



Microsoft Dynamic Functional CRM

Introduction

- Introduction to ERP and its features
- Administration Module setups >> Users
- Understanding the information Flow in Microsoft Dynamics 365

Basic

- Legal entities
- Operating units
- Number sequences
- Currencies
- Calendar
- Chart of accounts
- Account structure
- Ledger

Journals

- Creating journal names with various journal types
- Create and post General journal

Inventory

- Item Group
- Item Model Group
- Dimension Groups
- Inventory Parameters
- Creating Items
- Units of measure and setting up unit conversion
- Inventory Management
- Setting Purchase, Cost and Sales Pricing of Items

Procurement basic setups

- Terms of payment
- Method of payment
- Vendor group

- Vendor
- Vendor posting profile

Sales basic setups

- Customer group
- Customer
- Customer posting profile

Working with Purchase and Sales Orders

- Purchase order - Simple view
- Create Purchase Order lines
- Post Purchase orders
- 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
- Create and post Invoice Journals
- Create Free text invoice

Payment Process

- Vendor payments and its setup
- Customer payments and its setup

Quotations

- Setup a Sales Quotation
- Work with Quotations
- Various Quotation functions
- Request for quotation

Procurement category

- Category and its significance
- Purchasing Policies
- Purchase requisition process



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
- 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

Trade & Logistic Item Registration

- Item Registration Setup
- Automatic and Manual Registration of a Pick
- Item registration of serialized and batch inventory

Reservations

- Reservation, Dimensions and Transactions
- Reservation parameters
- Manual Reservations
- Automatic Reservations
- View Reservations
- Lock Reservations
- Cancel Reservations
- Batch Reservations
- Picking Reserved Items

Item Returns

- Vendor Returns
- Vendor Returns with serialized Items
- Customer Returns
- Customer serialized Returns
- Disposition codes

Customer and Vendor Trade Agreements

- Setup Trade Agreements
- Activate Trade Agreements
- Trade Agreement Parameters
- Make adjustments to Agreements
- Supplementary Items

Inventory Journal

- Inventory Journal general setup
- Journal Names
- Dimensions and more
- Posting
- Profit/Loss(Adjustment) 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

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
- Inventory and inventory closing
- Pre- closing actions
- Closing Inventory
- Inventory recalculation
- Manual inventory adjustments
- Inventory costing and adjusting reports

Other Important Functional Process / Features.

- Workflow creation
- Purchase requisition
- Functional requirement Document samples
- Identifying the GAPS >> GAPS Document
- Creation of Sample Functional Design specs

- Implementation Process
- Test Case Document/Sample and example

