

MB-330T00: Microsoft Dynamics 365 Supply Chain Management

Course Code: MB-330T00

Duration: 5 days

Instructor-led Training (ILT) | Virtual Instructor-led Training (VILT)

OVERVIEW

This **MB-330T00: Microsoft Dynamics 365 Supply Chain Management** 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

SKILLS COVERED

- 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.

WHO SHOULD ATTEND?

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

- None

MODULES

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.

Learning objectives

In this module, you will:

- Learn the benefits of Supply Chain Management.
- Get an overview of distribution and trade features in Supply Chain Management.

Prerequisites

- Ability to use Supply Chain Management for basic processing
- General knowledge of basic navigation within Supply Chain Management
- Knowledge of how Dynamics 365 apps are used
- Basic understanding of cloud concepts, and Microsoft Power Platform

Module 2: Configure and work with inventory management in Dynamics 365 Supply Chain Management

To perform the process of ordering, storing, and using a company's inventory of raw materials, components, and finished products, you need to configure the inventory management functionality in Dynamics 365 Supply Chain Management. Inventory journals are used to post physical inventory transactions of various types, such as the posting of issues and receipts, inventory movements, the creation of bills of material (BOMs), and the reconciliation of physical inventory.

Learning objectives

In this module, you will learn how to:

- 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.

Prerequisites

- General knowledge of supply chain processes and inventory management
- Ability to navigate in Supply Chain Management and perform basic tasks

Module 3: 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.

Learning objectives

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.

Prerequisites

- General knowledge of supply chain processes
- Ability to navigate in Supply Chain Management and perform basic tasks

Module 4: Create products and product masters in Dynamics 365 Supply Chain Management

Product information is the pillar of supply chain and retail applications across all industries. In the various modules of a business solution, product-specific information and setup are required to manage the business processes that are related to specific products, product families, or product categories.

Learning objectives

In this module, you will learn how to:

- 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.

Prerequisites

- General knowledge of supply chain management
- General knowledge of inventory procedures
- Basic knowledge of warehouse procedures
- Ability to use Microsoft Dynamics 365 Supply Chain Management for basic processing

Module 5: 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.

Learning objectives

In this module, you will learn how to create bill of materials and BOM versions by using the BOM designer in Supply Chain Management.

Prerequisites

- General knowledge of supply chain management
- An understanding of how to create products in Supply Chain Management
- General knowledge of inventory procedures in Supply Chain Management

Module 6: 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.

Learning objectives

In this module, you will 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.

Prerequisites

- General knowledge of supply chain management and procurement processes
- General knowledge of inventory procedures
- Basic knowledge of warehouse procedures
- Ability to use Dynamics 365 Supply Chain Management for basic processing

Module 7: 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.

Learning objectives

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.

Prerequisites

- General knowledge of supply chain management
- General knowledge of inventory procedures
- Basic knowledge of warehouse procedures

Module 8: 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.

Learning objectives

In this module, you will:

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

Prerequisites

- General knowledge of supply chain management
- General knowledge of inventory procedures
- Basic knowledge of warehouse procedures
- Know how to create and work with workflows in Supply Chain Management
- Know how to perform basic processing in Supply Chain Management

Module 9: Configure 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.

Learning objectives

In this module, you will learn how to:

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

Prerequisites

- General knowledge of supply chain management
- General knowledge of inventory procedures
- Basic knowledge of warehouse procedures
- Basic knowledge of quality control procedures
- The ability to use Dynamics 365 Supply Chain Management for basic processing

Module 10: 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.

Learning objectives

In this module, you will:

- 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.

Prerequisites

- General knowledge of supply chain management
- General knowledge of inventory procedures
- Ability to use Dynamics 365 Supply Chain Management for basic processing

Module 11: Configure and use 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 all documents are automatically generated for the participating legal entities, thus saving the organization time and money.

Learning objectives

In this module, you will learn how to:

- 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.

Prerequisites

- General knowledge of supply chain management
- General knowledge of inventory procedures
- Knowledge of procure-to-pay procedures
- Knowledge of order-to-cash procedures

Module 12: Configure and manage the order to cash process in Dynamics 365 Supply Chain Management

The order to cash process manages the life cycle of the sales process, which consists of sub processes of receiving and processing customer sales. The invoicing and accounts receivable functions in the process determine the company's cash inflows.

Learning objectives

In this module, you will learn how to:

- 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.

Prerequisites

- General knowledge of supply chain management
- General knowledge of sales procedures
- General knowledge of accounts receivable procedures
- Ability to use Dynamics 365 Supply Chain Management for basic processing

Module 13: 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.

Learning objectives

In this module, you will 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.

Prerequisites

- General knowledge of supply chain management processes
- General knowledge of inventory procedures
- Basic knowledge of warehouse procedures
- Ability to use Supply Chain Management for basic processing

Module 14: Work with warehouse management in Dynamics 365 Supply Chain Management

The Warehouse management module in Dynamics 365 Supply Chain Management lets you manage warehouse processes in manufacturing, distribution, and retail industries. It has a wide range of features to support the warehouse facility at an optimal level, at any time. Warehouse management is

fully integrated with other business processes in Supply Chain Management, such as transportation, manufacturing, quality control, purchase, transfer, sales, and returns.

Learning objectives

In this module, you will learn how to work with:

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

Prerequisites

- General knowledge of supply chain management
- General knowledge of inventory procedures
- Basic knowledge of warehouse procedures
- Ability to use Supply Chain Management for basic processing

Module 15: Configure and use built-in master planning in Dynamics 365 Supply Chain Management

Businesses in any market, such as retail, manufacturing, distribution, services, and public sector organizations, need functionality to help them plan for demand and supply of products and services during the course of short or long-term operations. Get to know the Master planning feature of Dynamics 365 Supply Chain Management to streamline your planning, based on pre-determined factors, to efficiently plan what materials need to be purchased, transferred, or manufactured.

Learning objectives

In this module, you will learn how to:

- 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.

Prerequisites

- General knowledge of supply chain management
- General knowledge of inventory procedures
- Knowledge of procure-to-pay procedures
- Knowledge of order-to-cash procedures
- Ability to use Dynamics 365 Supply Chain Management for basic processing

Module 16: Use Planning Optimization in Dynamics 365 Supply Chain Management

The Planning Optimization Add-in enables the calculation of a master plan to occur outside Dynamics 365 Supply Chain Management and its SQL database. Planning Optimization improves 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.

Learning objectives

In this module, you will:

- 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
- Basic knowledge of warehouse procedures
- The ability to use Supply Chain Management for basic processing

Prerequisites

- General knowledge of supply chain management processes
- General knowledge of inventory processes
- Knowledge of procure-to-pay processes
- Ability to use Dynamics 365 Supply Chain Management for basic processing

END OF PAGE**Module 17: 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.

Learning objectives

In this module, you will learn how to perform:

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

Prerequisites

- General knowledge of Supply Chain Management
- General knowledge of inventory procedures