



MB-920T00: Microsoft Dynamics 365 Fundamentals (ERP)

Course ID #: 7000-605-ZZ-Z

Hours: 7

Course Content

Course Description:

In this course, you will be provided with a broad introduction to the finance and operations capabilities of Dynamics 365. You will become familiar with the concept of enterprise resource management (ERP), and learn about the core capabilities of the finance and operations app. Then we will discuss each of the apps individually, including Dynamics 365 Supply Chain Management, Dynamics 365 Finance, Dynamics 365 Commerce, Dynamics 365 Human Resources, and the ERP capabilities of Dynamics 365 Project Operations. This course will include lecture and hands-on-labs.

Course Objectives:

- Describe built-in reporting capabilities.
- Describe Finance capabilities, features, and use cases.
- Describe chart of accounts, including main accounts and classification.
- Describe core accounts payable components, including vendors, purchase orders, and vendor invoices.
- Describe cash and bank management concepts.
- Describe use cases for Warehouse Management Systems (WMS) and warehouse configuration options, including layout, stocking limits, and location profiles.
- Describe distributed order management (DOM).
- Describe employee training and certification features.
- Describe project-based services and project types.
- Describe project scheduling and resourcing.
- And so much more!

Prerequisites:

Students should have a fundamental understanding of financial principles and business operations. An understanding of cloud computing is helpful but isn't necessary.

Target Audience:

- Business Owner

People in different roles and at various stages in their careers can benefit from this fundamentals course. This includes business stakeholders and others who want to be exposed to the finance and operations capabilities of Dynamics 365, students, recent graduates, and people changing careers who want to leverage Dynamics 365 to move to the next level.



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Topics:

Lesson 1: Describe the finance and operations apps

- Introduction
- Describe enterprise resource planning (ERP)
- Describe finance and operations apps use cases
- Describe the finance and operations apps user interfaces
- Exercise: Navigate the finance and operations apps
- Knowledge check
- Summary and resources

Lesson 2: Describe reporting and integration capabilities in finance and operations apps

- Introduction
- Describe reporting options
- Describe how to use Power BI to analyze data
- Describe options for manipulating data from finance and operations apps within Excel
- Describe Microsoft Office 365 integration capabilities
- Exercise: Excel integration
- Describe options for integrating finance and operations apps with Microsoft Power Platform
- Explore business events integration capabilities
- Knowledge check
- Summary and resources

Lesson 3: Describe Dynamics 365 Finance core capabilities

- Introduction
- Describe Finance capabilities and features
- Describe organization and legal entities
- Describe number sequence functionality
- Describe tax capabilities
- Describe cost accounting concepts
- Knowledge check
- Summary and resources

Lesson 4: Describe the general ledger in Dynamics 365 Finance

- Introduction
- Describe the chart of accounts functionality
- Describe financial dimensions and dimension set concepts
- Describe periodic financial processes
- Describe journaling concepts
- Exercise: Create a main account
- Knowledge check
- Summary and resources

Lesson 5: Describe accounts payable and accounts receivable in Dynamics 365 Finance

- Introduction
- Describe core accounts payable components
- Describe vendor payments and settlements
- Describe core accounts receivable components
- Describe credit and collection processes
- Describe revenue recognition
- Knowledge check
- Summary and resources



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Lesson 6: Explore expense management, fixed asset management, and budgeting in Dynamics 365 Finance

- Introduction
- Describe cash and bank management concepts
- Describe expense management
- Describe fixed asset management
- Describe budgeting capabilities
- Knowledge check
- Summary and resources

Lesson 7: Describe the general capabilities of Dynamics 365 Supply Chain Management

- Introduction
- Describe supply chain management capabilities and features
- Describe product master records, product variants, and product dimensions
- Exercise: Create a product
- Describe pricing and discounts in relation to trade agreements
- Describe the procure-to-pay process
- Exercise: Create a purchase order
- Describe the order-to-cash process
- Knowledge check
- Summary and resources

Lesson 8: Describe warehouse and inventory management capabilities in Dynamics 365 Supply Chain Management

- Introduction
- Describe costing methods
- Describe item arrival journals and cross-docking
- Describe inventory reservations, picking and packing, replenishment, and shipments
- Describe inventory counting and inventory on-hand concepts
- Describe quality management capabilities
- Describe use cases for Warehouse Management Systems (WMS)
- Describe use cases for Transportation Management Systems
- Knowledge check
- Summary and resources

Lesson 9: Describe manufacturing strategies in Dynamics 365 Supply Chain Management

- Introduction
- Describe manufacturing types
- Describe manufacturing strategies
- Describe the production elements of a production process
- Describe item tracking and tracing processes
- Describe manufacturing execution
- Describe master planning and planning optimization
- Exercise: Create a production order
- Knowledge check
- Summary and resources



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Lesson 10: Describe Dynamics 365 Commerce capabilities

- Introduction
- Describe Commerce core capabilities
- Describe Commerce channels
- Describe channel management concepts
- Describe distributed order management (DOM)
- Describe pricing and discounts
- Describe product hierarchies and assortments
- Exercise: Create a product assortment
- Explore Store Commerce
- Describe e-commerce capabilities
- Knowledge check
- Summary and resources

Lesson 11: Describe Dynamics 365 Commerce clienteling capabilities and Dynamics 365 Fraud Protection

- Introduction
- Describe loyalty programs
- Describe how to create personalized customer experiences by using clienteling
- Describe Fraud Protection
- Knowledge check
- Summary and resources

Lesson 12: Describe Dynamics 365 Human Resources core capabilities

- Introduction
- Describe use cases of Dynamics 365 Human Resources
- Describe workers and positions
- Describe the hire-to-retire process
- Describe compensation and benefits capabilities
- Describe leave and absence capabilities
- Describe compliance features
- Knowledge check
- Summary and resources

Lesson 13: Describe personnel management capabilities in Dynamics 365 Human Resources

- Introduction
- Describe self-service capabilities
- Describe employee training and certification features
- Describe performance management capabilities
- Knowledge check
- Summary and resources

Lesson 14: Identify project life cycle management capabilities in Dynamics 365 Project Operations

- Introduction
- Describe Dynamics 365 Project Operations capabilities
- Describe project-based services and project types
- Describe how Project Operations supports different industries
- Describe the project life cycle
- Describe project sales capabilities
- Describe project purchase orders
- Describe project contract capabilities
- Describe project pricing capabilities
- Knowledge check
- Summary and resources



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Lesson 15: Describe the project planning and execution capabilities of Dynamics 365 Project Operations

- Introduction
- Describe project planning
- Describe project scheduling and resourcing
- Describe work breakdown structures
- Describe project invoicing
- Describe project cost tracking
- Describe project budget capabilities
- Knowledge check
- Summary and resources

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