

---

# Microsoft Dynamics 365 Supply Chain Management

---

## 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