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

COURSE OVERVIEW

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

WHO WILL BENEFIT FROM THIS COURSE?

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.

COURSE OBJECTIVES

Students will learn to:

- Get started with Dynamics 365 Supply Chain Management
- Create products and product masters in Dynamics 365 Supply Chain Management
- Configure and work with inventory management in Dynamics 365 Supply Chain Management
- Configure warehouse management in Dynamics 365 Supply Chain Management
- Create bill of materials in Dynamics 365 Supply Chain Management
- Set up versioned products in Dynamics 365 Supply Chain Management
- Work with warehouse management in Dynamics 365 Supply Chain Management
- Work with the costing sheet in Dynamics 365 Supply Chain Management
- Configure and use agreements in Dynamics 365 Supply Chain Management
- Use inventory reports in Dynamics 365 Supply Chain Management
- Configure and work with quality control and quality management in Dynamics 365 Supply Chain Management
- Work with assets in Asset Management for Dynamics 365 Supply Chain Management

- Use preventive and reactive maintenance in Asset Management for Dynamics 365 Supply Chain Management
- Create and manage work orders in Asset Management for Dynamics 365 Supply Chain Management
- Schedule work orders in Asset Management for Dynamics 365 Supply Chain Management
- Configure and perform the procure-to-purchase process in Dynamics 365 Supply Chain Management
- Process purchase orders in Dynamics 365 Supply Chain Management
- Configure and manage vendor collaboration in Dynamics 365 Supply Chain Management
- Configure accounts receivable in Dynamics 365 Finance
- Convert prospects in Dynamics 365 Sales to customers in Dynamics 365 Supply Chain Management
- Configure and manage the order to cash process in Dynamics 365 Supply Chain Management
- Configure and use intercompany trade in Dynamics 365 Supply Chain Management
- Set up landed cost in Dynamics 365 Supply Chain Management
- Manage transportation management in Dynamics 365 Supply Chain Management
- Use warehouse management for manufacturing in Dynamics 365 Supply Chain Management
- Configure and use built-in master planning in Dynamics 365 Supply Chain Management
- Use Planning Optimization in Dynamics 365 Supply Chain Management
- Describe warehouse and inventory management capabilities in Dynamics 365 Supply Chain Management

COURSE OUTLINE

Module 1: Get started with Dynamics 365 Supply Chain Management
- Learn the benefits of Supply Chain Management.
- Get an overview of distribution and trade features in Supply Chain Management.

Module 2: Create products and product masters in Dynamics 365 Supply Chain Management
- 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 3: Configure and work with inventory management in Dynamics 365 Supply Chain Management
- Understand inbound and outbound inventory operations.
- Configure inventory parameters.
- Configure tracking number groups.
- Configure inventory breakdown.
- Configure inventory and warehouse journals.

- Configure inventory dimensions.
- Configure inventory costing.
- Understand inventory closing and adjustments.
- Archive inventory transactions.
- Use movement journals.
- Use inventory adjustment journals.
- Use transfer journals.
- Use counting and tag counting journals.
- Use item arrival journals.
- Work with reason codes for inventory counting.

Module 4: Configure warehouse management in Dynamics 365 Supply Chain Management

- 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 5: Create bill of materials in Dynamics 365 Supply Chain Management

- 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 6: Set up versioned products in Dynamics 365 Supply Chain Management

- 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 7: Work with warehouse management in Dynamics 365 Supply Chain Management

- GS1 and QR bar codes
- GTIN codes
- Inbound operations
- Outbound operations
- Cluster picking
- Packing and containerization
- Cycle counting
- Transfers and replenishment
- The Warehouse Management mobile app

Module 8: Work with the costing sheet in Dynamics 365 Supply Chain Management

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

Module 9: Configure and use agreements in Dynamics 365 Supply Chain Management
- 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 10: Use inventory reports in Dynamics 365 Supply Chain Management
- 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 11: Configure and work with quality control and quality management in Dynamics 365 Supply Chain Management
- Configure quality management
- Perform quality control processes
- Apply inventory blocking
- Perform quarantine management

Module 12: Work with assets in Asset Management for Dynamics 365 Supply Chain Management
- 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 13: Use preventive and reactive maintenance in Asset Management for Dynamics 365 Supply Chain Management
- 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 14: Create and manage work orders in Asset Management for Dynamics 365 Supply Chain Management
- 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 15: Schedule work orders in Asset Management for Dynamics 365 Supply Chain Management

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

- 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 17: Process purchase orders in Dynamics 365 Supply Chain Management

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

Module 18: Configure and manage vendor collaboration in Dynamics 365 Supply Chain Management

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

Module 19: Configure accounts receivable in Dynamics 365 Finance

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

Module 20: Convert prospects in Dynamics 365 Sales to customers in Dynamics 365 Supply Chain Management
- Learn about how to set up mapping in Dynamics 365 Sales and Dynamics 365 Supply Chain Management
- Learn how to sync orders and quotations between Sales and Supply Chain Management

Module 21: Configure and manage the order to cash process in Dynamics 365 Supply Chain Management
- Perform the order to cash process.
- Configure and use commissions.
- Configure customer and item search.
- Create and confirm sales quotations.
- Create and confirm sales orders.
- Print and post picking lists.
- Generate and post a sales order invoice.
- Configure order hold codes.
- Process customer returns.
- Work with sales order reservations.

Module 22: Configure and use intercompany trade in Dynamics 365 Supply Chain Management
- Configure products for intercompany trade relations.
- Configure intercompany trade relationships.
- Configure intercompany agreements.
- Process intercompany orders.
- Process intercompany direct deliveries.
- Process intercompany charges.
- Recognize the intercompany return order chain process.

Module 23: Set up landed cost in Dynamics 365 Supply Chain Management
- 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 24: Manage transportation management in Dynamics 365 Supply Chain Management
- Transportation planning
- Routing
- Rating
- Inbound operations
- Load processes
- Outbound operations

Module 25: Use warehouse management for manufacturing in Dynamics 365 Supply Chain Management
- Production input and output locations.
- Staging and order picking.
- Releasing BOM and formula lines to the warehouse.
- Cross-docking.
- Visibility into material exceptions.

Module 26: Configure and use built-in master planning in Dynamics 365 Supply Chain Management
- Set up and configure master planning.
- Use the Supply schedule page.
- Set up demand and supply forecasts.
- Configure calculated delays.
- Configure intercompany master planning.
- Run plans and firm planned orders.

Module 27: Use Planning Optimization in Dynamics 365 Supply Chain Management
- Review the architecture of the Planning Optimization Add-in.
- Identify the benefits of using Planning Optimization.
- Discover the performance improvements within Planning Optimization.
- Learn about priority-based planning

Module 28: Describe warehouse and inventory management capabilities in Dynamics 365 Supply Chain Management
- Describe costing methods, including standard costing, weighted averages, last in, first out (LIFO), and first in, first out (FIFO).
- Describe use cases for Warehouse Management Systems (WMS) and warehouse configuration options, including layout, stocking limits, and location profiles.
- Describe purchase orders, item arrival journals, and cross-docking
- Describe inventory concepts, including reservations, picking, and packing, replenishment, shipments, counting, and inventory on-hand.
- Describe transportation management.

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