MB-800T00: Microsoft Dynamics 365 Business Central Functional Consultant

Course Duration: 40 Hours (5 Days)

Overview

The MB-800T00: Microsoft Dynamics 365 Business Central Functional Consultant course is designed to equip learners with the skills needed to set up and configure the core functionalities of Microsoft Dynamics 365 Business Central. This comprehensive course covers various aspects of the software, from basic navigation and Operations to more complex financials and integration with other applications. Starting with an Introduction to Business Central, learners will understand common features, navigate the user interface, and master basic tasks. The course then progresses through Application setup, configuring financials, and sales and purchasing processes, ensuring a deep understanding of how to manage a company's financials, sales, inventory, and purchasing workflows. With Operations and Integration and automation modules, learners will delve into practical applications such as Managing transactions, Inventory costing, setting up workflows, and integrating Business Central with other tools like Power Automate, Power Apps, and Power BI. By the end of the course, participants will be well-prepared to work as functional consultants, helping businesses optimize their Operations with Dynamics 365 Business Central.

Audience Profile

The MB-800T00 course equips individuals with functional consulting skills for Microsoft Dynamics 365 Business Central, targeting professionals involved in business operations and system configurations.

- ERP Consultants
- Functional Consultants for Dynamics 365 Business Central
- Systems Administrators managing Dynamics 365 environments
- Financial Analysts seeking to leverage Dynamics 365 for financial management
- IT Professionals aiming to integrate and automate business processes with Dynamics 365
- Business Analysts looking to optimize sales, purchasing, and inventory within Business Central
- Project Managers overseeing Dynamics 365 Business Central implementations
- Accountants and Financial Controllers responsible for setting up and managing financials within Business Central
- Sales and Purchasing Managers focusing on pricing, discounts, and payment processing
- Professionals transitioning from other ERP solutions to Microsoft Dynamics 365 Business Central
- Microsoft Partners specializing in Business Central deployments and support

- Corporate Trainers and Educators providing instruction on Business Central functionality and setup

Course Syllabus

Module 1: Set up Business Central (15–20%)

Create and configure a company

- Create a company in Business Central
- Create a company by using Assisted Setup
- Describe the use cases and capabilities of configuration packages
- Create a configuration worksheet
- Create and use a configuration package
- Create journal opening balances
- Migrate data

Manage security

- Create and manage user profiles
- Set up a new user
- Create and assign permission sets and permissions
- Apply security filters
- Manage user permissions by using security groups

Set up core functionality

- Set up company information
- Set up reports and configure report layouts
- Set up and use job queues
- Set up email accounts
- Set up number series

Set up dimensions

- Set up dimensions and dimension values
- Set up global dimensions and shortcut dimensions
- Set up default dimensions for master data
- Set up blocking combinations of dimensions and dimension values
- Describe the Dimension Correction Tool
- Set up default dimensions for account types

- Set up default dimension priorities

Manage approvals by using workflows

- Set up native workflows
- Set up a notification system
- Set up users for approval and workflow user groups

Describe Business Central integrations with other products

- Describe use cases for Microsoft 365 integration, including Microsoft Excel, OneDrive, Outlook, Teams, and Word
- Describe uses cases for Microsoft Power Platform integration

Module 2: Configure financials (30–35%)

Set up Finance Management

- Configure General Ledger setup
- Configure accounting periods
- Set up payment terms

Manage the chart of accounts

- Set up general ledger account card
- Create account categories and subcategories
- Create financial reports based on the Account Categories field and statistical accounts

Set up posting groups

- Create specific posting groups including bank, customer, vendor, and inventory posting groups
- Create general posting groups
- Configure General Posting Setup
- Configure Inventory Posting Setup

Set up journals and bank accounts

- Set up bank accounts
- Create journal templates, including no. Series
- Create batches
- Implement recurring journals

Set up Accounts Payables

- Create vendor accounts, including payment terms, vendor bank accounts, and related records
- Configure Purchases & Payables Setup
- Set up payment journals
- Describe the relationship between vendors, vendor ledger entries, and detailed vendor ledger entries

Set up accounts receivables

- Create customer accounts
- Configure Sales & Receivables Setup
- Set up cash receipt journals
- Set up payment registration
- Configure customer payment methods
- Describe the relationship between customers, customer ledger entries, and detailed customer ledger entries

Module 3: Configure sales and purchasing (15–20%)

Set up inventory

- Configure inventory set up
- Manage items, including item categories, item attributes, and units of measure
- Create locations
- Describe the relationship between items, item ledger entries, and value entries
- Differentiate between costing methods

Configure master data for sales and purchasing

- Configure core customer settings including shipping agents, locations, and shipping addresses
- Configure core vendor settings including order address, lead time, and locations

Configure pricing and discounts

- Manage vendor purchase prices
- Manage purchase line and invoice discounts
- Manage customer sales prices
- Manage sales line and invoice discounts

Module 4: Perform Business Central operations (30–35%)

Perform basic tasks in Business Central

- Differentiate between designing, customizing, and personalizing pages
- Customize pages

- Apply and save filters
- Find documents and related entries
- Use the Inspect pages and data feature
- Perform data updates by using the Edit in Excel feature
- Attach and share files by using Microsoft OneDrive
- Describe and analyze telemetry

Process purchases

- Manage quotations
- Create a purchase order
- Receive items for a purchase order
- Describe the over-receipt feature
- Undo a receipt
- Create a posted invoice from a purchase order
- Configure recurring purchase lines
- Manage blanket purchase orders

Process sales

- Manage quotations
- Convert a sales quote into a sales order or sales invoice
- Analyze item availability
- Ship items for a sales order
- Undo shipments
- Create a sales invoice from a sales order
- Configure recurring sales lines
- Manage blanket sales orders

Process financial documents

- Process purchase invoices
- Process purchase credit memos
- Process sales invoices
- Process sales credit memos
- Combine sales shipments into a single sales invoice
- Combine purchase receipts into a single purchase invoice
- Correct a posted purchase invoice
- Correct a posted sales invoice
- Release and reopen documents

- Process prepayment invoices for purchases and sales

Process payments and journals

- Process payments by using payment journals
- Process receipts by using the cash receipt journal
- Process payment registrations
- Apply ledger entries and undo applied entries
- Reverse posted journals