



Mastering Microsoft Dynamics 365 for  
Finance and Operations: From  
Fundamentals to Advanced Configurations  
and Customizations



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# Mastering Microsoft Dynamics 365 for Finance and Operations: From Fundamentals to Advanced Configurations and Customizations

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## Introduction:

Microsoft Dynamics 365 for Finance and Operations is a comprehensive enterprise resource planning ERP solution that helps businesses streamline their financial and operational processes. This 10-day training course is designed to provide participants with a solid foundation in using Dynamics 365 for Finance and Operations to manage financial data, inventory, and supply chain processes.

## Course Objectives:

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

- Understand the core features and functionalities of Dynamics 365 for Finance and Operations
- Learn how to set up and configure the application to meet specific business requirements
- Gain hands-on experience in managing financial data, inventory, and supply chain processes
- Develop the skills necessary to create and customize reports and dashboards using Power BI
- Prepare for relevant Microsoft certification exams, including MB-310, MB-300, MB-500, and MB2-716.

## Targeted Audience:

- Business analysts
- Supply chain managers
- Finance and accounting professionals
- Project managers
- IT professionals
- Operations managers
- ERP consultants
- System administrators

## Course Outlines:

### Unit 1: Introduction to Dynamics 365 for Finance and Operations

- Overview of Microsoft Dynamics 365 for Finance and Operations
- Key features and benefits of Dynamics 365 for Finance and Operations
- Understanding the different modules in Dynamics 365 for Finance and Operations
- Navigating the user interface

### Unit 2: Setting up Dynamics 365 for Finance and Operations

- Installing and configuring Dynamics 365 for Finance and Operations
- Setting up security and user roles
- Configuring company settings
- Creating and managing financial dimensions

### Unit 3: Managing Financial Data with Dynamics 365 for Finance and Operations

- Managing the general ledger
- Managing accounts payable and accounts receivable
- Managing cash and bank accounts
- Managing fixed assets

#### Unit 4: Inventory Management with Dynamics 365 for Finance and Operations

- Setting up inventory management
- Managing inventory transactions
- Setting up and managing product information
- Managing inventory counts and adjustments

#### Unit 5: Supply Chain Management with Dynamics 365 for Finance and Operations

- Setting up supply chain management
- Managing purchase orders and vendor invoices
- Managing sales orders and customer invoices
- Managing production orders and bills of materials

#### Unit 6: MB-310

- Understanding Dynamics 365 for Finance and Operations Core
- Configuring security, processes, and options
- Performing data migration
- Configuring and managing workflows
- Implementing the mobile app

#### Unit 7: MB-300

- Understanding Dynamics 365 for Finance and Operations Architecture
- Configuring and managing the data model
- Managing reports and forms
- Configuring Power Platform integrations

#### Unit 8: MB-500

- Understanding Dynamics 365 for Finance and Operations Apps
- Managing Lifecycle Services
- Configuring environments
- Managing solutions and packages

#### Unit 9: MB2-716

- Understanding Microsoft Dynamics 365 Customization and Configuration
- Configuring Dynamics 365 customizations
- Managing solutions and customizations
- Configuring Power Platform integrations

#### Unit 10: Creating Reports and Dashboards with Power BI

- Understanding Power BI and its capabilities



- Creating and publishing Power BI reports and dashboards
- Integrating Power BI with Dynamics 365 for Finance and Operations
- Managing and sharing Power BI content.