

## **MOC 80306 A Distribution and Trade in Microsoft Dynamics AX 2012**

### **Course Summary**

#### **Description**

This three-day instructor-led course, 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.

#### **Objectives**

At the end of this course, students will be able to:

- Allow for over/under delivery of goods.
- Assign charges.
- Set up and manage quarantine management functionality.
- Recognize the pick process.
- Register serialized and batch inventory.
- Reverse and split a pick.
- Edit Item dimensions during picking.
- Create Vendor returns, Return actions, and Manage Customer returns.
- Manually reserve inventory.
- Set up automatic and explosion inventory reservation.
- Query, cancel, or change a reservation.
- Set up, activate, and modify Customer and Vendor trade agreements.
- Understand Customer and Vendor Price/Discount groups.
- Set up and use Supplementary items.
- Work with sales quotations.
- Define various sales quotation functions.
- Set up transfer orders.
- Create a transfer order.
- Pick items before transfer between warehouses.
- Transfer items between warehouses.
- Set up the elements of a commission agreement.
- View commission transactions from a financially updated sales order.
- Understand the ABC Inventory Classification System.
- Understand how to use the Physical inventory by inventory dimension report.
- Understand how to use reports in forecasting sales and purchase expectations.

#### **Topics**

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

#### **Audience**

This course is intended for customers and partners that want to learn more advanced features and functions offered in Microsoft Dynamics AX 2012 Trade and Distribution feature areas. The course is targeted toward sales and purchase managers, salespeople, purchasers, and other users in organizations that are responsible for the setup and administration of trade and logistics, inventory management, and quarantine management functionality.

## **MOC 80306 A Distribution and Trade in Microsoft Dynamics AX 2012**

### **Course Summary (cont'd)**

#### **Prerequisites**

Before attending this course, students must have:

- General knowledge of Microsoft Windows
- The ability to use Microsoft Dynamics AX 2012 for basic processing.
- Completed the Supply Chain Foundation in Microsoft Dynamics AX 2012 course.

In addition, students should have:

- Knowledge of trade and logistics.
- Knowledge of inventory management concepts.

#### **Duration**

Three days

## MOC 80306 A Distribution and Trade in Microsoft Dynamics AX 2012

### Course Outline

#### I. Overview

This module provides an overview of the content of the Distribution and Trade in Microsoft Dynamics AX 2012 course.

- A. Distribution and Trade

#### II. Over/Under Delivery and Charges

This module examines how to handle differences between ordered and received or delivered quantities in Microsoft Dynamics AX 2012. Also, it discusses how to handle 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.

- A. Introduction
- B. Over/Under Delivery
- C. Charges
- D. Price Charges
- E. Charges Codes
- F. Manual Charges
- G. Automatic Charges

**Lab: Use Over/Under Delivery with Purchase Orders**

**Lab: Use Under Delivery with Sales**

**Lab: Create a Charges Code**

**Lab: Manual Setup of Charges**

**Lab: Create a Customer Charges Group**

**Lab: Set Up Automatic Charges**

#### III. Customer and Vendor Agreements

This module discusses Customer and Vendor 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. It 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.

- A. Activate Trade Agreements
- B. Set Up Trade Agreements
- C. Trade Agreements Parameters
- D. Supplementary Items
- E. Purchase and Sales Agreements

**Lab: Customer Trade Agreement Setup**

**Lab: Set Up Smart Rounding**

**Lab: Using Smart Rounding**

**Lab: Supplementary Items**

**Lab: Sales Agreements**

#### IV. Item Arrival Registration

This module is designed to describe the features in Microsoft Dynamics AX 2012 that support receiving items in a company.

- A. Introduction
- B. Item Registration Setup
- C. Item Arrival

**Lab: Manage an Item Arrival**

#### V. Quarantine Management

This module examines how Microsoft Dynamics AX 2012 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 chapter.

- A. Introduction
- B. Quarantine Warehouse Setup Parameters
- C. Quarantine Item Management
- D. Inventory Transactions on Quarantine Items

**Lab: Create Quarantine Inventory**

**Lab: Purchase to Quarantine Inventory**

#### VI. Vendor Returns

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

- A. Introduction
- B. Create Vendor Returns
- C. Create Vendor Returns for Serialized Items

**Lab: Working with Vendor Returns**

**Lab: Complete a Vendor Return Using Returned Order Type**

#### VII. Sales Quotations

This module 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

- A. Introduction
- B. Sales Quotation Setup
- C. Working with Quotations
- D. Additional Sales Quotation Features

## MOC 80306 A Distribution and Trade in Microsoft Dynamics AX 2012

### Course Outline (cont'd)

**Lab: Create a Quotation and Convert it to a Sales Order**

**Lab: Create a Quotation Template**

**Lab: Mass Create Quotations**

#### VIII. Item Reservations

This module is designed to explain the Reservations functionality in Microsoft Dynamics AX 2012.

##### IX. Introduction

- A. Why Perform Reservations and What You Can Reserve?
- B. Manual Reservations
- C. Automatic Reservations
- D. Automatic Reservations and Selection of Batch
- E. Explosion Reservations
- F. View Reservations
- G. Lock Reservations
- H. Cancel Reservations
- I. Batch Reservation
- J. Picking Reserved Items

**Lab: Manual Reservation**

**Lab: Automatic Reservation**

#### X. Sales Order Picking

This module introduces the sales picking process

- A. Introduction
- B. Enable Sales Order Picking and Setup
- C. Release Sales Order Picking
- D. Automatic Registration of a Pick
- E. Manual Registration of a Pick
- F. Item Pick Registration of a Serial and Batch Inventory
- G. Edit, Reverse and Split a Pick

**Lab: Item Pick Registration of Serialized Inventory**

**Lab: Edit, Reverse, and Split a Pick**

#### XI. Customer Returns

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

- A. Introduction
- B. Set up Customer Returns

C. Create a Return Order

D. Item Arrival and Receipt Registration

E. Quarantine Orders

F. Replacement Orders

**Lab: Create a Return Order**

**Lab: Process a Return Order**

**Lab: Generate the Packing Slip and Invoice for a Return Order**

#### XII. Commissions

This module introduces the steps that are required to set up sales commissions for salespeople. It also covers how to inquire on the calculated commissions from posted sales transactions.

- A. Introduction
- B. Set Up a Commission
- C. View Commission Transactions
- D. Commission Transactions For Return Items

**Lab: Commission Calculations**

**Lab: Commission Transactions**

#### XIII. Transfer Orders

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

- A. Introduction
- B. Set Up of Transfer Orders
- C. Using the Transfer order Form
- D. Picking Items For a Transfer Order
- E. Shipping and Receiving a Transfer Order

**Lab: Create a Transfer Order**

**Lab: Pick, Ship and Receive a Transfer Order**

#### XIV. Reports

This module introduces how the ABC Inventory classification system is used in Microsoft Dynamics AX 2012. It also discusses how to use Microsoft Dynamics AX 2012 reports to help in forecasting sales and purchase expectations.

- A. Introduction
- B. ABC Inventory Classification
- C. Inventory Reports
- D. Forecasting Reports

**Lab: Run an ABC Classification Report**

**Lab: Reports**