

# RETAIL ASSORTMENTS

FOR MICROSOFT DYNAMICS® 365 FOR FINANCE AND  
OPERATIONS



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## Course Details

This eLearning course will describe retail assortments, and how they are utilized in Microsoft Dynamics 365 for Finance and Operations. The retailer's buying plan needs to be a balance between providing their customers with inventory and products associated with the retailer's business, together with the constant challenge of keeping their stores looking fresh.

### AUDIENCE

The intended audience includes:

- IT Engineer
- Technical End User/Power User
- System Implementer/Consultant

### AT COURSE COMPLETION

At course completion, participants will have an understanding of the available assortment features available in Microsoft Dynamics 365 for Finance and Operations. They'll also know the assortment creation process and will have seen how to set up an assortment scheduler.

### REGISTRATION AND PAYMENT

You can register for a course online at [academy.rsmus.com](https://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](mailto: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](mailto: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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## 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](mailto:academy@rsmus.com). Formal complaints or errors found in the content should be reported in writing to [academy@rsmus.com](mailto: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 a basic understanding of:

- General knowledge of Microsoft Windows
- General knowledge of basic navigation within Microsoft Dynamics 365 for Finance and Operations
- Basic knowledge of Retail Processes
- Completed course: Introduction to Microsoft Dynamics 365 for Retail
- Completed course: Retail Category Hierarchies in Microsoft Dynamics 365 for Finance and Operations
- Completed course: Released Products and Catalogs in Microsoft Dynamics 365 for Finance and Operations

## 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

## MODULE: FEATURES

In this module we'll discuss the various features available with assortment planning.

### Lessons

- Assortment Features

## MODULE: ASSORTMENT CREATION

In this module we'll learn about the four components that must be set up before an assortment can be created.

### Lessons

- Prerequisite Setup

## MODULE: VIEW ASSORTMENTS

In this module we'll cover how to view assortments once they've been created.

### Lessons

- Demonstration: View Assortments by Store or Channel

## MODULE: PROCESS AND PUBLISH ASSORTMENTS

In this module we'll take a look at how to set up a recurring batch job to automatically create and assign with retail assortments.

### Lessons

- Set Up an Assortment Scheduler

### Practices

- Make Products Available in a Channel
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