MB-330T00-A: Microsoft Dynamics 365 Supply Chain Management

OBJECTIVE

This course discusses supply chain management in the Dynamics 365 suite of apps

COURSE TOPICS

Module 1: Supply Management

To configure the inventory, you should first understand daily operations of the inventory. In this lesson we first discuss inbound and outbound inventory operations.

This module explains how to configure Inventory components for supply chain management processes in Finance and Operations.

Lessons

- Introduction
- Configure serial and batch numbers
- Configure inventory breakdown
- Configure inventory and warehouse journals
- Configure inventory dimensions
- Inventory closing and adjustment
- Practice Labs
- Module summary

Perform inbound and outbound inventory operations

- Configure Inventory parameters
- Configure Tracking number groups
- Configure inventory breakdown
- Configure inventory and warehouse Journals
- Configure units

Module 2: Use Inventory Journals

This topic explains how to use Inventory journals in Finance and Operations.

Lessons

- Introduction
- Use inventory journals
- Practice labs
- Module summary

Use movement journals

- Use inventory adjustment journals

- Use transfer journals
- Use counting and tag counting journals
- Use item arrival journals
- Use consignment journals

Module 3: Use Inventory Reports

This topic explains how to use Inventory reports for supply chain management processes in Finance and Operations.

Lessons

- Introduction
- Understand ABC classification
- Use other inventory inquiries and reports
- Practice Labs
- Module summary

Understand ABC Classification

- Use Inventory inquires and reports

Module 4: Create Products and Product Masters

Product information management in Dynamics 365 for Finance and Operations is for the creation and maintenance of an Enterprise Products Repository. It supports larger organizations in a centralized, structured approach in creating and maintaining core master data such as product definitions. Smaller organizations that require a more decentralized approach can, with some restrictions, create and maintain their respective products while their products are automatically added to the shared products repository.

This topic explains how to configure products for supply chain management processes in Finance and Operations.

Lessons

- Introduction
- Create products
- Create product masters with variants
- Create and configure attributes and category hierarchies
- Configure item pricing
- Practice Labs
- Module summary

Create products as type item and service

- Configure default order settings
- Create Product masters with predefined variants
- Create and configure category hierarchies
- Create product attributes

Module 5: Create Bill of Materials

A bill of materials is a comprehensive list of all the components, parts, raw materials, assemblies and their quantities that are required to make a finished product.

This module explains how create bill of materials and BOM versions by using BOM designer in Finance and Operations.

Lessons

- Introduction
- Use BOM designer
- Practice lab
- Module summary

Create Bill of materials and BOM versions by using BOM designer

Module 6: Configure and Perform the Procure-to-Purchase Process

This topic explains how to configure and perform the procure-to-purchase process in Finance and Operations.

Lessons

- Introduction
- Procurement and sourcing business scenario
- Create purchase requisition workflow
- Create purchase requisitions
- Create request for quotation
- Use procurement policies
- Practice Labs
- Module summary

Apply the procurement and sourcing processes in a business scenario

- Use procurement policies
- Create and maintain vendors
- Create purchase requisitions
- Create request for quotes

Module 7: Configure Vendor Collaborations

This topic explains how configure vendor collaborations in Finance and Operations.

Lessons

- Introduction
- Configure vendor collaborators
- Use vendor collaboration
- Practice labs
- Module summary

Configure the Vendor Collaborations

- Work with vendor collaboration workspace
- Use vendor collaboration as part of procure-to-pay process

Module 8: Configure and Perform the Purchase-to-Pay Process

The Purchase Orders module reviews the process that is required to create and manage purchase orders in Dynamics 365 for Finance and Operations. A company uses purchase orders to record information about the goods and services they are purchasing from various vendors.

Lessons

- Introduction
- Create purchase orders
- Use purchase order change management
- Use item orders and arrival
- Manage over and under delivery and charges
- Create vendor returns
- Practice labs
- Module summary

Understand overview of the purchase-to-pay scenario

- Use purchase order change management
- Create a Purchase order
- Use Item arrivals and Arrival overview
- Generate and Post the Invoice
- Create an invoice journal
- Generate and post the vendor payments
- Create vendor returns

Module 9: Configure and Use Agreements

This topic explains how to configure and use agreement in Finance and Operations.

Lessons

- Introduction
- Maintain trade agreements
- Create sales agreements
- Create purchase agreements
- Configure trade allowance
- Configure brokerage
- Configure royalties
- Configure rebates
- Practice Labs

- Module summary

Maintain trade agreements

- Configure smart rounding
- Create Sales agreements
- Use procurement policies
- Create Purchase agreements
- Configure trade allowance
- Configure brokerage
- Configure royalties
- Configure rebates

Module 10: Configure and Use the Order-to-Cash Process

This topic explains how to configure and use the order-to-cash process in Finance and Operations.

Lessons

- Introduction
- Understand the order-to-cash scenario
- Configure and use commissions
- Configure customer and item search
- Create and confirm sales quotations and orders
- Configure order promising
- Configure order hold codes
- Print and post picking lists
- Process customer returns
- Practice Lab
- Module Summary

Perform the order-to-cash process

- Configure and use commissions
- Configure customer and item search
- Create and confirm Sales quotations
- Create and confirm Sales orders
- Print and post picking lists
- Generate and post the invoice
- Configure order hold codes
- Process customer returns

Module 11: Configure and Use Quality Control and Management Processes

In this module, we describe how to configure and use quality control in Finance and Operations, how you can use quality control functionality, how to define and maintain nonconformances, and how to handle corrections.

But let’s first get familiar with the quality management overall processes.

Lessons

- Introduction
- Perform quality control and management processes
- Apply inventory blocking
- Perform quarantine management
- Practice labs
- Module summary

Perform Quality Control and Quality Management Processes

- Apply inventory blocking
- Perform quarantine management

Module 12: Configure and Use Intercompany Trade Relations

The Intercompany functionality in Dynamics 365 for Finance and Operations provides a mechanism for the consolidation of static and dynamic data from multiple companies as separate legal entities in a single database.

Intercompany Trade enables globally dispersed manufacturing sites, distribution centers, and sales subsidiaries to act as one unified organization.

This topic explains how to configure and use the intercompany trade relations and process intercompany orders in Finance and Operations.

Lessons

- Introduction
- Understand intercompany trading
- Setup intercompany trade relations
- Process intercompany chain orders
- Setup intercompany agreements and direct deliveries
- Practice labs
- Module summary

Configure products for Intercompany trade relations

- Configure intercompany trade relationships
- Configure intercompany agreements
- Process Intercompany orders
- Process Intercompany direct deliveries
- Process Intercompany charges
- Understand intercompany return order chain

Module 13: Configure and Use Master Planning

This topic explains how to configure and use the master planning in Finance and Operations.

Lessons

- Introduction
- Master planning considerations and setup
- Create master plans
- Learn about demand and supply forecasts
- Configure item coverage
- Brief introduction to intercompany planning
- Run plans and firm planned orders
- Practice labs
- Module summary

Define master planning Policies

- Learn about Demand and Supply Forecasts
- Configure calculated delays
- Configure Item coverage
- Understand brief introduction to intercompany master planning
- Run plans and firm planned orders

Module 14: Configure Warehouse Management

The Warehouse management module for Dynamics 365 for Finance and Operations lets you manage warehouse processes in manufacturing, distribution, and retail companies.

It has a wide range of features to support the warehouse facility at an optimal level, at any time. Warehouse management is fully integrated with other business processes in Finance and Operations such as transportation, manufacturing, quality control, purchase, transfer, sales, and returns.

Lessons

- Introduction
- Configure warehouse management setup
- Understand reservation hierarchies
- Location directives and work templates
- Practice Labs
- Module summary

Configure Warehouse management parameters

- Create warehouses and locations
- Configure work pools, zones, location format, and profiles
- Create reservation hierarchies
- Configure location directives
- Configure Waves

- Configure Loads
- Configure Inventory statuses
- Configure cycle counting
- Configure packing and containerization
- Set up and generate labels

Module 15: Configure Mobile Devices for Warehouse Management

This topic explains how to configure Mobile device setup for Warehouse Management in Finance and Operations.

Lessons

- Introduction
- Configure mobile devices
- Practice Lab
- Module summary

Create new work classes

- Configure mobile devices
- Configure menu items for activities and inquiries
- Configure menu items to create work for another worker or process
- Configure menu items to process existing work
- Define the layout of mobile device menus
- Configure the basic look and feel of mobile devices
- Create mobile device users
- Set up label layouts and define settings for printing labels

Module 16: Use Warehouse Management

Before you can use the Mobile device for Warehouse management you need to install the application. This topic explains how to use warehouse management processes in Finance and Operations.

Lessons

- Introduction
- Configure mobile device
- Inbound operations
- Cycle counting
- Transfers and replenishment
- Outbound operations
- Cluster picking
- Packing and containerization
- Practice Labs
- Module summary

Inbound operations

- Outbound operations

- Cluster Picking
- Packing and containerization
- Cycle counting
- Transfers and replenishment

Module 17: Configure Transportation Management

This module gives an overview of the Transportation management functionality in Microsoft Dynamics 365 for Finance and Operations and teaches you how to configure and use Transportation management.

Lessons

- Introduction
- Planning and configuring transportation management
- Procedures
- Routing and transportation flows
- Transportation engines and freight management
- Practice Labs
- Module summary

Transportation planning

- Routing
- Rating
- Inbound operations
- Load processes
- Outbound operations

Module 18: Course Conclusion

Final assessment and course summary, as well as a post-course survey for the course.

Lessons

- Final assessment
- Course summary
- Post-course survey

TRAINING APPROACH

This course includes lectures, course notes, exercises and hands-on practice.

COURSE DURATION

24 Hours (in 3 days)

Time: 9:00am to 6:00pm

Lunch Time: 1:00pm to 2:00pm

CERTIFICATION COMPLETION

A certificate of completion is provided for all trainees attending the course.