

MANAGE PLANNED PURCHASE ORDERS

for Microsoft Dynamics® 365 for Finance and Operations



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Course Details

This course will cover specific areas related to creating and changing planned purchase orders. First, the course covers how to perform tasks such as creating, splitting, and combining planned orders, as well as firming planned orders. Then, the course moves on to make updates and work with Dynamics 365 for Finance and Operations further on this topic. Specifically, it covers how to understand change planned order types, and the function of action messages. The course wraps up with a demonstration of reviewing planned purchase orders.

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:

- Create, combine, and split a planned order.
- Firm a planned purchase order.
- Change a planned order type.
- Use action messages.
- Review planned orders.

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.

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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:

- Define planned purchase orders.
- Modify and maintain planned purchase orders.
- Firm planned purchase orders.
- Change planned purchase order types.
- Review action messages for planned purchase orders.
- Demonstrate views to manage planned purchases.

MODULE: PLANNED PURCHASE ORDERS

This module covers an overview of planned purchase orders. Purchase orders are used to manage the request and receipt of goods and services from your vendors.

Lessons

- About Sources for Planned Purchase Orders
- Planned Purchase Order Characteristics
- Planned Purchase Order Status

MODULE: MAINTAIN PLANNED PURCHASE ORDERS

This module uses system demonstrations to explain how to modify and reschedule planned purchase orders in the system. This includes combining, splitting, and rescheduling orders.

Lessons

- Demonstration: Create, Combine, and Split a Planned Purchase Order

MODULE: HOW TO FIRM PLANNED PURCHASE ORDERS

This module covers how to firm planned purchase orders, including a discussion of parameters and locations in the system. This is followed by a demonstration.

Lessons

- Parameters for Firming Planned Purchases
 - Where to Firm Planned Purchase Orders
 - Demonstration: Firm a Planned Purchase Order
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MODULE: HOW TO CHANGE PLANNED PURCHASE ORDER TYPES

In some cases, you may need to change the planned order type. This module uses a system demonstration to explain how this accomplished.

Lessons

- Demonstration: Change a Planned Order Type

MODULE: ABOUT ACTION MESSAGES

An action message is a system-generated suggestion to change an existing planned order. This module provides information about using action messages and the types that are available. It contains a system demonstration on the concept.

Lessons

- Action Messages
- Demonstration: Review Action Message Types

MODULE: ABOUT THE VIEWS FOR MANAGING PLANNED PURCHASE ORDERS

Planned purchases can be monitored and managed from several locations in the system. This module focuses on a system demonstration about these locations and how to accomplish specific management tasks.

Lessons

- Demonstration: Review Planned Orders in the Master Planning Module
 - Demonstration: Review the Planned Purchase Orders Form in the Procurement and Sourcing Module
 - Demonstration: Review the Planned Purchase Orders with Order Date Today or Overdue Form in the Procurement and Sourcing Module
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