Course Outline

Module 1: Distribution Management/ Customer Relationship Management

**Lessons:**

* Relationship Management
* Setting Up Relationship Management
* Managing Contacts
* Managing Segments
* Recording Interactions
* Managing Sales Opportunities
* Use Profile Questionnaires to Classify Business Contacts
* Managing Customers and Sales Created in Dynamics 365 for Sales
* Contacts
* Opportunities
* Sales Quotes
* Sales Orders
* Blanket Sales Orders
* Customers
* Items
* Segments
* Campaigns
* Salespersons
* Walkthrough: Conducting a Sales Campaign

Module 2: Purchasing

**Lessons**

* Register New Vendors
* Record Special Purchase Prices and Discounts
* Prioritize Vendors
* Set Up Purchasers

Module 3: Warehousing and Inventory

**Lessons**

* Set Up General Inventory Information
* Work with Responsibility Centers
* Set Up Locations
* Register New Items
* Set Up Item Units of Measure
* Set Up Stockkeeping Units
* Categorize Items

Module 4: Manufacturing

**Lessons**

* Manufacturing Setup
* Product Design
* Production BOM
* Routings
* Routing Links
* Standard Task
* Families
* Items
* Produced Raw Materials
* Stockkeeping Units

Module 5: Capacity Planning

**Lessons**

* Capacities
* Work Centers
* Machine Centers
* Registered Absences
* Vendors

Module 6: Production Scheduling

**Lessons**

* Jobs
* Jobs
* Job Task
* Job Planning Lines
* Job Journals
* Job G/L Journals
* Recurring Job Journals
* Sales Invoices
* Purchases Invoices

Module 7: Resource Scheduling

**Lessons**

* Resources
* Resources
* Resources Groups
* Resources Journals
* Recurring Resource Journals

Module 8: Assembly Orders

**Lessons**

* Assembly Management
* Understanding Assemble to Order and Assemble to Stock
* Quote an Assemble-to-Order Sale
* Assemble Items
* Sell Items Assembled to Order
* Sell Inventory Items in Assemble-to-Order Flows
* Sell Assemble-to-Order Items and Inventory Items Together
* Undo Assembly Posting
* Work with Bills of Material
* Design Details: Assembly Order Posting

Module 9: Manufacturing

**Lessons**

* Manufacturing
* About Production Orders
* Create Production Orders
* Subcontract Manufacturing
* Post Consumption and Output for One Released Production Order Line
* Batch Post Consumption
* Batch Post Output and Run Times
* Post Scrap
* View the Load in Work and Machine Centers
* Post Capacities
* About Finished Production Order Costs
* Walkthrough: Planning Supplies Manually

Module 10: Calendars and Routing

**Lessons**

* Manufacturing
* Create Work Center Calendars
* Set Up Work Centers and Machine Centers
* Create Routings
* Create Production BOMs
* Enable Flushing of Components According to Operation Output
* Work With Manufacturing Batch Units of Measure
* Work With Production Families
* Set Up Standard Routing Lines
* Subcontract Manufacturing
* Agile Manufacturing

Module 11: Service Management

**Lessons**

* Service
* Service Overview
* Service Items
* Service Contracts
* Service Orders

Module 12: Setting up Service Management

**Lessons**

* Set Up Standard Service Codes
* Configure Service Processes
* Set Up Fault Reporting
* Set Up Service Offerings
* Set Up Troubleshooting
* Set Up Resource Allocation
* Set Up Pricing and Additional Costs for Services
* Set Up Service Items and Service Item Components
* Set Up Work Hours and Service Hours
* Set Up Statuses for Service Orders and Repairs
* Set Up a Loaner Program
* Set Up Service Contracts

Module 13: Service Management

**Lessons**

* Planning Service
* Fulfilling Service Contracts
* Delivering Service

Module 14: Course Review Best Practices

**Lessons**

* Complex Application Areas Using Best Practices
* Setup Best Practices: Supply Planning
* Setup Best Practices: Costing Methods