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

Course Duration: 16 Hours (2 Days)

Overview

The MB-300T00: Microsoft Dynamics 365: Core Finance and Operations course is an essential training for professionals seeking to understand the foundational elements of Dynamics 365. This course covers the key functionalities, common tasks, and essential skills needed to configure and support a Dynamics 365 Finance and Operations environment. Through various modules, learners will explore the user interface, navigation, administrative features, workflows, security, data management, and support. Participants will gain hands-on experience with Dynamics 365 Finance and Operations apps, learning to set up and configure core components, manage data, create workflows, and ensure the solution is validated and supported effectively. The course prepares individuals for real-world scenarios, enhancing their ability to contribute to the implementation, maintenance, and support of Dynamics 365 solutions. By the end of the training, learners will be equipped with the knowledge to optimize finance and operations within their organizations, making them valuable assets in the ever-evolving digital landscape.

Audience Profile

The MB-300T00 course equips professionals with skills in Dynamics 365 Finance and Operations, catering to those in IT and finance roles.

- IT Professionals and Administrators implementing and managing Dynamics 365 Finance and Operations
- Functional Consultants and Analysts who design and deploy financials and operations solutions
- Project Managers overseeing Dynamics 365 Finance and Operations deployments
- Technical Support Engineers specializing in Dynamics 365 solutions
- Business and Financial Analysts seeking to understand Dynamics 365 FO capabilities
- Solutions Architects designing comprehensive finance and operations systems
- ERP Specialists transitioning to or integrating with Dynamics 365 Finance and Operations
- System Developers who customize and extend Dynamics 365 FO functionalities
- Database Administrators involved in data management and migration for Dynamics 365 FO
- Compliance Officers ensuring that finance systems meet regulatory requirements

Course Syllabus

Module 1: Describe finance and operations UI Elements, Basic Navigation, Apps

- Introduction to Dynamics 365 Finance and Operations
- Basic UI and Navigation
- Dynamics 365 FO features and functionality
- Lab: Work with operational workspace
- Lab: Perform searches and work with filters
- Lab: Create search queries and save for future use
- Lab: Work with record templates
- Lab: Prepare, enable, and use business document management
- Lab: Work with Saved views
- Lab: Set up Number Sequence
- Lab: Configuring Address Books

Module 2: Configure administrative features and workflows

- Implement Security
- Implement Dynamics 365 Finance and Operations apps workflows and business events
- Plan and implement an organization
- Administer Finance and Operations Apps
- Implement Reporting
- Lab: Creating users and Assigning security roles
- Lab: Setting up segregation of duties
- Lab: Run a security report and analyze the output
- Lab: Create purchase requisition workflow
- Lab: Create a New Legal Entity
- Lab: Create an Operating Unit
- Lab: Create a Batch Job

Module 3: Manage Finance and Operations data

- Managing Finance and Operations Data
- Dynamics 365 apps that integrate with Finance and Operations apps
- Lab: Work with template in the Data Management Workspace
- Lab: Export and import the data
- Lab: Copy configuration data between legal entities
- Lab: Use Excel workbook designer

Module 4: Validate and support the solution

- Managing Applications in Dynamics 365 Finance and Operations
- Implementing Lifecycle services (LCS) Tools
- Testing solutions in Dynamics 365 Finance and Operations app