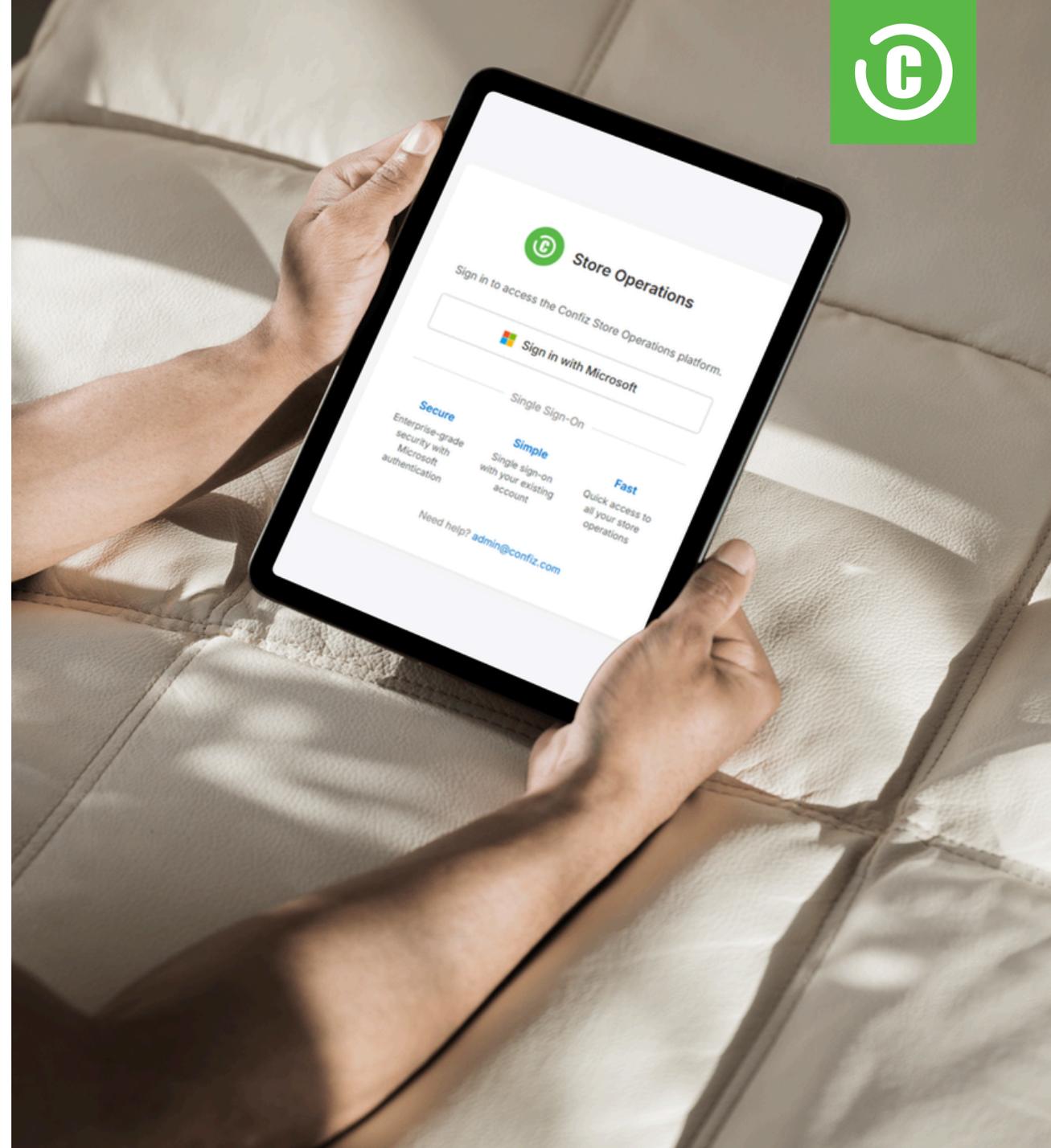
Login

Step:

- Open the Store Operations app.
- Sign in using Microsoft authentication.

Details:

- Secure, single sign-on with enterprise-grade security.
- Use your existing Microsoft account credentials.





Transfer Orders

Step:

- Navigate to 'Transfer Order' > 'All Transfer Orders'.

Details:

- View a list of all transfer orders with details such as order number, source/destination warehouses, status, and dates.
- Use filters to search or reset the view.

The screenshot displays the 'Store Operations Management System' interface. The left sidebar contains a navigation menu with categories like Home, Transfer Order, Purchase Orders, Reports, and Admin. The main content area is titled 'All Transfer Orders' and features a search bar, a status filter set to 'All', and buttons for 'Show advanced' and 'Reset'. A table lists 36 transfer orders with columns for Transfer ID #, From WH, To WH, Ship Date, Receive Date, Created Date, Company, and Status. The status column shows various states such as 'Created', 'Shipped', and 'Received'. A 'Create Transfer' button is visible in the top right corner.

Transfer ID #	From WH	To WH	Ship Date	Receive Date	Created Date	Company	Status
000229	11	12	11/12/2025	11/12/2025	11/13/2025	usmf	Created
000228	11	12	11/12/2025	11/12/2025	11/13/2025	usmf	Created
000210	11	12	11/12/2025	11/12/2025	11/12/2025	usmf	Created
000209	11	12	11/12/2025	11/12/2025	11/12/2025	usmf	Shipped
000208	11	12	11/12/2025	11/12/2025	11/12/2025	usmf	Created
000207	11	12	11/12/2025	11/12/2025	11/12/2025	usmf	Received
000206	11	12	11/11/2025	11/11/2025	11/12/2025	usmf	Created
000205	11	12	11/11/2025	11/11/2025	11/12/2025	usmf	Received
000204	11	12	11/11/2025	11/11/2025	11/12/2025	usmf	Received
000203	11	12	11/11/2025	11/11/2025	11/12/2025	usmf	Received
000186	11	12	11/11/2025	11/11/2025	11/11/2025	usmf	Received
000185	11	12	11/11/2025	11/11/2025	11/11/2025	usmf	Received
000184	11	12	11/10/2025	11/10/2025	11/11/2025	usmf	Received
000183	11	12	11/10/2025	11/10/2025	11/11/2025	usmf	Created
000182	11	12	11/10/2025	11/10/2025	11/11/2025	usmf	Created
000903	11	12	11/10/2025	11/10/2025	11/10/2025	usmf	Created



Transfer Orders Lines

Step:

- Select a transfer order to view its lines.

Details:

- See itemized details: item ID, batch number, quantity, shipped/received status, and dates.
- Useful for tracking the movement of each item within the order.

Store Operations Management System

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Transfer Order: 000229

Back

Transfer Order Header

TRANSFER NUMBER	FROM WAREHOUSE	TO WAREHOUSE	TRANSFER STATUS	SHIP DATE	RECEIPT DATE	CREATED
000229	11	12	Created	11/12/2025	11/12/2025	11/13/2025

Transfer Order Lines

Item number	Product name	Configuration	Size	Color	Style	Batch number	Serial number	Location	Transfer quantity	Shipped quantity	Ship remain	Received quantity	Receive remain	Ship date	Receipt date
M0030	M0030		8	Black	#000000100001B80A	-	-	5	0	5	0	5	0	11/12/2025	11/12/2025
M0030	M0030		4	White	#000000100001B51E	-	-	10	0	10	0	10	0	11/12/2025	11/12/2025
M0030	M0030		2	Black	#000000100001B7FE	-	-	15	0	15	0	15	0	11/12/2025	11/12/2025
M0030	M0030		6	Black	#000000100001B804	-	-	20	0	20	0	20	0	11/12/2025	11/12/2025
Total									50	0	50	0	50		



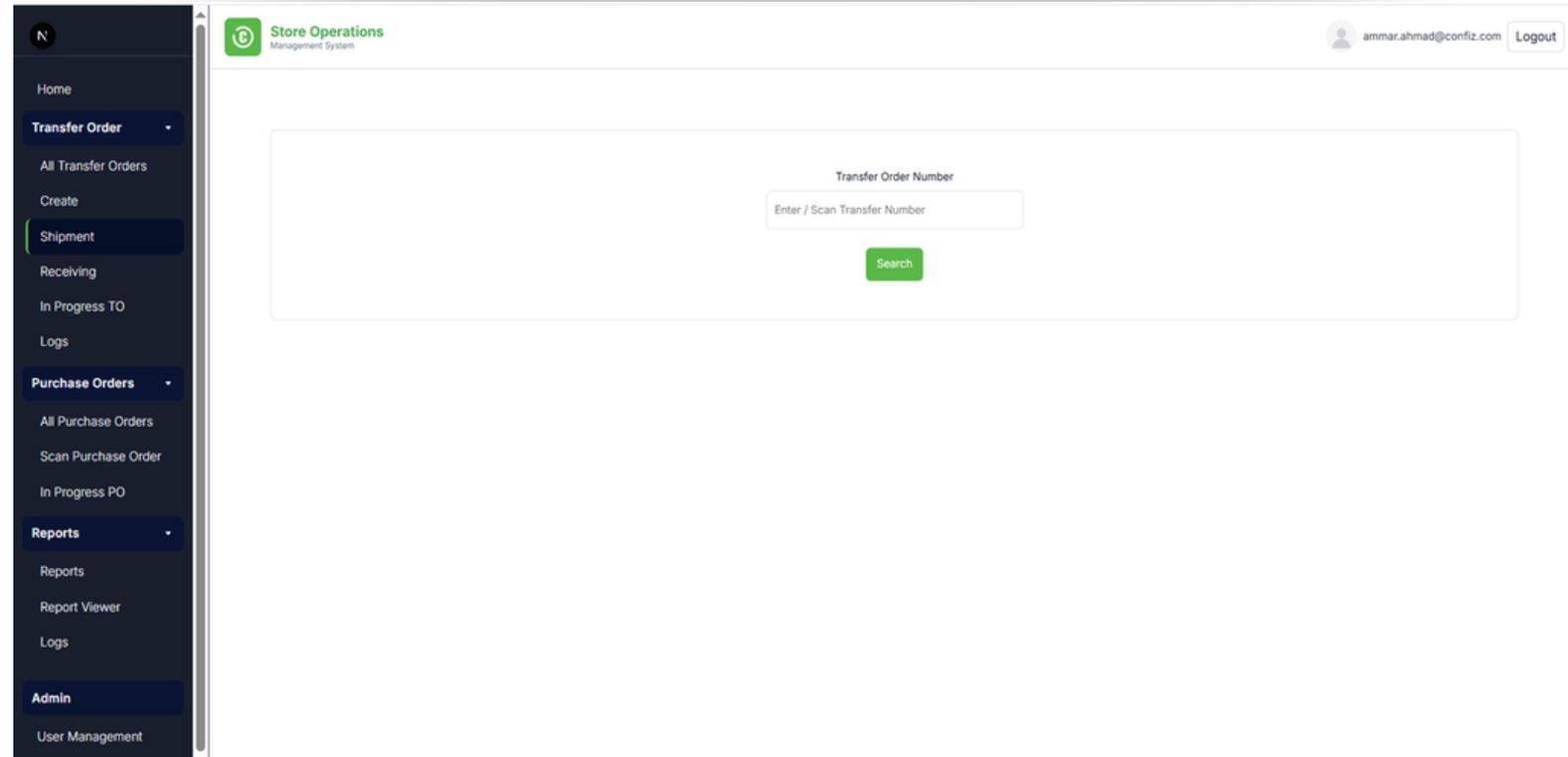
Transfer Orders Scanning

Step:

- Go to 'Transfer Order' > 'Scan Transfer Order'.
- Enter or scan the transfer order number.

Details:

- Quickly access a specific transfer order for processing.
- Barcode scanning is supported for efficiency.





Transfer Orders (Lines Scanning)

Step:

- After selecting a transfer order, scan item barcodes.

Details:

- Enter or scan item barcodes to update shipment/receipt status.
- View item details: barcode, item ID, name, serial number, batch, size, color, style, configuration, and scan remaining.

The screenshot displays the 'Store Operations Management System' interface. On the left is a dark sidebar with navigation options: Home, Transfer Order (selected), All Transfer Orders, Create, Shipment, Receiving, In Progress TO, Logs, Purchase Orders, All Purchase Orders, Scan Purchase Order, In Progress PO, Reports, Reports, Report Viewer, Logs, Admin, and User Management. The main content area shows a 'D365 Transfer #' of 000229. Below this is a search bar labeled 'Enter / Scan Barcode'. The interface is divided into several data fields:

Barcode	Item ID	Item Name	Serial Number
500M0030	M0030	Professionalspeakerc	-

Batch Number	Size	Color	Style
-	4	White	-

Configuration	Scan Remaining	Total Scanned
-	10	2

At the top right of the main area, there is a user profile for 'ammar.ahmad@confiz.com' and a 'Logout' button. Below the transfer number, there are three buttons: 'TO Items', 'Scanned Items', and 'Post Shipment'.



Transfer Orders (Shipment View)

Step:

- Review scanned items for the selected transfer order.

Details:

- See a summary of all scanned items, their details, and actions (edit/delete).
- Ensures accuracy before finalizing shipment.

The screenshot displays the 'Store Operations Management System' interface. On the left is a dark sidebar menu with categories: Home, Transfer Order (expanded), Purchase Orders, Reports, and Admin. The main content area shows the 'Shipment' view for a selected transfer order. At the top right of the main area, there is a 'Logout' button and a user profile for 'ammar.ahmad@confiz.com'. A 'Back to Scanning' button is located in the top right corner of the scanned items table. The table, titled 'Scanned Items (3)', lists three items with columns for #, Barcode, Item ID, Name, Serial, Batch, Size, Color, Style, Configuration, Qty, and Actions. Each item has 'Update' and 'Remove' buttons in the Actions column.

#	Barcode	Item ID	Name	Serial	Batch	Size	Color	Style	Configuration	Qty	Actions
1	500M0033	M0030	Professionalspeakerc			8	Black	-		1	Update Remove
2	500M0030	M0030	Professionalspeakerc			4	White	-		2	Update Remove
3	500M0031	M0030	Professionalspeakerc			2	Black	-		3	Update Remove



All PO's

Step:

- Navigate to 'Purchase Orders' > 'All Purchase Orders'.

Details:

- View all purchase orders with vendor, amount, status, approval, and requested/expected dates.
- Filter and search for specific POs.

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All Purchase Orders

Search by ID: Enter Purchase Order # [input] Status: All [dropdown] [Show advanced] [Reset]

Showing 2 of 2

Purchase order	Vendor account	Invoice account	Vendor name	Purchase type	Approval status	Purchase order status	Currency	Requested receipt date	Created date and time
00000105	Tailsin Parts	US-102	Tailsin Parts	Purch	None	Backorder	USD	1900-01-01T12:00:00	2020-07-23T13:52:31
00000104	Tailsin Parts	US-102	Tailsin Parts	Purch	None	Backorder	USD	1900-01-01T12:00:00	2020-07-23T13:41:08



Report Filters

Step:

Select a report and set parameters (date range, warehouse, order, etc.).

Details:

- Choose export format: PDF, Excel, or CSV.
- Click 'Generate Report' to create the report.

The screenshot displays the 'Store Operations Management System' interface. On the left is a dark sidebar with a navigation menu including: Home, Transfer Order (selected), All Transfer Orders, Create, Shipment, Receiving, In Progress TO, Logs, Purchase Orders, All Purchase Orders, Scan Purchase Order, In Progress PO, Reports, Reports, Report Viewer, Logs, and Admin. The main content area is titled 'Transfer Order History Report' and contains a 'Report Parameters' section with the following fields: 'From Date' (2025-11-13), 'To Date' (2025-11-13), 'From Location' (Select From Warehouse...), 'To Location' (Select To Warehouse...), 'Status' (Select Status...), and 'Transfer Order' (Select Transfer ID...). Below these fields are three buttons for 'Report Format': PDF (selected), Excel, and CSV. At the bottom right of the form are 'Generate Report' and 'Clear' buttons. The top right of the page shows the user 'ammar.ahmad@confiz.com' and a 'Logout' button.



Download Reports

Step:

- Access 'Report Viewer' to see report history.

Details:

- Download previously generated reports.
- View details such as report name, date, and file size.

The screenshot shows the 'Store Operations Management System' interface. The sidebar menu on the left includes options like Home, Transfer Order, Purchase Orders, Reports, and Admin. The main content area displays the 'Reports History (8)' section, which contains a table of 8 reports. Each report entry includes a serial number, a report name, details (including file size and share date), and a download icon.

Sr.No	Report Name	Details	Actions
1	CfzTransferOrderHistory 2025-11-12 07:52:49.961.pdf Shared on 11/12/2025	Size: 90711 bytes	Download
2	CfzTransferOrderHistory 2025-11-12 06:56:57.538.pdf Shared on 11/12/2025	Size: 89635 bytes	Download
3	CfzTransferOrderHistory 2025-11-10 13:02:13.785.pdf Shared on 11/10/2025	Size: 122064 bytes	Download
4	CfzTransferOrderHistory 2025-11-03 08:39:38.552.pdf Shared on 11/3/2025	Size: 87675 bytes	Download
5	CfzTransferOrderHistory 2025-11-03 08:18:46.104.pdf Shared on 11/3/2025	Size: 86911 bytes	Download
6	CfzTransferOrderHistory 2025-11-03 07:58:26.532.pdf Shared on 11/3/2025	Size: 87285 bytes	Download
7	CfzTransferOrderHistory 2025-10-31 14:17:46.903.pdf Shared on 10/31/2025	Size: 93860 bytes	Download
8	CfzTransferOrderHistory 2025-10-31 13:36:04.328.pdf Shared on 10/31/2025	Size: 86462 bytes	Download



Admin Portal

Step:

- Go to 'Admin' > 'User Management'.

Details:

- View all users, their roles, assigned warehouses, status, and last login.
- Add, edit, or deactivate users as needed.

Store Operations Management System

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Admin Panel

System administration and configuration

Total Users: 13 Active Users: 13 ✓

User Management

Manage warehouse staff accounts Add User

Name	Email ID	Role	Legal Entity	Warehouses	Status	Last Login	Action
test user	test6@confiz.com	System Administrator	Global Trading	N/A	Active	N/A	Edit Deactivate Trash
test	test0@gmail.com	Supervisor	US Retail	N/A	Active	N/A	Edit Deactivate Trash
test9	test8@gmail.com	Supervisor	US Retail	11-GIT, 11-UND	Active	Oct 29, 2025, 07:17 AM	Edit Deactivate Trash
test7	test6@gmail.com	Supervisor	ACME Corporation	11-GIT, 24-GIT	Active	Oct 28, 2025, 06:26 PM	Edit Deactivate Trash
test	test5@gmail.com	Warehouse Manager	US Retail	N/A	Active	N/A	Edit Deactivate Trash
test	test4@gmail.com	Warehouse Manager	N/A	N/A	Active	N/A	Edit Deactivate Trash
test	test3@gmail.com	N/A	N/A	N/A	Active	N/A	Edit Deactivate Trash
test	test2@gmail.com	N/A	N/A	N/A	Active	N/A	Edit Deactivate Trash
test	test1@gmail.com	System Administrator	N/A	N/A	Active	N/A	Edit Deactivate Trash



User Addition

Step:

- Click 'Add User' or edit an existing user.

Details:

- Enter user details: name, email, role, legal entity, and warehouse assignment.
- Save changes to update user access.

The screenshot displays the 'Admin Panel' for the 'Store Operations Management System'. It features a sidebar on the left with navigation options like Home, Transfer Order, Purchase Orders, Reports, and Admin. The main content area shows 'System administration and configuration' with summary cards for 'Total Users' (13) and 'Active Users' (13). Below this is the 'User Management' section, which includes a table of warehouse staff accounts and an 'Add User' button.

Name	Email ID	Role	Legal Entity	Warehouses	Status	Last Login	Action
test user	test6@confiz.com	System Administrator	Global Trading	N/A	Active	N/A	Edit Deactivate Delete
test	test0@gmail.com	Supervisor	US Retail	N/A	Active	N/A	Edit Deactivate Delete
test9	test8@gmail.com	Supervisor	US Retail	TI-GIT, TI-UND	Active	Oct 29, 2025, 07:17 AM	Edit Deactivate Delete
test7	test6@gmail.com	Supervisor	ACME Corporation	TI-GIT, 24-GIT	Active	Oct 28, 2025, 06:26 PM	Edit Deactivate Delete
test	test5@gmail.com	Warehouse Manager	US Retail	N/A	Active	N/A	Edit Deactivate Delete
test	test4@gmail.com	Warehouse Manager	N/A	N/A	Active	N/A	Edit Deactivate Delete
test	test3@gmail.com	N/A	N/A	N/A	Active	N/A	Edit Deactivate Delete
test	test2@gmail.com	N/A	N/A	N/A	Active	N/A	Edit Deactivate Delete
test	test1@gmail.com	System Administrator	N/A	N/A	Active	N/A	Edit Deactivate Delete

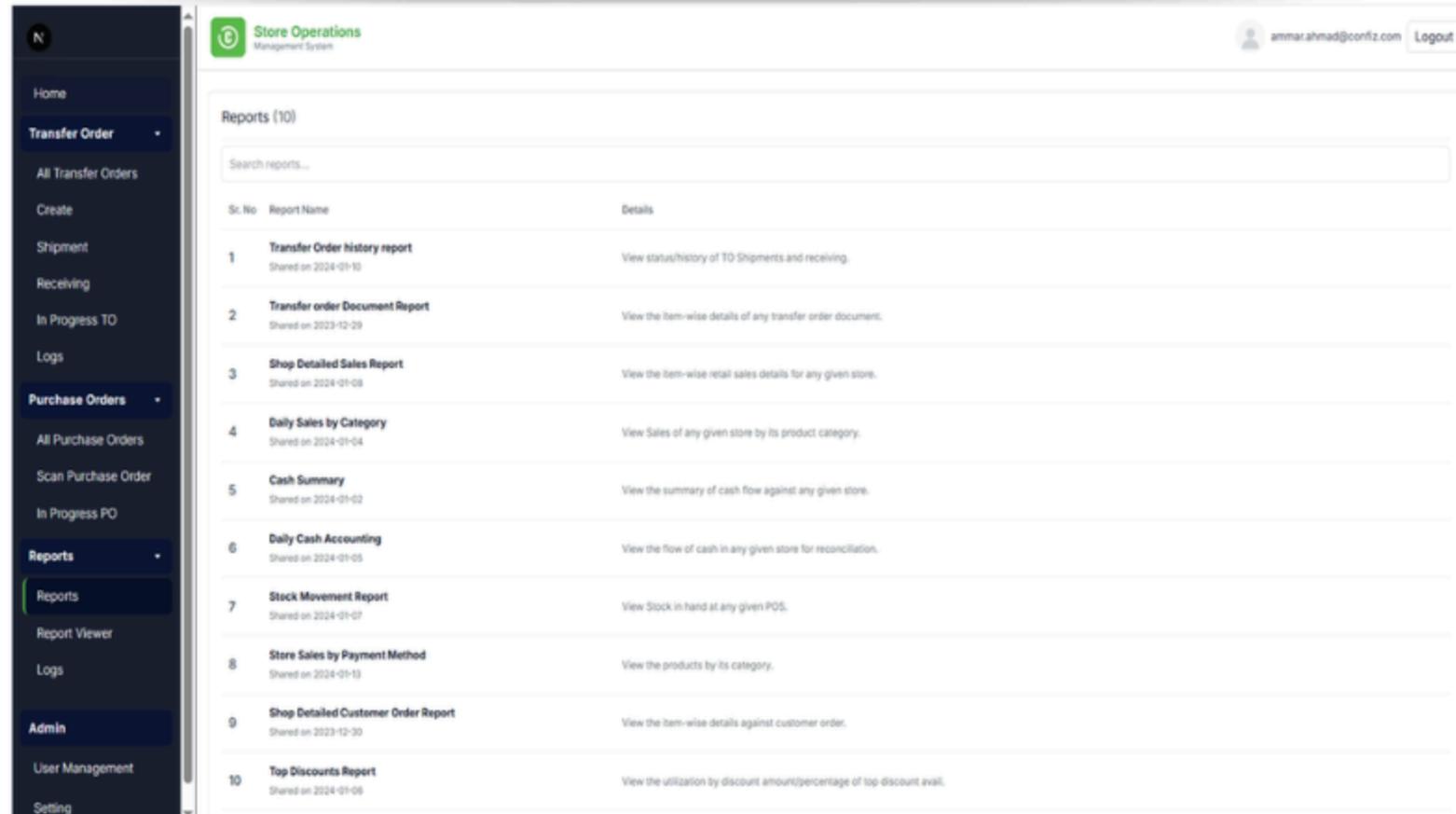
Available Reports

Step:

- Go to '**Reports**' to view available report types.

Details:

- **Examples:** Transfer Order History, Group Detailed Item, Sales by Category, Cash Summary, Daily Cash Reconciliation, etc.
- Each report provides specific operational insights.



The screenshot displays the 'Store Operations Management System' interface. On the left is a dark sidebar menu with categories: Home, Transfer Order, Purchase Orders, Reports (highlighted), and Admin. The main content area shows a 'Reports (10)' section with a search bar and a table of reports.

Sr. No	Report Name	Details
1	Transfer Order history report Shared on 2024-01-10	View status/history of TO Shipments and receiving.
2	Transfer order Document Report Shared on 2023-12-29	View the item-wise details of any transfer order document.
3	Shop Detailed Sales Report Shared on 2024-01-08	View the item-wise retail sales details for any given store.
4	Daily Sales by Category Shared on 2024-01-04	View Sales of any given store by its product category.
5	Cash Summary Shared on 2024-01-02	View the summary of cash flow against any given store.
6	Daily Cash Accounting Shared on 2024-01-05	View the flow of cash in any given store for reconciliation.
7	Stock Movement Report Shared on 2024-01-07	View Stock in hand at any given POS.
8	Store Sales by Payment Method Shared on 2024-01-15	View the products by its category.
9	Shop Detailed Customer Order Report Shared on 2023-12-30	View the item-wise details against customer order.
10	Top Discounts Report Shared on 2024-01-06	View the utilization by discount amount/percentage of top discount avail.