Microsoft Finance and Operations Core (MB-300T00)

Modality: Virtual Classroom

Duration: 2 Days

If you enroll in this course at the listed price, you receive a *Free Official Exam Voucher* *for the MB-300 Exam. This course does not include Exam Voucher if enrolled within the Master Subscription, however, you can request to purchase the Official Exam Voucher separately.*

About this Course:

Organizations use Dynamics 365 for Finance and Operations to reduce operational costs and rapidly respond to changing business needs. This solution lets organizations achieve these goals.

- This course discusses core components of Microsoft Dynamics 365 for Finance and Operations.
- This course discusses how to configure core components of Microsoft Dynamics 365 for Finance and Operations
- This course discusses data migration and go-live preparation for Microsoft Dynamics 365 for Finance and Operations.

The average salary of a Microsoft Dynamics Consultant is **$102,330** per year.

Course Objectives:

- Learn core common features of Dynamics 365 for Finance and Operations
- Learn core configuration in Dynamics 365 for Finance and Operations
- Learn Data migration and preparing for go-live with Dynamics 365 for Finance and Operations

Audiences:

- A Dynamics 365 for Finance and Operations Functional Consultant is responsible for performing discovery, capturing requirements, engaging subject matter experts and stakeholders, translating requirements, and configuring the solution and applications. The Functional Consultant implements a solution using out of the box capabilities, codeless extensibility, application and service integrations.

Prerequisites:

- Basic understanding of ERP, CRM concepts.

Course Outline:

Module 1: Use common functionality and implementation tools

In this module, you will learn get an introduction to Dynamics 365 Finance and Operations by learning Basic UI and Navigation. Students will also work with Power Platform tools that work with Finance and Operations apps.

Lessons

- Introduction
- Introduction to Dynamics 365 Finance and Operations
- Basic UI and Navigation
- Dynamics 365 Finance & Operations Features and Functionality
- Power Platform tools that work with Finance and Operations apps
- Module Summary

Lab : Work with operational workspaces

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 : Setup Number Sequences

Lab : Configuring Address Books

Lab : Work with Operational Workspaces

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.
- Navigate and efficiently use search filtering and create search queries.
- Understand and use record templates.
- The Finance and Operations apps available for different business processes
- Describe use cases for Power Platform apps and services.
- Integrate Power BI with Dynamics 365 Dynamics 365 Finance apps.

Module 2: Configure administrative features and workflows

In this module, you will learn how to Implement Security in Finance and Operations Apps while also implementing workflows and business events. Students will Administer Finance and Operations Apps and implement reporting.

Lessons

- Introduction
- Implementing Security in Finance and Operations Apps
- Implementing Dynamics 365 Finance and Operations apps workflows and business events
- Planning and Implementing an organization in Dynamics 365 Finance and Operations
- Administering Finance and Operations Apps
- Implement Reporting in Dynamics 365 Finance and Operations
- Module Summary

Lab : Create a Batch job

Lab : Create an organization hierarchy

Lab : Create an operating unit

Lab : Configure a new legal entity

Lab : Create a purchase requisition workflow

Lab : Run a security report and analyze the outputs

Lab : Set up segregation of duties

Lab : Create users and assign security roles

You have learned how to:

- Implement security and segregation of duties
- Design and create workflows
- Set up and configure legal entities and operating units
- Creating Batch Jobs

- Create an organization hierarchy and assign purpose
- Configure user options
- Use Excel Workbook Designer
- Configure email (SMTP/Exchange)
- Create and maintain email templates
- Use Power Automate flows from Dynamics 365 Finance and Operations

Module 3: Manage Dynamics 365 Finance and Operation data

In this module, you will learn how to Manage Finance and Operations data by planning for Data Migrations and work with apps with integrate with Finance and Operations apps.

Lessons

- Introduction
- Manage data in Dynamics 365 Finance and Operations apps
- Plan for Data Migration
- Introduction to AppSource and ISV solutions
- Dynamics 365 Finance and Operations integration
- Module Summary

Lab : Work with templates in the Data management workspace

Lab : Export and import data

Lab : Copy configuration data between legal entities

Lab : Use the Excel Workbook designer

In this module, you learned how to:

- Describe Data management concepts.
- Configuration data templates
- Identify relevant data entities and elements based on given scenarios.
- Describe use cases for and types of data entities.
- Create a template by using the Excel Workbook Designer.
- Describe use cases for the dual-write feature.
- Discuss how to prepare data for import or create all necessary startup data including postal code da
- Import or export data by using the data management framework.
- Copy configuration data between companies or legal entities by using the data management framework.
- Dynamics 365 Finance and Operations integration

Module 4: Validate and support the solution

In this module, you will learn how to manage applications and test solutions in Dynamics 365 Finance and Operations and Implement Lifecycle services (LCS) Tools.

Lessons

- Introduction
- Managing Applications in Dynamics 365 Finance and Operations
- Implement Lifecycle Services (LCS) tools
- Testing solutions in Dynamics 365 Finance and Operations apps
- Module Summary

In this module, you learned how to:

- Document gaps between existing and desired functionality
- Determine when to build versus buy
- Go live process and Fast-Track Go-live processes
- LCS Tools and Methodologies
- Business Process Modeler in LCS
- LCS Search and Service Requests
- Diagnostics and environment monitoring tools
- BPM Libraries overview
- Test cases by using Regression Suite Automation Tool (RSAT) and Azure DevOps.
- Analyzing performance with trace parser