

MASTER PLANNING
FOR MICROSOFT DYNAMICS® 365
for Finance and Operations

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Course Details

This two-day instructor-led course provides students with an introduction to setting up, running, and monitoring Master Planning in Microsoft Dynamics 365 for Finance and Operations. In addition to master planning, forecasting, and managing planned production, purchase orders, and transfers will be discussed. Students will have the opportunity to use the application to perform typical end-user tasks. This course is eligible for 14 CPE credits in the Computer Science field of study.

AUDIENCE

The intended audience is for application consultants working in or alongside the manufacturing industry.

AT COURSE COMPLETION

After completing this course, students will be able to:

- Set up master planning parameters
- Define scheduling by site parameters.
- Run master scheduling.

Electronic copies of certificates are given out automatically upon completion of a course. If for some reason you don't receive a certificate or have special circumstances (multiple participants, physical certificates, etc.), feel free to contact us at academy@rsmus.com.

COURSE CANCELLATION POLICY

RSM reserves the right to cancel courses up to 7 days prior to class commencement due to low enrollment. In the event of a cancellation, RSM will contact any enrolled students.

GUARANTEED TO RUN

All hosted courses are guaranteed to run. RSM reserves the right to cancel courses or to make changes in course schedules up to 7 days before the commencement of a course.

TRAVEL GUIDE

Hosted Training

You are responsible for making all arrangements for travel. We are located in the Denver Technology Center (DTC). You can fly into Denver International Airport (DEN) on most major airlines. It is recommended that you fly the evening before your class is scheduled to begin and depart the evening of the last day of class. On average please allow at least one hour to travel from our office to the airport.

5990 Greenwood Plaza Boulevard
Suite 350
Greenwood Village, CO 80111

Client Site Training

If the client would like the trainer to follow a specific travel policy attach it upon execution of the statement of work. For clients with a Master Services Agreement (MSA), travel and expenses will be billed after the conclusion of the training. For clients without an MSA, an estimated amount will be billed at a fixed fee and must be paid before the trainer will book travel.

PAYMENT

All work performed shall be performed on a fixed fee basis. RSM will bill the Client upon execution of the statement of work according to the Master Services Agreement (MSA). For clients without an MSA, payments must be received before the beginning of the training.

Refund Policy: Any cancellations 14 days prior to the scheduled course will be provided a 100% refund. Cancellations 7 days prior to the scheduled course will be provided with a 50% refund. Cancellations within 7 days of course commencement will not be refunded.

Prerequisites

ENVIRONMENT

If the training will be conducted in Denver at the RSM office, the requirements listed below will be provided by RSM.

Before the beginning of the first lesson the following materials and equipment will be required:

- A LCD Projector*
- Projection screen/surface
- A white board or
- Flip chart stand/paper (optional)

Each attendee will need a Laptop/PC with an Internet connection.

RSM Technology Academy hosts the training images on Microsoft Azure. The connection information is provided to the participants prior to commencement of the course.

* The instructor can provide a projector if one is not available upon request only.

Course Outline

MODULE: MASTER PLANNING

This module introduces participants to creating and running master planning. The concepts and setup for master planning will be discussed as well

Lessons

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

Practices

- Create a Master Plan
- Define Master Planning Parameters
- Run Master Planning

MODULE: INTERCOMPANY MASTERPLANNING

In this module we will review intercompany planning. Logistic operations of some companies will depend on other legal entities in the organization. This can include intercompany sales and purchases since the legal entities have separate chart of accounts.

Lessons

- Define intercompany planning
- Intercompany planning process
- Define and create intercompany planning groups
- Run intercompany master planning

Practices

- Create an Intercompany Planning Group
- Run an Intercompany Master Plan

MODULE: FORECASTING

In this module we will discuss forecasting. Forecast planning is comparable to master planning but forecast planning is focused on prediction of future sales.

Lessons

- Define forecast planning and scheduling
- Creating forecast models and submodels
- Demand forecasting
- Defining forecast plan parameters
- Machine learning
- Forecast algorithm
- Create and run a forecast
- Define supply forecasting
- Manual forecast line entry

Practices

- Create a forecast model
- Run Forecasting
- Manually Enter Forecast Information

MODULE: MANAGE PLANNED PRODUCTION

In this module we will discuss planned production orders. Production orders are used to manage the conversion of purchased materials into manufactured items.

Lessons

- Define planned production orders
- Modify and reschedule planned production orders
- Firm planned production orders
- Change planned production order types
- Define action messages
- Define calculated delays

Practices

- Modify and Reschedule Planning Production
- Firm Planned Orders
- Change Planned Order Types

MODULE: MANAGE PLANNED PURCHASE ORDERS

In this module we will discuss planned purchase orders. Purchase orders are used to manage the request and receipt of goods and services from your vendors.

Lessons

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

Practices

- Modify and reschedule planned orders
- Firm purchase orders

- Change planned order types

MODULE: MANAGE PLANNED TRANSFER ORDERS

In this module we will discuss planned transfer orders. Transfer orders are used to manage the movement of inventory between sites and warehouses within your organization.

Lessons

- Define planned transfer orders
- Modify and maintain planned transfer orders
- Firm planned transfer orders
- Change planned transfer order types
- Review action messages
- Review delays for planned transfer orders

Practices

- Modify, Group and Split Planned Transfer Orders
- Firm Planned Transfer Orders
- Change Planned Transfer Order Types

MODULE: MASTER PLANNING AND ADVANCED SCHEDULING

In this module we will discuss using batch order sequencing to help generate replenishment orders in a desired sorting schedule.

Lessons

- Define batch order sequencing
- Configure batch order sequencing
- Sequence planned batch orders
- Define master planning for process manufacturing

Practices

- Batch order sequencing configuration
- Sequence planned batch orders

Agenda

	Day 1	Day 2
9:00 AM	Introductions and Basic Navigation	Manage Planned Production Orders
10:00 AM	Master Planning	
11:00 AM		Manage Planned Purchase Orders
12:00 PM	LUNCH	LUNCH
1:00 PM	Intercompany Master Planning	Manage Planned Purchase Orders
2:00 PM		Managed Planned Transfer Orders
3:00 PM	Forecasting	Master Planning and Advanced Scheduling
4:00 PM		
5:00 PM	SESSION END	SESSION END

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