

Plan de formation

Trade in Microsoft Dynamics 365 – Business Central

Objectif

This two-day instructor-led training (ILT) course provides students with the knowledge and skills to handle the purchase, sale, and return of inventory. Students will learn how to manage sales and purchase transactions, including prices and discounts, item charges and order promising. Requisition management will be covered, as well as returns management and customer service features.

Durée

2 jours (14 heures)

Prérequis

Before attending this course, students must have:

- Attended or knowledge of course Introduction in Microsoft Dynamics 365.
- Attended or knowledge of course Finance Essentials in Microsoft Dynamics 365.
- Basic knowledge of distribution and logistics.

Profil du stagiaire

The intended audience includes individuals wanting to learn the basic features and to develop a working knowledge of the typical day-to-day procedures required to effectively use Microsoft Dynamics 365 Trade.

Plan de formation

Module 1: Sales Order Management

- Set Up Sales Order Management
- Manage Sales Transactions
- Item Reservation
- Posting Orders
- Drop Shipments
- Customer Prepayments

Module 2: Sales Prices and Discounts

- Sales Prices
- Maintain Sales Prices
- Sales Line Discounts
- Invoice Discounts

Module 3: Customer Service Features

- Item Substitutions
- Item Cross References
- Set Up and Create Nonstock Items
- Sell Nonstock Items

Module 4: Purchase Order Management

- Purchase Order Management Setup
- Manage Purchase Transactions
- Purchase Prices and Discounts
- Purchase Prices
- Invoice and Line Discounts
- Vendor Prepayments

Module 5: Requisition Management

- Requisition Management Setup
- Requisition Worksheet
- Additional Worksheet Features

Module 6: Item Charges

- Purchase Item Charges
- Sales Item Charges
- Purchase and Sales Allowances

Module 7: Order Promising

- Sales Order Promising Definitions and Calculations
- Date Calculation Setup for Sales Orders
- Promising Sales Order Delivery
- Purchase Order Promising Definitions and Calculations
- Date Calculation Setup for Purchase Orders
- Estimating Purchase Order Receipts
- Estimate a Transfer Order Receipt
- Calendars

Module 8: Returns Management

- Returns Management Setup
- Manage Customer Returns
- Manage Returns to Vendors