



## Microsoft Dynamics Curriculum: Sales Tips

### Course 80025, Trade and Logistics II in Microsoft Dynamics AX 2009

#### Course data

**Number:** 80025

**Length:** Two days

**Available:** September 2008

**Languages:**

- English (United States)

**Format:** classroom training

**Student materials:**

- Student workbook

**Certification exams:**

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

**Certification track:**

- Trade and Logistics

**Note** These course sales tips must be used to determine whether the course is appropriate for students, based on their current skills and technical training needs.

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

#### Course description

The two-day Microsoft Dynamics® AX 2009 Trade & Logistics II, 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.

#### Selling proposition

Learning to keep accurate records of all your financial data and to access it for timely business information promotes an assurance that a complete audit trail underlies the business transactions. This is an important course for all end-users, consultants, and implementers who want to learn about the core functionality included in the Trade & Logistics area of Microsoft Dynamics AX 2009.

Classroom training provides serious, in-depth learning through hands-on interaction. From demonstrations to presentations to classroom activities, hands-on experience is received with instruction from a certified staff of experts and increases productivity and efficiency by learning tips and tricks from product specialists.

#### Audience

The intended audience for this course includes partners wishing to learn how to set up Trade & Logistics in Microsoft Dynamics AX 2009 for their customers. This course is intended to follow the Microsoft Dynamics® AX 2009 Trade & Logistics, Series 1.

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

#### Primary course benefits

The course completion objectives are for students to:

- 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.
- Create and accept request for quote.
- Record and compare request for quote replies.
- Create and process a purchase requisition.
- Perform the necessary setups for purchase requisitions.
- Define user groups and set up security rights for a purchase requisition.

- Set up the purchase requisition workflow.
- Define setup information for sales quotation.
- Work with sales quotation.
- Define various sales quotation functions.
- Set up quality control.
- Use quality orders.
- Set up quality management.
- Understand non conformances.
- Create setup for transfer orders.
- Create a transfer order.
- Pick items before transfer between warehouses.
- Transfer items between warehouses.
- Set up the elements of commission agreement.
- View commission transactions from a financially updated sales order.
- View the resulting commission transactions created from item returns.
- Create and process a Profit/Loss and inventory movement journal.
- Create and process a transfer journal.
- Create and process a Bill of Materials (BOM) journal.
- Understand the use of journals to make inventory adjustments.
- Understand how to use the Counting journal to support and adjust physical inventory counts.
- Use Tag Counting to count physical inventory.
- Understand how the ABC inventory classification system is used in Microsoft Dynamics AX 2009.
- Set up manual ABC classification to a single item.
- Set up automatic ABC classification for all items.
- Use Microsoft Dynamics AX 2009 reports to assist in forecasting sales and purchase expectations.

## 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.

In addition, students should have:

- Basic knowledge of trade and logistics.
- Basic knowledge of inventory management concepts.

## About the technology

Microsoft Dynamics AX 2009 delivers accounting applications that can easily be customized for a customer's specific needs. Deployed in single or multi-company scenarios, Microsoft Dynamics AX 2009 users can easily retrieve the comprehensive business information they need, the way they need it. By natively supporting e-business functionality, critical information can be securely extended to any user, anywhere and at any time. Microsoft Dynamics AX 4.0 is optimized for the following Microsoft technologies:

**Operating System Platform:** Microsoft® Windows® Server 2003 and Microsoft® Windows® XP

**Database Platform:** Microsoft® SQL Server® 2000

### **Essential related courses**

- Introduction
- Trade and Logistics I

### **Training resources**

- [Read the course syllabus.](#)
- [Learn more about Microsoft Dynamics.](#)
- [Find additional training and certification information.](#)