

MS-MB335T00: AUGMENT ADVANCE LEVEL SUPPLY CHAIN MANAGEMENT SOLUTIONS WITH MICROSOFT DYNAMICS 365



DURATION	LEVEL	TECHNOLOGY	DELIVERY METHOD	TRAINING CREDITS
5 Days	Advanced	Dynamics	Instructor-led	NA

INTRODUCTION

This course is designed to build your in Dynamics 365 Supply Chain Management application knowledge. This course will cover the most important features and functionalities needed by Dynamics 365 Supply Chain Management functional consultant including: The product information and how to configure, create, and manage your product and inventory. Supply chain management configuration and processing. The transportation management features, and the warehouse management features. Asset Management functionalities. Master planning configuration and processing. Sales and procurement processes. This course includes lectures and several hands-on exercises. The exercises will be introduced to you in the form of a case study presented to a Dynamics 365 Supply Chain Management Functional Consultant, Expert. Each exercise will be based on a business scenario followed by a question or discussion then a step-by-step guidance to perform the system related steps.

AUDIENCE PROFILE

This course is designed for the Dynamics 365 Supply Chain Management Functional Consultant Expert. The Dynamics 365 Supply Chain Management Functional Consultant Expert is a key resource that implements and configures advanced features of Dynamics 365 Supply Chain Management to meet the requirements of a business. The functional consultant analyzes business requirements, translates those requirements into fully realized business processes and solutions, and applies industry-recommended practices to implementations. The functional consultant has a strong advanced knowledge of supply chain management operations including production, master planning, and asset management and demonstrates expertise in one or more of the following manufacturing methods: discrete, process, and lean. They partner with architects, developers, consultants and other stakeholders to implement solutions that meet or exceed the needs of their customers. The consultant identifies use cases for applying Dynamics 365 Supply Chain Management add-ins for mixed reality, internet of things (IoT), and machine learning (ML) technologies. The functional consultant specializes in one or more of the following feature sets of Dynamics: finance, manufacturing, or supply chain management. They partner with architects, developers, administrators, and other stakeholders to deliver solutions that meet or exceed the needs of their customers.

PREREQUISITES

Learners should start this course already having the following skills:

- General knowledge of supply chain management
- General knowledge of inventory procedures
- Basic knowledge of warehouse procedures
- Ability to use Microsoft Dynamics 365 Supply Chain Management for basic processing
- General knowledge of supply chain management
- An understanding of how to create products in Supply Chain Management
- General knowledge of inventory procedures in Supply Chain Management
- General knowledge of manufacturing processes
- An understanding of how to work with product information management
- An understanding of how to work with inventory management
- An understanding of how to work with warehouse management
- Ability to use Supply Chain Management for basic processing

COURSE OBJECTIVES

After completing this course, students will be able to:

- Create product masters with predefined variants.
- Create and set up category hierarchies.
- Create product attributes.
- Production order statuses
- Production stages
- Bill of materials (BOM)

COURSE CONTENT

Module 1: Get started with Dynamics 365 Supply Chain Management

Dynamics 365 Supply Chain Management empowers employees and organizations with the ability to obtain a unified view of inventory, warehouse, manufacturing, service, and logistics with predictive analytics that turn data into insights to support better strategic decisions.

Lessons

- Introduction
- Benefits of Supply Chain Management
- Overview of Supply Chain Management
- Cost accounting
- Cost management
- Inventory management and Warehouse management
- Master planning
- Procurement and sourcing
- Vendor collaboration
- Sales and marketing
- Customer portal
- Product information management
- Production control
- Intercompany trade
- Warehouse management
- Transportation management
- Lab – Explore Dynamics 365 Supply Chain Management
- Check your knowledge
- Summary

In this module, you will:

- Learn the benefits of Supply Chain Management.
- Get an overview of distribution and trade features in Supply Chain Management.

Module 2: Get started with inventory management in Dynamics 365 Supply Chain Management

Inventory management in Dynamics 365 Supply Chain Management helps you streamline the tracking, control, and optimization of inventory throughout your organization.

Lessons

- Introduction
- Inventory management overview
- Configure inventory dimensions
- Configure storage dimensions
- Configure tracking dimensions
- Configure serial and batch numbers
- Configure sites
- Configure warehouses
- Configure inventory policies
- Exercise - Set up inventory policies for an item model group

- Set up item groups and item model groups
- Allocate batch and serial numbers
- Work with consignment inventory
- Lab - Work with inventory management
- Check your knowledge
- Summary

This module explains the following concepts:

- Inventory management process
- How to configure inventory dimensions, storage dimensions, and tracking dimensions
- How to set up sites and warehouses
- Inventory policies and how to set up the policies
- How to configure item groups and item model groups
- How to allocate batch and serial numbers
- Consignment inventory

Module 3: Work with inventory management operations in Dynamics 365 Supply Chain Management

If a company only produces several simple products, production can be scheduled manually with the correct bill of materials (BOM) parts arriving on the production floor, at the correct time, and at the proper resource. This module explains what discrete manufacturing is and how it works in Dynamics 365 Supply Chain Management.

Lessons

- Introduction
- Inventory operations scenarios
- Inventory locations
- Inventory statuses
- Set up disposition codes
- Warehouse layout
- Set up barcodes
- Counting reason codes
- Inventory journals
- Inventory journal approval workflow
- Initialize stock levels in the warehouse
- Transfer orders
- Create and post an inventory journal
- Exercise- Create and post an inventory journal
- Check your knowledge
- Summary

This module explains the following concepts:

- Analyze inventory operations scenarios.
- Work with inventory locations.
- Review inventory statuses.
- Configure disposition codes.

- Review warehouse layouts.
- Set up bar codes.
- Configure counting reason codes.
- Work with inventory journals.
- Configure inventory approval workflow.
- Initialize stock levels in the warehouse.
- Review transfer orders.
- Create and post an inventory journal.

Module 4: Set up and work with outbound operations using inventory management in Dynamics 365 Supply Chain Management

Your organization can use outbound operations in Dynamics 365 Supply Chain Management to help streamline order fulfillment processes, improve accuracy and visibility, optimize operations, and scale effectively to meet growing demand.

Lessons

- Introduction
- Outbound operations
- Outbound setup
- Set up default order settings
- Reserve inventory quantities
- Reserve sales order batch numbers
- Check your knowledge
- Summary

This module explains the following concepts:

- Outbound operations
- Outbound setup
- How to set up default order settings for sales orders
- Reverse inventory quantities
- How to reserve sales batch order numbers

Module 5: Set up and work with inbound operations using inventory management in Dynamics 365 Supply Chain Management

This module provides a comprehensive explanation of the Arrival overview page and its role in enhancing the efficiency and accuracy of inbound order management processes in Dynamics 365 Supply Chain Management.

Lessons

- Introduction
- Inbound operations
- Arrival overview
- Set up an item arrival overview profile
- Set up default order settings
- Exercise - Use the item arrival profile
- Check your knowledge
- Summary

This module explains the following concepts:

- Inbound operations
- Arrival overview page
- How to set up an item arrival overview profile
- How to configure default order settings

Module 6: Set up and work with inventory control in Dynamics 365 Supply Chain Management

This module explores inventory cost methodologies and their impact on value, profits, and price management. You learn about methods, such as FIFO, LIFO, weighted average, standard cost, and their effects on inventory valuation and financial reporting. Additionally, you learn about the inventory close process, its role in settling transactions, and its impact on the general ledger. Then, you examine inventory recalculation, adjustments, and archiving for optimized storage and performance efficiency.

Lessons

- Introduction
- Inventory cost methodologies
- Inventory closing and adjustment
- Consolidate inventory transactions
- Check your knowledge
- Summary

This module explains the following concepts:

- Costing methods
- Inventory closing and adjustments
- How to archive inventory transactions

Module 7: Use inventory reports in Dynamics 365 Supply Chain Management

One of the factors for a successful business is having visibility into how much inventory exists at any given time. Inventory reports in Dynamics 365 Supply Chain Management will show how much inventory you have in variety of different ways, and will explain how to be more effective in your inventory investments.

Lessons

- Introduction
- ABC inventory classification
- Physical inventory by inventory dimension report
- Inventory value report
- Inventory on-hand report storage
- Inventory on-hand mobile workspace
- Exercise - Use the ABC classification report
- Exercise - Use the Physical inventory by inventory dimension report

- Exercise - Export a report to Microsoft Excel
- Check your knowledge
- Summary

In this module, you will learn how to:

- Understand ABC classification.
- Use the Physical inventory by inventory dimension report.
- Use the Inventory value reports, and Inventory on-hand report storage.
- Use the Inventory on-hand mobile workspace.

Module 8: Create products and product master's in dynamics 365 Supply Chain Management

Product information is the pillar of supply chain and retail applications across all industries. In the various modules of a business solution, product-specific information and setup are required to manage the business processes that are related to specific products, product families, or product categories.

Lessons

- Introduction
- Product information workspace
- Concept of a product
- Create products
- Set up unit conversions
- Batch disposition codes
- Default order settings
- Define products as not stocked
- Create product master's with variants
- Variant specific sales tax groups
- Gain productivity by using the Variant suggestions page
- Create and set up category hierarchies and attributes
- Set up item pricing
- Lab - Create a product and product master
- Check your knowledge
- Summary

In this module, you will learn how to:

- Create products as type Item and Service.
- Set up product unit conversions.
- Set up transfer orders
- Set up default order settings.
- Create product masters with predefined variants.
- Create and set up category hierarchies.
- Create product attributes.

Module 9: Create bill of materials in Dynamics 365 Supply Chain Management

A bill of materials (BOM) defines the components that are required to produce a product. The

components can be raw materials, semi-finished products, or ingredients. In some cases, services can be referenced in a BOM. However, BOMs typically describe the material resources that are required. When combined with a route or production flow that describes the operations and resources that are required to build a product, the BOM forms the foundation for calculating the estimated cost of the product.

Lessons

- Introduction
- Work with the BOM designer
- BOM and formula versions
- BOM line types
- BOM levels
- Exercise - Create a BOM in the BOM Designer
- Check your knowledge
- Summary

In this module, you will learn how to create bill of materials and BOM versions by using the BOM designer in Supply Chain Management.

Module 10: Get started with production control in Dynamics 365 Supply Chain Management

The life cycle of production begins with the creation of the production order, batch order, or kanban. It ends with a finished, manufactured item that is ready for either a customer or another phase of production. Each step in the life cycle requires different kinds of information to complete the process. As each step is completed, the production order, batch order, or kanban shows a change in the production status. Different types of products require different manufacturing processes.

Lessons

- Introduction
- Core concepts in production control
- Understand unified manufacturing
- Manufacturing principles
- Overview of the production process and production life cycle
- Set up and manage production-related reservations
- Reset the status of a production order
- Batch orders
- Discrete manufacturing
- Process manufacturing
- Lean manufacturing
- Configure production control for unified manufacturing
- Capacity planning
- Integration between the General ledger and the Production control modules
- IoT intelligence and insights

- Describe the value proposition for mixed-reality Guides for production floor workers
- Lab – Explore production control
- Check your knowledge
- Summary

In this module, you will learn about:

- Discrete, lean, and process manufacturing methodologies
- Unified manufacturing
- How to configure production control for unified manufacturing
- Capacity planning
- Integration between the General ledger and the Production control modules
- Production pools
- How to work with allocation keys
- IoT intelligence and insights in Supply Chain Management

Module 11: Get started with discrete manufacturing in Dynamics 365 Supply Chain Management

If a company only produces several simple products, production can be scheduled manually with the correct bill of materials (BOM) parts arriving on the production floor, at the correct time, and at the proper resource. This module explains what discrete manufacturing is and how it works in Dynamics 365 Supply Chain Management.

Lessons

- Introduction
- Discrete manufacturing life cycle
- Master planning and planned production orders
- Bills of materials
- Working with BOM and item configurations
- Create a bill of materials
- Production orders
- Exercise - Create a BOM without a version
- Exercise - Create a BOM in the BOM designer
- Exercise - Create a BOM with a version
- Exercise - Create and process a production order
- Check your knowledge
- Summary

In this module, you will learn about:

- Discrete manufacturing concepts
- Production order statuses
- Production stages
- Bill of materials (BOM)
- Resources
- Routes and operations

Module 12: Set up and use production control for discrete manufacturing in Dynamics 365 Supply Chain Management

If a company only produces simple products, they can schedule production manually with the correct bill of materials (BOM) parts arriving on the production floor, at the correct time and at the proper resource. As a functional consultant for manufacturing, you need to know how to set up Dynamics 365 Supply Chain Management for discrete manufacturing so that your customer can perform and control the production life cycle.

Lessons

- Introduction
- Prerequisite setup in production control
- Production groups
- Production control parameters
- Production pools
- Allocation keys
- Set up journal parameters
- Create a production unit
- Check your knowledge
- Summary

This module explains the following concepts:

- How to set up prerequisites in production control
- Production groups
- Production control parameters
- Production pools
- Allocation keys and their setup
- How to set up journal parameters

Module 13: Set up and use discrete manufacturing routes in Dynamics 365 Supply Chain Management

This module describes how to create operations and operation relations, define route groups, routes, and route versions. It also describes how to work with simultaneous operations and primary and secondary routes.

Lessons

- Introduction
- Create operations and operation relations
- Work with simultaneous operations
- Set up route groups and routes
- Route versions
- Copy routes
- Route networks
- Work with primary and secondary routes
- Exercise - Set up operations and routes
- Check your knowledge
- Summary

This module explains the following concepts:

- Operations and operation relations
- How to work with simultaneous operations
- Route groups and routes
- Route versions

- The purpose of copying routes
- How to set up route networks
- How to work with primary and secondary routes

Module 14: Set up and use discrete manufacturing resources in Dynamics 365 Supply Chain Management

Calendars and resources are two essential components to discrete manufacturing. These components play a crucial role in defining working times and producing the finished items in an efficient way.

Lessons

- Introduction
- Set up calendars and resources
- Set up working time templates
- Create calendars
- Resource capabilities
- Resource groups
- Check your knowledge
- Summary

This module explains the following concepts:

- How to set up calendars and resources
- How to set up working time templates
- How to create calendars
- Resource capabilities
- Resource groups

Module 15: Set up products for production for discrete manufacturing in Dynamics 365 Supply Chain Management

Allocating inventory dimensions, production dimensions, storage dimensions, and tracking dimensions on products for production helps your organization obtain granular tracking and analysis, improved planning and forecasting, enhanced visibility, streamlined operations, and more. With these dimensions, your organization can adapt to diverse requirements, support customization, and enhance overall operational effectiveness.

Lessons

- Introduction
- Set up inventory dimensions in production
- Set up production dimensions
- Set up storage dimensions
- Set up tracking dimensions
- Check your knowledge
- Summary

This module explains the following concepts:

- How to set up inventory dimensions in production
- How to set up production dimensions
- How to create storage dimensions
- Tracking dimensions

Module 16: Production costing for discrete manufacturing in Dynamics 365 Supply Chain Management

Manufacturing businesses must be able to calculate costs for labor, materials, surcharges, and overhead so that they know what these items cost while they're producing finished goods. Manufacturers can set up Dynamics 365 Supply Chain Management to compute the bill of materials costs for completed goods throughout production.

Lessons

- Introduction
- Production cost
- General ledger and manufacturing integration
- Inventory posting profiles, item groups, and item model groups
- End production orders
- Production journals
- Dimension link
- Production reports
- Check your knowledge
- Summary

This module explains the following concepts:

- Production costs
- General ledger and manufacturing integration
- Inventory posting profiles, item groups, and item model groups
- End production orders
- Production journals
- How to set up a dimension link
- How to use production reports

Module 17: Work with the costing sheet in Dynamics 365 Supply Chain Management

Manufacturing companies need to calculate the costs that are related to finished goods that are being produced such as labor, materials, surcharges, and overheads. You can configure Dynamics 365 Supply Chain Management to calculate costs of bill of materials of the finished goods in production. Additionally, you can create costing sheets that are broken out by particular cost categories, incorporate routing costs, and even add surcharges and other indirect costs. Companies can then analyze, summarize, and evaluate cost data so they can make the best possible decisions for price updates, budgets, cost control, and so on.

Lessons

- Introduction
- Costing versions
- Cost groups
- Calculation groups
- Costing sheets
- BOM calculations
- BOM Measurements

- BOM Reports
- Lab - Analyze BOM costs by using the costing sheet
- Check your knowledge
- Summary

In this module, you will learn how to:

- Configure the costing sheet.
- Perform BOM calculation and analyze costs by using the costing sheet.

Module 18: Work with capacity planning and scheduling in Dynamics 365 Supply Chain Management

The role of the scheduling system in Dynamics 365 Supply Chain Management is to plan the production process so that each operation in the production route is assigned a starting and ending date and time, and that the materials needed for production are available when the operation starts.

Lessons

- Introduction
- Scheduling options
- Split a production order
- Operations scheduling
- Job scheduling
- Scheduling options from the Gantt chart
- Resource scheduling
- Scrap and waste
- Exercise - Start a discrete production order
- Exercise - Run a resource schedule
- Check your knowledge
- Summary

In this module, you will learn how to:

- Work with capacity planning.
- Schedule a production order.
- Split a production order.
- Set up scrap and waste.

Module 19: Work with manufacturing execution in Dynamics 365 Supply Chain Management

The Manufacturing execution module is intended primarily for manufacturing companies. It can be used to register time and item consumption on production jobs or projects. Before you start to use manufacturing execution for job registrations, you must set up various production parameters that define how and when registrations are posted during the production process. The settings of production parameters affect inventory management, production management, and cost calculation.

Lessons

- Introduction
- Understand the manufacturing executions

- Identify roles in manufacturing execution
- Planning consideration for manufacturing execution
- Configure manufacturing execution
- Setup time and attendance for manufacturing execution processes
- Control production with manufacturing execution
- Create and process report as finished journals with co-products and by-products
- Calculate and approve raw time registrations
- Report as finished from the job card device
- Lab - Manufacturing execution
- Module assessment
- Summary

In this module, you will:

- Learn about the manufacturing execution process.
- Identify the roles in manufacturing execution.
- Process production orders.
- Discover the process workflows to manage a production.

Module 20: Set up configurable products in Dynamics 365 Supply Chain Management

Your organization can use product configuration to create and maintain product configuration models and to reuse components and attribute types in Dynamics 365 Supply Chain Management.

Lessons

- Introduction
- Product configurator concepts and terminology
- Elements of a product configuration model
- Scenario
- Product model components
- Exercise - Set up components
- Create a product configuration model
- Expression constraints
- Calculations for product configuration
- BOMs and routes
- Configuration rules
- Sales price models
- Exercise - Create a product configuration model
- Exercise - Add components and constraints to a configuration model
- Check your knowledge
- Summary

This module explains the following concepts:

- Product configurator concepts and terminology
- Product model components and how to set up the components

- How to create a product configuration model
- Expression constraints and table constraints
- How to configure BOMs and routes
- Sales price models and how to configure them

Module 21: Validate and release product configuration models in Dynamics 365 Supply Chain Management

Validating and releasing product configuration models in Dynamics 365 Supply Chain Management is essential for maintaining product integrity, enhancing operational efficiency, and ensuring a positive customer experience.

Lessons

- Introduction
- Extra configuration model options
- Improve product configuration performance
- Validate and test a product configuration model
- Configuration templates
- Configuration model versions
- Release a product configuration model
- Exercise - Release a product configuration model
- Reuse product configuration
- Check your knowledge
- Summary

This module explains the following concepts:

- Extra configuration model options
- How to improve product configuration performance
- How to validate and test a product configuration model
- Configuration templates and model versions
- How to release a product configuration model
- How to make product configurations available for reuse

Module 22: Work with configurable products in Dynamics 365 Supply Chain Management

Product configuration in Dynamics 365 Supply Chain Management helps your organization streamline and customize the sales and production processes. With this capability, your business can efficiently manage complex product variations and tailor configurations to meet specific customer needs, ultimately reducing lead times and improving customer satisfaction.

Lessons

- Introduction
- Configurable product use cases

- Intercompany and multiple site considerations
- Extend a product configuration model through the API
- Add a configurable product to a sales order line
- Exercise - Add a configurable product to a sales order line
- Check your knowledge
- Summary

This module explains the following concepts:

- Configurable product use cases
- Intercompany and multiple site considerations
- How to extend a product configuration model through the API
- How to add a configurable product to a sales order line

Module 23: Configure process manufacturing in Dynamics 365 Supply Chain Management

Process manufacturing is associated with formulas and manufacturing recipes, whereas discrete manufacturing uses discrete units and bills of materials. Process manufacturing is used in manufacturing environments where production is completed in batch or semi-continuous processes.

Lessons

- Introduction
- Process manufacturing item types
- Production type setup
- Set up packaging and batch attributes
- Shelf life related setup
- Item model group, product compliance, and approved vendors
- Catch weight
- Transaction adjustments
- Catch weight item handling policy
- Supported scenarios
- Catch weight tags
- Configure approved vendors
- Exercise - Create an approved vendor list
- Exercise - Create and use a partial visibility catch weight item
- Exercise - Use catch weight items
- Exercise - Create process activities for lean manufacturing
- Check your knowledge
- Summary

In this module, you will learn how to:

- Configure process manufacturing.
- Create and configure catch weight items.
- Configure approved vendors.

Module 24: Configure formulas for process manufacturing in Dynamics 365 Supply Chain Management

In process manufacturing in Dynamics 365 Supply Chain Management, a formula defines the materials, ingredients, and outcomes of a specific process.

Lessons

- Introduction
- Formulas, formula lines, and formula versions
- Formula features
- Approve and activate formulas and formula versions
- Use step consumption
- Coproducts
- By-products
- Burden allocation
- Planning items
- Exercise - Create co-products and by-products
- Exercise - Create a new formula with a version from the Released products page
- Exercise - Copy and modify formula versions
- Exercise - Create and update a scalable formula
- Exercise - Create a percentage-based formula
- Exercise - Create a step consumption formula
- Check your knowledge
- Summary

In this module, you learn how to:

- Manage formulas.
- Create co-products and by-products.

Module 25: Identify and configure batch attributes for process manufacturing in Dynamics 365 Supply Chain Management

Often, customers demand specific requirements for the finished goods results from process manufacturing. For example, in the cheese industry, milk is one of the raw materials that is used to produce the cheese and it can have attributes such as fat content and percentage weight. The cheese that is produced from the milk can have other attributes, such as moisture and age. If the customer requirement is not met, you will either have to rework the process or start a new batch process. To ensure that process manufacturers meet customer demands, you must define batch attributes that reflect customer requirements.

Additionally, after a quality check, the finished goods must meet the value or range of values from batch attributes.

Lessons

- Batch attributes
- Assign and reserve batch attributes

- Products that have an active ingredient
- Ingredient types
- The batch balancing process
- Exercise - Create and assign batch attributes
- Exercise - Record batch attributes at batch creation
- Exercise - Record batch attribute values by using quality orders
- Exercise - Reserve batch attributes on sales orders
- Module assessment
- Summary

In this module, you will learn about:

- Batch attributes.
- Batch balancing process.
- Potency management.

Module 26: Work with commodity pricing and compliance in Dynamics 365 Supply Chain Management

The fall and rise of prices for commodities such as renewable energy, natural gas, coal, and oil in manufacturing affect the cost of production. In this module, you'll learn how to set up commodity pricing and stay in compliance for your finished goods.

Lessons

- Introduction
- Configure commodity pricing
- Configure product compliance
- Exercise - Set up commodity pricing
- Exercise - Set up pricing calculation
- Exercise - Create price data and update agreements
- Exercise - Product compliance
- Module assessment
- Summary

By the end of this module, you'll be able to:

- Configure commodity pricing in Supply Chain Management.
- Configure product compliance in Supply Chain Management.

Module 27: Get started with Engineering Change Management for Dynamics 365 Supply Chain Management

Engineering Change Management for Dynamics 365 Supply Chain Management brings structure and discipline to the product data management process and enables products to be defined, released, and revised in a controlled manner supported by workflows.

Engineering change management makes it possible to document, assess the impact of, and apply engineering changes throughout the entire lifecycle of a product.

Lessons

- Introduction
- Overview of features

- End-to-end walkthrough of features
- Exercise - Set up demo data for the sample scenario
- Exercise - Create a new engineering product
- Exercise - Release an engineering product to a local company
- Exercise - Review and accept the product before you release it in the local company
- Exercise - Use the product in transactions in the local company
- Exercise - Add the engineering product to a sales order
- Exercise - Request changes in the engineering product
- Exercise - Make changes to the product by using an engineering change order
- Exercise - Release the changed product
- Check your knowledge
- Summary

In this module, you will:

- Understand the features in engineering change management.
- Learn how the end-to-end engineering change management process works.

Module 28: Set up versioned products in Dynamics 365 Supply Chain Management

Product data is an important part of any company that uses supply chain management processes. With Engineering Change Management for Microsoft Dynamics 365 Supply Chain Management, manufacturers can use strong data management and version control.

Lessons

- Introduction
- Create an engineering organization
- Create nomenclature for product versions
- Create product version number rules
- Create product dimension groups by using the version dimension
- Create product life cycle states
- Engineering attributes
- Product readiness policies
- Product release policies
- Create engineering categories
- Exercise - Create a product readiness policy
- Check your knowledge
- Summary

In this module, you will:

- Set up engineering organizations.
- Work with product versioning.
- Create dimension groups by using the version dimensions.
- Create product life cycle states.

- Use engineering categories.

Module 29: Configure engineering change management for Dynamics 365 Supply Chain Management

Some setup is required to use Engineering Change Management for Dynamics 365 Supply Chain Management. The feature must be enabled and severities identified. Also, you need to identify product owners and configure workflows to approve engineering change orders and engineering change requests.

Lessons

- Introduction
- Set up engineering change severities
- Set up severity rule sets
- Set up product owners
- Engineering workflows
- Exercise - Create a severity rule
- Check your knowledge
- Summary

In this module, you will:

- Set up engineering change severities and severity rules.
- Set up product owners.
- Use a workflow with engineering change management.

Module 30: Convert an existing product to an engineering product in Dynamics 365 Supply Chain Management

An engineering product in Dynamics 365 Supply Chain Management is a product that is version controlled through Engineering Change Management for Microsoft Dynamics 365 Supply Chain Management. You can convert an existing product to an engineering product.

Lessons

- Introduction
- Enable change management on existing products
- Enable engineering product categories
- Run the convert to engineering product wizard
- Check your knowledge
- Summary

In this module, you will:

- Enable change management on existing products.
- Enable engineering product categories.
- Run the convert to engineering product wizard.

Module 31: Work with export control in Dynamics 365 Supply Chain Management

For companies that do business internationally, it can be difficult to keep track of and validate various international regulations. With the

advanced export control system, companies can define these rules and regulations as expressions that are similar to Excel expressions. By using these defined rules, companies can validate that their exports comply with international regulations.

Lessons

- Introduction
- Advanced export control overview
- Turn on and set up advanced export control
- Work with advanced export control for products and sales orders
- Check your knowledge
- Summary

This module explains the following concepts:

- Explore the capabilities of advanced export control.
- Turn on and set up advanced export control.
- Work with advanced export control for products and sales orders.

Module 32: Extend export control in Dynamics 365 Supply Chain Management

With the advanced export control system, your organization can define these rules and regulations as expressions that are similar to expressions in Excel. By using these defined rules, your organization can validate that their exports comply with all international regulations.

Lessons

- Introduction
- Extend export control sales order functionality
- Extend export control rules functionality
- Extend export control license functionality
- Check your knowledge
- Summary

This module explains the following concepts:

- Sales order functionality for implementing export controls.
- License functionality for implementing export controls.
- Rules functionality for implementing export controls.

Module 33: Configure warehouse management in Dynamics 365 Supply Chain Management

Warehouse management in Dynamics 365 Supply Chain Management helps optimize and streamline warehouse processes according to your individual needs. It also provides insight into your inventory and the tools you need to help increase customer satisfaction and reduce costs.

Lessons

- Introduction
- Roles in warehouse management
- Set up warehouse management
- Configure the warehouse layout
- Configure catch weight processing for warehouse management
- Warehouse processes
- Reservation hierarchies
- Lab - Configure warehouse management
- Check your knowledge
- Summary

In this module, you learn how to:

- Create warehouses and locations.
- Configure work pools, zones, location format, and location profiles.
- Configure catch weight processing for warehouse management.
- Create reservation hierarchies.
- Configure location directives.
- Configure wave templates.
- Configure inventory statuses.

Module 34: Warehouse implementation experience in Dynamics 365 Supply Chain Management

Implementing new warehouse management applications can be a cumbersome process with several unassisted configuration steps. Now, the implementation time and cost of setting up warehouse operations within Dynamics 365 Supply Chain Management is more straightforward. With the help of setup wizards and streamlined configuration, your organization's warehouse professionals can set up and use Dynamics 365 Supply Chain Management without the need to consult subject matter experts.

Lessons

- Introduction
- Enable warehousing telemetry
- Warehouse implementation workspace
- Wizard-driven setup of Warehouse Management parameters
- Wizard-driven warehouse configuration
- Simplified query view of location directives
- Check your knowledge
- Summary

This module explains the following concepts:

- Options for implementing Warehouse Management on a new legal entity or warehouse
- Warehouse Management setup wizards
- How to create and view location directives

Module 35: Inbound warehouse operations using Dynamics 365 Supply Chain Management

Learn about some ways that your organization can complete your inbound warehouse operations from vendor to warehouse.

Lessons

- Introduction
- Inbound operations
- Inbound advanced shipping notices
- Cross dock products from receiving warehouse to stores
- Create a GTIN code for a product
- Wizard-driven setup of Warehouse Management parameters
- Exercise - Register a load where items are missing
- Check your knowledge
- Summary

This module explains the following concepts:

- General inbound warehouse process
- Vendor advanced shipping notices (ASNs)
- How to set up cross-docking

Module 36: Outbound warehouse operations using Dynamics 365 Supply Chain Management

Learn how to set up and maintain outbound warehouse operations within Dynamics 365 Warehouse Management. Additionally, learn about general setup and more advanced options to optimize your warehouse operations.

Lessons

- Introduction
- Outbound operations
- Warehouse work
- Cluster picking
- Packing and containerization
- Packing containers with the Warehouse Management mobile app
- Transfer orders and replenishment
- Exercise - Set up a cluster profile
- Check your knowledge
- Summary

This module explains the following concepts:

- Outbound operations
- Warehouse work
- How to create sales order picking and consolidated shipments
- How to implement cluster picking
- How to pack shipments with speed and resilience
- Packing and containerization processes

- How to pack containers with the Warehouse Management mobile app
- How to transfer orders and replenishment

Module 37: Execute across warehouse operations in Dynamics 365 Supply Chain Management

Two essential components for handling inventory management and warehouse operations are cycle counting and the material handling equipment interface. These practices play a crucial role in maintaining accurate inventory records, optimizing stock levels, and ensuring efficient movement of goods within a facility.

Lessons

- Introduction
- Cycle counting
- Material handling equipment interface
- Exercise - Create a cycle counting plan
- Check your knowledge
- Summary

This module explains the following concepts:

- Cycle counting and how you can use it within Dynamics 365 Supply Chain Management
- How your organization can use the material handling equipment interface

Module 38: Warehouse management mobile device configuration using Dynamics 365 Supply Chain Management

Learn more about how to use the Warehouse Management mobile device application in Supply Chain Management. From initial parameter setup to creating mobile device menus, this module describes the basics around setting up your warehouse mobile devices to fit your business needs.

Lessons

- Introduction
- Global mobile device parameters
- Set up and deploy GS1 and QR bar codes
- Set up work type menu items
- Set up mobile app step instructions
- Set up detours for steps in mobile device menu items
- Exercise - Set up a detour for a step in a task flow
- Check your knowledge
- Summary

This module explains the following concepts:

- General configurations for warehouse management mobile devices
- How to set up menu items

- Menu item detours and how to set up these components

Module 39: Use warehouse management for manufacturing in Dynamics 365 Supply Chain Management

Do you want to get the best out of warehouse management to support your manufacturing activities? In this module, you can learn about the manufacturing-specific warehouse management features in Dynamics 365 Supply Chain Management.

Lessons

- Production input location
- Production output location
- Staging and order picking
- Release BOM and formula lines to the warehouse
- Automatically rewave to add unfulfilled lines to new waves
- Cross-docking
- Planned cross docking
- Visibility into material exceptions
- Lab - Work with warehouse management in manufacturing
- Check your knowledge
- Summary

In this module, you will learn about:

- Production input and output locations.
- Staging and order picking.
- Releasing BOM and formula lines to the warehouse.
- Cross-docking.
- Visibility into material exceptions.

Module 40: Get started with lean manufacturing in Dynamics 365 Supply Chain Management

The goal is to produce exactly what the customer wants, when the customer wants it, and in an economical manner. For lean manufacturing, perfection is an aspiration. You can use lean manufacturing in a unified (mixed-mode) manufacturing environment that combines various supply, production, and sourcing strategies. These strategies include production orders, batch orders for process industries, purchase orders, and transfer orders. The lean manufacturing architecture in Dynamics 365 Supply Chain Management consists of production flows, activities, and Kanban rules.

Lessons

- Introduction
- Understand lean concepts and terminology
- Lean manufacturing techniques and processes
- Module assessment
- Summary

In this module, you'll:

- Learn about lean manufacturing.
- Explore the lean concepts and terminology.

Module 41: Set up lean manufacturing in Dynamics 365 Supply Chain Management

The lean manufacturing architecture in Dynamics 365 Supply Chain Management consists of production flows, activities, and kanban rules. You can use lean manufacturing in a unified manufacturing environment that combines various supply, production, and sourcing strategies.

Lessons

- Introduction
- Configure parameters
- Create value streams and production flow models
- Create production flows
- Set up production flows
- Exercises - Configure lean manufacturing
- Module assessment
- Summary

In this module, you will:

- Configure parameters.
- Create value streams.
- Create production flows.
- Configure lean manufacturing work cells.

Module 42: Create and process fixed kanbans in Dynamics 365 Supply Chain Management

The Kanban schedule board lets the production planner control and optimize the production plan for kanban jobs. It makes the flow of kanban jobs transparent and gives the production planner a tool that optimizes and adjusts the production plan for the lean manufacturing work cell. Kanban rules in Dynamics 365 Supply Chain Management are tied to production flows as the foundation that defines the activities of a kanban. Kanban rules can be set up to support various make-to-stock and make-to-order scenarios. This module explains how to work with Kanban schedule boards and describes kanban types, kanban replenishment strategies, and fixed quantity kanban rules.

Lessons

- Introduction
- Understand kanban boards
- Configure a fixed kanban rule
- Process a fixed kanban
- Kanban quantity calculations and circulating kanbans
- Exercise - Configure a fixed quantity kanban rule
- Exercise - Fixed kanban job processing
- Module assessment
- Summary

In this module, you learn about:

- Kanban rules.
- Manufacturing kanbans.
- Withdrawal kanbans.
- Fixed quantity kanbans.
- Kanban quantity calculations and circulating kanbans.

Module 43: Create and process event kanban rules in Dynamics 365 Supply Chain Management

You use event kanban rules to trigger and create related issues of raw materials when you create sales lines, estimate production orders, create kanbans from event kanban rules, or run the pegging event processing where inventory has hit a minimum quantity. This module explains how to create and process event kanbans in Dynamics 365 Supply Chain Management.

Lessons

- Introduction
- Configure event kanban rules
- Capable to Promise
- Exercise - Create an event kanban from a sales order
- Exercise - Set up a BOM line event kanban rule
- Module assessment
- Summary

In this module, you will:

- Create event kanban rules.
- Create and manage a sales line event kanban.
- Create and manage a BOM line event kanban.

Module 44: Create and process scheduled kanbans in Dynamics 365 Supply Chain Management

Scheduled kanbans are used for items that aren't typically suited for fixed quantity kanban rules. These products aren't used frequently, and you base the production of these items on a schedule. The schedule is analyzed and updated weekly based on customer forecasts.

Lessons

- Introduction
- Configure scheduled kanban rules
- Plan scheduled kanbans
- Exercise - Set up scheduled kanban rules
- Module assessment
- Summary

In this module, you'll learn how to configure and work with:

- Kanban rules.
- Manufacturing kanbans.
- Withdrawal kanbans.
- Creation and management of scheduled kanbans.
- Supply schedule.

Module 45: Configure activity-based subcontracting and production flow costing in

Dynamics 365 Supply Chain Management

The subcontracting functionality in Dynamics 365 Supply Chain Management offers visibility of the components that are provided to the subcontractor and also, if necessary, capacity visibility at the subcontractor. Additionally, working with kanban planning and process boards allows companies to make quick, informed decisions to effectively manage demand variations, especially when they are analyzing the production flow costing in lean manufacturing.

Lessons

- Overview of subcontracting and production flow costing
- Subcontracting capabilities
- Subcontracting a vendor
- Subcontracting service
- Create and process subcontracting purchase orders
- Transfer activities as subcontracting activities
- Subcontracting as an alternate resource
- Cost accounting of subcontracted services
- Subcontracting cost flow
- Backflush costing
- Products and material in Work in Progress
- Standard cost
- Costing lean manufacturing
- Calculation of standard cost
- Calculate unused quantities
- Calculation of production variances to standard cost
- Ledger entries created from processing a production flow
- Exercise - Set up a default vendor and create a purchase agreement
- Exercise - Create a work cell for subcontracting
- Exercise - Create an activity-based subcontracting rule
- Exercise - Create and schedule kanbans for subcontracting
- Exercise - Process and transfer jobs
- Check your knowledge
- Summary

In this module, you will learn how to:

- Configure activity-based subcontracting.
- Designate vendors as subcontractors.
- Configure production flow costing.

Module 46: Configure and perform the procure-to-purchase process in Dynamics 365 Supply Chain Management

Procure-to-purchase is the first step of the procure-to-pay process. Procure-to-purchase involves the

procurement agent finding a vendor and requesting a material or service to be purchased.

Lessons

- Introduction
- Procurement scenario
- Overview of the procure-to-purchase process
- Set up procurement categories
- Use procurement catalogs
- Create a purchase requisition
- Create and process a request for quotation
- Create purchase orders
- Vendor categories and catalogs
- Evaluate a vendor and put a vendor on hold
- Use purchasing policies
- Lab - Work with procure-to-purchase processes
- Check your knowledge
- Summary

In this module, you will learn how to:

- Apply the procurement and sourcing processes in a business scenario.
- Use purchasing policies.
- Create and maintain vendors.
- Create and process purchase requisitions.
- Create and process a request for quotation.

Module 47: Configure and manage vendor collaboration in Dynamics 365 Supply Chain Management

Speed, accuracy, and a digital solution when communicating with vendors is an essential need for a successful business. Dynamics 365 Supply Chain Management offers seamless collaborations with vendors through the Vendor collaboration portal.

Lessons

- Introduction
- Purchase order statuses with vendor collaboration
- Configure vendor collaboration
- Maintain vendor certification
- Set up vendor collaboration security roles
- Use the Vendor collaboration invoicing workspace
- Define purchase order response information
- Work with purchase orders when vendor collaboration is used
- Purchase order statuses and versions
- Sharing information about consignment inventory
- Inform vendors about vendor collaboration
- Work with request for quotes
- Purchase order confirmation workspace

- Accessing vendor master data in the Vendor information workspace
- Exercise - Set up an external role for a vendor
- Check your knowledge
- Summary

In this module, you will learn how to:

- Configure vendor collaborations.
- Work with the Vendor collaboration workspace.
- Maintain vendor certifications.
- Use vendor collaboration as part of a procure-to-pay process.

Module 48: Process purchase orders in Dynamics 365 Supply Chain Management

Organizations can use purchase orders to record information about the goods and services that they are purchasing from various vendors. Learn about processing purchase orders in Dynamics 365 Supply Chain Management.

Lessons

- Overview of the purchase order process
- Set up purchasing parameters
- Use purchase order change management
- Use Item arrivals and Arrival overview
- Manage over/under delivery for purchase orders
- Manage charges for purchase orders
- Create vendor returns
- Lab - Create and process a purchase order
- Module assessment
- Summary

In this module, you will:

- Set up purchase order parameters
- Use purchase order change management.
- Create a purchase order.
- Use item arrivals and arrival overview.
- Create vendor returns.

Module 49: Set up and work with quality control and quality management in Dynamics 365 Supply Chain Management

An important factor that impacts a company's reputation in today's market is the quality of their goods and services. By having a standard procedure for checking the quality of products when they arrive from vendors, move through supply chain, and are sent to customers, companies can reduce the number of returns and maintain their reputation in the market.

Lessons

- Introduction

- Configure quality management
- Perform quality control and management processes
- Describe transactions types and create quality orders
- Apply inventory blocking
- Perform quarantine management
- Exercise - Create and process a quality order
- Exercise - Create and process a nonconformance order
- Check your knowledge
- Summary

In this module, you'll learn how to:

- Configure quality management
- Perform quality control processes
- Apply inventory blocking
- Perform quarantine management

Module 50: Configure and use agreements in Dynamics 365 Supply Chain Management

Companies negotiate and agree on certain terms to fix the price of items. These agreements help businesses make correct estimations of cost of goods purchased and set a base for sales prices. By purchasing or selling goods, companies might be entitled to receive rebates or gain royalty rewards, which can be converted to a credit note.

Lessons

- Introduction
- Work with trade agreements
- Create sales agreements
- Create purchase agreements
- Configure trade allowance management
- Configure brokerage contract management
- Configure royalty contract management
- Configure vendor rebates
- Rebate management module
- Service management
- Exercise - Create a purchase agreement
- Exercise - Generate and process customer rebates
- Exercise - Create trade agreements
- Check your knowledge
- Summary

In this module, you will:

- Maintain trade agreements.
- Configure smart rounding.
- Create sales agreements.
- Use procurement policies.
- Create purchase agreements.
- Configure trade allowance.
- Configure brokerage.
- Configure royalties.
- Configure rebates.
- Learn about the Rebate management module.

Module 51: Set up intercompany trade in Dynamics 365 Supply Chain Management

Large organizations often buy and sell among their subsidiaries. Dynamics 365 Supply Chain Management facilitates intercompany trade so that an organization's legal entities can trade goods while the system automatically generates all documents for the participating legal entities, saving the organization time and money.

Lessons

- Introduction
- Intercompany trading overview
- Intercompany scenarios
- Set up intercompany trade
- Set up intercompany trade relationships
- Action policies
- Set up charges and posting
- Set up intercompany agreements and direct deliveries
- Lab - Set up intercompany relations
- Check your knowledge
- Summary

This module explains the following concepts:

- Work with intercompany trade through various scenarios.
- Set up intercompany trade.
- Set up intercompany trade relationships.
- Set up charges and posting.
- Set up intercompany agreements and direct deliveries.

Module 52: Work with intercompany trade in Dynamics 365 Supply Chain Management

Intercompany trade helps your organization streamline and automate transactions between legal entities. This integration improves efficiency by reducing manual data entry, which ensures consistency in pricing and inventory management. Additionally, it provides a comprehensive view of supply chain operations across different entities in the organization.

Lessons

- Introduction
- Synced intercompany data
- Create an intercompany sales order
- Process intercompany purchase orders
- Exercise- Process a sales order-initiated intercompany chain
- Return an intercompany sales order
- Customer payments for intercompany orders
- Exercise- Process returns in intercompany

- Create an intercompany purchase order
 - Check intercompany order price discrepancies
 - Manage intercompany purchase orders
 - Exercise- Process a purchase order-initiated intercompany chain
 - Check your knowledge
 - Summary
- This module explains how to:
- Create and process intercompany orders.
 - Process intercompany sales order returns.
 - Review customer payments for intercompany orders.
 - Check intercompany order price discrepancies.

Module 53: Set up order to cash in Dynamics 365 Supply Chain Management

With Dynamics 365 Supply Chain Management, your organization can set up order to cash to streamline and enhance the efficiency of your organization's business processes.

Lessons

- Introduction
- Sales and marketing workspaces
- Order to cash business processes
- Relationship management
- Customer setup
- Trade and Sales agreements
- Sales quotation setup
- Sales order setup
- Order promising concepts
- Set up order promising
- Set up order hold codes
- Set up commissions
- Set up customer and item search
- Check your knowledge
- Summary

This module explains the following concepts:

- Order to cash business processes
- Trade agreements and sales quotations
- Order promising concepts
- How to set up order hold codes
- How to set up commissions and analyze various scenarios
- How to set up customer and item search

Module 54: Work with order to cash in Dynamics 365 Supply Chain Management

Working with the order to cash process is crucial for businesses because it ensures the smooth flow of operations from receiving customer orders to receiving payment. Efficient management of

the order to cash process leads to increased customer satisfaction, reduced order processing times, improved cash flow, and better financial visibility. By streamlining order processing, invoicing, and payment collection, businesses can optimize resource allocation, minimize errors, and enhance overall profitability.

Lessons

- Introduction
- Sales order entry scenarios
- Create and process sales orders
- Sales order picking process
- Process customer returns
- Sales order reservations
- Lab - Create a sales order and work with commissions
- Check your knowledge
- Summary

This module explains how to:

- Perform the order to cash process.
- Create and confirm sales orders.
- Create and confirm sales quotations.
- Process customer returns.
- Work with sales order reservations.

Module 55: Set up Master Planning in Dynamics 365 Supply Chain Management

In every industry, whether it's retail, manufacturing, distribution, services, or public sector entities, the ability to effectively anticipate and manage demand and supply for goods and services is crucial for both short-term and long-term operations. Familiarize yourself with the Master Planning feature within Dynamics 365 Supply Chain Management to simplify your planning process. When you use predefined criteria, this tool enables you to efficiently strategize your procurement, transfers, and manufacturing requirements for materials.

Lessons

- Introduction
- Master planning considerations and set up
- Master planning parameters page
- Create a master plan
- Coverage settings
- Action messages
- Demand Forecasting
- Run plans and firm planned orders
- Set up and use the Supply schedule page
- Exercise - Firm a planned order
- Exercise - Change a planned order type
- Deprecated master planning
- Check your knowledge

- Summary

In this module, you learn how to: Set up master planning.

- Use the Supply schedule page.
- Set up demand and supply forecasts.
- Set up calculated delays.
- Set up intercompany master planning.
- Run plans and firm planned orders.

Module 56: Use master planning in Dynamics 365 Supply Chain Management

The master planning features enables the calculation of a master plan to occur outside Dynamics 365 Supply Chain Management and its SQL database. The master planning features also improve performance and has minimal impact on the SQL database during the planning runs. Therefore, it can be run during normal office hours and provide immediate results based on the most recent activity.

Lessons

- Introduction
- Set up master planning add-in
- Apply filters to a plan
- Master planning with demand forecasts
- Master planning support for capability-based resource allocation
- Priority-based planning
- Master planning and purchase trade agreements
- Set up supply chain calendars
- Safety margins
- Coverage time fences
- Approved planned orders
- Generate planned production orders
- Analyze and approve planned orders
- Auto-firming
- Planning with negative on-hand quantities
- View history and planning logs

In this module, you will:

- Review the architecture of master planning features.
- Identify the benefits of master planning features.
- Discover the performance improvements within master planning features.
- Learn about priority-based planning

Module 57: Demand Driven Material Requirements Planning in Dynamics 365 Supply Chain Management

Material Requirements Planning (MRP) has become an increasingly challenging area for supply chain management due to a multitude of factors. For instance, the growing

use of materials from overseas has greatly affected lead times for those materials. Furthermore, market fluctuation and an increasingly shorter lead time requested by customers has led many businesses to misjudge their stock and experience understocked situations. Demand Driven Material Requirements Planning (DDMRP) helps alleviate these problems by enforcing buffers on various items that you can define min, max, and resupply amounts for. This module

explores the benefits and applications of DDMRP.

Lessons

- Introduction
- Demand Driven Material Requirements Planning (DDMRP) Overview
- Inventory positioning
- Buffer profile and levels
- Demand-driven planning
- Visual and collaborative implementation
- Check your knowledge

- Summary

In this module, you will:

- Learn about the basic principles behind Demand Driven Material Requirements Planning.
- Discover how to use inventory positioning.
- Learn about buffer configuration.

ASSOCIATED CERTIFICATIONS & EXAM

This course will prepare delegates to write the Microsoft MB-335: Microsoft Dynamics 365 Supply Chain Management Functional Consultant Expert 365 exam.