Core Common Features of Dynamics 365 for Finance and Operations

MB-300T01-A; 1 Day; Instructor-led

Course 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 core components of Microsoft Dynamics 365 for Finance and Operations.

Audience

This course is intended for Dynamics 365 for Finance and Operations Functional Consultants who implement a solution using out of the box capabilities, codeless extensibility, application and service integrations. Primary responsibilities include:

• Performing discovery
• Capturing requirements
• Engaging subject matter experts and stakeholders
• Translating requirements
• Configuring the solution and applications

Prerequisites

This course requires that you meet the following prerequisites:

• Basic understanding of ERP, CRM concepts

Course Outline

Module 1: Get Started with Dynamics 365 for Finance and Operations

This module provides an understanding of what Dynamics 365 for Finance and Operations is, and the industries that it supports. It describes the modules in Finance and Operations, and the purpose of the features in those modules and how they support the industry-specific areas.

Lessons

• Introduction
• Industry focus
• Introduction to financial management
• Introduction to employee management
• Introduction to supply chain management
• Module summary

After completing this module, you will:
• Have an understanding of what Finance and Operations is, and the industries that it supports
• Be familiar with the modules in Finance and Operations, and the purpose of the features in those modules and how they support the industry-specific areas

Module 2: Get Started with Lifecycle Services

Microsoft Dynamics Lifecycle Services (LCS) is a collaborative workspace that customers and their partners use to manage Dynamics 365 for Finance and Operations projects from pre-sales to implementation and finally to the production environment either on the cloud or on-premise. It provides checklists and tools that help you manage the project including methodologies that can help you manage your implementation process.

Lessons
• Understand the functionality and tools of Lifecycle Services
• Reuse existing assets, copy and share data
• Understand Task recorder functionality
• Create a business process model
• Run the LCS Issue Search tool and analyze results
• Learn how to use Regression Suite Automation Tool
• Module Summary

Practice Labs
After completing this module, you will be able to:
• Understand the functionality and tools of Lifecycle services (LCS) for Finance and Operations
• Reuse existing assets, copy, and share data
• Understand Task recorder functionality
• Create a business process model
• Identify and analyze gaps using the Business process modeler (BPM)
• Run the LCS Issue Search tool and analyze results

Module 3: Use Lifecycle Services to Design and Plan

With proper planning, your Dynamics 365 for Finance and Operations implementation will be a success. After a customer signs the agreement to purchase licenses for Finance and Operations, your job as a functional consultant starts by managing the application lifecycle and moving toward a predictable, repeatable, high quality implementation.

Lessons
• Introduction
• Phases of a cloud implementation
• Phases of an on-premises implementation
• Create Functional Design Documents (FDD)

Module Summary

After completing this module, you will be able to:
• Prepare documentation for gathered requirements by using a methodology in Lifecycle Services (LCS)
• Define use case scenarios
• Participate in the creation of functional requirements documents (FRD)
• Understand the importance of creating and maintaining documented processes
• Participate in phase-based planning processes and solution design
• Describe the future state business processes based on a proposed solution
• Determine when to build versus buy
• Create functional design documents (FDD)

Module 4: Overview of Reporting and Analytics

A report in Dynamics 365 for Finance and Operations can be defined simply as a structured presentation of data. Under ideal circumstances, reports materialize data in such a way that it allows the user to make informed decisions. Finance and Operations supports a broad spectrum of information access scenarios.

Lessons
• Understand reports and inquiries
• Learn about Financial reporting
• Configure PowerBI to your instance

Module Summary

Practice Labs
After completing this module, you will have learned about:
• Different types of reports and inquiries in Finance and Operations
• Financial reporting
• Configuring Finance and Operations for Microsoft Power Platform

Module 5: Build and Test Mobile Apps

This module explains the guidelines and design patterns of a mobile app for Dynamics 365 for Finance and Operations. Additionally, it explains how to build and test mobile apps based on a use case scenario. The mobile platform makes it easy to change the forms and mobile app definitions to include customizations that are made to Finance and Operations. Mobile apps enable rich offline and mobile interactions and provide an easy-to-use designer experience. Developers can create simplified forms in Microsoft Visual Studio and then design mobile apps that expose this functionality.

Lessons
• Overview of Unified Operations mobile app
• Build and use mobile apps
• Module Summary

**Practice Lab**
After completing this module, you will be able to:
• Create a mobile app and publish it in Finance and Operations
• Understand the design considerations for a mobile app helps you create your mobile app to match the user experience of a modern application
• Run the Dynamics 365 Unified Operations app to connect to Finance and Operations, and know how to use the published mobile apps and pull-to-refresh the data

**Module 6: Create, Maintain and Use Workflows**

A workflow represents a business process. It defines how a document flows, or moves, through the system by showing who must complete a task, make a decision, or approve a document. Some organizations require that specific processes are approved by a user other than the person who enters the record. These workflow processes might require manual approval, workflow approval, or no approval.

**Lessons**
• Workflows for business processes
• Create and setup workflows
• Assign users to workflow touchpoints
• Use Work items
• Module Summary

**Practice Lab**
After completing this module, you will be able to:
• Apply automation by using workflows and discover that defining a specific type allows a business to control each step in a critical process
• Use workflows procedural steps that use approvals for several journal types
• Define several versions for each workflow and modify an existing workflow without deleting the original
• Set workflow processes that can require manual approval, workflow approval, or no approval
• Understand the workflow architecture, elements, and actions
• Set up workflows, configure workflow properties, and add a manual or automated task in a workflow
• Configure an approval process in a workflow
• Assign users to workflow touchpoints
• Configure an approval step in a workflow
• Use the Work items functionality to process a workflow

**Module 7: Course Conclusion**

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

- Final assessment
- Course summary
- Post-course survey