Dynamics AX 2012 Trade & Logistics

COURSE OVERIEW

About this Course

Supply Chain Foundation in Microsoft Dynamics AX 2012, provides students with the necessary tools and resources to perform basic tasks in the trade and inventory flow in Microsoft Dynamics AX 2012. Distribution and Trade in Microsoft Dynamics AX 2012, introduces advanced Trade & Logistics functionality. This course builds on information provided in the Supply Chain Foundation in Microsoft Dynamics AX 2012 course.

COURSE OUTLINE
Supply Chain Foundation

- ✓ Overview of AX 2012
- ✓ Overview – Supply Chain Management
- ✓ Product Information Management
- ✓ Inventory Management Setup
- ✓ Purchase Orders
- ✓ Serial and Batch Numbers
- ✓ Sales Orders
- ✓ Quality Management
- ✓ Inventory Journals

Distribution and Trade

- ✓ Overview – Distribution and Trade
- ✓ Over/Under Delivery and Charges
- ✓ Customer and Vendor Agreements
- ✓ Item Arrival and Registration
- ✓ Quarantine Management
- ✓ Vendor Returns
- ✓ Sales Quotations
- ✓ Item Reservations
- ✓ Sales Order Picking
- ✓ Customer Returns
- ✓ Transfer Orders
- ✓ Reports

Bills of Materials

- ✓ Bills of Materials Overview
- ✓ Creating Simple BOMs
- ✓ Creation BOMs with Versions
- ✓ Working with BOM and Item Configurations
- ✓ Sales Orders and BOMs
- ✓ Scrap and Measurement
- ✓ Report a BOM as Finished
- ✓ Reports and other BOM Functionality

Detailed Course Break-up:

Introduction
- ✓ ·Logistics and Trade Definition
- ✓ ·Inventory Management
- ✓ ·Microsoft Dynamics AX 4.0: Physical and Financial Inventory
- ✓ ·Understanding the information Flow in Microsoft Dynamics

Working with Purchase and Sales Orders
- ✓ ·Purchase order - Simple view
- ✓ ·Create Purchase Order lines
- ✓ ·Purchase Orders - Advanced view
- ✓ ·Purchase Order Types
- ✓ ·Sale Order Simple and Advanced view
- ✓ ·Sales Order types
- ✓ ·Purchase and Sales Parameters
- ✓ ·Multiple ship to functionality
- ✓ ·Enhanced delivery date control
- ✓ ·Direct delivery

Quotations
- ✓ ·Setup a Sales Quotation
- ✓ ·Work with Quotations
- ✓ ·Various Quotation functions

Inventory
- ✓ ·Item Groups
- ✓ ·Inventory Model Groups
- ✓ ·Dimension Groups
- ✓ ·Inventory Parameters
- ✓ ·Creating Items
- ✓ ·Units of measure and setting up unit conversion
- ✓ ·Warehouse Management

✓··Setting Purchase, Cost and Sales Pricing of Items

Sales and Purchase Order

✓··What is Posting ?

✓··Post Purchase Orders

✓··Updating sales Order

✓··Sales Order Posting Profile

✓··Purchase Order Posting Profile

Serial and Batch Numbers

✓··Setting up Serial and Batch Numbers as Inventory Dimensions

✓··Manually allocating Serial and / or Batch Numbers

✓··Automatically allocating Serial and / or Batch Numbers

✓··Creating Number groups Automatic allocation

✓··Understanding Tracing

✓··Tracing the Receipts and Issue Serialized Items

✓··Trace inventory dimensions

✓··Changing Serial & Batch Numbers

✓··Edit Dimension Forms

✓··Transfer Journal

Over/ Under Delivery and Miscellaneous Charges

✓··Over/Under delivery Setup

✓··Parameter Setup

✓··Item Setup

✓··Over/Under delivery Transactions

✓··Miscellaneous Charges

✓··Fixed Charges

✓··Miscellaneous Charges Codes

✓··Setting Up Manual Miscellaneous Charges

✓··Setting Up Automatically Miscellaneous Charges

✓··Editing Automatic Miscellaneous Charges

✓··Miscellaneous charges Transactions

✓··Landed Cost Miscellaneous Charges

Quarantine Management

✓··Quarantine Management Setup

✓··Quarantine Warehouse Setup

✓··Quarantine Parameters

✓··Quarantine Item Management

✓··Quarantine Processing

✓··Manual Quarantine Orders

✓··Automatic Quarantine Management

✓··Quarantine Order Processing Options

✓··Inventory Transactions on Quarantine Items

Reporting and Statistics
✓··ABC Inventory Classification
✓··Pareto's Law
✓··ABC Codes
✓··ABC Classification Job
✓··Purchase Order Analysis
✓··Deciding Item Coverage
✓··Sales Order Analysis

Trade & Logistic II
Item Registration
✓··Item Registration Setup
✓··Automatic and Manual Registration of a Pick
✓··Item registration of serialized and batch inventory
✓··Editing, Reversing and split picks
✓··Release Sales order picking

Reservations and Marking
✓··Reservation, Dimensions and Transactions
✓··Reservation parameters
✓··Manual Reservations
✓··Automatic Reservations
✓··Explosion Reservations
✓··View Reservations
✓··Lock Reservations
✓··Cancel Reservations
✓··Batch Reservations
✓··Picking Reserved Items
✓··Marking

Item Returns
✓··Vendor Returns
✓··Vendor Returns with serialized Items
✓··Customer Returns
✓··Customer serialized Returns

Customer and Vendor Trade Agreements
✓··Setup Trade Agreements
✓··Activate Trade Agreements
✓··Trade Agreement Parameters
✓··Make adjustments to Agreements
✓··Supplementary Items

Inventory Closing

- ✓ ··The fundamental Costing issue
- ✓ ··Standard Cost Price
- ✓ ··Estimated Inventory values before closing
- ✓ ··Packing slip updates and inventory value
- ✓ ··Inventory models used for closing
- ✓ ··The dimension group parameter financial
- ✓ ··Inventory and inventory closing
- ✓ ··Pre- closing actions
- ✓ ··Closing Inventory
- ✓ ··Inventory recalculation
- ✓ ··Manual inventory adjustments
- ✓ ··Inventory costing and adjusting reports

Inventory Journal

- ✓ ··Inventory Journal general setup
- ✓ ··Journal Names
- ✓ ··Dimensions and more
- ✓ ··Posting
- ✓ ··Profit/Loss and movement Journal
- ✓ ··Transfer Journal
- ✓ ··Bills of Material Journal
- ✓ ··Counting Journals Setup
- ✓ ··Warehouse Items
- ✓ ··Counting groups
- ✓ ··Creating and processing a counting journal
- ✓ ··Tag counting Journal

Transfer Orders

- ✓ ··Setup for transfer orders
- ✓ ··Using the Transfer orders form
- ✓ ··Picking items for a transfer order
- ✓ ··Shipping and receiving a transfer order

Commission

- ✓ ··Commission setup
- ✓ ··Commission posting
- ✓ ··Commission customer group and commission
- ✓ ··Item Group
- ✓ ··Commission sales group
- ✓ ··Commission calculation
- ✓ ··Viewing commission transactions
- ✓ ··Commission transaction for item returns