CONVERGENCE | AI + ERP
MIAMI | 2025
Driving Operational Excellence with Dynamics 365
Quality Management and Traceability
Sponsored By Microsoft
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Advanced Quality Management

Continuous improvement

- CAPA Management
- Non conformance

Optimized testing

- Flexible sampling plans
- Skip lot testing
- Instrument calibration
- New quality order triggers
- Sample Management
- AQL Sampling

Digitized manufacturing

- Electronic Batch Record
- Production dispensing

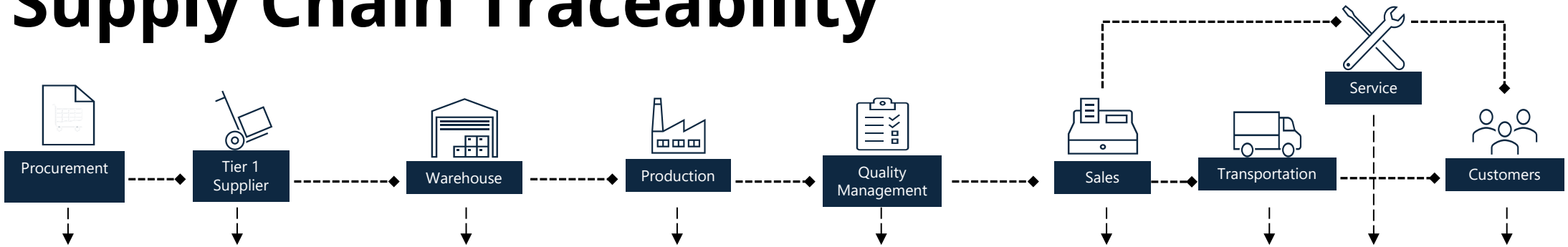
Regulatory compliance

- Approved customer list
- Customer specific COA
- Electronic signature

User productivity

- Quick test result entry
- Quality management workspaces

Supply Chain Traceability



Supply Chain Traceability

Genealogy Tree

Surface bundle
Serial No : SN 001-023-045-067
Container : CN-009-90001

Tablet
Serial No : SN 002-003-331-223
Qty : 1 EA

SSD
Serial No : SN 003-004-331-251
Qty : 1 EA

Screen
Batch No : 004-050-06-03-2023
Qty : 1 EA

Type Cover
Batch No : 005-070-05-02-2022
Qty : 1 EA

Pen
Serial No : SN 006-080-332-551
Qty : 1 EA

Activity Events

Date: 2023-02-06 Time: 14:42:00 Operator: JL001
Create, Sales Order - SO0001

Date: 2023-02-16 Time: 14:42:00 Operator: MY001
Create, Production Order - PO0001

Date: 2023-02-16 Time: 14:43:00 Operator: MY001
Release, Production Order - PO0001

Date: 2023-02-17 Time: 15:42:00 Operator: CK002
Start, Operation -OP1, Resource - RSC001

Date: 2023-02-17 Time: 14:50:00 Operator: CK002
Consume, Type Cover,
Batch No: 005-070-05-02-2022, Qty: 1 EA

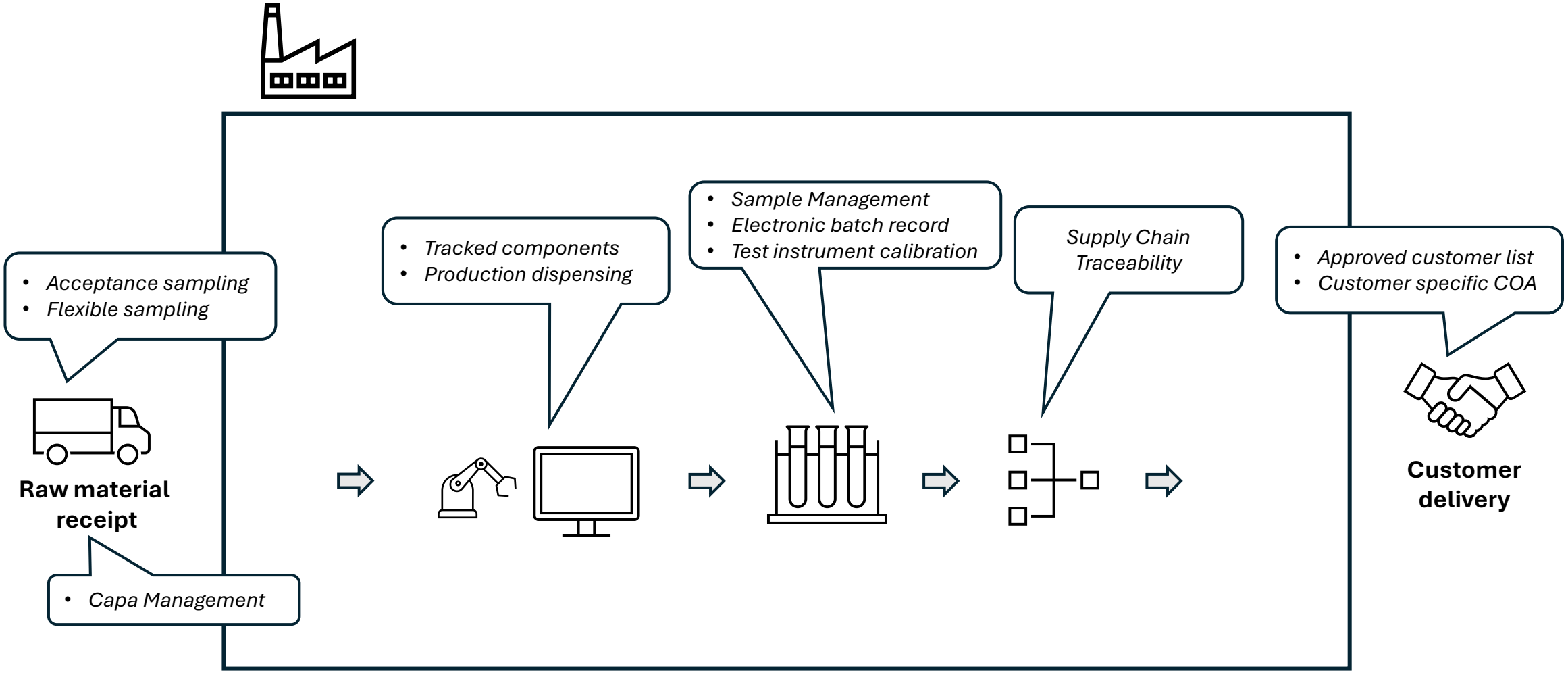
Data Collection

Vendor : PS001

Vendor Batch : PS001-05-02-2022

Test item: Outfit	Result: PASS
Test item: Size	Result: PASS
Test item: Color	Result: PASS

Driving Quality Excellence and Compliance



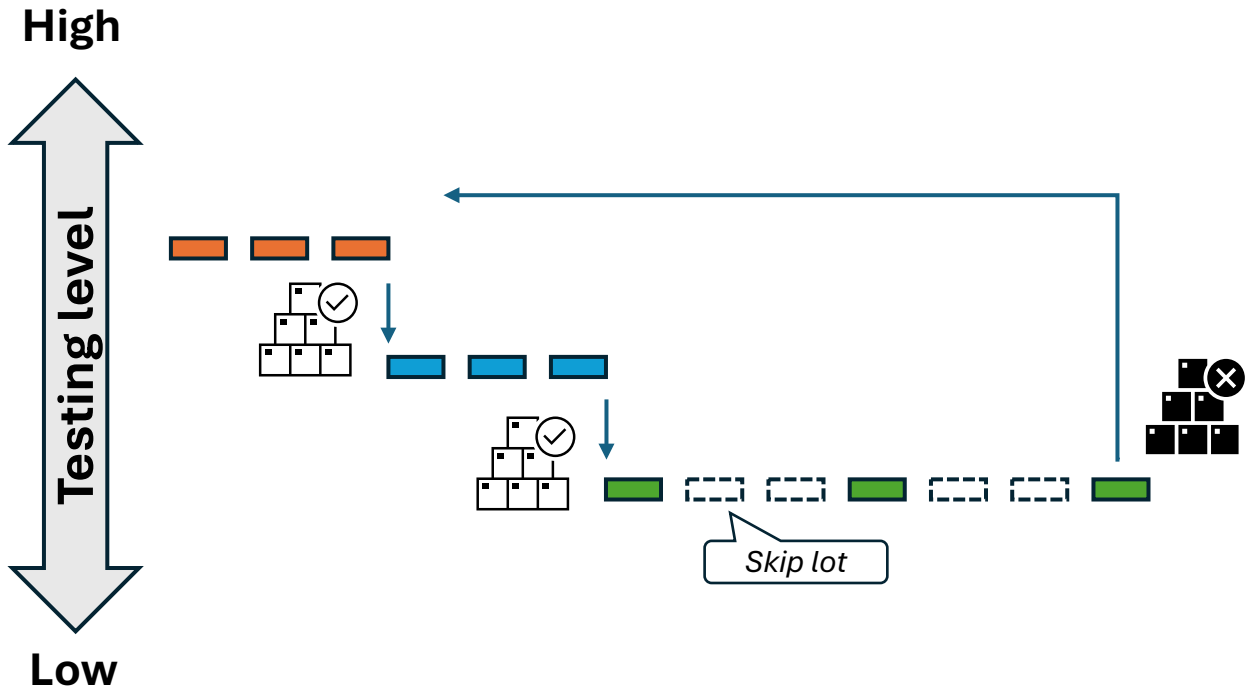
Flexible sampling plans

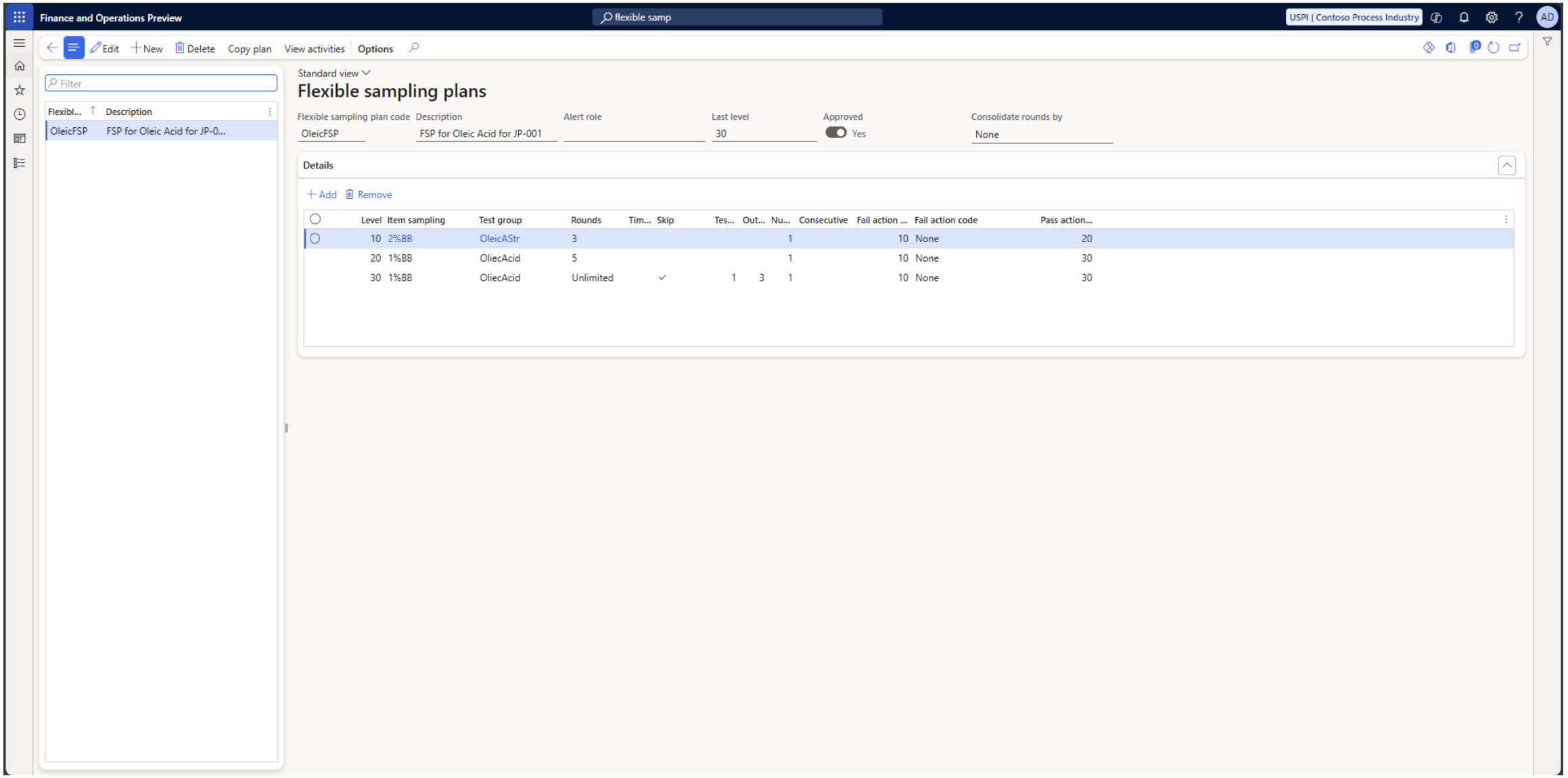
What is it?

- Adjusts sampling size, frequency, or criteria based on test results.

Benefits

- Allows for more precise control and efficient use of resources.
- Enhancing the overall accuracy and reliability of quality assessments.




Finance and Operations Preview
flexible samp
USPI | Contoso Process Industry
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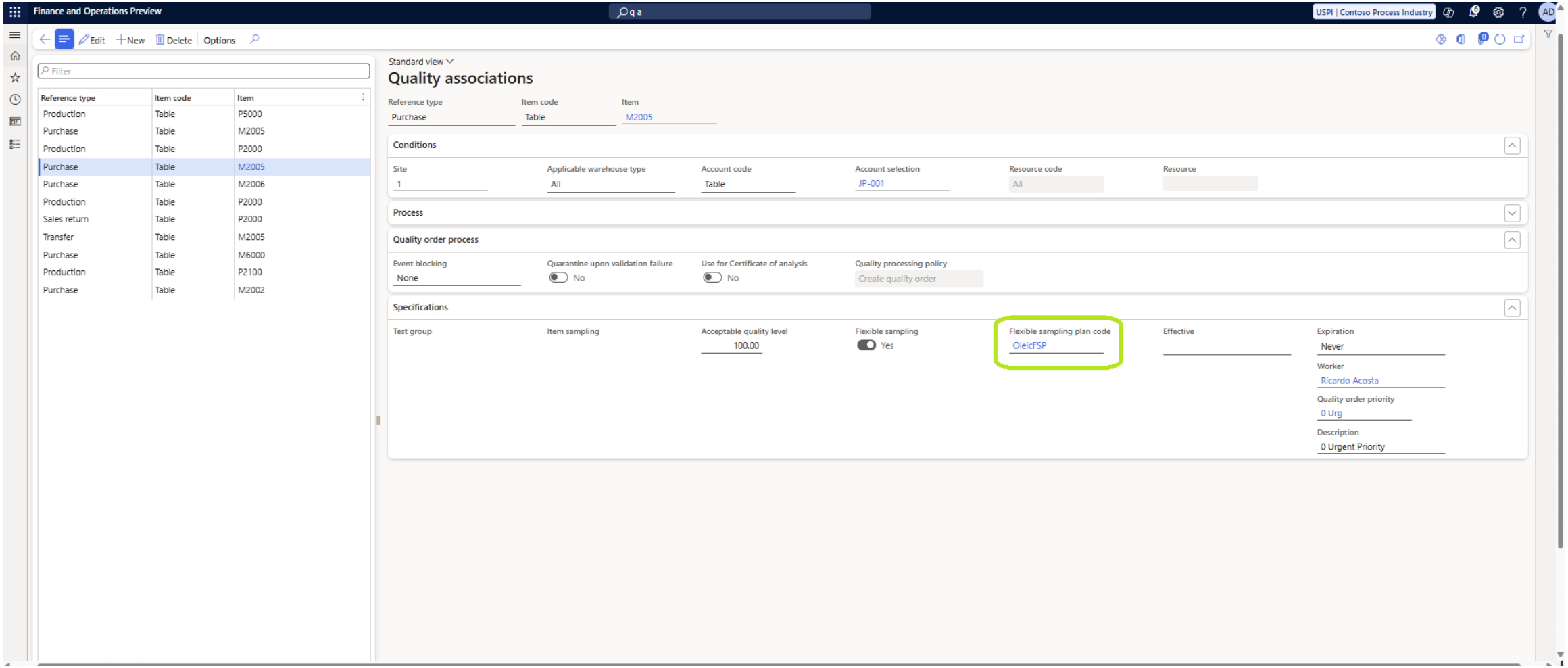
Description
OleicFSP
FSP for Oleic Acid for JP-0...
Standard view
Flexible sampling plans
Flexible sampling plan code
OleicFSP
Description
FSP for Oleic Acid for JP-001
Alert role
Last level
30
Approved
Yes
Consolidate rounds by
None
Details
Add
Remove
Level
Item sampling
Test group
Rounds
Tim...
Skip
Tes...
Out...
Nu...
Consecutive
Fail action ...
Fail action code
Pass action...
10 2%BB OleicAStr 3 1 10 None 20
20 1%BB OliecAcid 5 1 10 None 30
30 1%BB OliecAcid Unlimited 1 3 1 10 None 30


Finance and Operations Preview
USPI | Contoso Process Industry
Edit
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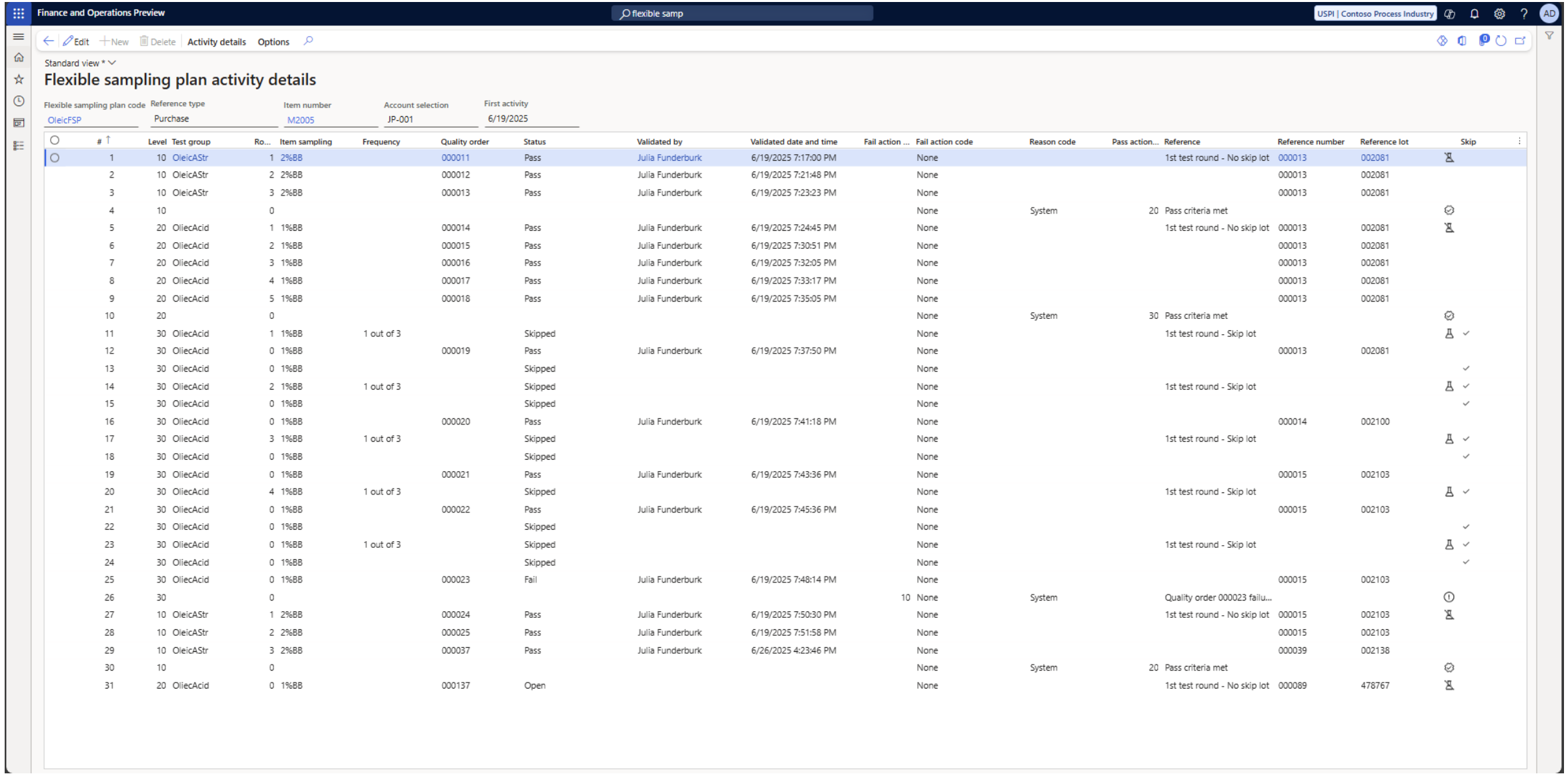
Reference type
Item code
Item
Production Table P5000
Purchase Table M2005
Production Table P2000
Purchase Table M2005
Purchase Table M2006
Production Table P2000
Sales return Table P2000
Transfer Table M2005
Purchase Table M6000
Production Table P2100
Purchase Table M2002
Standard view
Quality associations
Reference type Purchase
Item code Table
Item M2005
Conditions
Site 1
Applicable warehouse type All
Account code Table
Account selection JP-001
Resource code All
Resource
Process
Quality order process
Event blocking None
Quarantine upon validation failure No
Use for Certificate of analysis No
Quality processing policy Create quality order
Specifications
Test group
Item sampling
Acceptable quality level 100.00
Flexible sampling Yes
Flexible sampling plan code OleicFSP
Effective
Expiration Never
Worker Ricardo Acosta
Quality order priority 0 Urg
Description 0 Urgent Priority



Finance and Operations Preview

flexible samp

USPI | Contoso Process Industry

Edit | New | Delete | Activity details | Options

Standard view *

Flexible sampling plan activity details

Flexible sampling plan code	Reference type	Item number	Account selection	First activity
OleicFSP	Purchase	M2005	JP-001	6/19/2025

#	Level	Test group	Ro...	Item sampling	Frequency	Quality order	Status	Validated by	Validated date and time	Fail action ...	Fail action code	Reason code	Pass action...	Reference	Reference number	Reference lot	Skip
1	10	OleicAStr	1	2%BB		000011	Pass	Julia Funderburk	6/19/2025 7:17:00 PM		None			1st test round - No skip lot	000013	002081	
2	10	OleicAStr	2	2%BB		000012	Pass	Julia Funderburk	6/19/2025 7:21:48 PM		None				000013	002081	
3	10	OleicAStr	3	2%BB		000013	Pass	Julia Funderburk	6/19/2025 7:23:23 PM		None				000013	002081	
4	10		0								None	System	20	Pass criteria met			
5	20	OleicAcid	1	1%BB		000014	Pass	Julia Funderburk	6/19/2025 7:24:45 PM		None			1st test round - No skip lot	000013	002081	
6	20	OleicAcid	2	1%BB		000015	Pass	Julia Funderburk	6/19/2025 7:30:51 PM		None				000013	002081	
7	20	OleicAcid	3	1%BB		000016	Pass	Julia Funderburk	6/19/2025 7:32:05 PM		None				000013	002081	
8	20	OleicAcid	4	1%BB		000017	Pass	Julia Funderburk	6/19/2025 7:33:17 PM		None				000013	002081	
9	20	OleicAcid	5	1%BB		000018	Pass	Julia Funderburk	6/19/2025 7:35:05 PM		None				000013	002081	
10	20		0								None	System	30	Pass criteria met			
11	30	OleicAcid	1	1%BB	1 out of 3		Skipped				None			1st test round - Skip lot			
12	30	OleicAcid	0	1%BB		000019	Pass	Julia Funderburk	6/19/2025 7:37:50 PM		None				000013	002081	
13	30	OleicAcid	0	1%BB			Skipped				None						
14	30	OleicAcid	2	1%BB	1 out of 3		Skipped				None			1st test round - Skip lot			
15	30	OleicAcid	0	1%BB			Skipped				None						
16	30	OleicAcid	0	1%BB		000020	Pass	Julia Funderburk	6/19/2025 7:41:18 PM		None				000014	002100	
17	30	OleicAcid	3	1%BB	1 out of 3		Skipped				None			1st test round - Skip lot			
18	30	OleicAcid	0	1%BB			Skipped				None						
19	30	OleicAcid	0	1%BB		000021	Pass	Julia Funderburk	6/19/2025 7:43:36 PM		None				000015	002103	
20	30	OleicAcid	4	1%BB	1 out of 3		Skipped				None			1st test round - Skip lot			
21	30	OleicAcid	0	1%BB		000022	Pass	Julia Funderburk	6/19/2025 7:45:36 PM		None				000015	002103	
22	30	OleicAcid	0	1%BB			Skipped				None						
23	30	OleicAcid	0	1%BB	1 out of 3		Skipped				None			1st test round - Skip lot			
24	30	OleicAcid	0	1%BB			Skipped				None						
25	30	OleicAcid	0	1%BB		000023	Fail	Julia Funderburk	6/19/2025 7:48:14 PM		None				000015	002103	
26	30		0							10	None	System		Quality order 000023 failu...			
27	10	OleicAStr	1	2%BB		000024	Pass	Julia Funderburk	6/19/2025 7:50:30 PM		None			1st test round - No skip lot	000015	002103	
28	10	OleicAStr	2	2%BB		000025	Pass	Julia Funderburk	6/19/2025 7:51:58 PM		None				000015	002103	
29	10	OleicAStr	3	2%BB		000037	Pass	Julia Funderburk	6/26/2025 4:23:46 PM		None				000039	002138	
30	10		0								None	System	20	Pass criteria met			
31	20	OleicAcid	0	1%BB		000137	Open				None			1st test round - No skip lot	000089	478767	

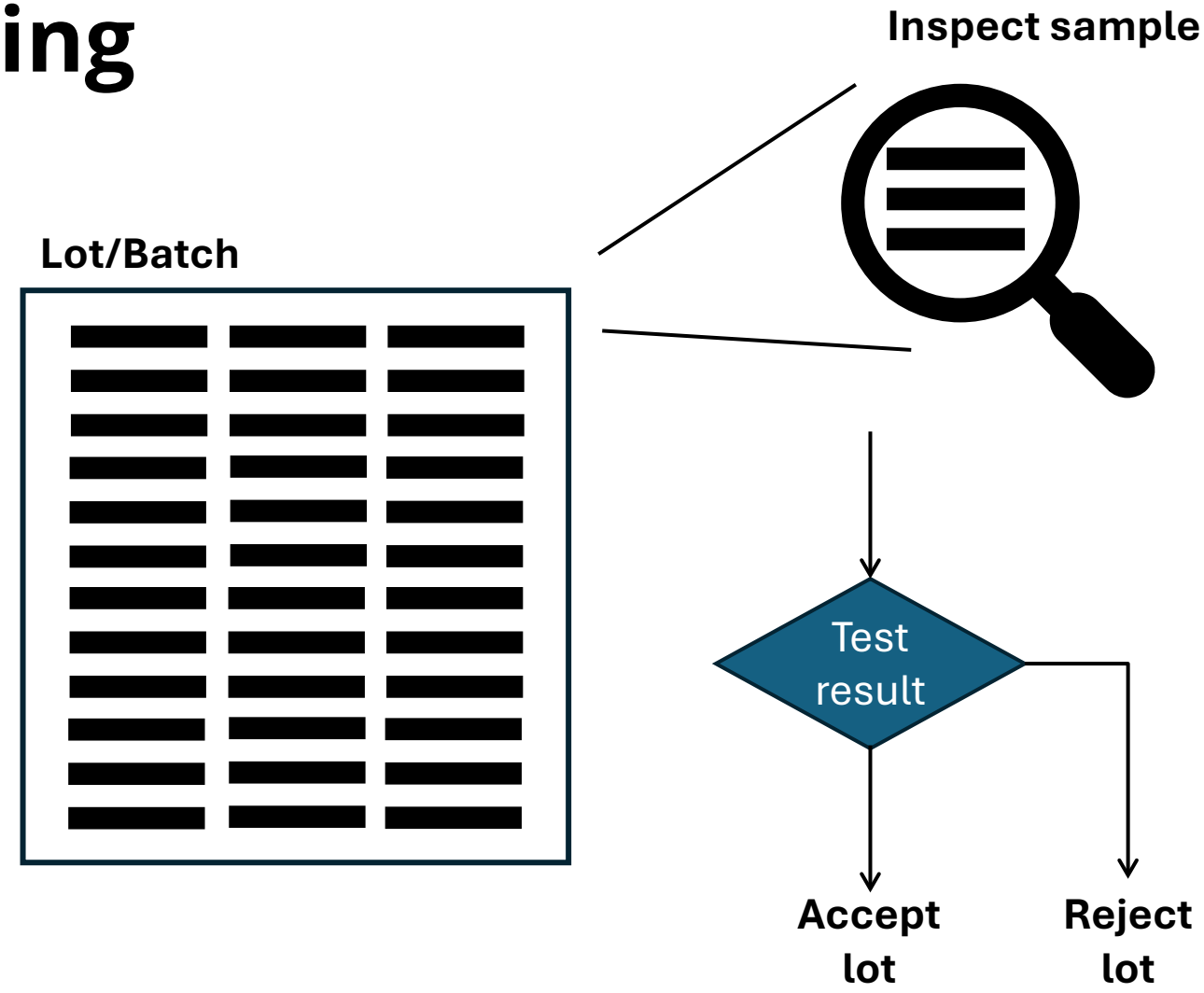
Acceptance sampling

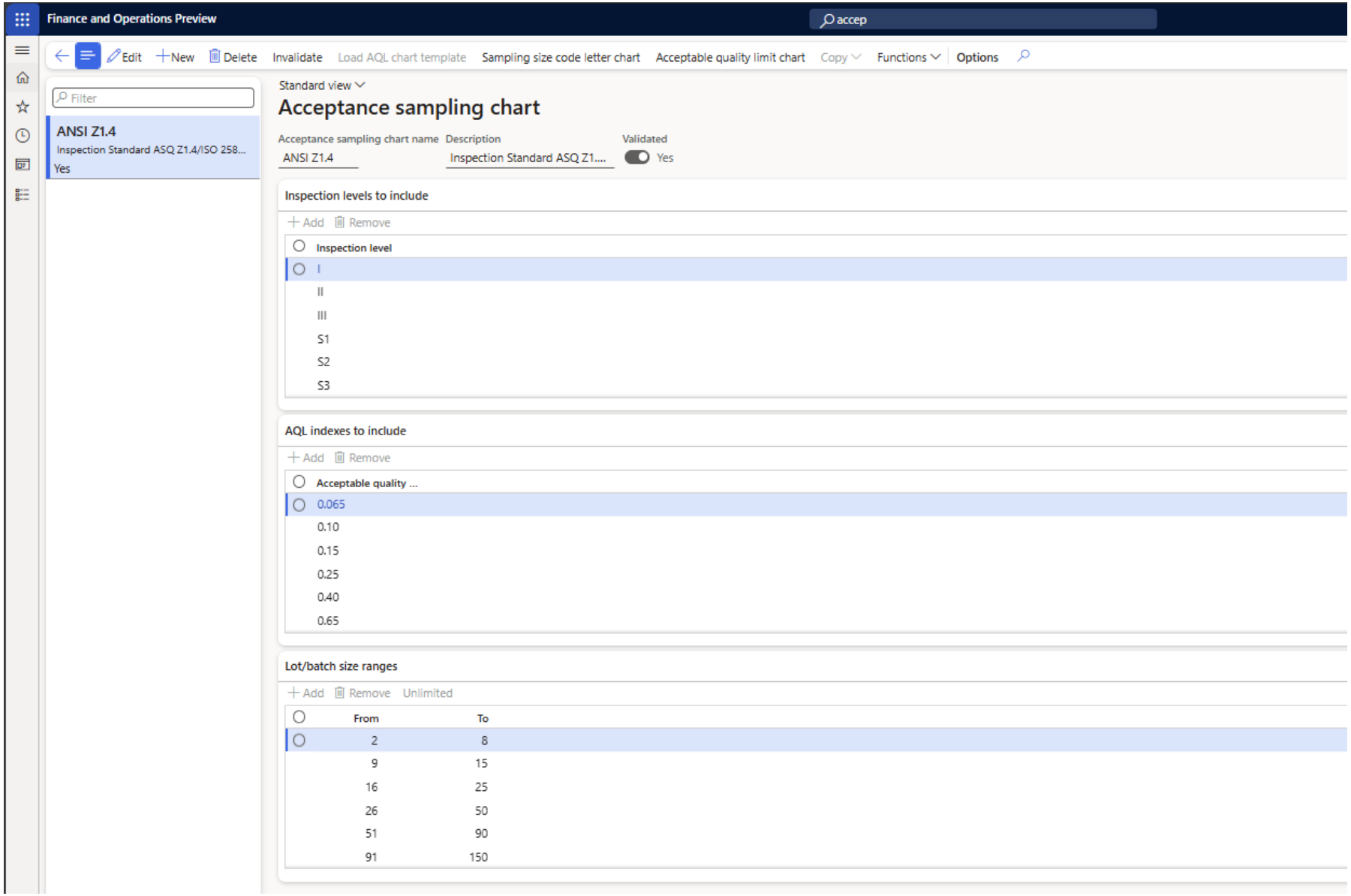
What is it?

- A statistical quality control method that uses random sampling to decide if a batch meets specified standards

Benefits

- Reduces inspection costs and time compared to 100% inspection.
- Balances risk and quality by using statistical methods to control defect probability.
- Supports high-volume production where full inspection is impractical.




Finance and Operations Preview
accep
Edit
New
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Invalidate
Load AQL chart template
Sampling size code letter chart
Acceptable quality limit chart
Copy
Functions
Options
Filter
ANSI Z1.4
Inspection Standard ASQ Z1.4/ISO 258...
Yes
Standard view
Acceptance sampling chart
Acceptance sampling chart name
ANSI Z1.4
Description
Inspection Standard ASQ Z1....
Validated
Yes
Inspection levels to include
Add
Remove
Inspection level
I
II
III
S1
S2
S3
AQL indexes to include
Add
Remove
Acceptable quality ...
0.065
0.10
0.15
0.25
0.40
0.65
Lot/batch size ranges
Add
Remove
Unlimited
From
To
2
8
9
15
16
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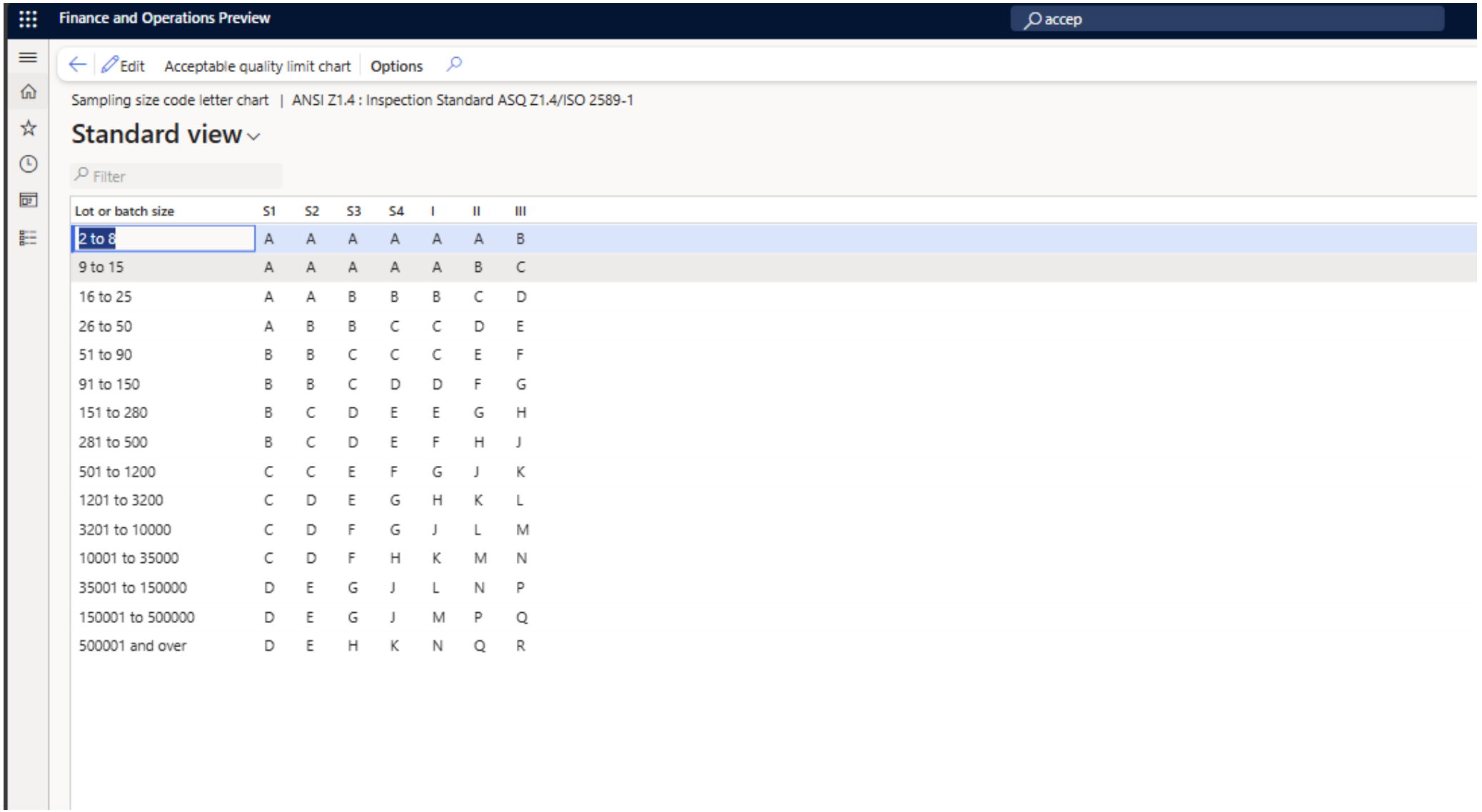
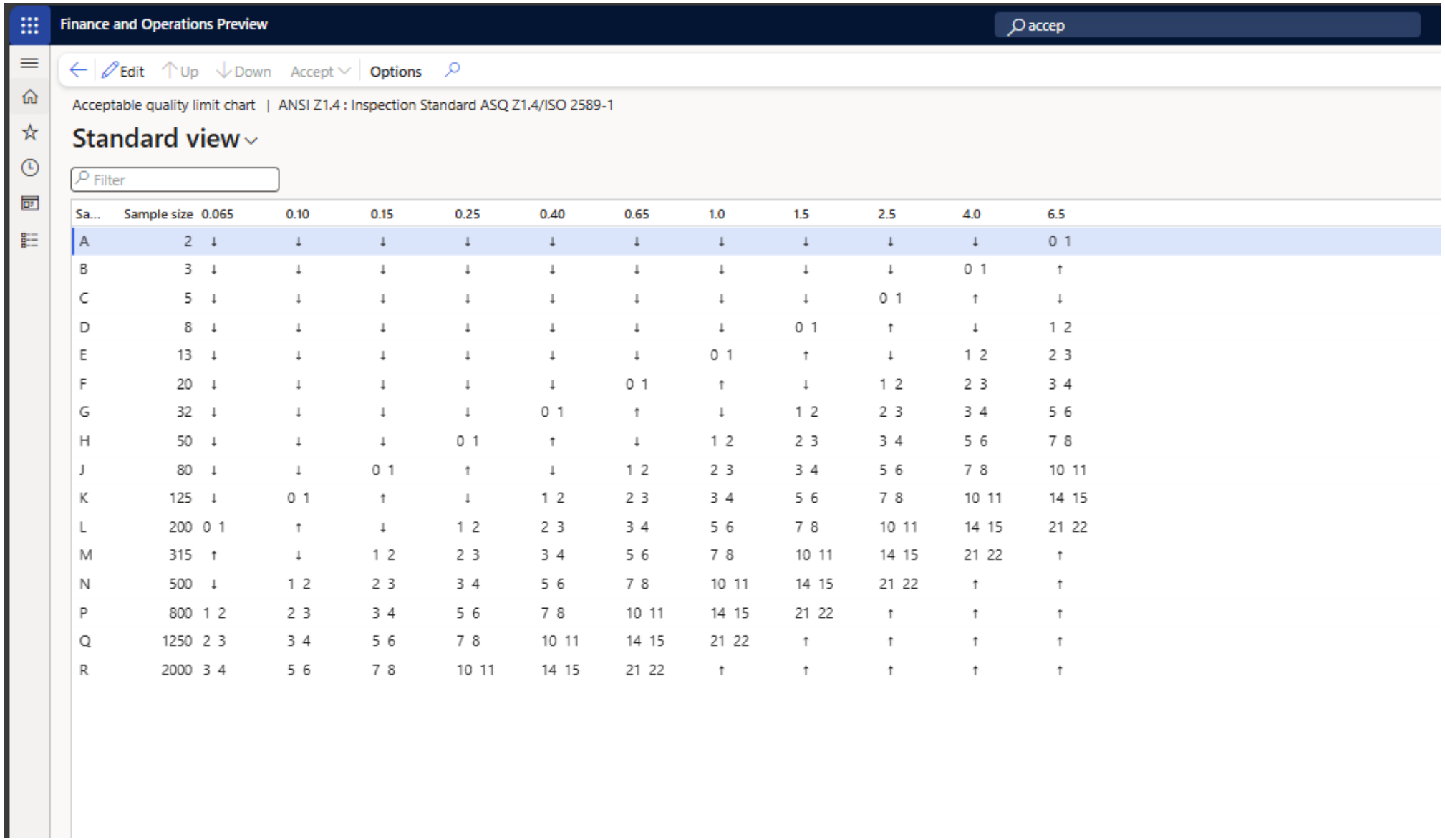
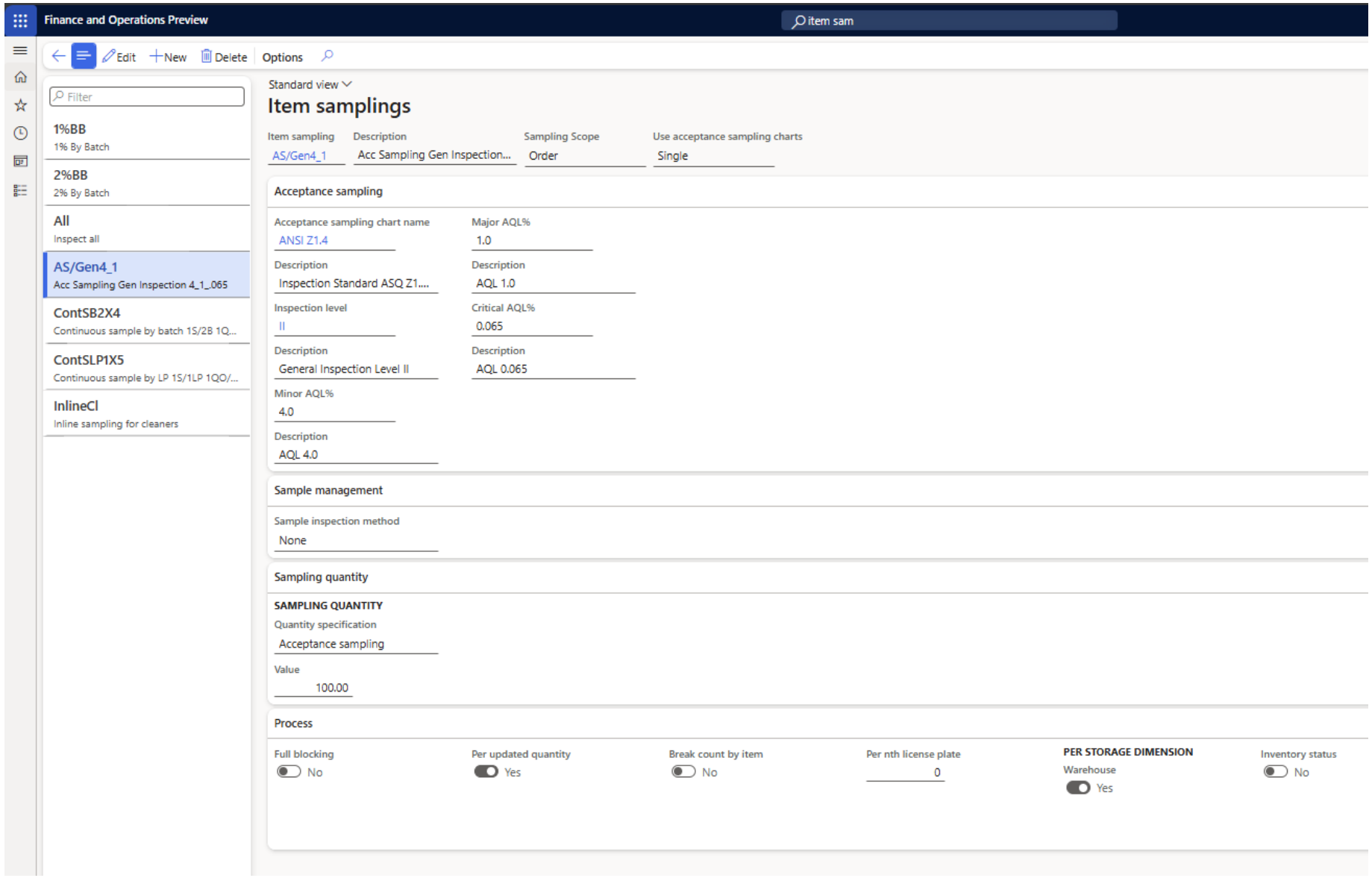
51
90
91
150



Lot or batch size	S1	S2	S3	S4	I	II	III
2 to 8	A	A	A	A	A	A	B
9 to 15	A	A	A	A	A	B	C
16 to 25	A	A	B	B	B	C	D
26 to 50	A	B	B	C	C	D	E
51 to 90	B	B	C	C	C	E	F
91 to 150	B	B	C	D	D	F	G
151 to 280	B	C	D	E	E	G	H
281 to 500	B	C	D	E	F	H	J
501 to 1200	C	C	E	F	G	J	K
1201 to 3200	C	D	E	G	H	K	L
3201 to 10000	C	D	F	G	J	L	M
10001 to 35000	C	D	F	H	K	M	N
35001 to 150000	D	E	G	J	L	N	P
150001 to 500000	D	E	G	J	M	P	Q
500001 and over	D	E	H	K	N	Q	R



Sa...	Sample size	0.065	0.10	0.15	0.25	0.40	0.65	1.0	1.5	2.5	4.0	6.5
A	2	↓	↓	↓	↓	↓	↓	↓	↓	↓	↓	0 1
B	3	↓	↓	↓	↓	↓	↓	↓	↓	↓	0 1	↑
C	5	↓	↓	↓	↓	↓	↓	↓	↓	0 1	↑	↓
D	8	↓	↓	↓	↓	↓	↓	↓	0 1	↑	↓	1 2
E	13	↓	↓	↓	↓	↓	↓	0 1	↑	↓	1 2	2 3
F	20	↓	↓	↓	↓	↓	0 1	↑	↓	1 2	2 3	3 4
G	32	↓	↓	↓	↓	0 1	↑	↓	1 2	2 3	3 4	5 6
H	50	↓	↓	↓	0 1	↑	↓	1 2	2 3	3 4	5 6	7 8
J	80	↓	↓	0 1	↑	↓	1 2	2 3	3 4	5 6	7 8	10 11
K	125	↓	0 1	↑	↓	1 2	2 3	3 4	5 6	7 8	10 11	14 15
L	200	0 1	↑	↓	1 2	2 3	3 4	5 6	7 8	10 11	14 15	21 22
M	315	↑	↓	1 2	2 3	3 4	5 6	7 8	10 11	14 15	21 22	↑
N	500	↓	1 2	2 3	3 4	5 6	7 8	10 11	14 15	21 22	↑	↑
P	800	1 2	2 3	3 4	5 6	7 8	10 11	14 15	21 22	↑	↑	↑
Q	1250	2 3	3 4	5 6	7 8	10 11	14 15	21 22	↑	↑	↑	↑
R	2000	3 4	5 6	7 8	10 11	14 15	21 22	↑	↑	↑	↑	↑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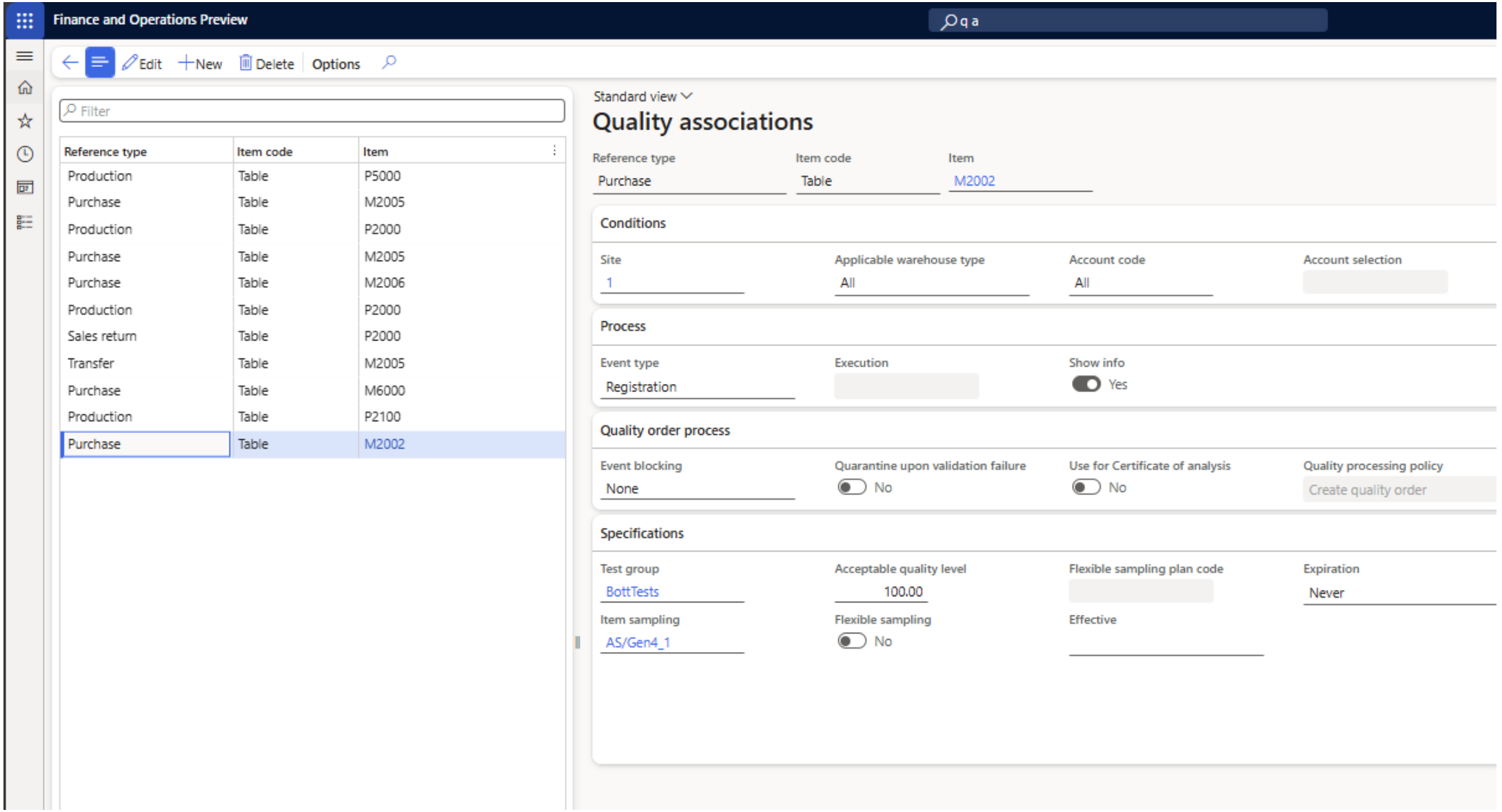
2%BB
2% By Batch
All
Inspect all
AS/Gen4_1
Acc Sampling Gen Inspection 4_1_065
ContSB2X4
Continuous sample by batch 1S/2B 1Q...
ContSLP1X5
Continuous sample by LP 1S/1LP 1QO/...
InlineCl
Inline sampling for cleaners
Standard view
Item samplings
Item sampling
AS/Gen4_1
Description
Acc Sampling Gen Inspection...
Sampling Scope
Order
Use acceptance sampling charts
Single
Acceptance sampling
Acceptance sampling chart name
ANSI Z1.4
Description
Inspection Standard ASQ Z1....
Inspection level
II
Description
General Inspection Level II
Minor AQL%
4.0
Description
AQL 4.0
Major AQL%
1.0
Description
AQL 1.0
Critical AQL%
0.065
Description
AQL 0.065
Sample management
Sample inspection method
None
Sampling quantity
SAMPLING QUANTITY
Quantity specification
Acceptance sampling
Value
100.00
Process
Full blocking
No
Per updated quantity
Yes
Break count by item
No
Per nth license plate
0
PER STORAGE DIMENSION
Warehouse
Yes
Inventory status
No


Finance and Operations Preview
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Reference type
Item code
Item
Production Table P5000
Purchase Table M2005
Production Table P2000
Purchase Table M2005
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Production Table P2000
Sales return Table P2000
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Quality associations
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Account code All
Account selection
Process
Event type Registration
Execution
Show info Yes
Quality order process
Event blocking None
Quarantine upon validation failure No
Use for Certificate of analysis No
Quality processing policy Create quality order
Specifications
Test group BottTests
Acceptable quality level 100.00
Flexible sampling plan code
Expiration Never
Item sampling AS/Gen4_1
Flexible sampling No
Effective

DEMO

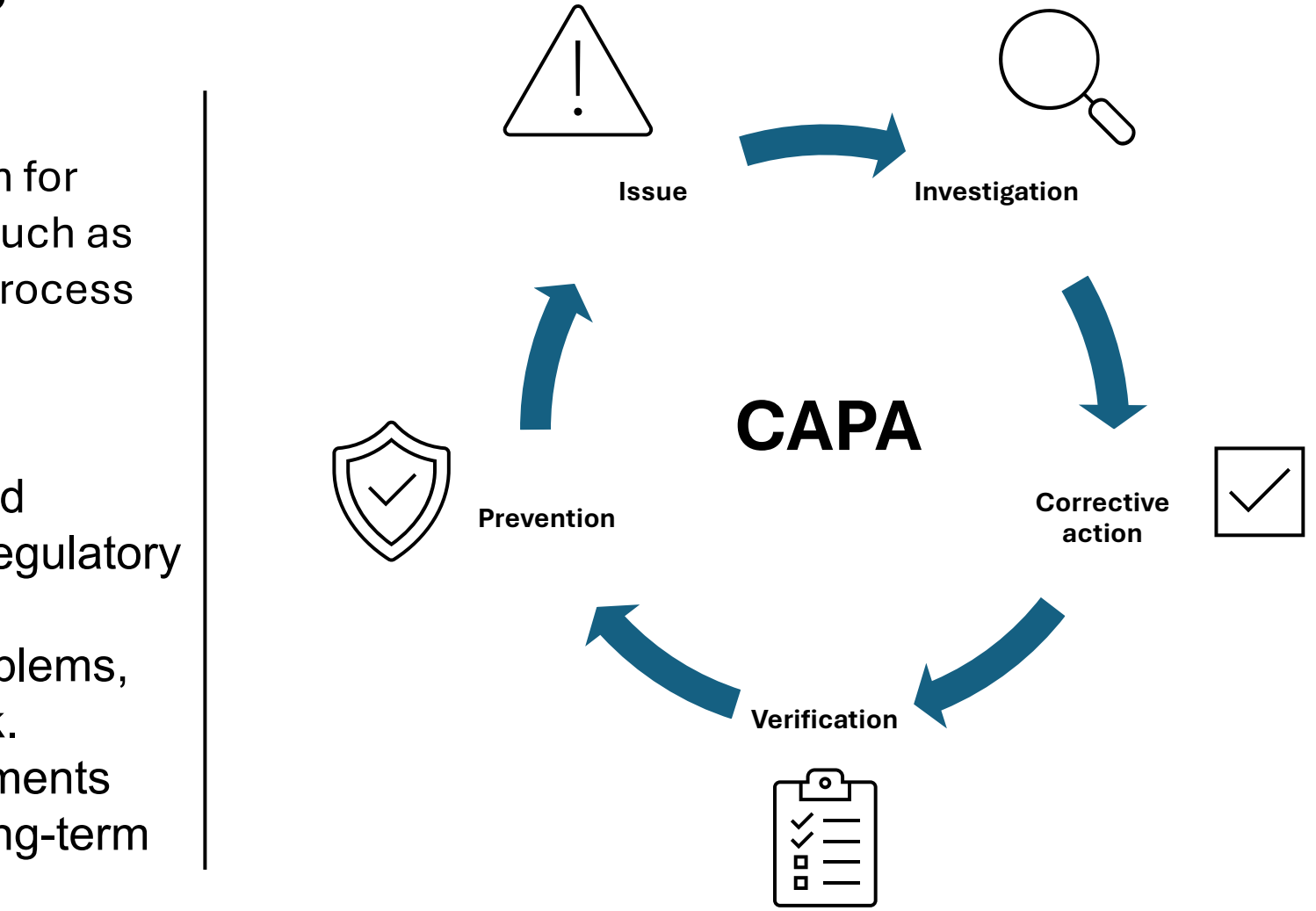
CAPA Management

What is it?

- A case management system for handling any type of issue such as non-conforming material, process problems, complaints etc.

Benefits

- Ensures issues are resolved systematically and meets regulatory standards.
- Prevents recurrence of problems, avoiding recalls and rework.
- Identifies trends and implements preventive measures for long-term efficiency.



DEMO

Sample Management

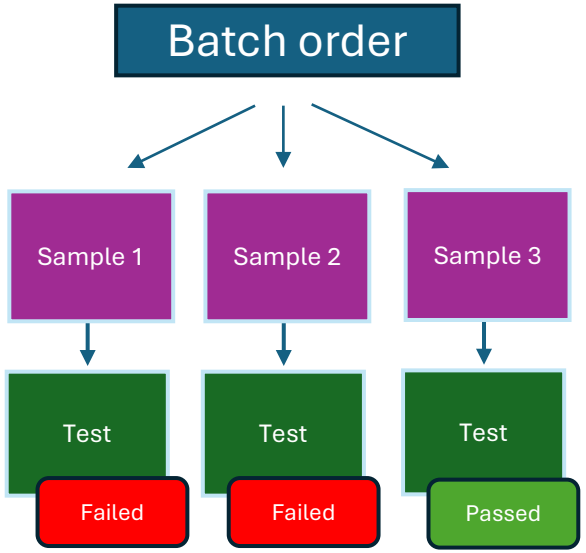
What is it?

- A quality control process for taking, tracking, and testing samples during production. It supports inline and continuous sampling.

Benefits

- Ensures representative testing without disrupting production flow.
- Links samples to specific batches for full auditability.
- Supports regulatory requirements by recording results systematically.
- Reduces manual handling and streamlines quality control processes.

Inline sampling



Sample Management

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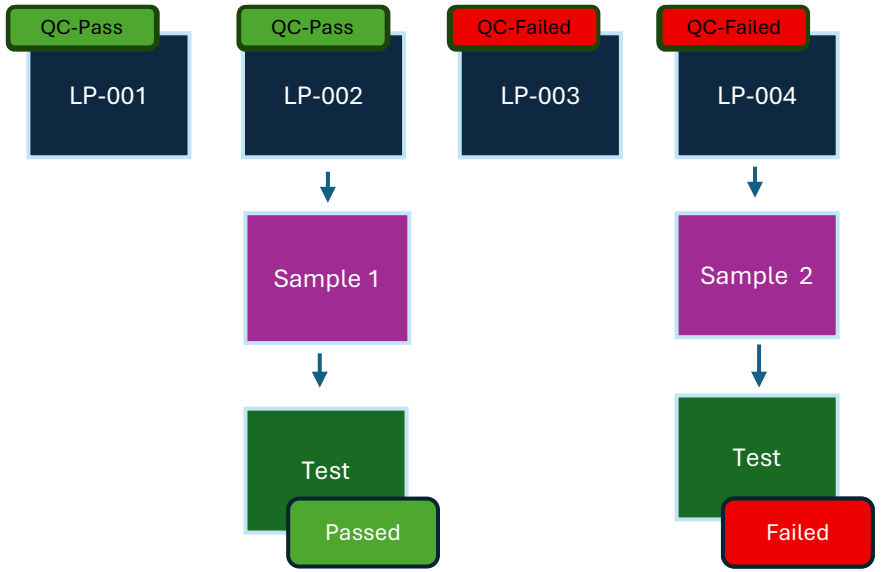
Continuous sampling



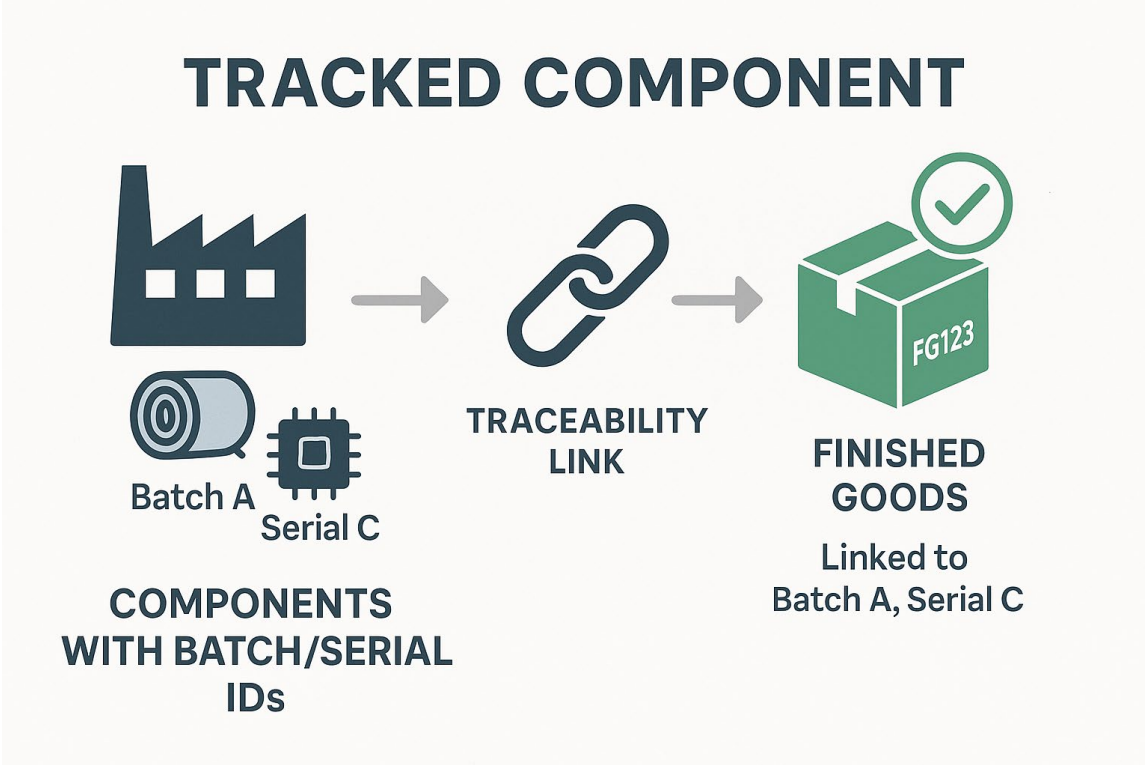
Tracked components

What is it?

- Process to link batch and serial numbers of consumed materials to finished goods batch and serial numbers.

Benefits

- Ensures full traceability for quality control and compliance.



DEMO

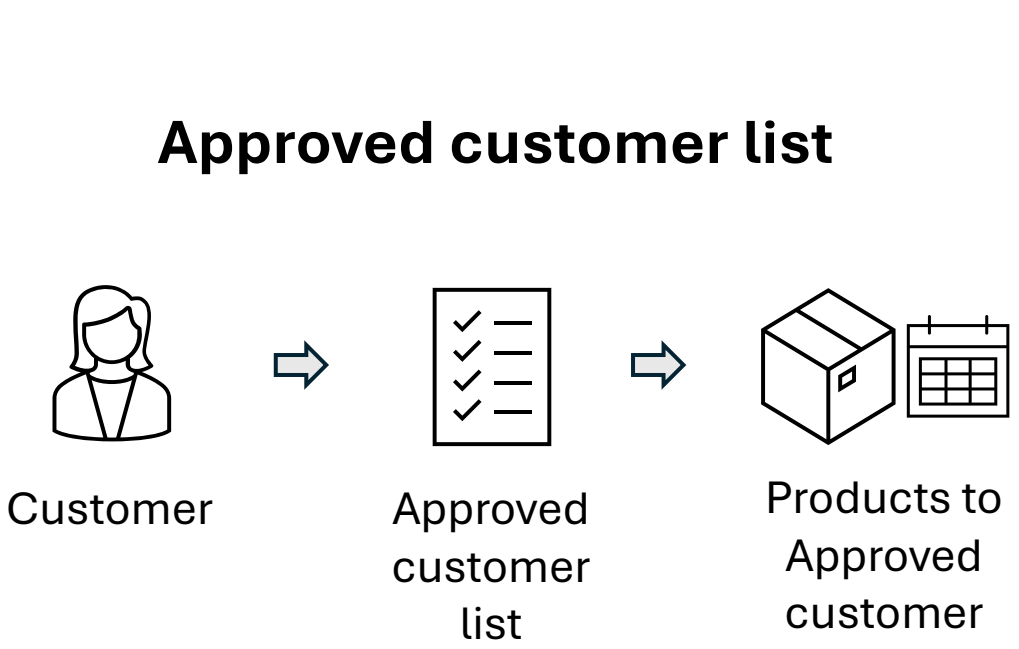
Approved customer list

What is it?

- Control mechanism that defines which customers are allowed to purchase specific products.
- The list includes customer details, allowed items, and validity dates to prevent unauthorized transactions.

Benefits

- It ensures compliance by validating customer eligibility before processing sales orders, quotations, or agreements.



Roadmap

Quality Management

Feature	Public preview
Test instrument calibration with Asset Management	10.0.46 ✓
Quality associations by product variant	10.0.47
Approval workflows for quality orders	10.0.48
BPA - Business performance analytics with customizable Power BI reports.	10.0.48

Subject to change

SCM Traceability

Feature	Public preview
Sales goods issue integration	10.0.46 ✓
Production Ready Preview	Dec. 2025
General Available	Mar. 2025
Data collection mapping for integration	After GA
Historical data migration	After GA

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