



# Course 806896 • Microsoft Dynamics 365 Distribution and Trade for Finance and Operations (AX)

## Length

- 5 days

## Prerequisites

- Understand distribution and trade processes
- Understand Microsoft Dynamics 365 for Finance, Procurement and Order Processing business processes

## Audience

- Professionals who implement, use, maintain, or support Dynamics 365 for Finance and Operations
- Microsoft Dynamics 365 partner staff, solution architects, production, inventory and sales
- Business functional consultants, and project managers
- Individuals who want to demonstrate foundational understanding of the Finance and Operations application

## What You'll Learn

- Manage customer and vendor relationships
- Manage the sales process
- Manage the purchase process
- Configure and manage inventory

This instructor led, hands on labs, accelerated course has seven days of training covered in a five day format.

This course is intended for individuals who want to improve their technical skills on Microsoft Dynamics 365 Distribution and Trade. You will have full use of a Dynamics 365 for Operations lab environment.

This course will prepare you for the MB6-896: Distribution and Trade in Microsoft Dynamics 365 for Finance and Operations certification exam.

## Workshop Outline

### Module 1: Introduction to Dynamics 365 for Operations

- How Dynamics Supply Chain and Distribution is integrated within the Dynamics 365 for Operations cloud based framework
- New Feature and Functionality on Dynamics 365 for Operations
- Similarities/differences with AX 2012 and 2009 versions

### Module 2: Inventory Management

- Configure and Manage Products and Inventory

### Module 3: Distribution and Trade

- Manage Customer and Vendor Relationships
- Manage the Purchase Process
- Manage the Sales Process

### Module 4: Intercompany Order Processing

- Set Up Intercompany Ordering
- Process a Purchase Order-Initiated Intercompany Chain
- Process a Sales Order-Initiated Intercompany Chain
- Configure Intercompany Agreements
- Configure Intercompany Agreements

- Update and Synchronize an Intercompany Order Chain
- Configure Direct Delivery for Intercompany Orders
- Process Intercompany Return Orders
- Process Intercompany Orders Utilizing Serial and Batch Numbers

### **Module 5: Procurement**

- Set Up and Maintain Vendors
- Set Up and Maintain Catalogs
- Create and Manage Purchase Requisitions
- Configure Purchasing Policies and Signing Limits
- Configure Purchasing Workflows
- Inquiries, Reports and Other Purchase Order Tasks

### **Module 6: Vendor Collaboration**

- Introduction to Vendor Collaboration
- Manage Users and Workflows for Vendor Collaboration
- Consignment Inventory Configuration
- Managing Consignment Inventory

### **Module 7: Product Costing and Inventory Valuation**

- Introduction to Inventory Costs
- FIFO Valuation
- LIFO Valuation
- Weighted Average Valuation
- Moving Average Valuation
- Inventory Close
- Standard Cost
- Review of Product Setup
- Review of Dimensions in Inventory Costing
- Production Costing
- Ledger Integration
- Inventory Insight and Reconciliation
- Non-Stock Items
- Cost Explorer

### **Module 8: Course Review**

- Introduction to Dynamics 365 for Operations
- Inventory Management
- Distribution and Trade
- Intercompany Order Processing
- Procurement
- Vendor Collaboration
- Product Costing and Inventory Valuation