



Microsoft Dynamics Curriculum: Sales Tips

Course 8549A Order Management in Microsoft Dynamics SL

Course Description

In this one information packed day, the Microsoft Dynamics™ SL Order Management class explores the accounting cycle and the processes required to enter and ship sales orders.

This course shows you how to easily manage the life-cycle of your customer's order from the initial quote to the shipment documentation and final invoicing. You learn how to perform additional functions such as create shippers, define credit rules, use the Credit Manager's Assistant and Customer Service Assistant, and define discount pricing. This course also covers setup and processing in the Order to Purchase module.

A thorough understanding of these topics allows you to boost order management productivity and help improve customer service by automating sales order workflow procedures. Microsoft Dynamics SL Order Management gives you precise control over the flow of order information by the use of customer defined Order Steps which allow for manager approval and credit checking throughout the life of the sales order. You learn how you can place large orders for best unit pricing, yet have goods shipped in smaller increments for production lines. You see how to apply your own credit rules to sales orders to determine whether they should be accepted or shipped.

This course shows you how to eliminate unnecessary steps in the order process, set up required steps according to your own business needs, and automate routine steps. You see how you can negotiate prices with immediate access to costs and pricing information. You will learn how to manually change quantity, units of measure, price, discount percent, extension, commissionable cost, or gross profit percentage by sales order or customer. We will show you how you can override shipping priorities and control what happens when orders exceed quantity on hand. You learn how to ship orders to multiple locations and on multiple delivery dates using Order Management functionality for unlimited shipping addresses and shipping dates per line item.

Selling Proposition

You learn how to improve customer satisfaction by keeping order processing on task, and on time, throughout the entire sales order process—under any circumstances. This core Distribution module provides comprehensive capabilities for a range of industries, such as distribution, service, and manufacturing, to help improve efficiency and customer service now and as your business grows.

You learn how to manage orders efficiently and cost-effectively, with the precise control that the Order Management automated workflow provides. We will show you how to schedule shipments with flexibility, and find best pricing scenarios for your customers quickly and easily. You also learn how to work more efficiently – by setting up credit rules so the system can monitor shipments and inform you automatically when those rules have been exceeded.

Classroom training provides serious, in-depth learning through hands-on interaction. From demonstrations to presentations to classroom activities, you will receive hands-on experience with instruction from our certified staff of experts and increase productivity and efficiency by learning tips and tricks from product specialists.

Key Data

Course Number: 8549A

Number of Days: 1

Available: January, 2006

Languages:

- US English

Format:

- Instructor-Led Training (lecture and labs)

Student Materials:

- Student Courseware

Certification Exam:

- Microsoft Dynamics SL Inventory and Order Processing

Certification Track:

- None

This course syllabus should be used to determine whether the course is appropriate for the students, based on their current skills and technical training needs.

Course content, prices, and availability are subject to change without notice.

Key Related Courses:

Purchasing

Microsoft Solomon Installation and Configuration

For a referral to a Microsoft Certified Partner Learning Solution in your area, see the Microsoft Training and Certification Web site at <http://www.microsoft.com/traincert>. Call your local Microsoft Certified Partner for Learning Solutions for more information and to register for classes.

Target Audience

Order Management training is recommended for anyone who plans to implement, use, maintain, consult, or support Solomon. The class is targeted toward administrators, office managers, CEOs, and consultants who need to understand the technical aspects of Order Management and gain foundational knowledge of the application functionality.

Key Course Benefits

After completing this course, students should be able to:

- Create Sales Orders, process Shippers, confirm Shipments, and print Invoices.
- Create custom price plans and enter master data that will automatically price items for a Sales Order.
- Execute comprehensive reports and use inquiry screens to obtain information which you can use to analyze and improve business processes.
- Understand how the Order Management module interacts with the Inventory, Purchasing, and Accounts Receivable modules.
- Close the Order Management module.
- Define set up options for the module that allow you to customize your system to better fit your organization's unique needs.

Prerequisites

Before attending this course, students must have:

- General knowledge of Microsoft Windows.
- Knowledge of basic navigation functions in Microsoft Solomon.
- Completion of any of the following: General Ledger, Accounts Payable, or Accounts Receivable training course required.

About the Technology

Microsoft Dynamics SL helps you increase productivity and achieve profitable growth rapidly. It provides advanced distribution capabilities in a flexible system designed for small and mid-size companies with manufacturing, advanced kitting, and/or production requirements. Covering discrete, make-to-order, and make-to-stock manufacturing, as well as job shops, it integrates processes and data across your entire business. . Solomon is optimized for the following Microsoft technologies:

Operating System Platform: Microsoft® Window®s Server 2003 and Microsoft® Windows® XP

Database Platform: Microsoft® SQL Server® 2000

Development Environment: Microsoft® Visual Basic®

Customization Scripting Language: Microsoft Visual Basic for Applications (VBA)

In addition, Microsoft Dynamics SL employs the use of two off-the-shelf report writing technologies for all standard and custom reports: FRx and Crystal Reports. These report writers are fully integrated with the Solomon system.

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