

Microsoft Dynamics 365 Finance and Operations ERP – Supply Chain Management Functional Workshop

Duration: 3 Days (24 Hours)

Audience: Procurement Users, Inventory Controllers, Warehouse Users, Customer Service Teams, Key Users and Functional Consultants

Day 1 – Inventory Management

Inventory Structure

- Released Products
- Inventory Dimensions
- Sites
- Warehouses
- On-Hand Inventory
- Inventory Transactions
- Inventory Inquiry

Inventory Operations

- Movement Journals
- Adjustment Journals
- Transfer Journals
- Inventory Adjustments
- Inventory Counting
- Cycle Counting
- Inventory Reconciliation

Inventory Control and Monitoring

- Inventory Inquiries
- Inventory Tracking
- Inventory Reporting

Day 2 – Procurement and Vendor Management

User Experience and Productivity

- Navigation and Workspaces
- Role-Based Dashboards
- Action Pane

- FastTabs and FactBoxes
- Saved Views and Personalization
- Search and Filtering
- Keyboard Shortcuts

Vendor Management

- Vendor Creation
- Vendor Maintenance
- Vendor Groups

Procurement Setup

- Procurement Parameters
- Purchasing Policies Overview

Purchase Order Management

- Purchase Order Creation
- Purchase Order Management
- Purchase Order Confirmation
- Purchase Order Status Tracking
- Product Receipt Posting
- Receipt Corrections
- Receipt Inquiry

Day 3 – Sales Order Processing and Operational Flows

Customer Management

- Customer Creation
- Customer Groups
- Credit Limit Management
- Customer Transactions
- Customer Account Review

Sales Order Management

- Sales Order Creation
- Sales Order Confirmation
- Order Lifecycle Management
- Reservation Overview
- Picking Overview
- Packing Slip Processing
- Shipment Review

End-to-End Operational Process Flow

- Vendor Creation to Product Receipt
- Inventory Adjustment and Inventory Counting
- Customer Creation to Packing Slip Processing

Integrated Process Review

- Procurement to Inventory Flow
- Inventory to Sales Flow
- Operational Transaction Tracking
- Cross-Module Process Visibility