



Course Syllabus

Microsoft® Business Solutions–Axapta® Trade & Logistics, Series 2

Elements of this syllabus are subject to change.

Key Data

Course #: 8353A

Number of Days: 2

Format: Instructor-Led

Certification Exams: None

Certification Track: None

This course syllabus should be used to determine whether the course is appropriate for the students, based on their current skills and technical training needs.

Course content, prices, and availability are subject to change without notice.

Introduction

The two-day Microsoft® Business Solutions–Axapta® Trade & Logistics, Series 2, course introduces advanced Trade & Logistics functionality in Axapta. Series 2 builds on information taught in Series 1, which serves as an introduction to Microsoft Axapta Trade & Logistics functionality. Series 2 covers Item Registration, Item Reservations and Marking, Item Returns, Inter-Company Sales, and Purchasing, Customer Trade Agreements, Supplementary Items, Vendor Trade Agreements, Inventory Journals, and Commission.

Audience

This course is for customers wishing to learn more advanced features and functions offered in Microsoft Axapta Trade & Logistics. This course is intended to follow Microsoft Axapta Trade & Logistics, Series 1.

The class is targeted toward sales and purchase managers, salespeople, purchasers, and others in an organization who are responsible for the setup and administration of trade and logistics, and inventory management functionality.

At Course Completion

After completing this course, students will be able to:

- 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
- Understand reservations
- Set up reservations
- Manually reserve inventory, and query, cancel, or change a reservation
- Create Vendor returns
- Create Return actions
- Create Customer credit notes
- Set up Inter-Company transactions
- Create Inter-Company purchase and sales orders within single- and multi-company account environments
- Assign and manage serial and batch numbers
- Set up, activate, and modify Customer trade agreements
- Understand Customer Price/Discount groups
- Set up and use Supplementary items
- Set up activate, and modify Vendor trade agreements
- Understand Vendor Price/Discount Groups
- Understand the use of journals to make inventory adjustments
- Understand how to use the Counting journal to support and adjust physical inventory counts

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- Use Tag Counting to count physical inventory
- Set up sale commission based on percentage of revenue or contribution margin
- Understand and view commission transactions created during Invoice updating a Sales order

Prerequisites

Before attending this course, students must have:

- General knowledge of Microsoft® Windows®
- The ability to use Microsoft Axapta for basic processing
- Completed Microsoft Axapta Trade & Logistics, Series 1

In addition, students should have:

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

Introduction

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

Lessons
<ul style="list-style-type: none">▪ Important Definitions▪ Understanding the Information Flow in Axapta

After completing this chapter, students will be able to:

- Understand the purpose of the Trade & Logistics Series 2 training course
- Define Trade and Logistics, Inventory, and Inventory Management

Chapter 1: Item Registration

This chapter entitled Item Registration is designed to introduce item registration during the pick process as a preparation to Reservations and Marking, which is discussed in Chapter 2.

Lessons
<ul style="list-style-type: none">▪ Item Registration Setup▪ Automatic Registration of a Pick▪ Manual Registration of a Pick▪ Item Registration of Serialized Inventory▪ Item Registration of Batch Inventory▪ Unpick and Edit Picks▪ Split Picks
Lab 1: Working with Item Registration Setup
<ul style="list-style-type: none">▪ Setting up the Manual Pick Registration▪ Manual Serialized Registration▪ Reversing a Pick

After completing this chapter, students will be able to:

- Understand the role of item registration during the pick process
- Register serialized inventory
- Register batch inventory
- Edit item dimensions values during the pick process
- Reverse a pick
- Split a pick

Chapter 2: Item Reservations and Marking

This chapter is a follow-up to Item Registration covered in Chapter 1 and is designed to introduce Reservations and Marking functionality in Microsoft Axapta.

Lessons
<ul style="list-style-type: none">▪ Manual Reservations▪ Reservation Options▪ Reservation Setup▪ Reservation Dialog Box▪ View Reservations▪ Cancel Reservations▪ Batch Reservation▪ Automatic Reservations▪ Automatic Reservations with Bills of Material▪ Picking Reserved Items▪ Marking and Cost Price Calculation▪ Marking Dialog Box▪ Using Edit Dimensions for Marking
Lab 1: Reservations & Marking Setup
<ul style="list-style-type: none">▪ Create Item▪ The Purchase Order▪ The Sales Order▪ Dimension Editing

After completing this chapter, students will be able to:

- Understand the three methods of reservations
- Set up reservations
- Manually reserve inventory
- View or query a reservation
- Cancel or change a reservation

Chapter 3: Item Returns

In this chapter you learn how to return a product to a vendor, as well as accept a product return from a customer. In both cases, you will be shown how to handle the returns with and without serial and batch numbers attached.

Lessons
<ul style="list-style-type: none"> ▪ Vendor Returns ▪ Negative Quantity ▪ Copy Original Purchase Invoice ▪ Returned Item ▪ Vendor Returns with Serialized Items ▪ Customer Returns ▪ Return Actions ▪ Damaged Items ▪ Customer Serialized Returns
Lab 1: Working with Item Returns
<ul style="list-style-type: none"> ▪ Setting up a Return Action ▪ Vendor Return using order Type "Returned Item" ▪ Customer Return of a Non-Resalable Serialized item

After completing this chapter, students will be able to:

- Create a Vendor Return Using a Negative Quantity
- Create a Vendor Return Using the Create Credit Note Feature
- Create a Vendor Return Using Purchase Order Type 'Returned Item'
- Return a Serialized Item to a Vendor
- Return an Item with Multiple Serial Numbers to a Vendor
- Create and Understand Return Actions
- Create a Customer Credit Note with resalable inventory
- Create a Customer Credit Note with non-resalable inventory
- Create a Credit Note with a serialized item

Chapter 4: Inter-Company Sales and Purchasing

In this chapter you will learn how the Inter-company feature of Microsoft Axapta handles the internal trade in companies that have more than one subsidiary or that have warehouses in more than one location.

Lessons
<ul style="list-style-type: none"> ▪ Inter-Company Setup ▪ User Access Rights ▪ Organization Common Codes ▪ Organization Document Setup ▪ External Codes ▪ Company Items ▪ Inter-Company Transactions ▪ Single Company Transactions ▪ Multi-Company Transactions
Lab 1: Inter-Company Sales and Purchasing
<ul style="list-style-type: none"> ▪ Single Company Solution ▪ Multi-Company Solution

After completing this chapter, students will be able:

- To understand the steps necessary to set up transactions in the Microsoft Axapta Inter-company solution.
- To understand how to create inter-company purchase and sales orders within single and multi-company account environments.

Chapter 5: Customer Trade Agreements and Supplementary Items

In this chapter, you will learn about Customer Trade Agreements, which are fixed price agreements that you enter into with one or more customers for the sale of individual or multiple items. This chapter will also cover Supplementary Items, which are complimentary or supplementary items sold to a customer or customer group, or sold with an item or item group.

Lessons
<ul style="list-style-type: none"> ▪ Customer Trade Agreement Setup ▪ Price/Discount Groups ▪ Activating Customer Trade Agreements ▪ Trade Agreement Parameters ▪ Making Adjustments to Agreements ▪ Supplementary Items Setup ▪ Using Supplementary Items
Lab 1: Customer Trade Agreement Setup
<ul style="list-style-type: none"> ▪ Test Your Knowledge ▪ Trade Agreement Setup, Scenario 1 ▪ Trade Agreement Setup, Scenario 2
Lab 2: Making Adjustments to Agreements
<ul style="list-style-type: none"> ▪ Test Your Knowledge ▪ Making Adjustments to Agreements, Scenario 1
Lab 3: Supplementary Items
<ul style="list-style-type: none"> ▪ Test Your Knowledge ▪ Supplementary Items, Scenario 1

After completing this chapter, students will:

- Understand the procedure for Customer Trade Agreement Setup and the steps necessary to set up and activate Customer Trade Agreements.
- Understand Price/Discount Groups and the four types of Customer Trade Agreements that are available in Microsoft Axapta.
- Understand how to create, copy, or modify trade agreements through the use of Trade Agreement Journals.
- Understand the setting up and use of Supplementary Items, which are items to be sold or suggested in concert with other items.

Chapter 6: Vendor Trade Agreements

This chapter will introduce Vendor trade agreements. Vendor trade agreements are fixed price agreements that may be entered into with one or more suppliers for the purchase of individual or multiple items.

Lessons
<ul style="list-style-type: none"> ▪ Vendor Trade Agreement Setup ▪ Price/Discount Groups ▪ Activating Vendor Trade Agreements ▪ Vendor Trade Agreement Parameters ▪ Inventory Recalculation ▪ Making Adjustments to Agreements
Test Your Skills
<ul style="list-style-type: none"> ▪ Lessons Learned

After completing this chapter, students will be able:

- Understand the steps necessary to set up and activate Vendor trade agreements.
- Understand Price/Discount Groups and the four types of Vendor trade agreements that are available in Microsoft Axapta.
- Understand how to create, copy, or modify trade agreements through the use of Trade agreement journals.

Chapter 7: Inventory Journals

In this chapter, you will gain an understanding of Inventory journals in Microsoft Axapta by reviewing the initial setup as well as 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
<ul style="list-style-type: none"> ▪ Inventory Journals General Setup ▪ Journal Names ▪ Dimensions and More ▪ Posting ▪ Profit/Loss and Movement Journals ▪ Transfer Journals ▪ Bills of Material Journals ▪ Counting Journals Setup ▪ Warehouse Items ▪ Counting Groups ▪ Creating and Processing a Counting Journal ▪ Tag Counting Journals
Lab 1: Inventory Journals
<ul style="list-style-type: none"> ▪ Movement Journal Scenario ▪ BOM Journal Scenario ▪ Tag Counting Journal Scenario

After completing this chapter, students will be able to:

- Understand how the Movement and Profit/Loss Inventory journals are used to make inventory adjustments.
- Post an inventory write-off from a Profit/Loss inventory journal.
- Understand how to create and post a Bill of material journal.
- Understand how Warehouse items and Counting groups are used to count a group of Items.
- Use the Counting journal to post physical inventory count adjustments.
- Understand how Axapta facilitates the Tag counting method of counting physical inventory.

Chapter 8: Commission

This chapter introduces the steps necessary to set up sales commissions for salespeople. It will also cover how to inquire on the calculated commissions from posted sales transactions.

Lessons
<ul style="list-style-type: none"> ▪ Commission Setup ▪ Commission Posting ▪ Commission Customer Group and Commission Item Group ▪ Commission Sales Group ▪ Commission Calculation ▪ Commission Transactions ▪ Sales Commission ▪ Returns on Commission
Lab 1: Commission Setup
<ul style="list-style-type: none"> ▪ Commission Setup Scenario
Lab 2: Commission Transactions
<ul style="list-style-type: none"> ▪ Commission Transactions Scenario ▪ Return on Commission Scenario

After completing this chapter, students will be able to:

- Set up sales commissions for a sales team based on a percentage of revenue or contribution margin.
- Understand and view the commission transactions created from invoice-updating a Sales order.
- Understand and view the resulting commission transactions created from a Returned Item.