MB-335T00: Microsoft Dynamics 365 Supply Chain Management, Expert

Course ID #: 7000-856-ZZ-Z

Hours: 35

Course Content

Course Description:

In this course, you will build your Dynamics 365 Supply Chain Management application knowledge. This course will cover the most important features and functionalities needed by Dynamics 365 Supply Chain Management functional consultant including: The product information and how to configure, create, and manage your product and inventory. Supply chain management configuration and processing. The transportation management features, and the warehouse management features. Asset Management functionalities. Master planning configuration and processing. Sales and procurement processes. This course includes lectures and several hands-on exercises. The exercises will be introduced to you in the form of a case study presented to a Dynamics 365 Supply Chain Management Functional Consultant, Expert. Each exercise will be based on a business scenario followed by a question or discussion then a step-by-step guidance to perform the system related steps.

Course Objectives:

Upon successful completion of this course, students will be able to:

- Set up default order settings.
- Create product masters with predefined variants.
- Understand the features in engineering change management.
- Create dimension groups by using the version dimensions.
- Schedule and dispatch work orders, including scheduling for a specific date and time.
- Create and process purchase requisitions.
- Schedule a production order.
- Set up demand and supply forecasts.
- And so much more!

Prerequisites:

- General knowledge of supply chain management
- General knowledge of inventory procedures
- General knowledge of manufacturing processes
- Basic knowledge of warehouse procedures
- Ability to use Microsoft Dynamics 365 Supply Chain Management for basic processing

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Target Audience:

- Functional Consultant

This course is designed for the Dynamics 365 Supply Chain Management Functional Consultant Expert. The Dynamics 365 Supply Chain Management Functional Consultant Expert is a key resource that implements and configures advanced features of Dynamics 365 Supply Chain Management to meet the requirements of a business. The functional consultant analyzes business requirements, translates those requirements into fully realized business processes and solutions, and applies industry-recommended practices to implementations. The functional consultant has a strong advanced knowledge of supply chain management operations including production, master planning, and asset management and demonstrates expertise in one or more of the following manufacturing methods: discrete, process, and lean. They partner with architects, developers, consultants and other stakeholders to implement solutions that meet or exceed the needs of their customers. The consultant identifies use cases for applying Dynamics 365 Supply Chain Management add-ins for mixed reality, internet of things (IoT), and machine learning (ML) technologies. The functional consultant specializes in one or more of the following feature sets of Dynamics: finance, manufacturing, or supply chain management. They partner with architects, developers, administrators, and other stakeholders to deliver solutions that meet or exceed the needs of their customers.

Topics:

Lesson 1: Create products and product masters in Dynamics 365 Supply Chain Management

- Introduction
- Product information workspace
- Concept of a product
- Create products
- Set up unit conversions
- Batch disposition codes
- Default order settings
- Define products as not stocked
- Create product masters with variants
- Gain productivity by using the Variant suggestions page
- Create and set up category hierarchies and attributes
- Set up item pricing
- Lab - Create a product and product master
- Check your knowledge
- Summary

Lesson 2: Create bill of materials in Dynamics 365 Supply Chain Management

- Introduction
- Work with the BOM designer
- BOM and formula versions
- BOM line types
- BOM levels
- Exercise - Create a BOM in the BOM Designer
- Check your knowledge
- Summary

Lesson 3: Get started with discrete manufacturing in Dynamics 365 Supply Chain Management
- Introduction
- Discrete manufacturing life cycle
- Master planning and planned production orders
- Bills of materials
- Working with BOM and item configurations
- Create a bill of materials
- Production orders
- Exercise - Create a simple BOM without a version
- Exercise - Create a BOM in the BOM designer
- Exercise - Create a BOM with a version
- Exercise - Create and process a production order
- Check your knowledge
- Summary

Lesson 4: Work with commodity pricing and compliance in Dynamics 365 Supply Chain Management
- Configure commodity pricing
- Configure product compliance
- Exercise - Set up commodity pricing
- Exercise - Set up pricing calculation
- Exercise - Create price data and update agreements
- Exercise - Product compliance
- Check your knowledge
- Summary

Lesson 5: Configure process manufacturing in Dynamics 365 Supply Chain Management
- Introduction
- Process manufacturing item types
- Production type setup
- Set up packaging and batch attributes
- Shelf life related setup
- Item model group, product compliance, and approved vendors
- Catch weight
- Transaction adjustments
- Catch weight item handling policy
- Supported scenarios
- Catch weight tags
- Configure approved vendors
- Exercise - Create an approved vendor list
- Exercise - Create and use a partial visibility catch weight item
- Exercise - Use catch weight items
- Exercise - Create process activities for lean manufacturing
- Check your knowledge
- Summary

Lesson 6: Get started with Engineering Change Management for Dynamics 365 Supply Chain Management
- Introduction
- Overview of features
- End-to-end walkthrough of features
- Exercise - Set up demo data for the sample scenario
- Exercise - Create a new engineering product
- Exercise - Release an engineering product to a local company
- Exercise - Review and accept the product before you release it in the local company
- Exercise - Use the product in transactions in the local company
- Exercise - Add the engineering product to a sales order
- Exercise - Request changes in the engineering product
- Exercise - Make changes to the product by using an engineering change order
- Exercise - Release the changed product
- Check your knowledge
- Summary

Lesson 7: Set up versioned products in Dynamics 365 Supply Chain Management
- Introduction
- Create an engineering organization
- Create nomenclature for product versions
- Create product version number rules
- Create product dimension groups by using the version dimension
- Create product life cycle states
- Engineering attributes
- Product readiness policies
- Product release policies
- Create engineering categories
- Exercise - Create a product readiness policy
- Check your knowledge
- Summary

Lesson 8: Configure engineering change management for Dynamics 365 Supply Chain Management
- Introduction
- Set up engineering change severities
- Set up severity rule sets
- Set up product owners
- Engineering workflows
- Exercise - Create a severity rule
- Check your knowledge
- Summary

Lesson 9: Request and follow up with product changes in Dynamics 365 Supply Chain Management
- Introduction
- Engineering change requests
- Engineering change orders
- Exercise – Create an engineering change request
- Check your knowledge
- Summary

Lesson 10: Get started with product configuration in Dynamics 365 Supply Chain Management
- Introduction
- Overview
- Elements of a product configuration model
- Expression constraints and table constraints in product configuration models
- Validate and test a product configuration model
- Finalize a model for configuration
- Set up a product configuration model
- Calculations for product configuration models
- Solver strategy for product configuration
- Reuse product configurations
- Release a product configuration model
- Customize a product configuration model
- Exercise - Build and use a product configuration model
- Check your knowledge
- Summary

Lesson 11: Work with the costing sheet in Dynamics 365 Supply Chain Management
- Introduction
- Costing versions
- Cost groups
- Calculation groups
- Costing sheets
- BOM calculations
- BOM Measurements
- BOM Reports
- Lab - Analyze BOM costs by using the costing sheet
- Check your knowledge
- Summary

Lesson 12: Configure formulas for process manufacturing in Dynamics 365 Supply Chain Management
- Introduction
- Formulas, formula lines, and formula versions
- Formula features
- Approve and activate formulas and formula versions
- Use step consumption
- Coproducts
- By-products
- Burden allocation
- Planning items
- Exercise - Create co-products and by-products
- Exercise - Create a new formula with a version from the Released products page
- Exercise - Copy and modify formula versions
- Exercise - Create and update a scalable formula
- Exercise - Create a percentage-based formula
- Exercise - Create a step consumption formula
- Check your knowledge
- Summary

Lesson 13: Get started with production control in Dynamics 365 Supply Chain Management
- Introduction
- Core concepts in production control
- Understand unified manufacturing
- Manufacturing principles
- Overview of the production process and production life cycle
- Batch orders
- Discrete manufacturing
- Process manufacturing
- Lean manufacturing
- Configure production control for unified manufacturing
- Capacity planning
- Integration between the General ledger and the Production control modules
- IoT intelligence and insights
- Describe the value proposition for mixed-reality Guides for production floor workers
- Lab - Explore production control
- Check your knowledge
- Summary

Lesson 14: Use warehouse management for manufacturing in Dynamics 365 Supply Chain Management
- Production input location
- Production output location
- Staging and order picking
- Release BOM and formula lines to the warehouse
- Cross-docking
- Planned cross docking
- Visibility into material exceptions
- Lab - Work with warehouse management in manufacturing
- Check your knowledge
- Summary

Lesson 15: Work with manufacturing execution in Dynamics 365 Supply Chain Management
- Introduction
- Understand the manufacturing executions
- Identify roles in manufacturing execution
- Planning consideration for manufacturing execution
- Configure manufacturing execution
- Setup time and attendance for manufacturing execution processes
- Control production with manufacturing execution
- Create and process report as finished journals with co-products and by-products
- Calculate and approve raw time registrations
- Report as finished from the job card device
- Lab - Manufacturing execution
- Check your knowledge
- Summary

Lesson 16: Get started with Asset Management for Dynamics 365 Supply Chain Management
- Overview and benefits
- Asset Management terminology and concepts
- Functional locations and assets
- Assets and work orders
- Install the Asset Management mobile workspace
- Use the Asset Management mobile workspace
- Asset Management integration capabilities
- Integrate Asset Management with Dynamics 365 Guides
- Check your knowledge
- Summary

Lesson 17: Schedule work orders in Asset Management for Dynamics 365 Supply Chain Management

- Introduction
- Configure workers for work order scheduling
- Schedule and dispatch work orders
- Calculate capacity load on scheduled work orders
- Lab – Set up a preferred worker, and schedule a work order
- Check your knowledge
- Summary

Lesson 18: Configure and perform the procure-to-purchase process in Dynamics 365 Supply Chain Management

- Introduction
- Procurement scenario
- Overview of the procure-to-purchase process
- Set up procurement categories
- Use procurement catalogs
- Create a purchase requisition
- Create and process a request for quotation
- Create purchase orders
- Vendor categories and catalogs
- Evaluate a vendor and put a vendor on hold
- Use purchasing policies
- Lab - Work with procure-to-purchase processes
- Check your knowledge
- Summary

Lesson 19: Configure activity-based subcontracting and production flow costing in Dynamics 365 Supply Chain Management

- Overview of subcontracting and production flow costing
- Subcontracting capabilities
- Subcontracting a vendor
- Subcontracting service
- Transfer activities as subcontracting activities
- Subcontracting as an alternate resource
- Cost accounting of subcontracted services
- Subcontracting cost flow
- Backflush costing
- Products and material in Work in Progress
- Standard cost
- Costing lean manufacturing
- Calculation of standard cost
- Calculate unused quantities
- Calculation of production variances to standard cost
- Ledger entries created from processing a production flow
- Exercise - Set up a default vendor and create a purchase agreement
- Exercise - Create a work cell for subcontracting
- Exercise - Create an activity-based subcontracting rule
- Exercise - Create and schedule kanbans for subcontracting
- Exercise - Process and transfer jobs
- Check your knowledge
- Summary

Lesson 20: Configure and use agreements in Dynamics 365 Supply Chain Management
- Introduction
- Work with trade agreements
- Create sales agreements
- Create purchase agreements
- Configure trade allowance management
- Configure brokerage contract management
- Configure royalty contract management
- Configure vendor rebates
- Rebate management module
- Exercise - Create a purchase agreement
- Exercise - Generate and process customer rebates
- Exercise - Create trade agreements
- Check your knowledge
- Summary

Lesson 21: Work with capacity planning and scheduling in Dynamics 365 Supply Chain Management
- Introduction
- Scheduling options
- Split a production order
- Operations scheduling
- Job scheduling
- Scheduling options from the Gantt chart
- Resource scheduling
- Scrap and waste
- Exercise - Start a discrete production order
- Exercise - Run a resource schedule
- Check your knowledge
- Summary

Lesson 22: Configure and use built-in master planning in Dynamics 365 Supply Chain Management
- Introduction
- Master planning considerations and setup
- Master planning parameters page
- Create a master plan
- Demand forecasting
- Coverage settings
- Action messages
- Configure intercompany planning
- Run plans and firm planned orders
- Set up and use the Supply schedule page
- Exercise - Firm a planned order
- Exercise - Change a planned order type
- Exercise - Create and run an intercompany master plan
- Check your knowledge
- Summary

Lesson 23: Use Planning Optimization in Dynamics 365 Supply Chain Management
- Introduction
- Install the Planning Optimization Add-in
- Integration and fit analysis
- Apply filters to a plan
- Master planning with demand forecasts
- Planning optimization support for capability-based resource allocation
- Priority-based planning
- Master planning and purchase trade agreements
- Safety margins
- Coverage time fences
- Approved planned orders
- Generate planned production orders
- Analyze and approve planned orders
- Auto-firming
- Planning with negative on-hand quantities
- View history and planning logs
- Cancel a planning job
- Exercise - Set up purchase trade agreements for Planning Optimization
- Exercise - Approve a planned order
- Check your knowledge
- Summary

Lesson 24: Create and process fixed kanbans in Dynamics 365 Supply Chain Management
- Introduction
- Understand kanban boards
- Configure a fixed kanban rule
- Process a fixed kanban
- Kanban quantity calculations and circulating kanbans
- Exercise - Configure a fixed quantity kanban rule
- Exercise - Fixed kanban job processing
- Check your knowledge
- Summary

Lesson 25: Identify and configure batch attributes for process manufacturing in Dynamics 365 Supply Chain Management
- Batch attributes
- Assign and reserve batch attributes
- Products that have an active ingredient
- Ingredient types
- The batch balancing process
- Exercise - Create and assign batch attributes
- Exercise - Record batch attributes at batch creation
- Exercise - Record batch attribute values by using quality orders
- Exercise - Reserve batch attributes on sales orders
- Check your knowledge
- Summary

Register for this class by visiting us at:
www.tcworkshop.com or calling us at 800-639-3535