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Learning Style: Virtual Classroom

Technology: Microsoft

Difficulty: Intermediate

Course Duration: 5 Days

Microsoft Dynamics 365 Supply Chain Management (MB-330T00)



About this Course:

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 bases on a business scenario followed by a question or discussion then a step-by-step guidance to perform the system related steps.

The average salary of Microsoft Dynamics 365 professional is **$101,413** per year

Course Objectives:

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

Audiences:

- 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:

- Basic understanding of ERP, CRM concepts

Course Outline:

Module 1: Implement product information management

This module 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

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

After completing this module, students will be able to:

- Implement product information management

Module 2: Implement inventory management

This module 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

- Configure Inventory management
- 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 this module, students will be able to:

- Implement inventory management

Module 3: Implement and manage supply chain processes

This module 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
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

- 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
- 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 this module, students will be able to:

- Implement and manage supply chain processes

Module 4: Implement warehouse management and transportation management

This module 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 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

- 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 #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 this module, students will be able to:

- Implement warehouse management and transportation management

Module 5: Configure and manage quality control and quality management

This module will introduce you to the following topics:

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

Lessons

- 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
- 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 this module, students will be able to:

- Configure and manage quality control and quality management

Module 6: Implement master planning

This module 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

- 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 this module, students will be able to:

- Implement master planning

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