MB-300T00: Microsoft Dynamics 365: Core Finance and Operations

Course Content

Course Description:

This course discusses:

- Core common features of Dynamics 365 Finance
- Core configuration in Dynamics 365 Finance
- Data migration and preparing for go-live with Dynamics 365 Finance Organizations use Dynamics 365 Finance to reduce operational costs and rapidly respond to changing business needs. This solution lets organizations achieve these goals. This course discusses core components and configuration of Microsoft Dynamics 365 Finance, and data migration and preparing for go-live.

At Course Completion:

After competing this course, student will be able to:

- Get started with Lifecycle Services for Dynamics 365 for Finance and Operations
- Use Lifecycle Services to design and plan implementation for Dynamics 365 for Finance and Operations
- Have an overview of reporting and analytics in Dynamics 365 for Finance and Operations
- Build and test mobile apps for Dynamics 365 for Finance and Operations
- Create, maintain, and use workflows in Dynamics 365 for Finance and Operations
- Set up and configure legal entities in Dynamics 365 for Finance and Operations
- Manage users and security in Dynamics 365 for Finance and Operations
- Perform personalization in Dynamics 365 for Finance and Operations
- Implement common integration features in Dynamics 365 for Finance and Operations
- Prepare data for migration and migrate data to Dynamics 365 for Finance and Operations
- Use data management in Dynamics 365 for Finance and Operations
- Perform user acceptance testing for Dynamics 365 for Finance and Operations
- Prepare for go-live

Prerequisites:

Before attending this course, students must have:

- General knowledge of Microsoft Windows
- The ability to use Dynamics 365 for Finance and Operations for basic processing
- General knowledge of basic mobile device features and navigation

Target Student:

A Dynamics 365 Finance Functional Consultant is responsible for performing discovery, capturing requirements, engaging subject matter experts and stakeholders, translating requirements, and configuring the solution and applications. The Functional Consultant implements a solution using out of the box capabilities, codeless extensibility, application and service integrations.

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Course ID #: 7000-404-ZZ-Z

Hours: 21

Topics:

Module 1: Get Started with Dynamics 365 for Finance and Operations
- Introduction
- Industry focus
- Introduction to financial management
- Introduction to employee management
- Introduction to supply chain management
- Module summary

Module 2: Get Started with Lifecycle Services
- Understand the functionality and tools of Lifecycle Services
- Reuse existing assets, copy and share data
- Understand Task recorder functionality
- Create a business process model
- Run the LCS Issue Search tool and analyze results
- Learn how to use Regression Suite Automation Tool
- Practice Labs
- Module Summary

Module 3: Use Lifecycle Services to Design and Plan
- Introduction
- Phases of a cloud implementation
- Phases of an on-premises implementation
- Create Functional Design Documents (FDD)
- Module Summary

Module 4: Overview of Reporting and Analytics
- Understand reports and inquiries
- Learn about Financial reporting
- Configure PowerBI to your instance
- Practice Labs
- Module Summary

Module 5: Build and Test Mobile Apps
- **Overview of Unified Operations mobile app**
- **Build and use mobile apps**
- **Practice Lab**
- **Module Summary**

Module 6: Create, Maintain and Use Workflows
- **Workflows for business processes**
- **Create and setup workflows**
- **Assign users to workflow touchpoints**
- **Use Work items**
- **Practice Lab**
- **Module Summary**

Module 7: Set Up and Configure Legal Entities
- Create a legal entity and generate number sequences
- Create a number sequence
- Create organization hierarchies
- Apply purposes and policies
- Configure calendars and date intervals
- Practice Labs
- Module summary

Module 8: Manage Users and Security
- Understand the security architecture
- Manage users and security
- Setup and apply segregation of duties
- Run security reports
- Setup batch jobs and alerts
- Practice labs
- Module summary

Module 9: Perform Personalization

- Describe and apply user options
- Create, export and import personalizations
- Create and maintain record templates
- Practice labs
- Module summary

Module 10: Implement Common Integration Features

- Microsoft Office integration
- Configure email
- Create and maintain email templates
- Use Power BI
- Setup network printing
- Integrate data into Common Data Services for Apps
- Practice Labs
- Module summary

Module 11: Prepare Data for Migration and Migrate Data

- Introduction
- Understand BYOD feature
- Perform a test migration and validate output
- Module summary

Module 12: Use Data Management

- Introduction
- Understand data management and integration
- Data management workspace
- Templates in data management
- Import, export and copy data into a legal entity
- Practice Labs
- Module summary

Module 13: Perform User Acceptance Testing

- Introduction
- Create and perform test cases for User Acceptance
- Practice Lab
- Module summary

Module 14: Prepare to Go Live

- **Introduction**
- **Get ready to go live**
- **Module summary**

Module 15: Course Conclusion

- Final assessment
- Course summary
- Post-course survey