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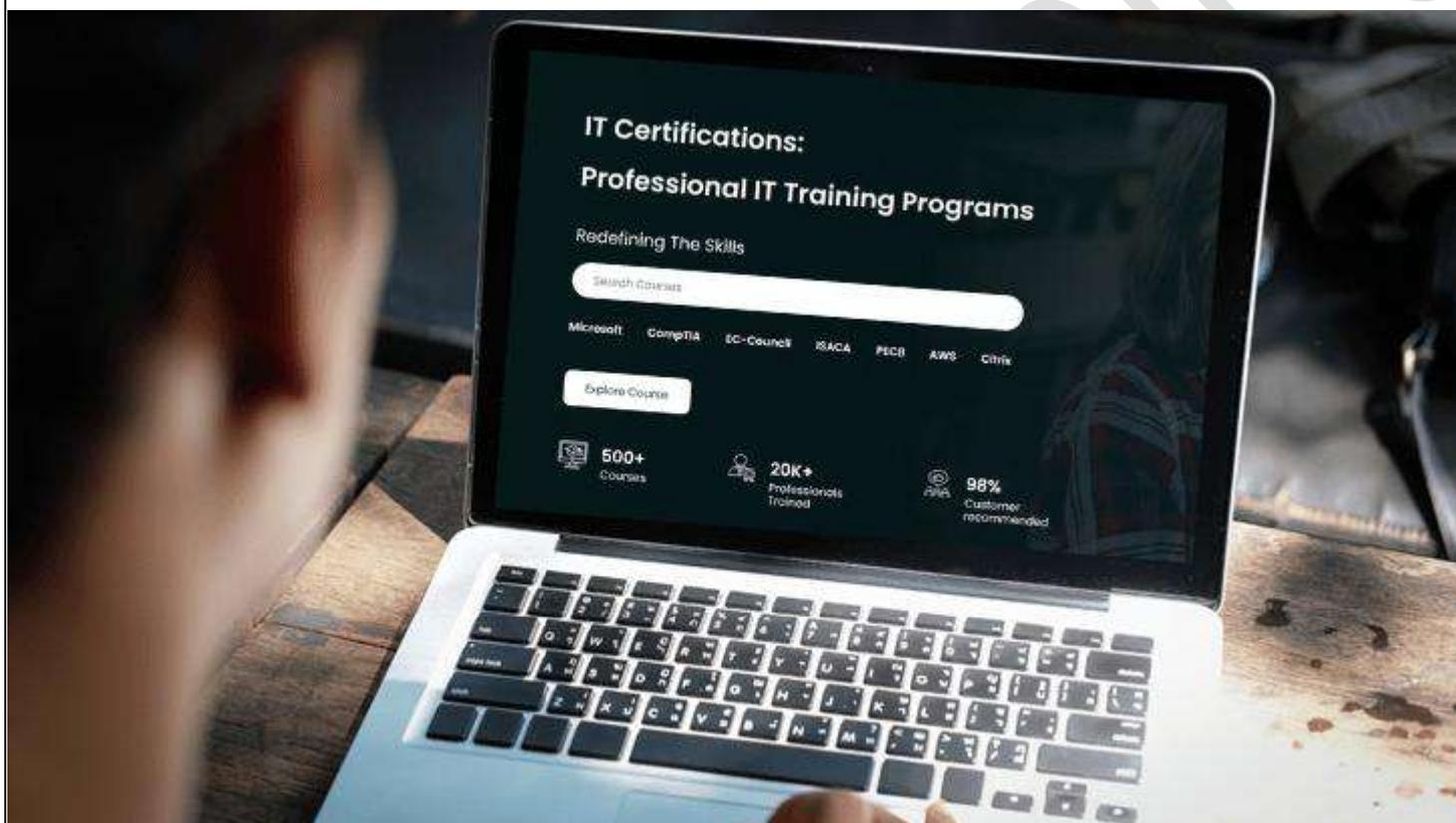
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MB-330T00: MICROSOFT DYNAMICS 365 SUPPLY CHAIN MANAGEMENT TRAINING

Duration: 5 Days

Course Description

MB 330T00: Microsoft Dynamics 365 Supply Chain Management Training is focused on professionals willing to learn about supply chain management of the Dynamics 365 platform. By completing this program, students will learn prominently about managing products, procurement, and quality control.

This course also includes learning about configuring, creating, and managing products and inventory with supply chain management configuration and processing.

After completion of this course, one can land the position of functional consultant in Dynamics 365 Supply Chain Management.

This course is based on the course objectives of MB 330T00 A.

Who should attend this course?

- Any professional working as a Dynamics 365 Supply Chain Management Functional Consultant is responsible for a key resource that designs and configures apps to meet the requirements of consumers.
- The functional consultant is also responsible for performing given things:
  - Analysing business requirements
  - Translating business requirements into potential business process
  - Implement industry-recommended practices
  - Specialize in sets of dynamics: finance, manufacturing, or supply chain management
- Given below are professionals who can use Microsoft Dynamics 365 Supply Chain Management Training to upskill their current positions:
  - Procurement Managers
  - Inventory Managers
  - Product Managers
  - Logistics Managers
  - Supply Chain Managers
  - Warehouse Managers
  - Manufacturing Engineers
  - Demand Planners
  - Dynamics 365 Consultants
  - ERP Specialists
  - Business Analysts

What you will learn

- How to process most of the Dynamics 365 Supply Chain Management transactions.
- Configure important parts of Dynamics 365 Supply Chain Management functionalities.
- Explanation of how Dynamics 365 Supply Chain Management features and functionalities work.
- Setting up and operating inventory management in order to maintain optimal stock levels
- Apply sales and marketing features to enhance consumer service
- Configure and perform warehouse management
- Learn to establish quality control to maintain high standards
- Configure and execute master planning, this also includes demand forecasting and planning optimization

Prerequisites

- There are no specific requirements for the MB 330 Exam.
- Professionals having prior knowledge or experience in finance and operation management have the advantage.

Curriculum

Module 1: Get started with Dynamics 365 Supply Chain Management

- Learn the benefits of Supply Chain Management
- Get an overview of distribution and trade features in Supply Chain Management
- Lab: Explore Dynamics 365 Supply Chain Management

Module 2: Create products and product masters in Dynamics 365 Supply Chain Management

- Create products as type Item and Service
- Set up product unit conversions
- Set up transfer orders
- Set up default order settings
- Create product masters with predefined variants
- Create and set up category hierarchies
- Create product attributes
- Lab: Create a product and product master

Module 3: Configure and work with inventory management in Dynamics 365 Supply Chain Management

- Understand inbound and outbound inventory operations
- Configure inventory parameters
- Configure tracking number groups
- Configure inventory breakdown
- Configure inventory and warehouse journals
- Configure inventory dimensions
- Configure inventory costing
- Understand inventory closing and adjustments
- Archive inventory transactions
- Use movement journals
- Use inventory adjustment journals
- Use transfer journals
- Use counting and tag counting journals
- Use item arrival journals
- Work with reason codes for inventory counting
- Lab: Work with inventory management

Module 4: Configure warehouse management in Dynamics 365 Supply Chain Management

- Create warehouses and locations
- Configure work pools, zones, location format, and location profiles
- Configure catch weight processing for warehouse management
- Create reservation hierarchies
- Configure location directives
- Configure wave templates
- Configure inventory statuses
- Lab: Configure warehouse management

Module 5: Create bill of materials in Dynamics 365 Supply Chain Management

- In this module, you will learn how to create bill of materials and BOM versions by using the BOM designer in Supply Chain Management
- Lab: Create a BOM in the BOM Designer

Module 6: Set up versioned products in Dynamics 365 Supply Chain Management

- Set up engineering organizations
- Work with product versioning
- Create dimension groups by using the version dimensions
- Create product life cycle states
- Use engineering categories
- Lab: Create a product readiness policy

Module 7: Warehouse implementation experience in Dynamics 365 Supply Chain Management

- Options for implementing Warehouse Management on a new legal entity or warehouse
- Warehouse Management setup wizards
- How to create and view location directives

Module 8: Work with the costing sheet in Dynamics 365 Supply Chain Management

- Configure the costing sheet
- Perform BOM calculation and analyze costs by using the costing sheet
- Lab: Analyze BOM costs by using the costing sheet

Module 9: Configure and use agreements in Dynamics 365 Supply Chain Management

- Maintain trade agreements
- Configure smart rounding
- Create sales agreements
- Use procurement policies
- Create purchase agreements
- Configure trade allowance
- Configure brokerage
- Configure royalties
- Configure rebates
- Learn about the Rebate management module
- Lab: Create a purchase agreement
- Lab: Generate and process customer rebates
- Lab: Create trade agreements

Module 10: Use inventory reports in Dynamics 365 Supply Chain Management

- Understand ABC classification
- Use the Physical inventory by inventory dimension report
- Use the Inventory value reports, and Inventory on-hand report storage
- Use the Inventory on-hand mobile workspace
- Lab: Use the ABC classification report
- Lab: Use the Physical inventory by inventory dimension report
- Lab: Export a report to Microsoft Excel

Module 11: Configure and work with quality control and quality management in Dynamics 365 Supply Chain Management

- Configure quality management
- Perform quality control processes

- Apply inventory blocking
- Perform quarantine management
- Lab: Create and process a quality order
- Lab: Create and process a nonconformance order

Module 12: Work with assets in Asset Management for Dynamics 365 Supply Chain Management

- Learn how to create, move, remove, and install assets
- Review how to create assets based on purchase orders
- Define how to create asset bills of materials
- Learn how to use the Asset view page and Asset attribute overview page
- Lab: Work with assets

Module 13: Use preventive and reactive maintenance in Asset Management for Dynamics 365 Supply Chain Management

- Understand what preventive maintenance is
- Define maintenance plans and associate to an asset
- Establish maintenance rounds for assets that require maintenance at regular intervals
- Establish maintenance schedules and their associated budgeted costs for preventive maintenance on assets
- Create work orders for preventive maintenance jobs
- Define maintenance downtime activities for scheduled maintenance jobs on related assets for a defined period
- Lab: Create a maintenance plan
- Lab: Update the maintenance schedule

Module 14: Create and manage work orders in Asset Management for Dynamics 365 Supply Chain Management

- Learn how to manually create work orders
- Establish maintenance forecasts for maintenance job types
- Create purchase orders from a work order
- Bill customers for maintenance work
- Design counters manually or automatically to track the number of hours an asset has been in operation
- Create maintenance checklists by maintenance job types
- Create maintenance downtime registrations to track downtime in assets
- Add faults to work orders to report faults and reason for the fault
- Produce work order reports and work order maintenance jobs
- Define work order pools to group common work orders
- Lab: Create and manage work orders

Module 15: Schedule work orders in Asset Management for Dynamics 365 Supply Chain Management

- Create worker calendars and scheduling
- Identify and assign preferred maintenance workers
- Schedule and dispatch work orders, including scheduling for a specific date and time
- Review the scheduled work order maintenance jobs to assign resources to maintenance jobs
- Learn how to calculate a capacity load on scheduled work orders by defined periods
- Lab: Set up a preferred worker, and schedule a work order

Module 16: Configure and perform the procure-to-purchase process in Dynamics 365 Supply Chain Management

- Apply the procurement and sourcing processes in a business scenario
- Use purchasing policies

- Create and maintain vendors
- Create and process purchase requisitions
- Create and process a request for quotation
- Lab: Work with procure-to-purchase processes

Module 17: Process purchase orders in Dynamics 365 Supply Chain Management

- Set up purchase order parameters
- Use purchase order change management
- Create a purchase order
- Use item arrivals and arrival overview
- Create vendor returns
- Lab: Create and process a purchase order

Module 18: Configure and manage vendor collaboration in Dynamics 365 Supply Chain Management

- Configure vendor collaborations
- Work with the Vendor collaboration workspace
- Maintain vendor certifications
- Use vendor collaboration as part of a procure-to-pay process
- Lab: Set up an external role for a vendor

Module 19: Set up accounts receivable in Dynamics 365 Finance

- Set up Accounts receivable components
- Create and maintain a customer
- Set up customer payments
- Set up payment calendars and calendar rules
- Set up customer posting profiles
- Set up accounts receivable charges
- Lab: Configure customer posting profiles and create a new customer

Module 20: Convert prospects in Dynamics 365 Sales to customers in Dynamics 365 Supply Chain Management

- Learn about how to set up mapping in Dynamics 365 Sales and Dynamics 365 Supply Chain Management
- Learn how to sync orders and quotations between Sales and Supply Chain Management

Module 21: Set up order to cash in Dynamics 365 Supply Chain Management

- Order to cash business processes
- Trade agreements and sales quotations
- Order promising concepts
- How to set up order hold codes
- How to set up commissions and analyze various scenarios
- How to set up customer and item search

Module 22: Work with order to cash in Dynamics 365 Supply Chain Management

- Perform the order to cash process
- Create and confirm sales orders
- Create and confirm sales quotations
- Process customer returns
- Work with sales order reservations
- Lab: Create a sales order and work with commissions

Module 23: Configure and use intercompany trade in Dynamics 365 Supply Chain Management

- Configure products for intercompany trade relations
- Configure intercompany trade relationships
- Configure intercompany agreements
- Process intercompany orders
- Process intercompany direct deliveries
- Process intercompany charges
- Recognize the intercompany return order chain process
- Lab: Configure intercompany relations
- Lab: Process a purchase order-initiated intercompany chain
- Lab: Process a sales order-initiated intercompany chain
- Lab: Process returns in intercompany
- Lab: Process an intercompany direct delivery

Module 24: Set up landed cost in Dynamics 365 Supply Chain Management

- Enable the Landed cost functionality
- Learn about the Landed cost parameters
- Set up voyages and shipping containers
- Set up delivery information
- Build multi-leg journeys
- Learn about basic shipping setup
- Lab: Create a voyage leg

Module 25: Manage transportation management in Dynamics 365 Supply Chain Management

- Transportation planning
- Routing
- Rating
- Inbound operations
- Load processes
- Outbound operations
- Lab: Explore transportation management

Module 26: Use warehouse management for manufacturing in Dynamics 365 Supply Chain Management

- Production input and output locations
- Staging and order picking
- Releasing BOM and formula lines to the warehouse
- Cross-docking
- Visibility into material exceptions
- Lab: Work with warehouse management in manufacturing

Module 27: Set up Master Planning in Dynamics 365 Supply Chain Management

- Set up master planning
- Use the Supply schedule page
- Set up demand and supply forecasts
- Set up calculated delays
- Set up intercompany master planning
- Run plans and firm planned orders
- Lab: Firm a planned order
- Lab: Change a planned order type

Module 28: Use master planning in Dynamics 365 Supply Chain Management

- Review the architecture of master planning features

- Identify the benefits of master planning features
- Discover the performance improvements within master planning features
- Learn about priority-based planning
- Lab: Set up purchase trade agreements
- Lab: Approve a planned order

Module 29: Describe warehouse and inventory management capabilities in Dynamics 365 Supply Chain Management

- Describe costing methods, including standard costing, weighted averages, last in, first out (LIFO), and first in, first out (FIFO)
- Describe use cases for Warehouse Management Systems (WMS) and warehouse configuration options, including layout, stocking limits, and location profiles
- Describe purchase orders, item arrival journals, and cross-docking
- Describe inventory concepts, including reservations, picking, and packing, replenishment, shipments, counting, and inventory on-hand
- Describe transportation management

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