

## (80440A) –Trade in Microsoft Dynamics NAV 2013

### OBJECTIVE

This two-day instructor-led training (ILT) course provides students with the knowledge and skills to handle the purchase, sale, and return of inventory. Students will learn how to manage sales and purchase transactions, including prices and discounts, item charges and order promising. Requisition management will be covered, as well as returns management and customer service features.

### COURSE TOPICS

#### Module 1: Sales Order Management

- Set Up Sales Order Management
- Manage Sales Transactions
- Item Reservation
- Posting Orders
- Drop Shipments
- Customer Prepayments

#### Module 2: Sales Prices and Discounts

- Sales Prices
- Maintain Sales Prices
- Sales Line Discounts
- Invoice Discounts

#### Module 3: Customer Service Features

- Item Substitutions
- Item Cross References
- Set Up and Create Nonstock Items
- Sell Nonstock Items

#### Module 4: Purchase Order Management

- Purchase Order Management Setup
- Manage Purchase Transactions
- Purchase Prices and Discounts
- Purchase Prices
- Invoice and Line Discounts
- Vendor Prepayments

**Module 5: Requisition Management**

- Requisition Management Setup
- Requisition Worksheet
- Additional Worksheet Features

**Module 6: Item Charges**

- Purchase Item Charges
- Sales Item Charges
- Purchase and Sales Allowances

**Module 7: Order Promising**

- Sales Order Promising Definitions and Calculations
- Date Calculation Setup for Sales Orders
- Promising Sales Order Delivery
- Purchase Order Promising Definitions and Calculations
- Date Calculation Setup for Purchase Orders
- Estimating Purchase Order Receipts
- Estimate a Transfer Order Receipt
- Calendars

**Module 8: Returns Management**

- Returns Management Setup
- Manage Customer Returns
- Manage Returns to Vendors

**Module 9: Assembly Management**

- Assembly Items and Assembly Bill of Materials
- Assemble to Order
- Reservations and Item Tracking
- Selling ATO Items and Inventory Items Together
- Assemble-to-Order Shipments

**Module 10: Analysis and Reporting**

- Analysis Views and Reports
- Analysis by Dimensions
- Sales and Purchase Budgets

After completing this course, students will be able to:

- Review the setup of Sales Order Management. This includes customers, shipping options, reservation rules, customer posting groups, and salespeople.
- Explain and process sales quotes and blanket sales orders, and review sales order information.
- Describe how to reserve items on a sales order.
- Explain how to post a sales order shipment.
- Describe and show how to combine shipments into one invoice.
- Explain and demonstrate the drop shipment process.
- Show how to process prepayments on a sales order.
- Define sales prices and set up sales prices and customer price groups.
- Explain how to maintain sales prices by using the sales price worksheet.
- Describe and set up line discounts.
- Explain how invoice discounts are used.
- Describe how to set up and use item substitutions.
- Review the setup and use of item cross references.
- Explain how to set up nonstock items and create them manually.
- Describe how to sell nonstock items by using special orders.

## PREREQUISITES

Before attending this course, students must have:

- Attended or knowledge of course Introduction in Microsoft Dynamics NAV 2013
- Attended or knowledge of course Finance Essentials in Microsoft Dynamics NAV 2013
- Basic knowledge of distribution and logistics

## TRAINING APPROACH

This course includes lectures, course notes, exercises and hands-on practice.

## COURSE DURATION

12 Hours (in 2 days)

## CERTIFICATION COMPLETION

A certificate of completion is provided for all trainees attending the course