D365 Task Frequency

Materials & Suppy · https://milo.masseyservices.com/docs/d365-task-frequency/

All D365 processes should be used throughout the month.

The table below shows when each should be used, according to current policy and best practices.

Frequency	Process
Daily	**Lawn & Termite Truck Transfer** Transfer Products to a Truck iPad Inventory Transfer
Weekly	**Pest Truck Transfer** Transfer Products to a Truck iPad Inventory Transfer
By the 10th	**Purchase Orders** Approving a Purchase Requisition Purchasing Requisition
Last Day of the Month	**Counting Journal** Create a Counting Journal Review a Counting Journal
After Inventory is Posted	**Review Purchases from Prior Month** Inventory Recap Report Irrigation Recap Report

As Needed	**EPO** Approving a Purchase Requisition Purchasing Requisition **Receive a Purchase Order** Receiving a Purchase Order **JVs** Receiving JVs Sending JVs