

## MB-300T02-A: Core Configuration in Dynamics 365 for Finance and Operations

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### Course Summary

#### Description

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 how to configure core components of Microsoft Dynamics 365 for Finance and Operations.

#### Topics

- Set Up and Configure Legal Entities
- Manage users and security
- Perform Personalization
- Implement Common Integration Features
- Course Conclusion

#### Audience

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.

#### Duration

One Day

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### Course Outline

#### I. *Set Up and Configure Legal Entities*

This module explains the setup and configuration of legal entities and number sequences in Dynamics 365 for Finance and Operations.

- A. Create a legal entity and generate number sequences
- B. Create a number sequence
- C. Create organization hierarchies
- D. Apply purposes and policies
- E. Configure calendars and date intervals
- F. Practice Labs
- G. Module summary

#### II. *Manage users and security*

Microsoft Dynamics 365 for Finance and Operations has an array of security and configuration options to help keep your sensitive data safe. This all means that your users can remain focused on their roles, while the system remains as streamlined as possible. Knowing how to implement different security options will help companies cover their security requirements. When you understand the security architecture of Finance and Operations, you can more easily customize security to fit the requirements of your business.

- A. Understand the security architecture
- B. Manage users and security
- C. Setup and apply segregation of duties
- D. Run security reports
- E. Setup batch jobs and alerts
- F. Practice labs
- G. Module summary

#### III. *Perform Personalization*

Personalization saves time and effort when using the system.

- A. Describe and apply user options
- B. Create, export and import personalization
- C. Create and maintain record templates
- D. Practice labs
- E. Module summary

#### IV. *Implement Common Integration Features*

Microsoft Dynamics 365 integrates with many other common programs; for example email, Microsoft Office, and Power BI.

- A. Microsoft Office integration
- B. Configure email
- C. Create and maintain email templates
- D. Use Power BI
- E. Setup network printing
- F. Integrate data into Common Data Services for Apps
- G. Practice Labs
- H. Module summary

#### V. *Course Conclusion*

Final assessment and course summary, as well as a post-course survey for the course.

- A. Final assessment
- B. Course summary
- C. Posto-course survey