

MB-920T00: Microsoft Dynamics 365 Fundamentals Finance and Operations Apps (ERP)

Course Summary

Description

Do you want to learn more about Dynamics 365? This course will provide you with a broad introduction to the finance and operations capabilities of Dynamics 365. You will become familiar with the concept of enterprise resource management (ERP), and learn about the core capabilities of the finance and operations app. Then we will discuss each of the apps individually, including Dynamics 365 Supply Chain Management, Dynamics 365 Finance, Dynamics 365 Commerce, Dynamics 365 Human Resources, and the ERP capabilities of Dynamics 365 Project Operations. This course will include lecture and hands-on-labs.

People in different roles and at various stages in their careers can benefit from this fundamentals course. This includes business stakeholders and others who want to be exposed to the finance and operations capabilities of Dynamics 365, students, recent graduates, and people changing careers who want to leverage Dynamics 365 to move to the next level.

Objectives

At the end of this course, students will be able to:

- Describe the capabilities and functionality of Dynamics 365 Supply Chain Management
- Describe the capabilities and functionality of Dynamics 365 Finance
- Describe the capabilities and functionality of Dynamics 365 Commerce
- Describe the capabilities and functionality of Dynamics 365 Human Resources
- Describe the capabilities and functionality of Dynamics 365 Project Operations (ERP)

Topics

- Get introduced to the finance and operations apps
- Create reports and integrate finance and operations apps
- Explore Microsoft Dynamics 365 Finance core capabilities
- Explore general ledger in Microsoft Dynamics 365 Finance
- Explore accounts payable and accounts receivable in Dynamics 365 Finance
- Explore expense management, fixed asset management, and budgeting in Dynamics 365 Finance
- Identify general capabilities of Dynamics 365 Supply Chain Management
- Explore warehouse and inventory capabilities
- Explore manufacturing strategies in Dynamics 365 Supply Chain Management
- Explore Dynamics 365 Commerce capabilities
- Explore Microsoft Dynamics 365 business-to-business e-commerce, Store Commerce, and Clienteling capabilities
- Explore Dynamics 365 Human Resources core capabilities
- Explore personnel management capabilities in Dynamics 365 Human Resources
- Identify project life cycle management capabilities in Dynamics 365 Project Operations
- Explore the project planning and execution capabilities of 365 Project Operations

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Course Summary (cont'd)

Audience

People in different roles and at various stages in their careers can benefit from this fundamentals course. This includes IT professionals, business stakeholders and others who want to be exposed to the finance and operations capabilities of Dynamics 365, students, recent graduates, and people changing careers who want to leverage Dynamics 365 to move to the next level.

Prerequisites

Students should have a fundamental understanding of financial principles and business operations. An understanding of cloud computing is helpful but isn't necessary.

Duration

One day

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Course Outline

I. *Get introduced to the finance and operations apps*

- A. Discover the suite of finance and operation apps that you can use for enterprise resource planning
- B. Review use cases for finance and operations apps

II. *Create reports and integrate finance and operations apps*

- A. Describe built-in reporting capabilities
- B. Describe options for analyzing data
- C. Describe options for manipulating data with Microsoft products
- D. Describe use cases for and integration capabilities with other Microsoft products
- E. Labs: Excel integration

III. *Explore Microsoft Dynamics 365 Finance core capabilities*

- A. Describe finance capabilities and features
- B. Describe use cases for legal entities
- C. Describe how Dynamics 365 Finance handles regional tax reporting requirements
- D. Describe cost accounting concepts
- E. Describe journaling concepts

IV. *Explore general ledger in Microsoft Dynamics 365 Finance*

- A. Describe charts of accounts, including main accounts and classification
- B. Describe financial dimensions and dimension set concepts
- C. Describe periodic financial processes
- D. Labs: Create the main account

V. *Explore accounts payable and accounts receivable in Dynamics 365 Finance*

- A. Describe core accounts payable components, including vendors, purchase orders, and vendor
- B. invoices
- C. Describe vendor payments and settlements, including three-way matching concepts

- D. Describe core accounts receivable components, including customers, customer invoices, and free text invoices
- E. invoices
- F. Describe credit and collection processes
- G. Labs: Create a free text invoice

VI. *Explore expense management, fixed asset management, and budgeting in Dynamics 365 Finance*

- A. Describe cash and bank management concepts
- B. Describe expense management, including cash advances and mobile workspaces
- C. Describe fixed asset management, and fixed asset creation, acquisition, and depreciation
- D. Describe budgeting capabilities

VII. *Identify general capabilities of Dynamics 365 Supply Chain Management*

- A. Describe product master records and product variants
- B. Describe master planning
- C. Describe trade agreements and discounts
- D. Labs: Create a new product

VIII. *Explore warehouse and inventory capabilities*

- A. Describe costing methods, including standard costing, weighted averages, last-in-first-out (LIFO), and
- B. first-in-first-out (FIFO)
- C. Describe use cases for Warehouse Management System (WMS) and warehouse configuration
- D. options, including layout, stocking limits, and location profiles
- E. Describe purchase orders, item arrival journals, and cross-docking
- F. Describe inventory concepts, including reservations, picking and packing, replenishment, shipments,
- G. counting, and inventory on-hand
- H. Describe quality management capabilities
- I. Labs: Create a purchase order
- J. Labs: Create a counting journal

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Course Outline (cont'd)

IX. Explore manufacturing strategies in Dynamics 365 Supply Chain Management

- A. Describe manufacturing types
- B. Describe manufacturing strategies, including make-to-order (MTO), make-to-stock (MTS), and
- C. configure-to-order (CTO)
- D. Describe item tracking and tracing processes
- E. Describe tools that can be used to manage shop floors
- F. Describe master planning
- G. Labs: Create a production order

X. Explore Dynamics 365 Commerce capabilities

- A. Describe commerce capabilities
- B. Describe retail channels and channel management concepts
- C. Describe distributed order management (DOM)
- D. Describe the product assortment
- E. Labs: Create a product assortment

XI. Explore Microsoft Dynamics 365 business-to-business e-commerce, Store Commerce, and Clienteling capabilities

- A. Understand the B2B digital commerce capabilities in the online channel
- B. Describe loyalty and clienteling concepts
- C. Describe how Dynamics 365 Commerce uses Dynamics 365 Customer Insights
- D. Describe how Dynamics 365 Fraud Protection reduces fraudulent activities in the system

XII. Explore Dynamics 365 Human Resources core capabilities

- A. Explore workers and positions
- B. Explore compensation and benefits capabilities
- C. Explore compliance features
- D. Explore performance management capabilities

XIII. Explore personnel management capabilities in Dynamics 365 Human Resources

- A. Describe self-service capabilities
- B. Describe leave and absence capabilities
- C. Describe employee training and certification features

- D. Identify integration options between Dynamics 365 Human Resources and LinkedIn

XIV. Identify project life cycle management capabilities in Dynamics 365 Project Operations

- A. Describe the project lifecycle, including project invoicing and revenue recognition
- B. Describe project-based services
- C. Describe project sales capabilities
- D. Describe project contract capabilities
- E. Describe project pricing capabilities

XV. Explore the project planning and execution capabilities of 365 Project Operations

- A. Describe project planning capabilities
- B. Describe project execution capabilities
- C. Describe the work breakdown structure
- D. Describe project invoicing capabilities
- E. Describe project cost-tracking capabilities