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

Course ID #: 7000-404-ZZ-Z

Hours: 14

Course Content

Course Description:

In this course, you will cover the following core features in Dynamics 365: core common features, core configuration, data migration, and preparing to 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 and navigation
- Experience being a functional or technical consultant who has used Dynamics Finance Apps to gather and analyze business requirements
- General knowledge of basic mobile device features and navigation
- The student should be able to take a synchronous, virtual course and communicate feedback in a positive, constructive manner

Target Audience:

Consultants (functional and technical) gather and analyze business requirements, and translate those requirements into fully realized business processes and solutions that implement industry recommended practices. They serve as a key resource in implementing and configuring apps to meet business requirements. Consultants should be able to implement shared features used by Dynamics 365 finance and operations apps. They should also have awareness of how Dynamics 365 finance and operations apps integrate with external systems and tools including Microsoft Power Platform. The consultant uses Lifecycle Services (LCS), Azure DevOps, and other Microsoft tools and platforms to facilitate the application lifecycle management (ALM) process. Consultants pursue continuous education by reading the product release notes, reviewing product roadmaps, participating in conferences, or continue learning by using Microsoft Learn, Microsoft Docs, instructor-led training, blogs, and user communities. They should also pursue role-base certifications and assessments to ensure their knowledge is recognized.

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Topics:

Lesson 1: Introduction to Microsoft Dynamics 365
- Introduction
- Digital transformation is business transformation
- Microsoft business applications
- Artificial intelligence
- Mixed reality
- Check your knowledge
- Summary

Lesson 2: Navigate finance and operations apps
- Introduction
- Navigation elements
- See how workspaces drive productivity
- Use filtering techniques
- Search in finance and operations apps
- Compare views
- How to use View and Edit modes
- Check your knowledge
- Summary

Lesson 3: Get started with Dynamics 365 Finance
- Introduction
- Benefits of Dynamics 365 Finance
- Overview
- General ledger
- Cash and bank management
- Tax
- Accounts payable
- Accounts receivable
- Credit and collections
- Budgeting
- Fixed assets
- Cost accounting
- Electronic invoicing
- Lab – Explore Dynamics 365 Finance
- Check your knowledge
- Summary

Lesson 4: Get started with production control in Dynamics 365 Supply Chain Management
- Introduction
- Core concepts in production control
- Understand unified manufacturing
- Manufacturing principles
- Overview of the production process and production life cycle
- Discrete manufacturing
- Process manufacturing
- Lean manufacturing
- Configure production control for unified manufacturing
- Capacity planning
- Integration between the General ledger and the Production control modules
- IoT intelligence and insights
- Lab – Explore production control
- Check your knowledge
- Summary

Lesson 5: Get help and learn more about finance and operations apps
- Introduction
- Microsoft Learn site
- In-product help
- Customize help topics
- Protecting the privacy and personal data of your customers
- Summary

Lesson 6: Get started with Lifecycle Service for finance and operations apps
- Introduction
- Understand the functionality and tools of Lifecycle Services
- Lifecycle Services security
- Reuse existing assets, copy, and share data
- Perform actions in the Asset library
- Work with the Task recorder
- Business process modeler (BPM)
- Issue search and support
- Get product updates from Lifecycle Services
- Exercise – use the Task recorder to create and edit a recording
- Exercise – create a business process in the business process modeler
- Exercise – create a support incident
- Check your knowledge
- Summary

Lesson 7: Design and plan an implementation of finance and operations apps
- Introduction
- Use implementation methodologies for a successful implementation
- Cloud implementation – analysis
- Cloud implementation – design and develop
- Cloud implementation – test
- Cloud implementation – deploy and operate
- On-premises implementation – analysis
- On-premises implementation – design and develop
- On-premises implementation – test, deploy, and operate
- Gathering and analyzing the requirements
- Create functional design documents (FDD)
- Check your knowledge
- Summary

Lesson 8: Translate Dynamics 365 apps and documentation with Dynamics 365 Translation Service
- Introduction
- Access Dynamics 365 Translation Service
- Types of requests
- Reuse translations (recycling)
- Custom-trained machine translation system
- Exercise – Create, review, and regenerate a user interface translation request
- Exercise – Create, review, and regenerate a documentation translation request
- Exercise – Create a translation memory file
- Check your knowledge
- Summary

Lesson 9: Plan and configure the global address book in finance and operations apps
- Introduction
- How the global address book works
- Plan for the global address book and other address books
- Lab – configure address books
- Lab – Add a new record and check for duplicates
- Check your knowledge
- Summary

Lesson 10: Plan and implement legal entities in finance and operations apps
- Introduction
- Create a legal entity
- Create a number sequence
- Understand organizational hierarchies and operating units
- Plan your organizational hierarchy
- Decide whether to model internal organizations as legal entities or operating units
- Decide whether to model internal organizations as legal entities or operating units (cont.)
- Best practices for modeling organizations and hierarchies
- Apply purposes and policies
- Distributed order management (DOM) policy
- Configure calendars and date intervals
- Lab – Configure a new legal entity
- Lab – Create an operating unit
- Lab – Create an organization hierarchy
- Lab – Set up a number sequence
- Check your knowledge
- Summary

Lesson 11: Plan and implement security in finance and operations apps
- Introduction
- Understand the security architecture
- Encryption in finance and operations apps
- Manage users and security
- Set up and apply segregation of duties
- Run security reports
- Stay compliant with user licensing requirements
- Security diagnostics for task recordings
- Extensible data security policies
- Exercise – Import a user and assign security role
- Lab – Work with security
- Check your knowledge
- Summary

Lesson 12: Set up batch jobs in Finance and operations apps
- Overview of batch processing
- Batch processing and batch servers
- Batch processing of reports and setup of alerts
- Copy a batch job
- Batch job manager role
- Unlock a journal
- Lab – Work with batch jobs and set up alerts
- Check your knowledge
- Summary

Lesson 13: Work with workflows in finance and operations apps
- Introduction
- Workflow types for business processes
- Create and set up workflows
- Assign users to workflow elements
- Use the daily journal workflow
- Lab – Create a purchase requisition workflow
- Check your knowledge
- Summary

Lesson 14: Design and build mobile apps for finance and operations apps
- Introduction
- Demonstration
- Overview of the Dynamics 365 Unified Operations mobile app
- Page design guidelines
- Action design guidelines
- Form design requirements
- Design considerations
- Understand use cases for mobile apps
- Get the Dynamics 365 Unified Operations mobile app
- Check your knowledge
- Summary

Lesson 15: Personalize finance and operations apps
- Introduction
- Understand the differences between customization and personalization
- Apply user options
- Implicit personalization
- Explicit personalization
- Administer personalization
- Saved views
- The personalization toolbar
- Personalize a workspace
- Personalize a dashboard
- Personalize inventory dimensions
- Create and maintain record templates
- Lab – Personalize user options
- Lab – Create and use a record template
- Check your knowledge
- Summary

Lesson 16: Implement common integration features in finance and operations apps
- Introduction
- Microsoft Office integration
- Excel workbook designer
- Document management
- Configure email (SMTP/Exchange)
- Create an email template
- Power BI in finance and operations
- Set up network printing
- Integrate data from multiple sources into Microsoft Dataverse for Apps
- Lab – Work with Microsoft Office integration
- Check your knowledge
- Summary

Lesson 17: Feature management in finance and operations apps
- Introduction
- Feature management workspace
- Feature states
- Enable a feature
- Reschedule a feature
- Disable a feature
- Features that must be enabled
- Enable all features
- Check for updates
- Assign roles
- Features that use configuration keys
- Data entities
- Check your knowledge
- Summary

Lesson 18: Prepare data for migration to finance and operations apps
- Introduction
- Select a data integration (import/export) strategy
- Common migration scenarios and tools
- Bring your own database (BYOD)
- Test a data migration and validate output
- Check your knowledge
- Summary

Lesson 19: Work with data management in finance and operations apps
- Introduction
- Data management concepts
- Use data entities for data management and integration
- Work with the Data management workspace
- Using Standard and Enhanced views for tiles
- Use templates in data management
- Export, import, and copy data into a legal entity
- Lab – Explore the Data management workspace
- Lab – Explore data using the Data management workspace
- Database movement operations
- Data sharing framework
- Check your knowledge
- Summary

Lesson 20: Perform user acceptance testing in finance and operations apps
- Introduction
- Create user acceptance test libraries
- Record test cases and save to BPM
- Synchronize and configure your test plan in Azure DevOps
- Run user acceptance tests
- Data task automation
- Exercise – Build test scripts to test business functionality
- Check your knowledge
- Summary

Lesson 21: Prepare to go-live with finance and operations apps
- Introduction
- Understand the go-live process
- Complete the Lifecycle Services methodology
- Perform user acceptance testing (UAT) for your solution
- FastTrack go-live assessment
- Request a production environment
- Check your knowledge
- Summary

Lesson 22: Work with analytics and reporting in finance and operations apps
- Introduction
- Understand different types of reports and inquiries
- Financial reporting
- Find inquiries and reports
- Generate and consume inquiries and reports
- Configure finance and operations apps for Microsoft Power Platform
- Lab – Work with reports
- Check your knowledge
- Summary

Lesson 23: Configure electronic reporting in Dynamics 365 Finance
- Introduction
- Configure electronic reporting
- Use barcode data sources to generate bar code images
- Lab – Generate electronic documents for payments
- Check your knowledge
- Summary

Register for this class by visiting us at:
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