



Emporis Academy Private Limited



Learning Solutions
Microsoft Business Solutions

Course Syllabus

Trade and Logistics I in Microsoft Dynamics AX 2009

(Elements of this syllabus are subject to change.)

Key Data:

Course number: 80024

Instructor-Led Training (lecture and labs)

Student Materials: Microsoft Official Curriculum (MOC)

Certification Exam: MB6-817 Microsoft Dynamics AX 2009 Trade and Logistics

Introduction: This training provides students with the necessary tools and resources to perform basic tasks in the trade and inventory flow in Microsoft Dynamics AX 2009. This course shows how to work with sales and purchase orders, post sales and purchase transactions, manage customer and vendor returns, and item arrival and picking. The course also explains how to manage inventory and use quarantine management. Additionally, the course shows how to assign, manage, and trace serial and batch numbers and how to allow for over/under delivery of both sales and purchases and assign miscellaneous charges.

Prerequisites

Before attending this course, students must have:

- General knowledge of Microsoft® Windows®
- Completed the Introduction to Microsoft Dynamics AX 2009 course
- The ability to use Microsoft Dynamics AX 2009 for basic processing
- Basic knowledge of trade and logistics and inventory management concepts

Chapter 1: Introduction to Trade and Logistics

The purpose of this module is to introduce students to the course and its goals.

| Lessons |
|--|
| <ul style="list-style-type: none">• Logistics and Inventory Management• Logistics and Inventory Features• Information Flow |

Chapter 2: Inventory

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This module concentrates on how to create and set up new items. Creating new items is completed through the Inventory Management module. All item-based data created in Inventory Management is used by the company accounts for purchases, sales, warehouse management, inventory journals, production, and projects.

Lessons

- Item Groups
- Inventory Model Groups
- Dimension Groups
- The Inventory Dimensions Form
- Item Dimension Combinations
- Item Setup
- Default Order Settings
- Units of Measure
- Warehouse Management
- Item Pricing

Chapter 3: Purchase Orders and Purchase Order Posting

Create purchase orders using the Simple and Advanced views, purchase order types, and purchase parameters. This module also discusses a variety of different posting techniques and processes that you can apply when working with purchase orders in Microsoft Dynamics AX 2009. Additionally, inventory posting profiles are discussed. Inventory posting profiles control what ledger accounts are used and when they are used when you are purchasing and selling inventory.

Lessons

- Working with Purchase Orders
- Purchase Order Types
- Set up Accounts Payable Parameters
- Ship to Multiple Addresses
- Purchase Order Posting
- Post a Purchase Order
- Post a Receipts List
- Post a Packing Slip
- Post a Purchase Order Invoice
- Accounts Payable Invoice Matching
- Purchase Order Financial Posting

Chapter 4: Serial and Batch Numbers

This module explains how serial numbers and batch numbers are used and how to set up, allocate, and change serial numbers and batch numbers. In addition, the module focuses on how to use the serial and batch number tracing functionality in Microsoft Dynamics AX 2009.

Lessons

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- Dimension Group – Storage Dimensions
- Manual Allocation
- Automatic Allocation
- Tracing

Chapter 5: Item Arrival and Registration

This module is designed to introduce the features in Microsoft Dynamics AX 2009 that support receiving items in a company.

Lessons

- Item Registration Setup
- Item Arrival using the Arrival Overview Form

Chapter 6: Quarantine Management

This module examines how Microsoft Dynamics AX 2009 uses Quarantine orders. Items can be set aside to await either manual or automatic approval, depending on setup. The item may be in quarantine for a certain period, for example, for quantity control purposes. Quarantine management is part of the Microsoft Dynamics AX Inventory management module.

Lessons

- Quarantine Warehouse Setup Parameters
- Quarantine Item Management
- Inventory Transactions on Quarantine Items

Chapter 7: Vendor Returns

This module discusses how to return a product to a vendor. You will be shown how to handle the returns with and without serial and batch numbers attached.

Lessons

- Create Vendor Returns
- Create Vendor Returns for Serialized Items

Chapter 8: Sales Orders and Sales Order Posting

This module focuses on how to create sales orders using the Simple and Advanced views, sales order types, and sales parameters. The module also discusses a variety of different posting techniques and processes that you apply when working with sales orders in Microsoft Dynamics AX 2009. Additionally, inventory posting profiles are discussed. Inventory posting profiles control what ledger accounts are used and when they are used when you purchase and sell inventory.

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Lessons

- Working with Sales Orders
- Sales Order Types
- Sales Parameters
- Ship to Multiple Addresses
- Enhanced Delivery Date Control
- Available Ship and Receipt Dates
- Order Entry Deadlines
- Create a Sales Order in a Multi Time Zone Environment
- Direct Delivery
- Sales Order Posting
- Post a Sales Order Confirmation
- Post a Sales Order Picking List
- Post a Picking List Registration
- Post a Sales Order Packing List
- Post a Sales Order Invoice
- Post an Invoice Based on Packing Slips
- Sales Order Financial Posting
- Multisite
- Shipping Carrier Interface

Chapter 9: Sales Order Picking

This module introduces the sales picking process.

Lessons

- Item Pick Registration Setup
- Automatic Registration of a Pick
- Manual Registration of a Pick
- Item Pick Registration of Serialized and Batch Inventory
- Edit, Reverse, and Split a Pick
- Release Sales Order Picking

Chapter 10: 10: Customer Returns

This module discusses how to accept and handle a product return from a customer. You will be shown how to process the returns through the Return order, Arrival overview, Quarantine order, and Sales order forms.

Lessons

- Set up Customer Returns
- Create a Return Order
- Item Arrival and Receipt Registration
- Quarantine Orders
- Replacement Orders
- Reports and Statistics

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Chapter 11: Over/Under Delivery and Miscellaneous Charges

This module examines how to handle differences between ordered and received or delivered quantities in Microsoft Dynamics AX 2009. In addition, the module discusses how to handle miscellaneous charges in Sales and Purchase orders that include how to allocate charges to items and how to include landed costs in an item's total cost.

| Lessons |
|--|
| <ul style="list-style-type: none">• Over/Under Delivery• Miscellaneous Charges• Price Miscellaneous Charges• Miscellaneous Charges Codes• Manual Miscellaneous Charges• Automatic Miscellaneous Charges• Landed Cost Miscellaneous Charges• Add Miscellaneous Charges to a Purchase Order Invoice |

Trade and Logistics II in Microsoft Dynamics AX 2009

Course Number: 80025

Instructor-Led Training (lecture and labs)

Student Materials: Microsoft Official Curriculum (MOC)

Certification Exam: MB6-817 Microsoft Dynamics AX 2009 Trade and Logistics

Introduction:

This course introduces advanced Trade & Logistics functionality in Microsoft Dynamics AX 2009. Series 2 builds on information taught in Series 1 that serves as an introduction to Microsoft Dynamics AX 2009 Trade & Logistics functionality. Series 2 covers Item Reservations, Customer and Vendor Trade Agreements, Request For Quote, Purchase Requisition, Sales Quotation, Quality Management, Transfer Orders, Commissions, Inventory Journals and Inventory Reports.

Prerequisites

Before attending this course, students must have:

- General knowledge of Microsoft → Windows →.
- The ability to use Microsoft Dynamics AX 2009 for basic processing.
- Completed Microsoft Dynamics AX 2009 Trade & Logistics, Series 1.

Chapter 1: Item Reservations

This chapter is designed to introduce the Reservations functionality in Microsoft Dynamics AX 2009.

| Lessons |
|--|
| <ul style="list-style-type: none">• Why Perform Reservations and What Can You Reserve• Manual Reservations• Automatic Reservations |

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- Automatic Reservations and Selection of Lots
- Explosion Reservations
- View Reservations
- Lock Reservations
- Cancel Reservations
- Batch Reservation
- Picking Reserved items

Chapter 2: Customer and Vendor Trade Agreements

This chapter discusses Customer and Vendor Trade Agreements that are fixed price agreements that are entered into with one or more customers or vendors for the sale of individual or multiple items. This chapter also covers Supplementary Items that are complimentary or supplementary items sold to a customer or customer group, or sold with an item or item group.

Lessons

- Set Up Trade Agreements
- Activate Trade Agreements
- Trade Agreement Parameters
- Make adjustments to Agreements
- Supplementary Items

Chapter 3: Request for Quote

This chapter is designed to introduce the Request For Quote functionality in Microsoft Dynamics AX 2009.

Lessons

- Create a Request For Quote Case
- Record Request For Quote Replies
- Compare Request For Quote Replies
- Accept a Request For Quote

Chapter 4: Purchase Requisition

This chapter is designed to introduce the Purchase requisition functionality in Microsoft Dynamics AX 2009.

Lessons

- Managing Purchase Requisitions
- Setting Up Purchase Requisitions
- Define User Groups and security Settings for Purchase Requisitions
- Purchase Requisition Workflow

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Chapter 5: Sales Quotation

This chapter explains how to set up, maintain, and process quotations. The trade and logistics functionality allows for sales personnel to issue quotations, track the progress of quotations, and follow-up on won or lost quotations. Various quotation functions are also explained

| Lessons |
|---|
| <ul style="list-style-type: none">• Sales Quotation Setup• Working with Quotations• Various Functions |

Chapter 6: Quality Management

This chapter is designed to introduce the Quality management functionality in Microsoft Dynamics AX 2009.

| Lessons |
|---|
| <ul style="list-style-type: none">• Set Up Quality Management Basics• Set Up Automatic Quality Order Generation• Create a Manual Quality Order• Work with a Non Conformance• Non Conformance Corrections• Quality Reports and Certificates |

Chapter 7: Transfer Orders

In this chapter, students gain an understanding of the new Transfer orders form. This is a process-oriented way to deal with transfer orders between warehouses within the same company.

| Lessons |
|---|
| <ul style="list-style-type: none">• Set Up of Transfer Orders• Using the Transfer Orders Form• Picking Items For a Transfer Order• Shipping and Receiving a Transfer Order |

Chapter 8: Commissions

This chapter introduces the steps required to set up sales commissions for sales people. It also covers how to inquire on the calculated commissions from posted sales transactions.

| Lessons |
|---|
| <ul style="list-style-type: none">• Set Up a Commission• View Commission Transactions• Commission Transactions For Return Items |

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Chapter 9: Inventory Journals

In this chapter, students gain an understanding of Inventory journals in Microsoft Dynamics AX 2009 by reviewing the initial setup and each of the journals. Inventory journals are used for posting physical and financial inventory transactions including posting issues and receipts, inventory movements, creating Bills of Material, and Reconciliation of physical inventory.

Lessons

- Set Up of Inventory Journals
- Profit/Loss and Movement Journals
- Transfer Journals
- Bill of Material Journals
- Counting Journals
- Counting Journal Specific Setup
- Creating and Processing a Counting Journal
- Tag Counting Journals

Chapter 10: Inventory Reports

This chapter introduces how the ABC Inventory Classification System is used in Microsoft Dynamics AX 2009. It also discusses how to use Microsoft Dynamics AX 2009 reports to help in forecasting sales and purchase expectations.

Lessons

- ABC Inventory Classification
- Forecasting Reports

Bill of Materials in Microsoft Dynamics AX 2009

Course Number: 80010

Instructor-Led Training (lecture and labs)

Student Materials: Microsoft Official Curriculum (MOC)

Certification Exam: MB6-817 Microsoft Dynamics AX 2009 Trade and Logistics

Introduction: This course provides students with the knowledge and skills to work with Bills of Materials in a non-production environment.

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Prerequisites

Before attending this course, students must have:

- Introduction to Microsoft Dynamics® AX 2009.
- Microsoft Dynamics® AX 2009 Trade and Logistics Series I & II

Chapter 1: Bill of Materials Overview

This chapter provides an overview of the Microsoft Dynamics AX 2009 Bill of Materials functionality. This covers general concepts, BOM features and elements, different forms used, and the standard BOM creation process.

Lessons

- General Overview
- Bill of Material Concepts
- BOMs/Routes in Multisite Environment
- Features of BOMs in Microsoft Dynamics AX 2009
- BOM Levels
- BOM Lines
- BOM Line Type and its Usage
- Bill of Material Form Overview
- Item Form
- BOM Form
- BOM Line Form
- BOM Designer Form
- Bill of Material Creation Process

Chapter 2: Creating Simple BOMs

This chapter explains how to create simple BOMs using the BOM form, and create and edit simple BOMs using the BOM designer.

Lessons

- Create BOMs in the BOM form
- Create and Edit BOMs in the BOM Designer
- Using the BOM Designer from the BOM Form
- Editing BOMs using the BOM Designer
- Deleting BOM Component Lines in the BOM Designer

Chapter 3: Creating BOMs with Versions

This chapter explains the concept of version control, and describes how to create BOMs with versions. In addition, this section covers activating, copying, and changing BOM versions, in addition to creating quantity-dependent BOMs and using other version-related functionality.

Lessons

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Course Syllabus: Microsoft Dynamics AX 2009 Trade & Logistics –I, II & BOM

- BOM Versions Overview
- Version Control Methods
- Version Control Using Date and Quantity
- Version Control Using Site
- Deactivate BOM Versions
- BOM/Route Version Assigned to Multiple Items Based on Site
- Creating BOMs Using the Item form
- Activate Multiple BOM Versions
- Activating BOM Versions and Validating Lines
- Copy BOM Versions
- Copying BOMs
- Change BOM Versions
- Create BOMs with a Version from the BOM Form
- Create BOMs with Versions in the BOM Designer
- Overview of the BOM Designer Functionality
- Quantity Dependent BOMs
- Working with Validity Dates and Sub-BOMs on Component Lines
- Validity Dates of BOM Lines
- Using Validity Dates
- Sub-BOMs on Component Items

Procedures

- Adding a New BOM from the Item Form
- Creating a new BOM from the BOM Line Form
- Adding Items to a New BOM
- Approving a BOM
- Copying a BOM for a New BOM Item
- Attaching an Item
- Copying a BOM for an Existing BOM Item
- Attaching an Item for an Existing BOM Item
- Creating a BOM version
- Adding Components Items and Approving a BOM Version
- Linking Versions
- Creating a BOM in BOM Designer
- Specifying Validity Dates
- Specifying Sub-BOMs on a BOM Component

Chapter 4: Working with BOM and Item Configurations

This chapter explains the purpose, use, and setup of BOM configurations and Item Configurations. In addition, Configuration groups, Configuration routes, and Configuration rules are discussed.

Lessons

- BOM Configurations
- Configuration Groups
- Configuration Route
- Configuration Rule
- Item Configuration
- Item Configuration Prerequisites

Procedures

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- Creating a Configuration Group
- Creating a Configuration Group in the BOM Line Form
- Creating a Configuration Route
- Creating a Configuration Rule

Chapter 5: Working with BOM Calculations

This chapter explains the BOM calculation structure used in Microsoft Dynamics AX 2009, in addition to the use and set up of Cost groups, Profit settings, Calculation groups and Costing versions. Running and viewing BOM calculations, including cost and sales price calculations is also addressed. Finally, exclusions to BOM calculations are discussed.

Lessons

- BOM Calculation Structure
- Cost Breakdown
- Cost Groups, Profit Settings, and Calculation Groups
- Cost Groups
- Profit Settings
- Cost Breakdown Calculation Groups
- Setup of Costing Version
- Use of Costing Version
- Cost Data Maintenance
- Item Price Form
- BOM Calculation Form
- Summary Function
- Complete BOM Calculation Form
- Cost and Sales Price Calculations
- Access Cost and Sales Price Calculation Form
- BOM Calculation Form Accessed from the Item Form
- BOM Calculation Form Accessed from the Periodic Folder
- Explosion Mode and BOM Stop Explosion
- Explosion Mode Options
- Explosion Mode

Procedures

- Creating a Cost Group
- Creating a Profit Setting
- Enable Cost Breakdown
- Assigning Calculation Groups to Items
- Create a Costing version
- Input Item Planned Cost in a Costing Version
- BOM Stop Explosion
- Omitting BOM Lines from Calculation

Chapter 6: Sales Orders and BOMs

This chapter describes creating a sales order with a configurable BOM, viewing, exploding, and calculating the BOM from a sales order, and transferring calculation prices and quantities to a sales order.

Lessons

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- Configurable BOMs and Sales Orders
- Viewing BOMs on a Sales Order
- View BOMs using the Composed of – Tree Form
- Designer Tab
- Setup Tab
- Changing BOM Components from the Sales Order
- Explode a BOM from a Sales Order
- Calculate BOMs from a Sales Order
- Transfer BOM Calculation Prices and Quantities
- Transfer Quantities

Procedures

- Exploding a BOM from a Sales Order

Chapter 7: Scrap and Measurement

This chapter describes the use and setup of constant and variable scrap and BOM calculations using scrap. The section also covers the use and setup of measurement configurations including consumption calculation, rounding-up, measurement dimensions, conversion factors, and BOM calculations using measurements.

Lessons

- BOM Scrap
- Specifying Scrap
- Scrap Setting on the BOM
- Scrap and Calculation
- BOM Measurement
- Setting up Measurement Configuration
- Rounding-up
- Measurement Settings
- Measurement Conversion Factors

Procedures

- Set Scrap on the BOM Line
- View Total Cost Price for each Unit
- Setting Consumption Calculation
- Set Rounding-up Options
- Setting up Measurement

Chapter 8: Report a BOM as Finished

This chapter describes the purpose of reporting a BOM as finished, and explores the methods of accessing the report as a finished process within Microsoft Dynamics AX 2009.

Lessons

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- Report a BOM as Finished
- Max. Report as Finished Form
- Sub-BOMs
- Report as Finished Process
- From the Periodic Folder
- From the Item Form
- From the BOM Journal

Procedures

- Running Periodic Report as Finished Batch Jobs
- Reporting a BOM as Finished from the Item Form
- Reporting a BOM as Finished from the BOM Journal
- Reviewing and Posting Reported as Finished BOM Items

Chapter 9: Reports and Other BOM Functionality

This chapter describes the standard BOM reports in Microsoft Dynamics AX 2009 and other BOM functionality including changing and checking BOMs, and sorting BOM lines.

Lessons

- Standard BOM Reports
- Lines Report
- Where-used Report
- Where-used Inquiry from the Item Form
- Where-used Inquiry from the BOM Line Form
- BOM Calculation Report
- Other BOM Functionality
- Changing BOMs
- Checking BOMs
- Sorting BOM Lines

Procedures

- Generating a BOM Calculation Report from the Item Form
- Generating a BOM Calculation Report from the Periodic Folder
- Generating a BOM Calculation Report from a Sales Order
- Checking BOMs Automatically
- Checking BOMs Manually
- Sorting BOM Lines with the Sorting Function
- Sorting BOM Lines with the Standard Sorting Function

At Course Completion

- Create Purchase and Sales orders
- Create and manage inventory and inventory dimensions
- Post Purchase and Sales transactions
- Assign and manage serial and batch numbers
- Allow for over/under delivery of goods
- Assign miscellaneous charges

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- Set up and manage quarantine management functionality
- Assign ABC Classifications to items
- Report on inventory, sales, and purchasing activities
- Understand the role of item registration during the pick process
- Register serialized and batch inventory
- Reverse and split a pick
- Edit Item dimensions during picking
- Manually reserve inventory
- Set up automatic and explosion inventory reservation
- Query, cancel, or change a reservation
- Use the Marking functionality to link item issues to receipts
- Create Vendor returns
- Create Return actions
- Create Customer credit notes
- Set up, activate, and modify Customer and Vendor trade agreements
- Understand Customer and Vendor Price/Discount groups
- Set up and use Supplementary items
- Understand the issues involved in inventory costing
- Identify different inventory models and the effects these have on inventory valuation
- Close inventory and perform inventory recalculations
- Perform manual adjustments to transactions and on hand
- Use inventory costing and adjustment reports
- Understand the use of journals to make inventory adjustments
- Understand how to use the Counting journal to support and adjust physical inventory counts
- Describe Microsoft Dynamics AX 4.0 Bill of Materials concepts, forms, and functionality
- Outline the standard BOM creation processes
- Create and edit simple BOMs
- Explain the concepts, purposes, and processes of BOM versions
- Describe and create quantity-dependent BOMs
- Explain the purpose and use of BOM and Item configurations
- Outline the BOM calculation structure, including its set up and processing
- Create sales orders from configurable BOMs
- Set up and describe constant and variable scrap on the BOM
- Explain and set up measurement configuration on the BOM
- Outline the purpose and process of reporting a BOM as finished
- Describe standard Microsoft Dynamics AX 4.0 BOM reports
- Change and check BOMs
- Sort BOM lines

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