



Supply Chain Foundation In Microsoft Dynamics 365

1. Introduction and Navigation

Day 1 Time: 0.5 hours

2. Product Information Management

Day 1 Time: 3 hours

A. Defining Products

- Product Information Management
- Product Types
- Product Creation Process
- Product Translation
- Category Hierarchies and Categories
- Procedure: Categorize Products
- Define Product Attributes
- Procedure: Define Attribute Types
- Procedure: Define Product Attributes
- Procedure: Assign Product Attribute Values to a Product
- Product Dimensions

B. Modeling Configurable Products

- Configuration Technology Types
- Defining Product Master and Predefined Product Variants
- Scenario: Creating Product Masters and Predefined Variants
- Procedure: Create a Product Master
- Procedure: Assign Product Dimensions
- Procedure: Create Product Variants
- Product Master and Dimension-based Configured Product Variants
- Scenario: Dimension-based Configuration
- Product Master and Constraint-based Configured Product Variants
- Scenario: Constraint-based Configuration



C. Inventory Dimension Groups

- Storage Dimension Groups
- Mandatory
- Primary Stocking
- Active
- Blank Receipt Allowed
- Example: Blank Receipt Allow
- Blank Issue Allowed
- Physical Inventory
- Example: Physical Inventory Selected
- Example: Physical Inventory Cleared
- Financial Inventory
- Coverage Plan by Dimension
- Example: Coverage Plan by Dimension
- For Purchase Price
- For Sales Price
- Tracking Dimensions Group

D. Authorizing Product Setup in Legal Entity

- Scenario: Releasing a Product to Multiple Legal Entities
- Procedure: Release a Product to Multiple Legal Entities
- Open Product Releases

E. Finalizing Released Products

- Manual Entry of Reference Data
- Scenario: Finalizing a Released Product for a Legal Entity
- Product Templates
- Procedure: Create a Product Template
- Procedure: Apply a Product Template
- Validating Product Setup

F. Default Order and Site Settings

- Default Order and Site Setting Forms
- Default Order Settings - General Tab
- Purchase, Inventory, and Sales: Unit and Site Fields
- Order Quantity Modifiers for Purchasing
- Order Quantity Modifiers for Inventory



- Order Quantity Modifiers for Sales
- Other Fields on Default Order Settings
- Site Specific Order Settings

G. Item Pricing

- Product's Purchase Price
- Product's Sales Price
- Costing Versions
- Scenario: Costing Version
- Costing Version Types
- Costing Version Types - BOM Calculation
- Item Price Form
- Item Price Form Details
- Activate Pending Prices
- Procedure: Add Product in a Costing Version
- Procedure: Activate Cost Price from a Costing Version
- Procedure: Specify Prices Manually in the Released Products Form
- Procedure: Update Price Automatically in the Released Products Form

H. Unit of Measure

- Procedure: Set Up Units of Measure
- Procedure: Specify a Unit of Conversion for the Unit
- Unit Creation Wizard

I. Defining Products as Not Stocked

- Example: Not Stocked Item

J. Practice Yourself

3. Inventory Management Setup

Day 1 Time: 1.5 hours

A. Item Groups

- Item Group Grid
- Sales Order Fast Tab
- Purchase Order Fast Tab
- Inventory FastTab
- Setup FastTab
- Item Group Buttons

B. Item Model Groups

- Setup FastTab
- Inventory Policy Field Group
- Negative Inventory Field Group
- Physical Negative Inventory
- Financial Negative Inventory
- Warehouse Management Field Groups
- Quarantine Management
- Consolidated Picking Method
- Ledger Integration Field Groups
- Post Physical Inventory
- Post Financial Inventory
- Post to Deferred Revenue Account on Sales Delivery and Accrue Liability on Product Receipt
- Physical Update Field Group
- Registration Requirements
- Receiving Requirements
- Picking Requirements and Deduction Requirements
- Inbound
- Outbound
- Reservation Field Group
- Inventory Model Tab
- Procedure: Applying the Item Model Group to a Product

C. Warehouse Management

- Site
- Procedure: Create a Site
- Warehouse
- Warehouse Types
- Procedure: Create a Warehouse
- Procedure: Set Up a Warehouse on a Product

4. Purchase Orders

Day 1 Time: 3 hours

A. Working with Purchase Orders

- All Purchase Orders List Page
- Purchase Order Form
- Purchase Order Types
- Purchase Order Statuses
- Purchase Order Document Statuses
- One-Time Supplier
- Administration Field Group

B. Set Up Purchasing Parameters

- General Tab
- Updates Tab
- Prices Tab
- Inventory Dimensions Parameters
- Number Sequences

C. Create Purchase Orders

- Procedure: Create a Purchase Order
- Adding Lines to a Purchase Order
- Procedure: Add a Line to a Purchase Order
- Procedure: Enter Purchase Order Header Details
- Ship to Multiple Address
- Procedure: Enter Purchase Order Line Details
- Delivery Schedule
- Scenario: Creation a Purchase Order With a Delivery Schedule
- Procedure: Adding a Delivery Schedule to a Purchase Order Line
- Charges on a Purchase Order
- Procedure: Add Charges to a Purchase Order
- Allocate Charges to a Purchase Order Lines
- Procedure: Add Charges to a Purchase Order Lines

D. Process Purchase Orders

- Procedure: Confirm a Purchase Order
- Procedure: Generate and Print a Purchase Order

- Procedure: Pro Forma Purchase Orders
- Procedure: Finalize a Purchase Order

E. Generate Purchase Order Documents

- Generate a Receipts List
- Scenario
- Procedure: Generate a Receipt List
- Generate Product Receipt
- Procedure: Generate a Product Receipt
- Product Receipt Form – Other Tab
- Product Receipt Form – Lower Grid
- Product Receipt Form – Buttons
- Procedure: Generate a Partial Product Receipt
- Procedure: Cancel a Product Receipt
- Procedure: Correct a Product Receipt
- View Changes Between Product Receipts Versions

F. Change Management

- Approval Statuses
- Change Management Roles
- Change Management Process
- Enable Change Management
- Procedure: Enable Change Management
- Procedure: Create a Change Request with Workflow Approval
- Procedure: Process a Change Request

G. Purchase Order Tasks

- Copy from All
- Copy from Journal
- Procedure: Copy a Purchase Order
- Procedure: View Totals for a Purchase Order
- Procedure: Cancel an Order Line
- Procedure: View Purchase Order Versions
- Procedure: Compare Purchase Order Versions
- Procedure: Create a Purchase Order from a Sales Order
- Direct Deliveries
- Procedure: Create a Direct Delivery Purchase Order

H. Purchase Order Inquiries and List Pages

- Additional List Pages
- Inquiries

I. Practice Yourself

5. Serial and Batch Numbers

Day 2 Time: 3 hours

A. Dimension Groups – Tracking Dimensions

- Serial Number Control
- Procedure: Set Up Unique Serial Numbers

B. Manual Allocation

- Serial Numbers
- Assign Serial Numbers
- Procedure: Create and Assign Serial Numbers to a Product
- Procedure: View the Inventory Transactions Form
- Procedure: Manually Allocate Serial Numbers on Registration
- Scenario: Manually Allocate Serial Numbers on Registration Using Split
- Procedure: Manually Allocate Serial Numbers on Registration by Using Split
- Batch Numbers
- Scenario: Manually Create Batch Numbers for a Product
- Procedure: Manually Create Batch Numbers for a Product
- Procedure: Manually Allocate Batch Numbers on the Line
- Scenario: Manually Allocate Batch Number on Registration
- Demonstration: Manually Allocate Batch Number on Registration

C. Automatic Allocation

- Procedure: Create a Number Group
- Number Groups Form - General Fast Tab
- Allocation Field Group
- Example: Allocation Settings
- Number Groups – Activation Fast Tab
- Procedure: Assign a Number Group to a Product
- Updating Serial and Batch Numbers

D. Tracing

- Trace Inventory Dimensions
- Trace Inventory Dimensions Form
- Trace Inventory Dimensions Form - Setup Tab
- Procedure: Trace a Serial or Batch Number
- Scenario: Using the Trace Function
- Procedure: Using the Trace Function

6. Sales Orders

Day 2 Time: 3 hours

A. Working with Sales Orders

- All Sales Order List Page
- Sales Order Form
- Working in the Line View
- Working in the Header View
- Working in the Edit in Grid View
- Sales Order Statuses
- Sales Order Document Statuses
- One-Time Customer

B. Sales Order Types

- Sales Order
- Journal
- Subscription
- Returned Order
- Item Requirements

C. Set Up Sales Parameters

- General Tab
- Updates Tab
- Summary Update Tab
- Shipments Tab
- Prices Tab
- Inventory Dimensions Tab
- Number Sequences Tab

D. Creating a Sales Order

- Procedure: Create a Sales Order from the All Sales Orders List Page

- Procedure: Create a Sale Order from the All Customers List Page
- Adding Lines to a Sales Order
- Procedure: Add a Line to a Sales Order
- Procedure: Add a Sales Category Line to a Sales Order
- Copy from All
- Procedure: Copy from Sales Order

E. Ship to Multiple Addresses

- Scenario: Specify and Save an Alternative Delivery Address for a Sales Order Header
- Procedure: Insert an Alternative Address for a Sales Order Header
- Scenario: Specify an Alternative Delivery Address for Sales Order Lines
- Procedure: Change an Address for a Sales Order Line

F. Delivery Schedule

- Delivery Schedules
- Scenario: Create a Sales Order with a Delivery Schedule
- Procedure: Create a Sales Order with a Delivery Schedule

G. Enhanced Delivery Date Control

- Enable the Delivery Date Control Feature
- Available-to-Promise
- Capable-to-Promise
- Earliest Possible Delivery Date Factors
- Coverage Calendar
- Procedure: Set Up a Coverage Calendar for a Warehouse
- Transport Time
- Procedure: Set up Transport Times
- Fallback Warehouse
- Transport Calendar
- Procedure: Attach a Calendar to a Mode of Delivery
- Procedure: Customer Receipt Calendar
- Supply Overview
- Scenario: Supply Overview Form

H. Available Ship and Receipt Dates

- Specify and Update Request Dates with the Available Dates Function

I. Order Entry Deadlines

- Scenario: Order Entry Deadlines
- Example: Order Entry Deadline
- Procedure: Set Up Order Entry Deadlines
- Procedure: Create an Order Entry Deadline Group
- Procedure: Assign an Order Entry Deadline Group to a Customer
- Procedure: Activate Combinations of Order Entry Deadline Groups and Sites

J. Direct Delivery

- Scenario: Create and Process a Direct Delivery Order
- Procedure: Create a Purchase Order for a Direct Delivery Sales Order
- Update a Sales Order/Purchase Order of the Direct Delivery Type
- Other Updates of Purchase Orders and Sales Orders
- Process Flow - Direct Delivery
- Updating Sales Orders
- Update Sales Orders - Reaction on a Purchase Order
- View Related Orders

K. Processing a Sales Order

L. Generate a Sales Order Confirmation

- Procedure: Generate a Sales Order Confirmation
- Confirm Sales Order Form – Print Options
- Confirm Sales Order Form – Parameters
- Confirm Sales Order Form – Other Tab
- Procedure: Perform a Credit Check of a Sales Order
- Check Credit Limit Options
- Confirm Sales Order Form – Summary Update
- Confirm Sales Order Form – Overview Tab
- Confirm Sales Order Form – Setup Tab
- Confirm Sales Order Form – Lines and Line Details Tab

M. Generate a Sales Order Picking List

- Picking List Generation and Parameters
- Procedure: Quick Generation of a Picking List
- Posting Picking List Form – Quantity Field
- Posting Picking List Form – Parameters Tab
- Posting Picking List Form – Other Tab

N. Process a Picking List Registration

- Procedure: Perform a Picking List Registration

O. Generate a Sales Order Packing Slip

- Procedure: Quick Generation of a Sales Order Packing Slip
- Packing Slip Posting Form - Parameters Tab
- Packing Slip Posting Form - Other Tab
- Posting Packing Slip Form - Lower Panel
- Procedure: Generate a Partial Packing Slip
- Procedure: Cancel a Packing Slip
- Procedure: Correct a Packing Slip
- View Changes between Packing Slip Versions

P. Shipping Carrier Interface

- Integration with Shipping Carriers
- Scenario: Shipping Carrier Interface

7. Quality Management

Day 2 Time: 2 hours

A. Set Up Quality Management Basics

- Test and Quality Orders
- Validation Process
- Quality Order Prerequisites
- Set Up Parameters
- Set Up Store Areas
- Set Up Test Instruments
- Set Up Tests
- Procedure: Create a Test
- Set Up Test Variables
- Example: Setting Up Test Variables
- Procedure: Create a Test Variable
- Procedure: Create an Outcome for a Test Variable
- Set Up Item Sampling
- Procedure: Create an Item Sampling
- Set Up Test Groups
- Procedure: Create a Test Group
- Destructive Tests
- Example: Destructive Test Inventory Transactions



- Set Up Quality Groups
- Example: Assigning Products to a Quality Group
- Procedure: Create a Quality Group
- Set Up Items in Quality Groups
- Procedure: Add Items to a Quality Group

B. Set Up Automatic Quality Order Generation

- Set Up Quality Associations
- Example: Setting Up Quality Associations
- Procedure: Create a Quality Association

C. Create a Manual Quality Order

- Example: Creating a Manual Quality Order
- Procedure: Create a Manual Quality Order

D. Working with a Non-Conformance

- Procedure: Create a Problem Type
- Procedure: Attach a Problem Type to a Non Conformance Type
- Procedure: Create a Non Conformance
- Diagnostic Types
- Procedure: Create a Diagnostic Type
- Operations
- Example: Working with the Operations Form
- Procedure: Create an Operation
- Procedure: Add an Operation to a Non Conformance
- Related Operations
- Quality Charges
- Example: Creating a Quality Charge
- Procedure: Create a Quality Charge for a Non Conformance
- Quarantine Zones
- Non Conformance Corrections

E. Quality Reports and Certificates

- Non Conformance Report
- Non Conformance Tag
- Correction Report
- Certificate of Analysis
- Procedure: Create and Print a Certificate of Analysis

F. Practice Yourself

8. Inventory Journals

Day 3 Time: 1 hour

A. Inventory Journals Setup

- Procedure: Create a Journal Name
- Procedure: Set Up Journal Name as Default Value
- Example: Setting up Default Journal Names
- Inventory Dimensions and Inventory Journals
- Setting up Inventory Dimensions to be Edited in Specific Journal Types
- Procedure: Select Dimensions that are Displayed in Inventory Journals • Posting
- Procedure: Set Up Inventory Posting

B. Inventory Adjustment and Movement Journals

- Movement Journal
- Demonstration: Using the Movement Journal
- Inventory Adjustment Journal
- Procedure: Create an Inventory Adjustment Journal
- Procedure: View a Posted Transaction

C. Transfer Journals

- Defining Transfer Journals
- Procedure: Create a Transfer Journal

D. Bill of Material Journals

- Procedure: Report a BOM as Finished by Using an Inventory Journal
- Procedure: Generate BOM Journal and Lines from the Released Products Details Form

E. Counting Journals

- Scenario: Counting Journal Setup

F. Counting Journal Setup

- Procedure: Create a Warehouse Item
- Counting Groups
- Procedure: Create a Counting Group
- Example: Creating a Counting Group
- Example: Verifying Items are Physically On-Hand
- Procedure: Attach a Counting Group to a Product/Warehouse Item



G. Creating and Processing a Counting Journal

- Create Journal Lines
- Lock Items During Counting
- Procedure: Lock Items During Counting
- Processing a Counting Journal
- Procedure: Print a Counting List
- Procedure: Completing and Posting Journal Lines
- Procedure: View Transactions

H. Tag Counting Journals

- Processing a Tag Counting Journal
- Procedure: Create and Process a Tag Counting Journal

I. Inventory Blocking

- Block Items Manually
- Procedure: Manually Blocking Items
- Block Items by Creating a Quality Order
- Block Items by a Process that Generates a Quality Order
- Example: Inventory Blocking

J. Practice Yourself

TEST YOUR KNOWLEDGEMENT

Day 3 Time: 1 hour

Questions Based in the Content Above

1. In Microsoft Dynamics AX 2012, which of the following inventory storage dimensions may be assigned to a product? (Choose all that apply.)

- A. Cost Center
- B. Location
- C. Pallet ID
- D. Site
- E. Size

Answer: D, C, B

2. You are setting up a new product in Microsoft Dynamics AX 2012. The product will be sold, but inventory will not be tracked. You need to ensure that the product is defined as a not stocked product. On which form should you configure the inventory policy settings?

- A. Item group
- B. Item model group
- C. Storage dimension group
- D. Tracking dimension group

Answer: B

3. Where do you set up inventory management ledger account postings in Microsoft Dynamics AX 2012?

- A. In the item group.
- B. In the item model group.
- C. In the item sales tax group.
- D. In the inventory dimension group.

Answer: A

4. In Microsoft Dynamics AX 2012, you create a purchase order for items that are not currently in stock. You need to reserve these items. What should you do?

- A. Enable the Stocked product inventory parameter.
- B. Enable the Automatic reservation inventory parameter.
- C. Enable the Reserve ordered items inventory parameter.
- D. Enable the Allow negative inventory parameter for the item model group.

Answer: C

5. You plan to generate a receipts list for a purchase order in Microsoft Dynamics AX 2012. How will this affect the status of the purchase order and any transactions that may exist? (Choose all that apply.)

- A. The purchase order status does not change.
- B. The purchase order status changes to Received.
- C. Inventory transactions are not modified.
- D. Inventory transactions are created with a status of Receipts List.

Answer: C, A

6. You need to enable the change management functionality in Microsoft Dynamics AX 2012 for specific vendors only. What should you do on the General tab of the Procurement and Sourcing Parameters form? (Choose all that apply.)

- A. Enable the Activate Change Management parameter.
- B. Disable the Activate Change Management parameter.
- C. Enable the Allow override of settings per vendor parameter.
- D. Disable the Allow override of settings per vendor parameter.

Answer: C, B

7. When the Serial number control check box is selected on a products assigned tracking dimension group in Microsoft Dynamics AX 2012, which of the following statements is true?

- A. Serial numbers assigned to products must be unique.
- B. Serial numbers cannot be manually assigned to products.
- C. Serial numbers must be assigned during all receipt and issue transactions for the product.
- D. The manufacturing date must be entered when assigning serial numbers to products.

Answer: A

8. In Microsoft Dynamics AX 2012, when can you enable delivery date control for a sales order?

- A. When creating the sales order.
- B. When changing the shipping address.
- C. When picking items on the sales order.
- D. When posting a packing slip for the sales order.

Answer: A

9. In Microsoft Dynamics AX 2012, what is the purpose of a quality order?

- A. To track issues with customers or vendors.
- B. To confirm the results of an item inspection.
- C. To define a warranty when products are sold.
- D. To define a set of tests that must be performed against an item.

Answer: D

10. When are ledger accounts that are set up in the Inventory Posting for inventory adjustment postings used in Microsoft Dynamics AX 2012? (Choose all that apply.)

- A. When running an inventory close.
- B. When transferring items in a movement journal.
- C. When posting a discrepancy in a counting journal.
- D. When the inventory is updated in the corresponding inventory adjustment journal.

Answer: D, C