MB-300 Microsoft Dynamics 365 Core Finance and Operations

Module 1: Course Overview

This course covers the core features in Dynamics 365 Finance and Operations apps. The overall topics discussed here include core common features, core configuration, data migration, and preparing to go live. This course is a preliminary course for functional consultants and technical consultants. They should have a fundamental understanding of the Dynamics 365 Finance and Operations apps. They should also have awareness about how Dynamics 365 Finance and Operations apps integrate with external systems and tools, including Power Platform. The consultant actively manages application lifecycles by using Lifecycle Services and other Microsoft tools and platforms.

Lessons
- Learning Objectives
- Module Overview

You will have learned the modules covered in this course.

Module 2: Use common functionality and implementation tools

In this module, you will learn how to:

- Use common functionality and implementation tools.
- Describe uses cases for, and capabilities of, workspaces.
- Use and personalize operational workspaces.
- Describe case management.
- Describe global address book features and their use cases.
- Identify the inquiry and report types available in a default installation.
- Describe use cases for the business document management and electronic reporting features.
- Work with business document management.
- Navigate and efficiently use search filtering and create search queries.
- Understand and use record templates.
- Describe use cases for Power Platform apps and services.
- Identify when to use Power Platform in the Dynamics 365 Finance app.
- Integrate Power BI with Dynamics 365 Finance apps.

Lessons
- Introduction
- Identify and use common Dynamics 365 Finance and Operations apps features and functionality

- Describe use cases for Power Platform apps and services
- Module Summary

Lab : Work with an operational workspace

Lab : Prepare, enable, and use Business document management

Lab : Perform searches and work with filters

Lab : Create search queries and save for future use

Lab : Work with record templates

You have learned how to:

- Use common functionality and implementation tools .
- Describe use cases for, and capabilities of, workspaces.
- Use and personalize operational workspaces.
- Describe case management.
- Describe global address book features and their use cases.
- Identify the inquiry and report types available in a default installation.
- Describe use cases for the business document management and electronic reporting features.
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- Navigate and efficiently use search filtering and create search queries.
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- Describe use cases for Power Platform apps and services.
- Identify when to use Power Platform in the Dynamics 365 Dynamics 365 Finance app.
- Integrate Power BI with Dynamics 365 Dynamics 365 Finance apps.

Module 3: Configure security, processes, and options

In this module, you will learn how to:

- Distinguish between roles, duties, privileges, and permissions.
- Apply security roles to users.
- Describe segregation of duties.
- Run and analyze security reports.
- Create and use workflow for approval.
- Configure workflow properties and elements.
- Set up and configure legal entities and operating units.
- Configure and troubleshoot number sequences.
- Create an organization hierarchy and assign purpose.
- Describe and apply user options.
- Configure document handling for attachments.
- Configure print management and form setup features.

- Describe use cases for the Microsoft Excel Workbook Designer and the Microsoft Dynamics Office add-in.
- Configure email (SMTP/Exchange).
- Create and maintain email templates.
- Use the personalization feature.
- Set up and monitor batch jobs and alerts.

Lessons

- Introduction
- Implement security
- Design and create workflows
- Configure Organization administration features
- Configure System administration features
- Module Summary

Lab : Create users and assign security roles

Lab : Set up segregation of duties

Lab : Run a security report and analyze the output

Lab : Create a purchase requisition workflow

Lab : Configure a new legal entity

Lab : Create an operating unit

Lab : Set up number sequences

Lab : Create an Organization Hierarchy and assign purpose

Lab : Use Excel workbook designer

Lab : Create a batch job

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- Distinguish between roles, duties, privileges, and permissions.
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Module 4: Manage Dynamics 365 Finance and Operation data

In this module, you will learn how to:

- Manage data in Dynamics 365 Finance and Operations apps.
- Describe Data management concepts.
- Understand the Data management workspace overview.
- Work with templates in the Data management workspace.
- Prepare data for import or create all necessary startup data including postal code data, customers, vendors, and products.
- Describe use cases for and types of data entities.
- Export data from a legal entity.
- Import data into a legal entity.
- Copy configuration data between companies or legal entities by using the data management framework.
- Describe use cases for the dual-write feature.
- Plan a migration strategy.
- Identify common migration scenarios and tools in Dynamics 365 Finance and Operations apps.
- Determine the scope for a migration.
- Identify relevant data entities and elements based on given scenarios.
- Establish migration strategy processes including migration scope.
- Prepare data for migration and migrate data.
- Create a checklist for proper planning for a given scenario prior to data migration.
- Identify and extract source data.
- Identify available data types for creating source data on a given scenario for data migration.
- Generate field mapping between source and target data structures.
- Import or export data by using the data management framework.
- Support the transition between the existing and migrated systems.
- Perform a test migration and validate output from the process.
- Implement data task automation.

Lessons

- Introduction
- Manage data in Dynamics 365 Finance and Operations apps
- Plan a migration strategy
- Prepare data for migration and migrate data

- Module Summary

Lab : Work with templates in the Data management workspace

Lab : Export and import data

Lab : Copy configuration data between legal entities

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- Manage data in Dynamics 365 Finance and Operations apps.
- Describe Data management concepts.
- Understand the Data management workspace overview.
- Work with templates in the Data management workspace.
- Prepare data for import or create all necessary startup data including postal code data, customers
- Describe use cases for and types of data entities.
- Export data from a legal entity.
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- Perform a test migration and validate output from the process.
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Module 5: Validate and support the solution

In this module, you will learn how to:

- Describe the correlation between test cases and business requirements.
- Use best practices for recording test cases.
- Use Task recorder.
- Create a scenario for acceptance testing and save in a Business process modeler (BPM) library.
- Sync and configure your test plan in Azure DevOps.
- Execute your tests.
- Use Regression suite automation tool (RSAT).
- Create user acceptance tests (UAT) and test plans.

- Create and work with BPM.
- Use Issue search