

MB-800T00: Microsoft Dynamics 365 Business Central Functional Consultant Course
Overview (Duration : 5 Days / 8 hours per day)

Module 1: Introduction to Business Central

- Describe use cases and common features for Business Central modules
- Technology overview
- Navigate the user interface
- Perform basic user tasks in Business Central
- Master Data
- Sales and Purchase processes

Module 2: Application Setup

- i. Create and configure a new company
 - Create a new company by using the Assisted Setup
 - Copy a company
 - Copy data from an existing company
- ii. Migrate data to Business Central
 - Overview
 - Migrate data by using the Assisted Setup
 - Create a configuration worksheet
 - Create configuration questionnaires
 - Use configuration packages
 - Migrate data by using the **Edit in Excel** feature
 - Create journal opening balances
- iii. Manage Security
 - Set up new users and user groups
 - Create and assign permission sets
 - Apply security filters
 - Create and manage user profiles
 - Perform user-specific setup
- iv. Set up core app functionality
 - Set up company information
 - Set up printers
 - Set up reports
 - Set up and use job queues
 - Set up email
 - Set up number series
 - Set up base calendars
 - Set up change log

Module 3: Configure Financials

- i. Set up Finance Management
 - Configure accounting periods
 - Configure the general ledger setup

- ii. Set up the Chart of Accounts
 - Create G/L accounts
 - Create account categories and subcategories

- iii. Set up posting groups
 - Overview
 - Create specific posting groups
 - Create general posting groups
 - Configure general posting setup options
 - Set up VAT Posting Groups
 - Configure the VAT Posting Setup

- iv. Set up dimensions
 - Overview
 - Set up dimensions and dimension values
 - Set up global and shortcut dimensions
 - Set up default dimensions
 - Block combinations
 - Define default dimension priorities

- v. General Journals
 - Overview
 - Create general journal templates
 - Create general journal batches

- vi. Set up currencies
 - Set up currencies
 - Update exchange rates

- vii. Set up Cash Management
 - Set up bank accounts
 - Set up bank imports and exports
 - Set up payment reconciliation journals
 - Set up payment application rules
 - Explore data exchange definitions

- viii. Set up Accounts Payables
 - Create vendor accounts
 - Create Payment Terms
 - Configure Payment Methods
 - Merge vendor accounts
 - Configure the purchases and payables setup
 - Set up payment journals
 - Set up vendor bank accounts
 - Create document sending profiles

- ix. Set up Accounts Receivables
 - Create customer accounts
 - Merge customer records

- Configure the Sales & Receivables Setup
- Set up cash receipt journals
- Set up payment registration
- Set up customer bank accounts
- Enable customer payments through payment services
- Relationship between customer and customer ledger entries

Module 4: Configure Sales and Purchasing

- i. Set up Inventory
 - Create customer accounts
 - Merge customer records
 - Configure the Sales & Receivables Setup
 - Set up cash receipt journals
 - Set up payment registration
 - Set up customer bank accounts
 - Enable customer payments through payment services
 - Relationship between customer and customer ledger entries

- ii. Configure sales pricing and discounts
 - Create customer-specific discounts
 - Create customer-specific prices
 - Pricing customer groups
 - Best price calculation

- iii. Configure purchase pricing and discounts
 - Configure purchase prices
 - Configure purchase discounts

- iv. Configure Salespeople and Purchasers
 - Configure salespeople
 - Assign a salesperson to a customer
 - Configure purchasers
 - Assign a purchaser to a vendor

Module 5: Operations

- i. Purchase items
 - Create quotations
 - Convert a quotation into a purchase order
 - Receive items associated with a purchase order
 - Over-receive items
 - Reverse a receipt
 - Invoice items
 - Review a purchase transaction
 - Configure recurring purchase lines

- ii. Sell items
 - Create quotations
 - Convert a quotation into an order or invoice

- Analyze item availability
 - Ship items
 - Reverse shipments
 - Invoice items
 - Configure recurring sales lines
 - Post and review a sales transaction
- iii. Order Promising
- Process customer payments
 - Process payments to vendors
 - Unapply entries
 - Reconcile bank accounts
 - Process journal entries
 - Reverse posted journals
- iv. Financial Transactions
- Process purchase invoices
 - Reverse or correct a posted purchase invoice
 - Process sales invoices
 - Reverse or correct a posted sales invoice
 - Combine order shipments for invoicing
 - Process payments journals
 - Suggest vendor payments
 - Unapply entries
 - Reverse posted journals
 - Describe bank reconciliations
 - Create and process journal entries
 - Process periodic entries using standard journals
- v. Inventory Costing
- Create and manage inventory periods
 - Describe the inventory batch posting process
 - Describe costing methods

Module 6: Integration and Automation

- i. Set up and manage approvals by using workflows
- Explore workflow in Business Central
 - Create workflows
 - Set up approval users
 - Set up notifications
 - Use approval workflows
- ii. Integrate Business Central with other applications
- Integrate Business Central with Office apps
 - Describe use cases for integrating Business Central with Microsoft Teams and Microsoft Office
 - Describe use cases for AppSource (Marketplace)
 - Configure integration between Business Central and Microsoft Dataverse

- Describe use cases connecting to Dynamics 365 Sales
- iii. Connect Power Automate
 - Describe use cases for enhancing Business Central by using Power Automate
 - Describe the process for creating flows and using standard connectors
 - Use embedded (built-in flows in Business Central) Power Automate flows
- iv. Connect Power Apps
 - Describe use cases for enhancing Business Central by using Power Apps
 - Create Power App with Standard API
- v. Connect Power BI
 - Consume Power BI reports within Business Central
 - Consume Business Central data by using Odata in Power BI Desktop

Day 5 : Workshop Demo