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MICROSOFT DYNAMICS NAV – TRADE

Course Outline

Module 1: Sales Order Management

This module examines the setup of and transactions in Sales Order Management, including blanket sales orders, sales order shipments, drop shipments, and prepayments.

Lessons

- Set Up Sales Order Management
- Manage Sales Transactions
- Item Reservation
- Posting Orders
- Drop Shipments
- Customer Prepayments

Lab : Create and Convert a Blanket Sales Order

Lab : Reserve an Item on a Sales Order

Lab : Ship and Invoice a Sales Order

After completing this module, students will be able to:

- Review the setup of Sales Order Management. This includes customers, shipping options, reservation rules, customer posting groups, and salespeople.
- Explain and process sales quotes and blanket sales orders, and review sales order information.
- Describe how to reserve items on a sales order.
- Explain how to post a sales order shipment.
- Describe and show how to combine shipments into one invoice.
- Explain and demonstrate the drop shipment process.
- Show how to process prepayments on a sales order.

Module 2: Sales Prices and Discounts

This module explores Microsoft Dynamics NAV pricing and discount features.

Lessons

- Sales Prices
- Maintain Sales Prices
- Sales Line Discounts
- Invoice Discounts

Lab : Manage Sales Prices

Lab : Update Sales Prices

Lab : Offer the Best Available Price to a Customer

After completing this module, students will be able to:

- Define sales prices and set up sales prices and customer price groups.
- Explain how to maintain sales prices by using the sales price worksheet.
- Describe and set up line discounts.
- Explain how invoice discounts are used.

Module 3: Customer Service Features

This module explores customer service features in Microsoft Dynamics NAV, which include the substitution of one item with another, item cross reference, and nonstock items. Companies can manage the sale of nonstock items in two ways—create drop shipments and use special orders.

Each of these features adds to customer satisfaction by offering more flexibility and by expediting the sales process.

Lessons

- Item Substitutions
- Item Cross References
- Set Up and Create Nonstock Items
- Sell Nonstock Items

Lab : Process a Sales Order with Item Substitutions

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Lab : Process a Sales Order with Item Cross References

After completing this module, students will be able to:

- Describe how to set up and use item substitutions.
- Review the setup and use of item cross references.
- Explain how to set up nonstock items and create them manually.
- Describe how to sell nonstock items by using special orders.

Module 4: Purchase Order Management

This module explains how to set up all aspects of Purchase Order Management. It also describes how to use purchase documents.

Lessons

- Purchase Order Management Setup
- Manage Purchase Transactions
- Purchase Prices and Discounts
- Purchase Prices
- Invoice and Line Discounts
- Vendor Prepayments

Lab : Process a Purchase Quote to an Order

Lab : Manage Alternative Purchase Prices

Lab : Manage Purchase Line Discounts

After completing this module, students will be able to:

- Review the setup of Purchase Order Management. This includes vendors, vendor posting groups, shipping and, or receiving options, and purchasers.
- Explain how to use purchase documents. This includes quotes, blanket orders, and purchase orders.
- Review purchase prices and discounts in relation to item costs.
- Explain purchase price setup and processing.

- Explain discount setup and processing.
- Describe how to process prepayments on a purchase order.

Module 5: Requisition Management

This module explains how to set up requisition management and use the requisition worksheet.

Lessons

- Requisition Management Setup
- Requisition Worksheet
- Additional Worksheet Features

After completing this module, students will be able to:

- Briefly describe requisition management setup and planning parameters.
- Explain the core functionality of the requisition worksheet and show how to calculate a plan and process proposed orders.
- Describe additional worksheet features including support for drop shipments and special orders, planning worksheet lines, and manually created lines.

Module 6: Item Charges

This module explains the item charges and allowances.

Lessons

- Purchase Item Charges
- Sales Item Charges
- Purchase and Sales Allowances

Lab : Assign Freight Charges to an Open Purchase Order

Lab : Create an Item Charge Purchase Credit Memo

After completing this module, students will be able to:

- Describe the setup of item charges.

- Explain purchase item charges and show how to assign them to a posted purchase receipt.
- Describe sales item charges and show how to assign them to a posted sales shipment.
- Explain purchase and sales allowances and show how to record an item charge for a sales allowance on a credit memo.

Module 7: Order Promising

This module explains how to define field definitions and date calculations and estimate dates. It also explains how to use Calendars functionality.

Lessons

- Sales Order Promising Definitions and Calculations
- Date Calculation Setup for Sales Orders
- Promising Sales Order Delivery
- Purchase Order Promising Definitions and Calculations
- Date Calculation Setup for Purchase Orders
- Estimating Purchase Order Receipts
- Estimate a Transfer Order Receipt
- Calendars

Lab : Promise Sales Order Delivery to a Customer

Lab : Purchase Order Promising

After completing this module, students will be able to:

- Describe the key concepts, field definitions, and date calculations for sales order promising.
- Explain the setup of time values and other parameters for sales order promising.
- Show order promising and date calculation functionality for sales order deliveries.
- Define the field definitions and date calculations for estimating purchase order receipts.
- Explain the setup of time value parameters for estimating purchase order receipts.
- Show how to estimate dates for purchase order receipts and the related calculations.
- Explain how transfer order receipts are estimated.
- Describe how to use the Calendars functionality to exclude nonworking days in date calculations.

Module 8: Returns Management

This module explains how to setup Returns Management and process returns from customer or returns to vendors.

Lessons

- Returns Management Setup
- Manage Customer Returns
- Manage Returns to Vendors

Lab : Process a Customer Return

Lab : Process a Vendor Return

After completing this module, students will be able to:

- Describe the returns management setup for sales and purchases.
- Explain and show how to manage customer returns.
- Explain and show how to manage returns to vendors.

Module 9: Assembly Management

This module explains how to set up assembly management. It also shows processes for assemble-to-order and inventory items.

Lessons

- Assembly Items and Assembly Bill of Materials
- Assemble to Order
- Reservations and Item Tracking
- Selling ATO Items and Inventory Items Together
- Assemble-to-Order Shipments

Lab : Create Assemble-to-Order Sales Order and Change Assembly Lines

Lab : Create Partial Shipments on Sales Lines That Contain Both ATO Items and Inventory Items

After completing this module, students will be able to:

- Review assembly management setup, assembly items, and assembly bill of materials.
- Describe and show assemble-to-order functionality. This includes a full description of sales interface functionality, underlying links to assembly orders, and assembly quotes and blanket orders.
- Review component availability warnings and views.
- Describe the processes involved in selling assemble-to-order items and inventory items together.
- Explain item reservation in assembly management.
- Review assemble-to-order shipments and how to undo shipments.

Module 10: Analysis and Reporting

This module explains how to set up and use reports and perform analysis by dimensions.

Lessons

- Analysis Views and Reports
- Analysis by Dimensions
- Sales and Purchase Budgets

Lab : Create an Analysis Report

Lab : Analyze Item Sales by Area

After completing this module, students will be able to:

Explain how to set up and use sales and purchase analysis reports.

- Show how to perform analysis by dimensions.
- Explain how to create and export budgets and use them in analysis reports.