
Microsoft Dynamics 365 Supply Chain Management

Duration: 5 Days **Course Code: M-MB330**

Overview:

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 on a 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.

Target Audience:

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.

Job role: Functional Consultant

Preparation for exam: MB-330

Features: none

Objectives:

- Configure the most important Dynamics 365 Dynamics 365 Supply Chain Management functionalities.
 - Explain to others how Dynamics 365 Supply Chain Management features and functionalities works.
 - Process most of the Dynamics 365 Supply Chain Management transactions.
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Content:

Module 1: Implement product information management

Module 1 will introduce you to the following topics:

- Create and release products and product variants
- Create and apply product templates
- Create bills of materials (BOMs)
- Identify the purpose and capabilities of the product configuration models
- Configure catch weights
- Configure direct-delivery products
- Create and manage inventory dimensions
- Configure item groups
- Create and assign bar codes and Global Trade Identification Number (GTIN) codes
- Configure category hierarchies and product attributes
- Configure product unit conversions
- Configure default order settings
- Describe inventory costing methods ; model groups
- Configure Costing versions for standard and planned costs
- Configure and default purchase prices, default sales prices, and trade agreements.

Lessons for module 1

- Create and manage products
- Configure products for supply chain management
- Manage inventory pricing and costing

After completing module 1, students will be able to:

- Implement product information management

Module 2: Implement inventory management

Module 2 will introduce you to the following areas:

- Set up inventory management parameters and journals
- Configure inventory breakdown Structure
- Configure ABC classifications
- Configure inventory valuation reports
- Create and process journals including bill of materials, item arrival, transfer, movement, inventory adjustment, counting, and tag counting journals
- Create and process transfer orders
- Perform inventory closings and adjustments.

Lessons for module 2

- Configure Inventory management

Exercise #6 Create a vendor charges group and assign to vendors

Exercise #7 Create an automatic charge

Exercise #8 Approve purchase orders prior to confirmation

Exercise #9 Create trade agreements for vendors

Exercise #10 Create a purchase order based on a trade agreement

Lab : Case study 2B Sales and marketing

Exercise #1 Enter and confirm sales order

Exercise #2 Create and review a sales order for commission

Exercise #3 Create a customer trade agreement

After completing module 3, students will be able to:

- Implement and manage supply chain processes

Module 4: Implement warehouse management and transportation management

Module 4 will introduce you to the following topics:

- Create sites, warehouses, locations, location formats, location profiles, location types, and zones
- Implement location directives
- Configure Inventory Statuses, unit sequence groups, and reservation hierarchies
- Implement wave and work, templates
- Implement wave load building template
- Configure mobile device menus, menu items, and display settings
- manage inventory stock movement processes
- Perform cycle counting
- Process inbound and outbound orders
- Process shipments
- Describe the replenishment process

Exercise #13 Configure cluster picking

Exercise #14 Setup manual packing

Exercise #15 Configure carriers

Exercise #16 Configure rate masters

Exercise #17 Setup route plans and route guides

Exercise #18 Process inbound shipments

Exercise #19 Process outbound shipments

Exercise #20 Configure freight reconciliation

After completing module 4, students will be able to:

- Implement warehouse management and transportation management

Module 5: Configure and manage quality control and quality management

Module 5 will introduce you to the following topics:

- Configure quality control
- Configure quality management
- Manage quality orders and quarantine Order
- Manage inventory blocking.

Lessons for module 5

- Configure quality control and quality management
- Manage quality control and quality management

Lab : Case study 4 Quality control and quality management

Exercise #1 Enable quality management process

Exercise #2 Create a manual quality order with a specification

■ Manage and process inventory activities

Lab : Case study 1 Implement inventory management

Exercise #1 Add products to a new warehouse using basic inventory management

Exercise #2 Create a standard cost version that uses a specific model group

Exercise #3 Add and releasing new products to a warehouse

Exercise #4 Use the inventory movement journal to initialize stock levels in a warehouse

Exercise #5 Use the inventory transfer journal to move items to a new location in the warehouse

Exercise #6 Adjust stock levels using the inventory adjustment journal

Exercise #7 Use the inventory counting journal to compare D365 inventory amounts to manually counted

Exercise #8 Create a BOM in the BOM designer

After completing module 2, students will be able to:

■ Implement inventory management

Module 3: Implement and manage supply chain processes

Module 3 will introduce you to the following topics:

- Create and manage purchase requisitions, requests for quotes (RFQs), and purchase orders (POs)
- Configure change management processes
- Configure and apply vendor rebates
- Introduction to Vendor collaboration
- Manage consignment inventory
- Manage over and under deliveries
- Configure procurement categories and purchasing policies
- Configure charges
- Configure quotations, sales orders, and return orders

cross-docking

- Introduction
- Configure shipping carriers and carrier groups
- Perform planning and executing loads and shipments
- Configure and generate freight bills and invoices
- Configure route plans and guides
- Configure route and rate engines
- Configure and use dock appointment scheduling

Lessons for module 4

- Configure warehouse management
- Perform warehouse management processes
- Implement transportation management

Lab : Case study 3 Warehouse management and transportation management

Exercise #1 Configure warehouse management

Exercise #2 Create a reservation hierarchy

Exercise #3 Create disposition codes and inbound location directives

Exercise #4 Configure mobile devices

Exercise #5 Configure purchase orders

Exercise #6 Configure wave processing

Exercise #7 Configure cycle counting

Exercise #8 Define cycle counting

Exercise #9 Define a partial location cycle counting process

Exercise #10 Transfer orders and replenishments

Exercise #11 Setup replenishment

Exercise #12 Configure outbound processing

Exercise #3 Define conditions to work with non-conformance issues

Exercise #4 Use non-conformance order to repair an item and a faulty machine

Exercise #5 Run non-conformance reports

After completing module 5, students will be able to:

- Configure and manage quality control and quality management

Module 6: Implement master planning

Module 6 will introduce you to the following topics:

- Differentiate between planning optimization and master planning
- Set up coverage groups and item coverage
- Configure master planning parameters, master plan, forecast plans, and continuity plans
- Differentiate between action messages, delay messages, time fences, and negative days
- Process and view planned orders
- Set up and use the Supply Schedule form
- Configure and process safety stock journals
- Set up and Implement inter-company master planning
- Implement demand-base forecasting
- Implement planning optimization

Lessons for module 6

- Configure master planning and forecasting
- Run master plans and manage planned orders
- Implement additional master planning features

Lab : Case study 5 Master planning

Exercise #1 Process and view planned orders

Exercise #2 Create and run intercompany master plans

After completing module 6, students will be able to:

- Implement master planning

- Configure sales groups and commissions
- Configure customer, product, and prospect searches
- Configure and process inter-company trade relations documents
- Introduction to D365 Guides
- Authoring of D365 Guides
- Operating of D365 Guides.

Lessons for module 3

- Implement Procurement and sourcing
- Implement common sales and marketing features
- Using Microsoft Guides

Lab : Case study 2A Procurement and sourcing

Exercise #1 Create, submit, and approve a purchase requisition

Exercise #2 Create, reply and accept a request for quotation

Exercise #3 Create purchase requisition and purchasing policies

Exercise #4 Create a purchase order for delivery to multiple sites

Exercise #5 Create a charges code

Further Information:

For More information, or to book your course, please call us on 00 20 (0) 2 2269 1982 or 16142

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