

1 Days

Vendor Management and Collaboration in Microsoft Dynamics AX 2012

This one-day instructor-led course builds on the knowledge gained from the Procurement in Microsoft Dynamics AX 2012 course, and focuses on the processes involved with Vendor onboarding and collaboration. It investigates the various features that are found in the Vendor and Employee Services portals, procurement categories, and hierarchies and catalogs.

Course Details

Course Outline

Module 1: Overview The Overview module introduces the vendor onboarding process features in Microsoft Dynamics AX 2012. Lessons Feature Overview Workflows and Vendor Management Terminology and Concepts User and Vendor Roles After completing this module, students will be able to: Describe the features of the Vendor and Employee Services portals. Explain the procurement categories and hierarchies. Describe catalogs and their functionality for ordering. Describe the vendor management workflows. Define terminology and concepts used in vendor management and collaboration. Name the key roles in the vendor management process flow and explain the functionality that each role provides by default.

Module 2: Vendor Onboarding This module explains the request and approval processes that support vendor onboarding. Lessons Vendor Add Requests Provision Prospect Vendor User New Vendor Application Approve New Vendor Application Vendor (Portal User) Add Request Vendor Extensions Unsolicited Vendor Registration Lab : Create, Submit, and Approve a Vendor Add Request Lab : Provision a User Lab : Answer a Vendor Application on Vendor Portal Lab : Convert a Prospect to a Vendor Lab : Create and Approve Vendor User Requests After completing this module, students will be able to: Create vendor add requests. Provision prospective vendor users. Create a new vendor application. Approve a new vendor application. Manage vendor user add requests. Examine solicited and unsolicited vendor registration.

Module 3: Vendor Management This module reviews some of the required workflow setups and the application of categories, diversities, and vendor status. Lessons Add Categories to a Vendor Vendor Diversity Vendor Holds Lab : Vendor Categorization Lab : Work with Holds After completing this module, students will be able to: Work with vendor management in the Enterprise portal and Microsoft Dynamics AX 2012 client. Create categories and link them to a vendor. Examine workflow requirements for category requests. Approve category requests. Apply vendor diversity. Report and search by vendor diversity. Attach documents to a vendor. Apply and manage vendor holds. Examine workflow requirements for Vendor status change request. Approve a Vendor status change request.

Module 4: Vendor Collaboration This module examines features that are used to strengthen and coordinate vendor interaction in Microsoft Dynamics AX 2012. Lessons Notifications Print Management Request for Quotations (RFQs) Vendor Invoices Lab : Work with Notifications Lab : RFQ Life Cycle Lab : Create and Approve Invoices After completing this module, students will be able to: Create, send, and view notifications in vendor management. Set up and use print management for vendors. Create, send, accept, and reject request for quotations (RFQs) by using the Vendor portal. Configure workflows and create and approve vendor invoicing from the Vendor portal.

Module 5: Vendor Request Configuration This module examines some set up and configuration used to make the vendor request, portal, and collaboration work. Lessons Types Vendor Request Configuration Form FastTab Sections Lab : Configure a Vendor Add Request After completing this module, students will be able to: Examine the types of vendor requests and applications that are available in Microsoft Dynamics AX 2012. Configure various components of vendor management and collaboration.

Who Should Attend

This course is intended for Partners that sell and implement AX 2012. They typically investigate the customer

Pre Requisite

Before attending this course, students must have attended the following courses: Supply Chain Foundation in Microsoft Dynamics AX 2012

Exams

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