

MS-MB330T00: CONCEPTUALIZE SUPPLY CHAIN MANAGEMENT IN MICROSOFT DYNAMICS 365



DURATION	LEVEL	TECHNOLOGY	DELIVERY METHOD	TRAINING CREDITS
5 Days	Intermediate	Dynamics 365	Instructor-led	NA

INTRODUCTION

This course is designed to build your foundation 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. Quality management and quality control functionalities. Master planning configuration and processing. 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. 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. The Dynamics 365 Supply Chain Management functional consultant is a key resource that designs and configures apps to meet the requirements for a customer. The functional consultant analyzes business requirements and translates those requirements into fully realized business processes and solutions that implement industry-recommended practices. 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:

- Basic manufacturing skills
- Dynamics 365 Core skills

COURSE OBJECTIVES

After completing this course, students will be able to:

- Manage inventory and warehousing in Dynamics 365

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

Working with inventory operations in Dynamics 365 Supply Chain Management is essential for enhancing operational efficiency, reducing costs, meeting customer demands, and maintaining compliance with industry regulations.

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

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

In this module, you learn how to:

- 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: 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

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

This module explains the following concepts:

- 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

This module explains the following concepts:

- 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'll 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

In this module, you will:

- 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 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 24: 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 25: 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 26: 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 27: 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 28: 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 29: 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 30: 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 31: Manage a discrete product BOM and route for versioned products in Dynamics 365 Supply Chain Management

Learn how to create a new engineering product, include the BOM and routes, and handle changes to the product in Microsoft Dynamics 365 Supply Chain Management.

Lessons

- Introduction
- Create a new engineering product
- Set up a product version BOM
- Set up a product version route
- Release the product to operational companies
- Review and accept the product before release
- Change a life cycle state and use a product in transactions
- Use readiness checks
- Exercise - Create and release an engineering product
- Check your knowledge
- Summary

In this module, you will:

- Learn how to create an engineering product.
- Release the product to other legal entities.
- Review and accept the release of a product in an operational legal entity.

- Maintain the life cycle of a product.
- Perform readiness checks on a product.

Module 32: Request and follow up with product changes in Dynamics 365 Supply Chain Management

During the life cycle of an engineering product, instances might occur where the product information will need to be updated, removed, or replaced. In this scenario, Engineering Change Management for Dynamics 365 Supply Chain Management provides you with a structured process for making these changes.

Lessons

- Introduction
- Engineering change requests
- Engineering change orders
- Exercise - Create an engineering change request
- Check your knowledge
- Summary

In this module, you will:

- Create an engineering change request.
- Learn about business impacts.
- Create an engineering change order.

Module 33: Manage changes in formulas and their ingredients in Dynamics 365 Supply Chain Management

The formula change management process allows for an iterative product development process in Dynamics 365 Supply Chain Management by using the Engineering Change Management features. The features that are used in this module will cover formula change management and will help you take advantage of the capabilities within these features.

Lessons

- Introduction
- Engineering change management
- Centralized product data management
- Product versioning
- Formula lines and versioning
- Product life cycle management
- Formula management process
- Formula change management
- Evaluate business impact of a change request and send notifications
- Engineering change orders
- Readiness control
- Enhanced product release functionality
- Check your knowledge
- Summary

In this module, you'll:

- Learn how to manage changes to a formula or product.
- Learn about the process flow of a formula change.
- Discover the different applications of formula changes and change management.

Module 34: 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 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 35: 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

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 36: 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 learn how to:

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

Module 37: 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 transaction 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 will learn how to:

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

Module 38: 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 learn how to:

- 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 39: 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

In this module, you will learn how to:

- 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 40: 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

In this module, you will learn how to:

- Create and process intercompany orders.
- Process intercompany sales order returns.
- Review customer payments for intercompany orders.
- Check intercompany order price discrepancies.

Module 41: Get started with Asset Management for Dynamics 365 Supply Chain Management

Asset Management is a module for managing assets and maintenance jobs in Dynamics 365 Supply Chain Management. Asset Management enables you to efficiently manage and carry out tasks related to managing and servicing many types of equipment in your company, for example, machines, production equipment, and vehicles. Asset Management supports solutions across numerous industries.

Lessons

- Overview and benefits
- Asset Management terminology and concepts
- Functional locations and assets
- Assets and work orders
- Use the Asset Management mobile workspace
- Asset Management integration capabilities
- Integrate Asset Management with Dynamics 365 Guides
- Check your knowledge
- Summary

In this module, you will learn how to:

- Review the benefits of Asset Management.
- Define the key terms and concepts in Asset Management.
- Learn how to install, and work with the Asset Management mobile workspace.
- Review Asset Management integration capabilities.

Module 42: Set up functional locations in Asset Management for Dynamics 365 Supply Chain Management

Before your organization can start using Asset Management for Dynamics 365 Supply Chain Management, you must first establish the structure. Functional locations are used to identify where your physical assets are installed.

Lessons

- Introduction
- Functional location lifecycle states
- Configure functional location types
- Maintenance attribute types
- Exercise - Create a functional location lifecycle state and functional location lifecycle model
- Exercise - Create functional location types
- Check your knowledge
- Summary

In this module, you will learn how to set up:

- Functional location lifecycle states
- Functional location lifecycle models
- Functional location types
- Attribute types

Module 43: Set up assets in Asset Management for Dynamics 365 Supply Chain Management

Before your organization can start using Asset Management for Dynamics 365 Supply Chain Management, you must first establish the structure. This module will walk you through the steps on how to set up the key functionalities for assets such as how to create asset types, create condition assessment templates and registrations on those assets, create lifecycle states for assets, establish criticality types, and much more.

Lessons

- Introduction
- Create asset lifecycle states
- Create asset lifecycle models
- Asset types
- Create asset type defaults
- Condition assessments and Condition assessment templates

- Create asset manufacturers and models
- Asset counters
- Set up asset management parameters
- Set up asset service levels
- Set up asset criticality types
- Create asset document relations
- Create assets based on purchase orders
- Create maintenance workers and worker groups
- Exercise - Set up assets
- Check your knowledge
- Summary

In this module, you will:

- Define and create asset types.
- Review how to use Condition assessments to manage and maintain your equipment.
- See how to use the Asset counter to help with tracking, and using maintenance plans.
- Review asset lifecycle states, and define asset statuses.
- Set up asset service levels.
- Create maintenance workers, and worker groups.

Module 44: Set up work orders in Asset Management for Dynamics 365 Supply Chain Management

Work orders are used to track and manage maintenance jobs in Asset Management for Dynamics 365 Supply Chain Management. Before work orders can be used by your organization, they must first be configured based on your organizational structure and processes.

Lessons

- Introduction
- Maintenance job type categories
- Create a maintenance job type variant
- Maintenance job trade
- Maintenance checklist variables
- Maintenance checklist template
- Maintenance job types
- Create maintenance job type default lines and related forecasts
- Overview of maintenance job types related to assets
- Work order lifecycle states and projects
- Relationships between work order lifecycle models, work order types, and work order lifecycle states
- Work order lifecycle models
- Work order project setup
- Service levels and descriptions
- Fault management
- Exercise- Set up work orders
- Check your knowledge
- Summary

In this module, you will:

- Establish job types and categories
- Define work order lifecycle states and types for work orders
- Define costs associated to projects related to Asset management projects
- Create service level definitions for work orders

Module 45: Set up maintenance requests in Asset Management for Dynamics 365 Supply Chain Management

For your organization to use the Maintenance components of Asset Management for Dynamics 365 Supply Chain Management, you must first set up the framework. This module will show you how to configure maintenance requests and request types, lifecycle states, and establish maintenance worker responsibilities.

Lessons

- Introduction
- Create maintenance request lifecycle states
- Create maintenance request lifecycle models
- Create maintenance request types
- Maintenance worker responsibilities
- Exercise - Set up maintenance request lifecycle states, models, and types
- Check your knowledge
- Summary

In this module, you will:

- Learn how to configure maintenance requests.
- Review how to set up Lifecycle states.
- Define how to establish maintenance request types.
- Establish maintenance workers responsibilities in Asset Management.

Module 46: Work with functional locations in Asset Management for Dynamics 365 Supply Chain Management

Functional locations in Asset Management for Dynamics 365 Supply Chain Management provides your organization the ability to define and track where your assets are located. The benefit of functional locations not only provides traceability, but improves the reporting relationship to work orders, condition and fault assessments, and production stop registrations.

Lessons

- Introduction
- Create functional locations
- Install assets on functional locations

- Exercise - Create a default functional location, and assign it as the default
- Check your knowledge
- Summary

In this module, you will:

- Create functional locations
- Learn how to install assets on functional locations

Module 47: Work with assets in Asset Management for Dynamics 365 Supply Chain Management

Asset Management for Dynamics 365 Supply Chain Management allows your organization to effectively manage your resources, through the identification of asset locations. You can schedule maintenance tasks related to those assets, track usage, and review reports associated with the assets and their locations.

Lessons

- Introduction
- All assets page
- Create an asset
- Multi-level assets
- Copy an asset or asset structure
- Move, remove, and install an asset
- Create assets based on purchase orders
- Asset bills of materials
- Asset event history
- Asset view
- Asset attribute overview
- Lab - Work with assets
- Check your knowledge
- Summary

In this module, you will:

- Learn how to create, move, remove, and install assets.
- Review how to create assets based on purchase orders.
- Define how to create asset bills of materials.
- Learn how to use the Asset view page and Asset attribute overview page.

Module 48: Manage maintenance requests in Asset Management for Dynamics 365 Supply Chain Management

Maintenance requests in Asset Management for Dynamics 365 Supply Chain Management are fundamental in keeping your valuable assets running efficiently, while managing downtime and protecting your overall productivity. This module defines maintenance requests, how to create maintenance requests, using asset loans, tracking inbound and outbound assets, and reporting.

Lessons

- Introduction
- View maintenance requests

- Maintenance request lifecycle states
 - Create and update maintenance requests
 - Create work orders from maintenance requests
 - Asset loans
 - Inbound and outbound assets
 - Maintenance request management workspace
 - Work order management workspace
 - Maintenance request reports
 - Exercise - Create a maintenance request
 - Exercise - Create a Maintenance request list report
 - Check your knowledge
 - Summary
- In this module, you will:
- Learn how to use and create maintenance requests.
 - Review how to create a work order from maintenance requests.
 - Define asset loans and how to use them in Asset Management.
 - Learn about inbound and outbound assets.
 - Review how to use maintenance request reports to optimize your organization's performance.

Module 49: Create and manage work orders in Asset Management for Dynamics 365 Supply Chain Management

Work orders are used to track and manage maintenance jobs scheduled on assets in Asset Management for Dynamics 365 Supply Chain Management.

Lessons

- Introduction
- Manually create work orders
- Maintenance forecasts
- Procurement of work order purchase requisitions
- Bill customers for maintenance work
- Manual update of asset counters
- Automatic update of asset counters
- Maintenance checklists
- Maintenance downtime
- Add a fault to a work order
- Work order report
- Work order pools
- Active work order maintenance jobs page
- Work order management workspace
- Exercise - Create and manage work orders
- Check your knowledge

In this module, you will:

- Learn how to manually create work orders

- Establish maintenance forecasts for maintenance job types
- Create purchase orders from a work order
- Bill customers for maintenance work
- Design counters manually or automatically to track the number of hours an asset has been in operation
- Create maintenance checklists by maintenance job types
- Create maintenance downtime registrations to track downtime in assets
- Add faults to work orders to report faults and reason for the fault
- Produce work order reports and work order maintenance jobs
- Define work order pools to group common work orders

Module 50: Schedule work orders in Asset Management for Dynamics 365 Supply Chain Management

Schedules for maintenance workers, assets and other tools are created when work orders are scheduled in Asset Management for Dynamics 365 Supply Chain Management.

Lessons

- Introduction
- Configure workers for work order scheduling
- Schedule and dispatch work orders
- Calculate capacity load on scheduled work orders
- Lab - Set up a preferred worker, and schedule a work order
- Check your knowledge
- Summary

In this module, you will:

- Create worker calendars and scheduling.
- Identify and assign preferred maintenance workers.
- Schedule and dispatch work orders, including scheduling for a specific date and time.
- Review the scheduled work order maintenance jobs to assign resources to maintenance jobs.
- Learn how to calculate a capacity load on scheduled work orders by defined periods.

Module 51: Use controls and reports in Asset Management for Dynamics 365 Supply Chain Management

To effectively manage your assets in Asset Management for Dynamics 365 Supply Chain Management, you can use controls and reports.

Lessons

- Introduction
- Cost control for assets calculation
- Work order date control calculation
- Work order hour control calculation
- Asset fault cost control calculation
- Calculate asset KPIs
- Item where used calculation
- Maintenance status calculation
- Exercise - Create a Work order cost control report
- Exercise - Create an Item where used report
- Check your knowledge
- Summary

In this module, you will:

- Calculate comparisons of actual costs compared to budgeted costs using the Cost and work order date control.
- Calculate the actual hours compared to the budgeted hours using the Work order hour control.
- Create a calculation that analyzes the total number of faults over a defined period.
- Establish a Key Performance Indicator (KPI) calculation that tracks the performance of defined assets and asset types.
- Define a calculation that shows when and how long assets are used.
- Create forecasting that tracks maintenance jobs associated to projects and integrates with the Project management and accounting modules.

Module 52: Use preventive and reactive maintenance in Asset Management for Dynamics 365 Supply Chain Management

Machinery and equipment used in production and warehouses all require maintenance. It's like taking your car in for service. You take preventive measures and get the oil changed regularly, and you plan for the downtime of when you won't be able to use your vehicle until maintenance is complete. Your organization's success depends on planning maintenance, downtime, and the cost of maintaining your assets. This is where Asset Management for Dynamics 365 Supply Chain Management can help.

Lessons

- Introduction
- Maintenance plans
- Interval types
- Assign a maintenance plan to an asset
- Schedule maintenance plans

- Maintenance rounds
- Maintenance schedule
- Maintenance schedule cost
- Maintenance downtime
- Exercise - Create a maintenance plan
- Exercise - Update the maintenance schedule
- Check your knowledge
- Summary

In this module, you will:

- Understand what preventive maintenance is
- Define maintenance plans and associate to an asset
- Establish maintenance rounds for assets that require maintenance at regular intervals
- Establish maintenance schedules and their associated budgeted costs for preventive maintenance on assets
- Create work orders for preventive maintenance jobs
- Define maintenance downtime activities for scheduled maintenance jobs on related assets for a defined period

Module 53: Work with capacity planning in Asset Management for Dynamics 365 Supply Chain Management

Capacity planning helps your organization estimate the capacity of your asset load. This is important because it helps you plan for maintenance, identify work orders assigned to your assets, whether scheduled or unscheduled. This module reviews how to calculate capacity loads for your assets as well as forecasting item consumption for your assets over a period of time.

Lessons

- Introduction
- Calculate capacity load
- Calculate an item forecast
- Exercise - Run a capacity load, and run an item forecast
- Check your knowledge
- Summary

In this module, you will:

- Calculate capacity load on work orders and maintenance schedule lines.
- Establish a forecast calculation for work orders, and maintenance schedule lines.

Module 54: Register and report consumption in Asset Management for Dynamics 365 Supply Chain Management

Consumption registrations must be completed when the maintenance job is completed for a work order. The registration feeds the associated costs to the asset and

consumption reports in Asset Management for Dynamics 365 Supply Chain Management.

Lessons

- Introduction
- Register consumption
- Create consumption reports
- Exercise - Create an asset consumption
- Check your knowledge
- Summary

In this module, you will:

- Register consumption and post journals.
- Create consumption reports to track and manage posted consumption on work orders.

Module 55: Work with warranties in Asset Management for Dynamics 365 Supply Chain Management

Protecting your organizational assets begins with maintaining detailed warranty records in Asset Management for Dynamics 365 Supply Chain Management. In this module, we will review the warranty agreement process, and establish warranties on assets and asset types.

Lessons

- Introduction
- Warranty agreements
- Warranty on assets and asset types
- Exercise - Set up a warranty
- Check your knowledge
- Summary

In this module, you will:

- Define and create warranty terms.
- Learn to set up warranties on assets and asset types.

Module 56: Work with maintenance budgets in Asset Management for Dynamics 365 Supply Chain Management

Maintenance budgets provide a place for organizations to forecast expected costs for preventive maintenance on assets.

Lessons

- Introduction
- Create maintenance budgets
- Update maintenance budgets
- Exercise - Create, and adjust a maintenance budget
- Check your knowledge
- Summary

In this module, you will:

- Review the steps to create and update maintenance budgets.

Module 57: Set up landed cost in Dynamics 365 Supply Chain Management

The Landed cost module helps businesses streamline inbound shipping operations by giving users

complete financial and logistical control over imported freight, from the manufacturer to the warehouse.

Lessons

- Introduction
- Landed cost concepts and terminology
- Landed cost parameters
- Set up voyages and shipping containers
- Set up delivery information
- Set up multi-leg journeys
- Set up shipping information
- Set up costing parameter values
- General ledger integration configuration
- Vendor settings for Landed cost
- Lab - Create a voyage leg
- Check your knowledge
- Summary

In this module, you will:

- Enable the Landed cost functionality.
- Learn about the Landed cost parameters.
- Set up voyages and shipping containers.
- Set up delivery information.
- Build multi-leg journeys.
- Learn about basic shipping setup.

Module 58: Work with landed cost in Dynamics 365 Supply Chain Management

Landed costs in Dynamics 365 Supply Chain Management help your organization have more efficient inbound shipping operations. Additionally, landed costs allow your users to complete financial and logistical control over imported freight from the manufacturer to the warehouse.

Lessons

- Introduction
- Create a voyage
- Manage a voyage
- Estimate and manage landed costs
- Track inbound voyages and shipping container journey
- In-transit processing
- Warehouse management and landed cost
- Process over and under transactions
- Update tracking for put away
- Inquiries and reports for landed cost
- Check your knowledge
- Summary

In this module, you'll learn how to:

- Create a voyage.
- Add purchase order lines to shipping containers.
- Process goods in transit invoices.
- Track inbound voyages and shipping container voyages.

- Estimate and manage landed costs.
- Work with in-transit processing functionality.
- Process over and under transactions.
- Update tracking for put away.
- Work with the landed cost inquiries and reporting.

Module 59: Set up accounts receivable in Dynamics 365 Finance

Learn to set up the Accounts receivable module in Dynamics 365 Finance to create customer invoices, post packing slips, and use free text invoices that aren't related to sales orders. This module also explains how to receive customer payments by using several different payment types, such as cash, checks, credit cards, and electronic payments.

Lessons

- Introduction
- Payment schedule
- Terms of payment and payment days
- Cash discounts
- Payment fees
- Set up the credit card payment service
- Methods of payment and payment control
- Set up a payment calendar and payment calendar rules
- Create and maintain customers
- Set up customer posting profiles
- Configure accounts receivable charges
- Lab - Configure customer posting profiles and create a new customer
- Check your knowledge
- Summary

In this module, you will:

- Set up Accounts receivable components.
- Create and maintain a customer.
- Set up customer payments.
- Set up payment calendars and calendar rules.
- Set up customer posting profiles.
- Set up accounts receivable charges.

Module 60: Get started with accounts receivable daily procedures in Dynamics 365 Finance

Learn how to create free text invoices, record customer payments, distribute funds, configure recurring invoices, and reimburse a customer.

Lessons

- Introduction

- Create free text invoices
- Exercise - Create and process a free text invoice
- Recurring free text invoices
- Create and handle payments of customer invoices for sales orders
- Exercise - Work with invoices from sales orders
- Settle transactions and undo settlements
- Exercise - Process an invoice and settle it against a payment
- Reimburse a customer
- Check your knowledge
- Summary

In this module, you will:

- Create free text invoices and record customer payments.
- Distribute funds by using accounting distributions.
- Configure recurring invoices.
- Use reversals in Accounts receivable.
- Settle transactions.
- Reimburse a customer.

Module 61: Set up credit and collections in Dynamics 365 Finance

Although most customers pay their invoices on time, you must be able to process invoices that aren't paid by their due date. Accounts receivable collections information is managed in one central view by using the Collections page in Dynamics 365 Finance. Credit and collections managers can use this central view to manage collections.

Lessons

- Introduction
- Set up accounts receivables for credit and collections
- Set up credit and collections components
- Set up interest rates for an interest code
- Waive, reinstate, or reverse interest fees
- Set up and manage collection letters
- Exercise - Set up credit and collections in Finance
- Exercise - Create a write-off journal for a customer
- Check your knowledge
- Summary

In this module, you will:

- Configure credit and collections components.
- Configure aging reports, customer pools, collection agents, and aging period definitions.
- Set up and manage interests.
- Set up and manage collection letters.

Module 62: Process credit and collections in Dynamics 365 Finance

Although most customers pay their invoices on time, you need to be able to process invoices that aren't paid by their due date. This module shows you how Dynamics 365 Finance helps companies to process collections for delinquent customers

Lessons

- Introduction
- Customer account statement
- Working with collections
- Collections coordinator workspace
- Manage customer credit and collections
- Credit management
- Lab - Work with credit and collections
- Check your knowledge
- Summary

In this module, you will learn:

- How to use customer account statements.
- How to process collections using Copilot in Dynamics 365 Finance.
- How to use the credit management feature.

Module 63: Manage transportation management in Dynamics 365 Supply Chain Management

The Transportation management module in Dynamics 365 Supply Chain Management helps you find the most efficient way to deliver goods to your customers. Transportation management calculates the least expensive and fastest way of delivering goods and lets you identify vendor and routing solutions for inbound and outbound orders.

Lessons

- Introduction
- Planning transportation management
- Configure transportation management
- Routing and transportation flows
- Load building strategy
- Transportation management engines
- Bill of lading
- Plan freight transportation routes with multiple stops
- Reconcile freight in transportation management
- Lab - Explore transportation management
- Check your knowledge
- Summary

In this module, you learn how to perform:

- Transportation planning
- Routing
- Rating
- Inbound operations
- Load processes

- Outbound operations

Module 64: 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 65: 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 66: 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 MB-330: Microsoft Dynamics 365 Supply Chain Management exam.