Dynamics 365 Supply Chain Management: Procurement Fundamentals

Duration: 2 days| **Focus Area:**   Business/IT Alignment | **Difficulty level:** 200-300

Intended Audience

Individuals responsible for overseeing the day-to-day business operations related to procurement.

Primary Audience: Procurement professionals
Secondary Audience: AP Professionals

Overview

The Microsoft Dynamics 365 Supply Chain Management – Procurement Fundamentals Chalk Talk is a two-day engagement delivered remotely by a Dynamics 365 Supply Chain Management expert. This course is geared toward individuals who are responsible for overseeing the day to-day business operations related to procurement.

Objectives and Key takeaways

Individuals who attend this course will retain a working knowledge of the procurement functionality available in Dynamics 365 Supply Chain Management by covering the following areas:

• Product Information Management
• Inventory Management setup
• Vendors
• Purchase requisition and workflow
• Purchase orders
• Over/Under Delivery and charges
• Procurement categories

Agenda

Day 1

• Module 1
• Module 2
• Module 3

Day 2

• Module 4
• Module 5
• Module 6

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Course details

Module 1: Product Information Management

- Defining Products and Product Masters
- Configurable Products
- Inventory Dimension Groups
- Release Products
- Default Order Settings

Module 2: Inventory Management Setup

- Item Groups
- Item Model Groups
- Warehouse Management, Site, Warehouse

Module 3: Purchase Requisitions

- Setup Purchase Requisitions
- Create and Process Purchase Requisitions
- Convert Purchase Requisitions to Purchase Orders
- Demand Consolidation
- Purchase Requisition Workflow

Module 4: Purchase Orders

- Setup and Maintain Vendors
- Working with Purchase Orders
- Setup Purchasing Parameters
- Create and process Purchase Orders
- Change Management

Module 5: Over/Under Delivery and charges

- Setting up and managing over and under deliveries.
- Setting up charges.
- Manually adding charges to purchase orders.
- Automatically adding charges to and purchase orders.
- Setting up and using landed costs

Module 6: Procurement Categories

- Introduction to Organization Hierarchies
- Category Hierarchies
- Category Attributes
- Commodity Codes
- Procurement Category Management
- Procurement Catalogs

Pre-requisites

General knowledge of the procurement process is recommended but not required.

For more information

Contact your Microsoft Account Representative for further details.

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