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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 based 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 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 work.

## 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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