Introduction to supply chain management in Dynamics 365 Training

Duration: **1 Day**

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Overview

What Can You Achieve with This Training?

- Understand how **Microsoft Dynamics 365 Supply Chain Management** supports end-to-end supply chain operations.
- Explore how **product information management, inventory, procurement, sales, warehousing, and manufacturing** work together within an ERP environment.
- Discover the role of **Copilot and AI-powered capabilities** in finance, operations, inventory management, and demand forecasting.
- Become familiar with **Power BI, Microsoft 365, and Microsoft Power Platform** integration and reporting options.
- Develop foundational knowledge of **inventory costing, master planning, and planning optimisation**.
- Learn about the shared capabilities of **Dynamics 365 Finance and Operations** applications and their role in unified business processes.

The **Introduction to Supply Chain Management in Dynamics 365 Training** introduces beginners to **Microsoft Dynamics 365 Supply Chain Management** and explains how supply chain functions are managed within an integrated **Enterprise Resource Planning (ERP)** environment.

The programme begins with an overview of **Dynamics 365 Finance and Operations** applications, introducing ERP concepts, the user interface, and features such as **Copilot-driven workflows, AI-powered agents, intelligent reconciliation, and embedded analytics**.

Participants then explore the applications' **reporting and integration capabilities**, including **Power BI data analysis**, connections with **Microsoft 365 and Microsoft Power Platform**, business events, and business document management.

The course also introduces shared finance and operations capabilities such as**security, workflows, batch jobs, legal entities, record templates, the global address book, alerts, and number sequences**.

Supply chain-specific modules focus on **product information management, inventory dimensions, product variants, on-hand inventory, and quality management**. Participants learn how these features support product and stock-related activities.

The programme then examines the **procure-to-pay** and **order-to-cash** processes, including vendor and customer management, purchasing, sales orders, fulfilment, and returns.

In the **warehouse management** module, learners explore warehouse layouts, reservation hierarchies, location directives, mobile warehouse operations, cycle counting, and replenishment.

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The **manufacturing** module introduces bills of materials, formulas, routes, operations, and different production approaches, including **lean, discrete, and process manufacturing**.

The final module addresses **inventory costing methods, cost groups, master planning, planning optimisation, AI-assisted demand forecasting, and landed cost scenarios**.

Throughout the course, **module assessments and knowledge checks** help participants consolidate their understanding of Dynamics 365 Supply Chain Management and its connected business processes.

Prerequisites

There are **no specific prerequisites** for attending this training.

The course is suitable for beginners who want to explore **Dynamics 365 Supply Chain Management** and ERP-supported supply chain operations.

Who Should Attend

This course is designed for:

- **Management professionals** interested in understanding integrated business processes
- Individuals interested in **procurement, inventory management, warehousing, manufacturing, and planning**
- Learners who want to understand how these functions are **unified within an ERP solution**

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What You Will Learn

By the end of this course, participants will be able to:

- Describe **Dynamics 365 Finance and Operations** applications and their **AI-powered capabilities**.
- Explain how **ERP systems** bring together supply chain and financial operations.
- Recognise use cases for **Copilot, AI agents, and embedded analytics**.
- Explain how **Power BI, Microsoft 365, and Microsoft Power Platform** support reporting and integration.
- Identify shared finance and operations capabilities such as **security, workflows, batch jobs, organisational management, and record management**.
- Describe the **core capabilities of Dynamics 365 Supply Chain Management**.
- Understand the relationship between **product information, product dimensions, variants, and inventory dimensions**.
- Recognise key activities involving **on-hand inventory, inventory journals, transfer orders, and quality management**.
- Explain the main stages of the **procure-to-pay process**.
- Understand **vendor management, purchase orders, receipts, and returns**.
- Describe the **order-to-cash process** and the management of sales orders.
- Identify **warehouse layout, reservation, mobile warehouse operations, cycle counting, and replenishment** capabilities.
- Distinguish between **lean, discrete, and process manufacturing**.
- Explain the purpose of **BOMs, formulas, routes, and manufacturing execution**.
- Recognise common **inventory costing methods** and cost management components.
- Understand **master planning, planning optimisation, and AI-assisted demand forecasting**.
- Identify options for **integrating Dynamics 365 Supply Chain Management with Microsoft products**.

Outline

1. Dynamics 365 Finance and Operations Apps Overview

This module introduces the structure of **Dynamics 365 Finance and Operations** applications, the ERP concept, and AI-powered capabilities.

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- Exploring how **AI-powered agents** and **Copilot-driven workflows** improve financial operations
- Understanding **intelligent reconciliation** and **embedded analytics** for forecasting, collections, and reporting
- Introducing **Enterprise Resource Planning (ERP)**
- Examining **AI tool use cases** in finance and operations applications
- Reviewing the **finance and operations user interface**

2. Reporting and Integration Capabilities

This module covers reporting features and the integration options available across the Microsoft ecosystem.

- Exploring **built-in reporting capabilities**
- **Analysing data with Power BI**
- Understanding **Microsoft 365 integration**
- Reviewing integration options for **Microsoft Power Platform**
- Examining **business events** and their use cases
- **Configuring and editing business documents**
- Using **Copilot-based insights** in finance and operations applications

3. Shared Features in Finance and Operations Apps

This module introduces common application capabilities that support consistent business operations.

- **Security capabilities**
- **Workflow functionality**
- **Batch jobs**
- Managing **organisations and legal entities**
- Creating and maintaining **record templates**
- Exploring **global address book** features
- **Setting up alerts**
- Managing **number sequences**
- Using **attachment capabilities**

4. Core Capabilities of Dynamics 365 Supply Chain Management

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This module focuses on product information, product configuration, and related inventory settings.

- **Product information management**
- **Inventory dimensions** and **item groups**
- **Copilot-powered product insights**
- Managing **products and released products**
- **Product masters, product dimensions, and variants**
- **Storage and tracking dimensions**
- **Default order settings**

5. Inventory Management

This module explores inventory visibility, stock transactions, and quality management.

- Managing **on-hand inventory**
- Using **inventory journals** and understanding journal types
- Working with **transfer orders** and **inventory blocking**
- Exploring **AI-assisted inventory insights**
- Understanding **quality management capabilities**

6. Procurement Processes

This module introduces the purchasing lifecycle and supplier-related operations.

- **Vendor management**
- **Trade agreements**
- Understanding the **procure-to-pay process**
- Managing **purchase requisitions, purchase orders, receipts, and returns**
- Exploring **charges** and **Copilot support** in procurement
- Introducing the **Supplier Communications Agent**
- Conducting **supply risk assessments**

7. Sales Processes

This module examines customer management and the sales order lifecycle.

- **Customer management**

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- **Trade agreements**
- Understanding the **order-to-cash process**
- **Sales order creation, fulfilment, and returns**
- **Intercompany orders** and charges
- Exploring **Copilot support in sales scenarios**

8. Warehouse Management

This module introduces the structures and capabilities used to organise warehouse operations.

- **Warehouse layout management**
- **Reservation hierarchies** and **unit sequence groups**
- **License plates** and **location directives**
- **Work templates** and the **Warehouse Management mobile app**
- **Wave templates, cycle counting, and replenishments**
- **Packing dimensions** and **containerisation**

9. Manufacturing Processes

This module explores manufacturing structures and production execution.

- Understanding **production types**
- **Bills of Materials (BOMs)**, formulas, and BOM types
- **Routes and operations**
- **Lean manufacturing**
- **Discrete manufacturing**
- **Process manufacturing**
- **Manufacturing execution**

10. Inventory Costing and Master Planning

This module focuses on inventory valuation and supply chain planning capabilities.

- **Costing methods** and their use cases
- **Resources** and **cost groups**
- **Cost management** and **coverage groups**

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- **Master planning** and **planning optimisation**
- **AI-assisted demand forecasting**
- **Landed cost scenarios**