

80308: Procurement In Microsoft Dynamics AX 2012

Course Details

Course Outline

1. Procurement Overview

- About Procurement and Sourcing
- Enterprise Portal Features
- Integration
- End-To-End Scenario

2. Product Information Management

- Introduction
- Defining Products
- Modeling Configurable Products
- Inventory Dimension Groups
- Authorizing Product Setup in a Legal Entity
- Finalizing Product Setup in a Legal Entity

3. Vendors

- Introduction
- Set Up for Vendors
- Create Vendors
- Vendor Tasks
- Vendor Reports and Inquiries

4. Catalogs

- About Catalogs
- Category Hierarchies
- Category Attributes
- Commodity Codes
- Procurement Category Management
- Procurement Catalogs
- Vendor Catalogs
- External Catalogs
- Catalog Comments
- Category Reports

5. Request for Quotation

- Introduction
- Set Up Request for Quotations
- Issue a Request for Quotation
- Follow-up on Request for Quotations
- Request for Quotation Replies
- Transfer Accepted Request for Quotation Replies
- Request for Quotation Reports and Inquiries

6. Purchase Requisitions

- Introduction
- About Purchase Requisitions
- Create Purchase Requisitions
- Complete a Purchase Requisition
- Follow-up on Purchase Requisitions
- Convert Purchase Requisitions to Purchase Orders
- Demand Consolidations
- Other Purchase Requisition Tasks
- Purchase Requisition Workflow

7. Purchase Orders

- Introduction
- Working with Purchase Orders
- Set Up Accounts Payable Parameters
- Create a Purchase Order
- Process a Purchase Order
- Change Management
- Purchase Order Tasks
- Purchase Order Inquiries and List Pages

8. Vendor Returns

- Introduction
- Create Vendor Returns
- Create Vendor Returns for Serialized Items

9. Purchase Agreements

- Purchase Agreements

10. Vendor Self-Service Portal

- Introduction
- Vendor Role Center
- Vendor Profiles
- Notifications
- Questionnaires
- Transactions
- Vendor Self-Service Portal Security

11. Procurement Order Site

- Introduction
- Purchase Requisitions
- Managing Purchase Information
- Product Receipt Confirmations
- Order Products on the Employee Services Site

12. Purchasing Policies and Signing Limits

- Introduction
- About Policies
- Purchasing Policy Set Up
- Create Purchasing Policies
- Configure Catalog Policy Rules
- Configure Category Access Policy Rules
- Configure Category Policy Rules
- Configure Purchase Requisition RFQ Rules
- Configure Purchase Requisition Control Rules
- Configure Purchase Order Creation and Demand Consolidation Rules
- Expenditure Reviewers
- Limits

13. Workflow

- Introduction
- About Workflow
- Procurement Catalog Workflows
- Purchasing Workflows
- Vendor Workflows
- Demonstration: Configure a Purchase Requisition Workflow