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Microsoft Implementations and Functional Trainings

Microsoft Dynamics 365 Finance & Operations

Navigation and Personalization
Benefits of Moving to D365, Navigation Concepts, Dashboards, Workspaces, Navigation Pane, Workflow, Toolbars and Menus, Views, Modules, Personalization, User Options, Visual Options, Preferences, Mobile Workspaces.

Supply Chain Management
Product Management, Master Planning, Sales Order Management, Procurement Sourcing, Asset management, Warehouse Management, Manufacturing.

Products and Inventory Management
Item Groups, Item Model Group, Storage and Tracking Dimensions, Product Dimensions, Inventory Tracking, Unit of Measure, Owner Dimensions, Released Products, Product Variants, Product Attributes, Category Hierarchies, Sites, Warehouses, Ailes, Locations, Boxing Logic, Picking Workbench Profiles, Inventory Journals and Types, Counting Journals, Cycle Counts, Transfer Orders, Picking, Shipping, Receiving, ABC Classifications, Inventory Aging Reports, Close Process.

Engineering Change Management
Structure and Discipline to Products data management process, Version Control and ECM in Products, BOMS, and Routes, Enhanced Product Release, Product Readiness Control and Ploicy, Product Life Cycle, Engineering Change Requests, Engineering Change Orders, Engineering Attributes, Engineering Workflow, and Engineering Organizations.

Warehouse Management
Basic vs. Advanced WMS, Production Waves, Raw Materials, Releasing Production Orders, Default Locations, Input Locations, Finished Goods, Wave Templates, Location Directives, Work Templates, Route Operations, Mobile Devices.

Order to Cash Optimization
Automating O2C, Order Management, Cash Management, Order Fulfillment, Transportation and Shipping, Invoicing, Accounts Receivables, Credit and Collections, Reporting and Business Intelligence.

Procure to Purchase and Pay Optimization
Purchase Requisition, Request for Quotation, Purchase Order, Products Received, Invoice Generated, Vendor Payments.

Project Management Accounting
Projects (Navigation, Creating, Hierarchies, Copying, Stages), Project Types (Time and Materials, Fixed Price, Internal, Cost, Investment, Time), Project Transactions, Categories, Sales Price Models, Pricing, Groups, Ledger Posting Setup, Project Journals (Hours, Expense,

Fee, Item, Beginning Balance, Journal Approvals), Project Invoices and Formats, Credit Notes, Process Flow, Print Management,

Advanced Project Accounting and Analysis
WIP, Accruals, Cost to Complete Methods, Total Cost and Forecast, Remaining Budget, Completed Contract, Continuous Revenue Recognition, Project Analysis (Inquiries, Reports, Workspace, Power BI), Invoice Control, Cost Control, WIP %, Consumption Report, Cash Flow Report.

Retail - Channel Management and Corporate Operations
Architecture, HQ/Channel Setup, Omni-Channel, Retail Channels, MPOS, Cloud POS, Online Store and Components, Organization Model/Hierarchy, Operating Units, Store Creation Process, Call Centers, Store Locator Groups, Info Codes, Email Notification Profiles, Shared Parameters, Sales Tax, Payment Connectors, Channel Payment Methods, POS Setup, POS Offline Profiles, Receipt Format Masks, Hardware Profiles, POS Considerations, Retail POS Layout, Keyboard Mapping Groups, Workers and Security, POS Permission Groups, Global Address Books, Retail Security Roles, Loyalty Reward Points, Price Groups, Loyalty Transactions, Retail Channel Transactions, Gif Cards, End of Day Operations, Statement Posting Process.

Retail - Merchandising and Inventory Management
Workflow, Unit of Measure, Product Variants, Product Dimensions, Dimension Groups, Retail Categories, Barcodes and Labels, Category Hierarchies, Product Attributes, Released Products and Catalogs, Catalog Approval Flow, Up-Selling and Cross-Selling, Catalog Source Codes, Assortments, Assortments Scheduler, Modes of Delivery, Pricing and Discounts, Vendor Catalogs, Replenishments, Service Categories, Cross-Docking, Product Kits, Inventory Periodic Functions, Product Availability, Product Relationships.

Retail - Call Centers
Configuration, RFM (Recency, Frequency, Monetary) Analysis, Order Holds, Fraud Rules, Catalog Management, Target Markets, Pricing and Discounts, Coupons, Customer Management, Customer Merge, Product Management, Gift Cards, Sales Order Management, Order Notes, Price Match Process, History Purge Process, Credit Card Processing, Credit Card Workbenches, Refund Check Process, Check Holds, Installment Billing, Returns and RMA Process, Continuity Programs, Direct Delivery (Drop-ship), Picking Workbench, Picking Workflow.

Retail - Point of Sale
Cahier's Tasks, Time Clock, Tender Process, Void Transactions, Returns, Gif Cards, Loyalty Process, Inventory Lookup, Store Manager's Tasks, Shift Operations, Opening Procedures, Overrides, Closing Procedures, Safe and Bank Drops, X and Z Reports, Income and Expense Accounts, Store Inventory Manager's Tasks, Picking and Receiving, Stock Counts, Disassemble a Kit at the POS, Reports and Analysis, Power BI.

Manufacturing - Managing Production
Sites, Warehouses, Production Units, Working Time Templates, Resources, Resource Groups, Workers, Production Orders, Stages of Pre-Production, Job Card Terminal/Device, Corrections and Reversals, Job Management, Picking Lists, BOM Lines, Production Feedback, Daily Registrations, Monitor Production, Monitor Attendance, BOM Consumption, Flushing Principals, Route Consumption, Allocation Keys, Production Costing, Item Pricing, Costing Versions, Trade Agreements, Standard Costing, Bill of Materials, Operations and Routes,

Route Groups, Cost Groups, Cost Categories, Item Calculations, BOM Calculations, Scrap and Waste Calculations, Reporting as Finished, Ending Production Orders.

Process Production Orders
Create Production Orders, Pre-Production Stages (Estimate, Schedule, Release), Production (Start), Corrections and Reversals, Picking Lists, BOM Lines Picking List, Route and Job Card Journals, Reporting as Finished, Ending Production Orders.

Production Costing
Setting up Item Default Pricing, Item Prices and Costing Versions, Trade Agreements, Standard Costing in Manufacturing, Bill of Materials, Formula Management, Operations and Routes, Item Calculations, Scrap and Waste in Calculations.

Advanced Scheduling for Process Manufacturing and Master Planning
Batch Orders, Batch Order Sequence Configuration, Sequence Planned Batch Orders, Master Planning Considerations.

Configure and Use Process Manufacturing
Core Concepts in Batch Orders, Unified Manufacturing, Manufacturing Principles, Discreate / Process / Lean Manufacturing, Capacity Planning, Integration with General Ledger, IoT Intelligence.

Transportation Management
Analytics, Freight Invoice Management, Freight Reconciliation, Settlements and Adjustments, Scheduling, Dock Management, Warehouse Operations, Transport Documentation, Status Tracking, Transport Orders, Load Planning and Optimization, Load Pricing, PO Management, Carrier Management (Recruitment, Service, Routes, Pricing, Contract), Capacity Planning.

Master Planning Essentials and Intercompany
Master and Forecast Plans, Scheduling Parameters, Run Master Scheduling, Intercompany Planning, Purchase and Sales Order Policies, Planning Groups, Run Intercompany Master Planning.

Accounts Receivables
AR Setups (Method of Payments, Terms of Payment, Cash Discounts, AR Parameters, Customer Groups, Posing Profiles), Sales Order Invoices, Text Invoices, Account Statements, Collection Letters, Interest Calculations and Codes, Aging Periods, Payment Schedules, Cash Receipts, Electronic Payments, Customer Transactions, Deposit Slips.

Accounts Payables
AP Setups (Method of Payments, Terms of Payment, Cash Discounts, AP Parameters, Vendor Groups, Posing Profiles, Payment Schedules), Vendor Invoices, Invoice Matching, Invoice Journals, Voucher Templates, Vendor Payments, Payment Journals, Electronic Payments and Checks, Vendor Transactions, Refund Checks, 1099s.

Cash and Bank Management
C&B Setups (Bank Transaction Types and Groups, Parameters, Purpose Codes, Bank Accounts, C&B Advanced Reconciliation, Electronic Reporting, Checks, Bill of Exchange.

Fixed Assets
Books (Value Models), Asset Types, Parameters, Main Accounts, Asset Groups, Posting Profiles, Reason Codes, Capitalization Threshold, Depreciation Profiles, Depreciation

Conventions, Provision Types, Lending Assets, Bar Codes, Acquisitions, Transaction types, Reversals, Disposals, Adjustments.

General Ledger
GL Setups (Currency, Exchange Rate, Periods and Fiscal Year, Reason Codes, Sales Tax, Calendars, Consolidation Company, Subsidiary Company), Allocations, Financial Dimensions, Account Structures, Chart of Accounts, Main Accounts, Journal Controls, Balance Control Accounts, GL Transactions and Reversals, Journals w/Worflow Approvals, Voucher Templates, Periodic Journals, Ledger Accruals, Intercompany Transactions, Year End Close, Consolidations, Financial Reporting.

Field Services
Introduction, Agreements, Inventory, and Purchasing in D365 for Field Service, Mobile and Dispatch, Setup and Configuration in D365 for Field Service.

Microsoft Power BI

Datasets, Data Model & Warehouse Design, Server Configuration, Administration, Security Roles, M Queries, DirectQuery, DAX (Data Analysis Expressions) Measures and Functions, KPIs, Data Transformations, SQL Views, Fact and Dimension Tables, On/Off Premise Data Gateways, OData Feeds, Mobile-Optimized Reports, D365F&O OOB Power BI Reports (*Actual vs budget, Cash overview, Compensation and benefits, Cost accounting analysis, Credit and collections management, Employee competencies and development, Financial performance, Fixed asset management, Organizational training, Practice manager, Production performance, Purchase spend analysis, Recruiting, Sales and profitability performance, Vendor payments, Warehouse performance, Workforce metrics*).

Microsoft Power Apps

Canvas Apps, Common Data Services, Business Rules, Process Flow, Data Entities, Custom Entities, Model-driven Apps, Power Automate.