

Introduction	0-1
Welcome	0-1
Microsoft Dynamics Courseware Contents	0-2
Documentation Conventions	0-3
Student Objectives	0-4
Chapter 1: Sales Order Management	1-1
Objectives.....	1-1
Introduction.....	1-1
Set Up Sales Order Management	1-2
Manage Sales Transactions	1-10
Lab 1.1 - Create and Convert a Blanket Sales Order.....	1-19
Item Reservation	1-21
Lab 1.2 - Reserve an Item on a Sales Order.....	1-25
Posting Orders	1-26
Lab 1.3 - Ship and Invoice a Sales Order	1-31
Invoice a Combined Shipment	1-32
Customer Prepayments.....	1-34
Summary	1-40
Test Your Knowledge	1-41
Quick Interaction: Lessons Learned.....	1-43
Solutions.....	1-44
Chapter 2: Sales Prices and Discounts	2-1
Objectives.....	2-1
Introduction.....	2-1
Sales Prices	2-2
Lab 2.1 - Manage Alternative Sales Prices	2-9
Maintain Sales Prices	2-11
Lab 2.2 - Update Sales Prices.....	2-17
Line and Invoice Discounts	2-19
Lab 2.3 - Offer the Best Price Available to a Customer.....	2-28
Invoice Discounts	2-30
Summary	2-32
Test Your Knowledge	2-33
Quick Interaction: Lessons Learned.....	2-35
Solutions.....	2-36
Chapter 3: Customer Service Features	3-1
Objectives.....	3-1
Introduction.....	3-1
Item Substitutions	3-2
Lab 3.1 - Process a Sales Order with Items Substitutions	3-5
Item Cross References.....	3-6
Lab 3.2 - Process a Sales Order with Item Cross References	3-9
Set Up and Create Nonstock Items.....	3-11
Sell Nonstock Items.....	3-15
Lab 3.3 - Sell a Nonstock Item Using Special Orders	3-19
Summary	3-21

Test Your Knowledge	3-22
Quick Interaction: Lessons Learned	3-24
Solutions.....	3-25
Chapter 4: Purchase Order Management	4-1
Objectives.....	4-1
Introduction.....	4-1
Purchase Order Management Setup.....	4-2
Manage Purchase Transactions.....	4-9
Lab 4.1 - Process a Purchase Quote to an Order	4-18
Purchase Prices and Discounts	4-20
Purchase Prices	4-20
Lab 4.2 - Manage Alternative Purchase Prices	4-24
Invoice and Line Discounts	4-27
Lab 4.3 - Manage Purchase Line Discounts.....	4-32
Vendor Prepayments.....	4-35
Summary	4-37
Test Your Knowledge	4-38
Quick Interaction: Lessons Learned	4-40
Solutions.....	4-41
Chapter 5: Requisition Management	5-1
Objectives.....	5-1
Introduction.....	5-1
Requisition Management Setup	5-2
Manage Reordering Policies	5-7
Requisition Worksheet	5-13
Additional Worksheet Features	5-17
Summary	5-19
Test Your Knowledge	5-20
Quick Interaction: Lessons Learned	5-22
Solutions.....	5-23
Chapter 6: Item Charges	6-1
Objectives.....	6-1
Introduction.....	6-1
Item Charges Setup	6-3
Purchase Item Charges.....	6-4
Lab 6.1 - Assign Freight Charges to an Open Purchase Order.....	6-10
Sales Item Charges	6-12
Purchase and Sales Allowances	6-14
Lab 6.2 - Create an Item Charge Purchase Credit Memo	6-16
Summary	6-18
Test Your Knowledge	6-19
Quick Interaction: Lessons Learned	6-21
Solutions.....	6-22
Chapter 7: Order Promising	7-1
Objectives.....	7-1
Introduction.....	7-2

Date Calculation Concepts	7-2
Promise Orders to Customers	7-3
Date Calculation for Sales and Order Promising Setup	7-6
Promising Sales Order Delivery	7-10
Lab 7.1 - Promise Order Delivery to a Customer	7-20
Estimate Order Receipt	7-22
Date Calculation Setup for Purchase Orders	7-24
Estimating Purchase Order Receipts	7-28
Lab 7.2 - Purchase Order Promising	7-33
Estimate Transfer Order Receipt.....	7-35
Calendars	7-35
Summary	7-37
Test Your Knowledge	7-39
Quick Interaction: Lessons Learned	7-41
Solutions.....	7-42

Chapter 8: Returns Management 8-1

Objectives.....	8-1
Introduction.....	8-1
Activity Diagram for Returns Management.....	8-3
Returns Management Setup	8-4
Manage Customer Returns	8-7
Lab 8.1 - Process a Customer Return	8-24
Manage Returns to Vendors	8-27
Lab 8.2 - Process the Vendor Return	8-33
Summary	8-36
Test Your Knowledge	8-37
Quick Interaction: Lessons Learned	8-39
Solutions.....	8-40

Chapter 9: Analysis and Reporting 9-1

Objectives.....	9-1
Introduction.....	9-1
Analysis Reports	9-2
Lab 9.1 - Create an Analysis Report	9-15
Analysis by Dimensions	9-18
Lab 9.2 - Analyze Item Sales by Area	9-21
Sales and Purchase Budgets	9-24
Lab 9.3 - Create a Sales Budget	9-29
Summary	9-33
Test Your Knowledge	9-34
Quick Interaction: Lessons Learned	9-36
Solutions.....	9-37

