



Preparation for exam MB6-892

Microsoft Dynamics 365 Distribution and Trade

1. Set up and maintain master data for the supply chain.

Day 1 Time: 1.5 hours

Manage customer relationships

- Create and maintain customer records in Microsoft Dynamics AX,
- Configure and manage customer trade agreements,
- Set up customer groups and posting profiles,
- Configure credit limits

Manage vendor relationships

- Create and maintain vendor records,
- Configure and manage vendor trade agreements,
- Set up vendor groups and posting profiles

2. Set up and maintain master data for the supply chain.

Day 1 Time: 1.5 hours

Manage products and services

- Create product and service items,
- Create item groups and item model groups,
- Create product dimensions and inventory dimension groups,
- Track inventory using serial and batch numbers,
- Create units of measure,
- Create inventory and posting profiles

3. Set up and maintain master data for the supply chain.

Day 1 Time: 1.5 hours

Enrich product data

- Set up product attributes,
- Create and maintain product hierarchies

4. Manage the sales process

Lesson 1.

Day 1 Time: 1.5 hours

Control and manage sales

- Create charges codes,
- Create customer charges groups,



- Create item charges groups,
- Create delivery charges groups,
- Create auto charges,
- Create terms of payment

5. Discussion

Day 1 Time: 2 hours

6. Manage the sales process. Lesson 2.

Day 2 Time: 1.5 hours

Manage sales commissions

- Create commission customer groups,
- Create commission item groups,
- Create commission sales groups,
- Set up commission calculations

Create sales quotations

- Work with sales quotations,
- Update sales quotations

7. Manage the sales process Lesson 3.

Day 2 Time: 1.5 hours

Perform the sales process

- Create sales orders,
- Create customer sales agreements

Process outbound delivery and invoicing

- Set up warehouses,
- Pack and ship products,
- Post a packing slip,
- Invoice customers,
- Process returns from customers

8. Manage the purchase process. Lesson 1.

Day 2 Time: 1.5 hours

Control and manage purchases

- Create charges codes,
- Create vendor charges groups,
- Create item charges groups,
- Create delivery charges groups,
- Create auto charges



Create purchase requisitions

- Create and submit purchase requisitions for approval
- Define control parameters and workflow on purchase requisition documents
- Set up purchasing policies

Create requests for quotations

- Process requests for quotations,
- Reply to requests for quotations,
- Create requests for quotations

9. Manage the purchase process Lesson 2.

Day 2 Time: 1.5 hours

Perform the procurement process

- Create purchase orders,
- Create purchase agreements,
- Create release lines,
- Set up and process change management

Receive products and services

- Perform desktop receiving,
- Create purchase invoices and match receipts,
- Set up quality management on purchase items,
- Inspect product receipts,
- Receive products and return rejections,
- Create a case for undelivered products from a vendor

10. Discussion

Day 2 Time: 2 hours

11. Manage the purchase process Lesson 3.

Day 2 Time: 1.5 hours

Manage vendor invoices

- Set up payment schedules,
- Manage terms of payment,
- Create cash discounts,
- Configure payment fees,
- Configure vendor posting profiles,
- Add charges on purchase order invoices,
- Describe the types of invoice matching,
- Perform invoice matching,
- Create and process vendor invoices

Manage vendor invoice journals

- Describe the methods for invoicing in Accounts Payable,



- Create and process invoice registers and approval journals,
- Create and process invoice journals,
- Create and use a voucher template in an invoice journal,
- Process invoice matching for vendor invoices

12. Manage the payment and cash application process.

Lesson 1

Day 3 Time: 1.5 hours

Set up payment management

- Configure methods of payments,
- Create payment days,
- Configure customers and vendors for payment processing,
- Set up bank remittance,
- Create payment fees

13. Manage the payment and cash application process.

Lesson 2

Day 3 Time: 1.5 hours

Manage vendor payments

- Create and process vendor payment journals,
- Set up and process electronic vendor payments,
- Manage vendor transactions,
- Reverse a vendor transaction,
- Reverse a posted payment,
- Identify inquiries and reports in Accounts Payable and their uses

14. Manage the payment and cash application process.

Lesson 3

Day 3 Time: 1.5 hours

Manage customer payments

- Create and process payment journals, such as cash receipts;
- Set up and process electronic customer payments;
- Set up and generate prenotes;
- Manage customer transactions;
- Create and manage deposit slips;
- Set up and use bridging accounts for posting payments;
- Identify inquiries and reports in Accounts Payable and their uses

Manage bills of exchange

- Identify and configure journal names for bills of exchange,

- Configure Accounts Receivable parameters for bills of exchange,
- Configure the setup components for bills of exchange,
- Process bills of exchange

15. Discussion, questions

Day 3 Time: 2 hours

16. Preparation for the exam

Day 3 Time: 4 hours

20 questions for MB6-892