

# Microsoft Dynamics 365 Core Finance and Operations & Supply Chain

## Course 1 \ Microsoft Dynamics 365: Core Finance and Operations

### Course Prerequisites

- There are no prior educational requirements to be eligible for the Microsoft Dynamics 365 Core Finance and Operations (MB-300T00) Certification Training Course. Candidates are only required to have functional knowledge and understanding of how to use Microsoft Windows.
- Candidates also need to have some past experience using Microsoft Dynamics 365, especially for Finance and Operations, even if it is just the basics of processing.

### Module 1: Course Overview

- Learning Objectives
- Module Overview

### Module 2: Use common functionality and implementation tools

- Use common functionality and implementation tools.
- Describe uses 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.
- Work with business document management.
- Navigate and efficiently use search filtering and create search queries.
- Understand and use record templates.
- Describe use cases for Power Platform apps and services.
- Identify when to use Power Platform in the Dynamics 365 Finance app
- Integrate Power BI with Dynamics 365 Finance apps.
- Introduction
- Identify and use common Dynamics 365 Finance and Operations apps features and functionality
- Describe use cases for Power Platform apps and services

- Module Summary
- Lab : Work with an operational workspace
- Lab : Prepare, enable, and use Business document management
- Lab : Perform searches and work with filters
- Lab : Create search queries and save for future use
- Lab : Work with record templates

### Module 3: Configure security, processes, and options

- Distinguish between roles, duties, privileges, and permissions.
- Apply security roles to users.
- Describe segregation of duties
- Run and analyze security reports
- Create and use workflow for approval.
- Configure workflow properties and elements.
- Set up and configure legal entities and operating units.
- Configure and troubleshoot number sequences.
- Create an organization hierarchy and assign purpose
- Describe and apply user options.
- Configure document handling for attachments.
- Configure print management and form setup features.
- Describe use cases for the Microsoft Excel Workbook Designer and the Microsoft Dynamics Office add-in.
- Configure email (SMTP/Exchange)
- Create and maintain email templates
- Use the personalization feature.
- Set up and monitor batch jobs and alerts
- Introduction
- Implement security
- Design and create workflows
- Configure Organization administration features
- Configure System administration features
- Module Summary
- Lab : Create users and assign security roles
- Lab : Set up segregation of duties
- Lab : Run a security report and analyze the output
- Lab : Create a purchase requisition workflow
- Lab : Configure a new legal entity
- Lab : Create an operating unit
- Lab : Set up number sequences
- Lab : Create an Organization Hierarchy and assign purpose
- Lab : Use Excel workbook designer
- Lab : Create a batch job

## Module 4: Manage Dynamics 365 Finance and Operation data

- Manage data in Dynamics 365 Finance and Operations apps.
- Describe Data management concepts.
- Understand the Data management workspace overview.
- Work with templates in the Data management workspace
- Prepare data for import or create all necessary startup data including postal code data, customers, vendors, and products.
- Describe use cases for and types of data entities.
- Export data from a legal entity.
- Import data into a legal entity
- Copy configuration data between companies or legal entities by using the data management framework.
- Describe use cases for the dual-write feature
- Plan a migration strategy
- Identify common migration scenarios and tools in Dynamics 365 Finance and Operations apps
- Determine the scope for a migration.
- Identify relevant data entities and elements based on given scenarios.
- Establish migration strategy processes including migration scope.
- Prepare data for migration and migrate data.
- Create a checklist for proper planning for a given scenario prior to data migration.
- Identify and extract source data.
- Identify available data types for creating source data on a given scenario for data migration.
- Generate field mapping between source and target data structures.
- Import or export data by using the data management framework.
- Support the transition between the existing and migrated systems.
- Perform a test migration and validate output from the process.
- Implement data task automation.
- Introduction
- Manage data in Dynamics 365 Finance and Operations apps
- Plan a migration strategy
- Prepare data for migration and migrate data
- Module Summary
- Lab : Work with templates in the Data management workspace
- Lab : Export and import data
- Lab : Copy configuration data between legal entities

## Module 5: Validate and support the solution

- Describe the correlation between test cases and business requirements.

- Use best practices for recording test cases.
- Use Task recorder.
- Create a scenario for acceptance testing and save in a Business process modeler (BPM) library.
- Sync and configure your test plan in Azure DevOps.
- Execute your tests.
- Use Regression suite automation tool (RSAT).
- Create user acceptance tests (UAT) and test plans.
- Create and work with BPM.
- Use Issue search

## **Course 2 \ Microsoft Dynamics 365: Supply Chain Management**

### **Course Prerequisites**

In order to successfully complete the Microsoft Dynamics 365 Supply Chain Management course, professionals must have:

- Basic knowledge of accounting principles and financial operations of the business, customer service, field service, manufacturing, retail, and supply chain management concepts.
- Knowledge around supply chain management practices, including procurement, trade, logistics, warehouse management, and transportation management

### **Module 1: Implement product information management**

- Create and manage products
- Configure products for supply chain management
- Manage inventory pricing and costing

### **Module 2: Implement inventory management**

- Configure Inventory management
- Manage and process inventory activities

### **Module 3: Implement and manage supply chain processes**

- Implement Procurement and sourcing
- Implement common sales and marketing features
- Using Microsoft Guides