

MASTER PLANNING ESSENTIALS

for Microsoft Dynamics® 365 for Finance and Operations



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Course Details

This course provides an introduction to and information about Master Planning in Microsoft Dynamics 365 for Finance and Operations. The course begins by providing an overview of master planning, forecast planning, scheduling, and plan types, and planning method. It also provides information about master planning parameters, as well as operations scheduling and job scheduling. The course wraps up by demonstrating running master planning.

AUDIENCE

The intended audience includes application consultants, pre-sales positions, and users who are looking to implement Microsoft Dynamics 365 for Finance and Operations.

AT COURSE COMPLETION

At course completion, participants will have an understanding of:

- The Master planning General and Time fences in days tabs
- Calculated days, action message, safety margins in days, sequencing, and intercompany planning
- The Master planning parameters General, Planned order, and Standard update tabs
- Scheduling parameters
- Scheduling parameters by site
- Running master scheduling

REGISTRATION AND PAYMENT

You can register for a course online at academy.rsmus.com by browsing the catalog and selecting courses to add to your cart. You can also email your request to academy@rsmus.com.

Payment must be received and verified before you can gain access to the course content. When purchasing through our website, all payments are made through PayPal. You can use an existing PayPal account to pay with your credit card or other method of payment configured in your PayPal account. If you do not have a PayPal account you can use the guest check out feature to use your credit card to pay. If you prefer to pay by using another method of payment, please contact us at academy@rsmus.com to make arrangements. We cannot guarantee all methods of payment will be accepted but we will try to accommodate your requests.

REFUND POLICY

Once an eLearning course has been purchased, no refunds will be provided. If you have any questions about this policy, you may contact us at by clicking the Support button on our site or email us at academy@rsmus.com. Formal complaints or errors found in the content should be reported in writing to academy@rsmus.com. Complaints will be reviewed to determine what action needs to be taken.

Prerequisites

PARTICIPANT REQUIREMENTS

Students attending this section of the course should have:

- General knowledge of Microsoft® Windows®
- General knowledge of basic navigation within Dynamics 365 for Finance and Operations
- General knowledge of supply chain and manufacturing processes and procedures

TECHNOLOGY REQUIREMENTS

- The site has been optimized for Internet Explorer. Although other browsers may work, it is recommended that you use Internet Explorer for the best experience.
 - Silverlight must be installed in order to use the practices.
 - A screen resolution with a minimum of 1024x768 is recommended. You can use full screen icons within the eLearning to maximize your view. A smaller resolution may result in content being cut off from your screen.
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Course Outline

The objectives of this eLearning course are:

- Learn about master and forecast plans.
- Review Master planning parameters.
- Define scheduling and scheduling by site parameters.
- Run master scheduling.

MODULE: ABOUT MASTER AND FORECAST PLANS

This module covers an overview of the master and forecast plans. This includes flow charts, scheduling, plan types, and planning methods.

Lessons

- About Master Planning
- About Forecast Planning
- Master Planning Business Flow Chart
- Scheduling
- Plan Types
- Planning Method
- Demonstration: Using the Master Planning General Tab
- Demonstration: Using the Master Planning Time Fences in Days Tab
- Demonstration: Using Additional Tabs

MODULE: MASTER PLANNING PARAMETERS

This module provides information about master planning parameters, which is used to specify default plans and settings for calculating master scheduling.

Lessons

- Master Planning Parameters Tabs
 - Demonstration: Using the Master Planning Parameters General Tab
 - Demonstration: Using the Planned Order Tab
 - Demonstration: Using the Standard Update Tab
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MODULE: SCHEDULING PARAMETERS

This module provides information about scheduling parameters for scheduling at the operation level and job level.

Lessons

- Operations Scheduling
- Job Scheduling
- Demonstration: Using Scheduling Parameters and Scheduling Parameters by Site

MODULE: HOW TO RUN MASTER PLANNING

This module focuses on a demonstration about running master planning in the system.

Lessons

- Demonstration: Running Master Planning
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