MS-MB500T00: MICROSOFT DYNAMICS 365: FINANCE AND OPERATIONS APPS DEVELOPER

DURATION	LEVEL	TECHNOLOGY	DELIVERY METHOD	TRAINING CREDITS
5 Days	Intermediate	Dynamics	Instructor-led	NA

INTRODUCTION

In this course we discuss the tasks needed to fulfill the role of developer in Dynamics 365 Finance and Operations Apps. The Dynamics 365 Finance and Operations apps developer is a key technical resource that implements and extends the application to meet the requirements of the business.

AUDIENCE PROFILE

Microsoft Dynamics 365 Finance and Operations Apps Developers.

PREREQUISITES

Before attending this course, delegates should have:

- Experience with Microsoft Dynamics 365 Finance and Operations Apps – Understanding of the platform's architecture and functionality.
- Knowledge of X++ Programming – Ability to develop business logic using X++.
- Familiarity with Microsoft Visual Studio – Experience using Visual Studio for development tasks.
- Understanding of Dataverse and Power Platform – Ability to integrate with Power Apps and Power Automate.
- Experience with SQL Server and Reporting Tools – Knowledge of SQL Server Reporting Services (SSRS) and Power BI.
- Application Lifecycle Management (ALM) Skills – Ability to manage implementations using Azure DevOps and Lifecycle Services tools.

COURSE OBJECTIVES

After completion of this course, delegates should be able to:

- Plan Architecture and Solution Design – Develop technical designs and implementation details.
- Apply Developer Tools – Utilize Microsoft Visual Studio, Azure DevOps, and Lifecycle Services.
- Design and Develop AOT Elements – Create and modify finance and operations app reports and workspaces.
- Develop Business Logic Using X++ – Implement standardized coding patterns and extensible features.
- Customize the UI – Modify user interfaces to meet business requirements.
- Provide Endpoints and APIs – Support Microsoft Power Platform apps and external integrations.
- Perform Testing and Monitor Performance – Ensure application reliability and efficiency.
- Analyze and Manipulate Data – Work with SQL Server Reporting Services (SSRS) and Power BI.
- Manage Implementations Using ALM – Oversee application lifecycle management processes.

COURSE CONTENT

Module 1: Explore the ecosystem and main components of finance and operations apps

Dynamics 365 offers a large range of cloud-driven applications that help organizations optimize their business so they can reach their full potential. This module explores the Dynamics 365 ecosystem and how the apps work together to help your organization reach its fullest potential. Additionally, this module describes the major components of finance and operations apps that are important for you to know before you begin developing.

Lessons

- Finance and operations apps and associated apps.
- Finance + Operations on-premises and cloud-based finance and operations apps.
- Development and deployment processes.
- The user interface.
- Reporting capabilities.
- Check your knowledge.

After completing this module, students will be able to:

- Explore the Dynamics 365 ecosystem.

- Learn about the main components of finance and operations apps.
- Learn about on-premises and cloud deployment options.
- Explore the development and deployment process for finance and operations apps.

Module 2: Explore the technical architecture of finance and operations apps

To begin developing for finance and operations, you must understand the core concepts of development, including packages, models, and elements. Additionally, as a developer, you will need to understand metadata management and source control tools and processes by using Azure DevOps. Last, this module will also discuss the purpose of Lifecycle Services, deployable packages and their importance throughout development, and implementation of finance and operations apps.

Lessons

- Differentiate cloud and on-premises architecture.
- Elements, models, and packages.
- Application components and architecture.
- Metadata management processes.
- Source control processes.
- Conform code to organization policies.
- Overview of Lifecycle Services.
- Check your knowledge.

After completing this module, students will be able to:

- Differentiate between on-premises and cloud architecture of finance and operations.
- Learn about the purposes and relationships between packages, models, and elements.
- Learn about the application components and architecture.
- Detail metadata management and source control processes.
- Use and understand the purpose of Lifecycle Services.and operations apps.

Module 3: Explore design and deployment considerations for finance and operations apps

Identifying design and deployment processes that conform to organizational policies will help you in developing for finance and operations apps and ensure that code is deployed to the correct environments to avoid issues in production.

Lessons

- Introduction.
- Identify relevant business concepts.
- Evaluate functional specifications and create technical design documentation.
- Identify the technical gaps.
- Design patterns and practices for code deployments.
- The process for deploying code changes.
- Finance and operations apps frameworks.
- Check your knowledge.

After completing this module, students will be able to:

- Learn about design patterns and process for code deployment.
- Identify code deployment strategies.
- Learn about post-deployment tasks and activities.

Module 4: Manage finance and operations apps implementations by using Lifecycle Services

Lifecycle Services helps you host finance and operations apps environments. It provides repeatable processes to support consistent success with each delivery. Lifecycle Services is available to customers and partners as part of their support plans.

Lessons

- Introduction.
- Identify relevant business concepts.
- Evaluate functional specifications and create technical design documentation.
- Identify the technical gaps.
- Design patterns and practices for code deployments.
- The process for deploying code changes.
- Finance and operations apps frameworks.
- Check your knowledge.

After completing this module, students will be able to:

- Learn about design patterns and process for code deployment.
- Performing support tasks.
- Provisioning and managing environments.
- Managing asset libraries.
- Managing the code upgrade process between versions of finance and operations apps.

Module 5: Work with performance and monitoring tools in finance and operations apps

Learn how to use performance tools and Lifecycle Services environment monitoring tools to enhance your validation and testing experience in finance and operations apps.

Lessons

- Introduction.
- Diagnose performance issues by using Trace parser.
- Load testing by using the Performance SDK.
- Monitor performance by using SQL Insights.
- Create a SQL trace by using the SQL Profiler.
- Monitor server health metrics in Lifecycle Services.
- Exercise - Use the Environment monitoring tool in Lifecycle Services.
- Check your knowledge.

After completing this module, students will be able to:

- Diagnose performance issues by using Trace parser.
- Explore load testing by using the Performance SDK.
- Monitor performance by using the SQL Insights dashboard.
- Monitor server Health metrics in Microsoft Dynamics Lifecycle Services.

Module 6: Manage source code by using version control in finance and operations apps

When you're collaborating with other developers, it's important to manage your source code by using version control. For finance and operations apps, source code is managed by using Azure DevOps within Visual Studio.

Lessons

- Introduction.
- Configure Visual Studio to connect to Azure DevOps.
- Working in Visual Studio.
- Manage and perform code reviews.
- Check your knowledge.

After completing this module, students will be able to:

- Connect your developer environment to an Azure DevOps project.

- Use best practices for version control.
- Manage and perform code reviews.

Module 7: Explore the test framework and tools in finance and operations apps

In finance and operations apps, the test framework helps to alleviate risks and provides a system to manage a clean record of testing.

Lessons

- Introduction.
- Unit test framework.
- Acceptance test library.
- Task recorder.
- Best Practices tool.
- Identify various categories and types of errors.
- Configure the testing environment and prepare data.
- Run unit tests.
- Document and fix issues.
- Check your knowledge.

In this module, you will learn about:

- Capabilities and benefits of the unit test framework.
- Capabilities and benefits of Task Recorder.
- Benefits of the Best Practices tool.

Module 8: Explore reporting tools in finance and operations apps

A report is a structured presentation of data. Reporting presents data in a way that lets you make informed decisions by using data visualizations, dashboards, financial reporting, and structured documents. finance and operations apps provide several reporting tools that you can use to meet different reporting needs. This module will help you become familiar with the various reporting options that are available with finance and operations apps.

Lessons

- Introduction.
- Create and modify report data sources and supporting classes.
- Implement reporting security requirements.
- Publish a report.
- Lab – Set authorization requirements on database tables.
- Check your knowledge.

After completing this module, students will be able to:

- Learn about the capabilities of various reporting tools in finance and operations apps.
- Determine which types of reports should be used.
- Create and modify a report data source.
- Learn about reporting and security requirements.
- Deploy reports with PowerShell.
- Deploy reports with Visual Studio.

Module 9: Set up and work in the finance and operations apps developer environment

Learn how to use performance tools and Lifecycle Services environment monitoring tools to enhance your validation and testing experience in finance and operations apps. These tools help identify performance issues, monitor environment health, validate app functionality, and conduct stress testing. By optimizing resource usage and addressing performance bottlenecks, you can improve app reliability and enhance the overall user experience. Insights from these tools help you make data-driven decisions so that you can maintain high performance standards and ensure smooth app operation in finance and operations apps.

Lessons

- Introduction.
- Set up a VHD for first-time use.
- Set up and manage a downloadable VHD for development.
- Upgrade the VHD.
- Exercise – Install a virtual machine.
- Check your knowledge.

After completing this module, students will be able to:

- Introduction
- Access cloud-hosted development environments
- On-premises architecture
- Set up a VHD for first-time use
- Set up and manage a downloadable VHD for development
- Upgrade the VHD
- Exercise - Install a virtual machine
- Access and configure Visual Studio
- Models and packages
- Design and create models
- Exercise - Configure Visual studio
- Check your knowledge
- Summary

Module 10: Start developing for finance and operations apps by using Visual Studio

Visual Studio is the integrated development environment (IDE) for finance and operations apps. Developers can create deployable packages that contain projects and elements that are stored as metadata. Developing in Visual Studio allows users to customize the finance and operations apps experience.

Lessons

- Introduction.
- Create and build projects.
- Create and use label files.
- Manage metadata by using the Application Explorer.
- Build deployment packages.
- Synchronize data changes with the database.
- Use the Element Designer to create elements.
- Lab - Create a project and add an element.
- Check your knowledge.

After completing this module, students will be able to:

- Create and build projects and deployable packages in Visual Studio.
- Create and use label files
- Use the Application Explorer to manage elements.
- Synchronize data dictionary changes with the application database.
- Work in the Element Designer to create elements.

Module 11: Build extended data types and enumerations for finance and operations apps

Extended data types (EDTs) and base enumerations (enums) are data types that are created and managed in the development environment. Base enums represent a list of literals, while EDTs are reusable data types that have a specific definition. The Application Object Tree (AOT) in finance and operations apps contains many existing EDTs and base enums that can be extended for use in your project, or you can create new data types. This module

will focus on creating new data types.
Lessons

- Introduction.
- Extended data types and element properties.
- Base enums and element properties.
- Lab - Create a base enumeration, add elements, and update properties.
- Check your knowledge.

After completing this module, students will be able to:

- Identify the different types of EDTs.
- Use base enumerations (base enums)
- Identify how EDTs and base enums are viewed in the finance and operations apps user interface.
- Create a base enumeration.

Module 12: Build data models in finance and operations apps

The data model in finance and operations apps consists of tables, views, queries, and other components. These components are important in development. All data in finance and operations apps is stored in tables and managed in the data model in Visual Studio. Tables store data such as company transactions, inventory, and journals.
Lessons

- Introduction.
- Create tables and table fields.
- Populate table and field properties.
- Add fields, field groups, indexes, and relations.
- Table methods.
- Create, manage, and extend views.
- Create, manage, and extend queries.
- Create, manage, and extend table maps.
- Lab - Create a table, add fields, and create field groups.
- Check your knowledge.

After completing this module, students will be able to:

- Define the use of tables in finance and operations apps.
- Create a new table in Visual Studio.
- Create, manage, and extend views, queries, and table maps.
- Manage table properties.
- Add fields and field groups to a table.
- Create an index and a table relation.
- Learn about table methods.

Module 13: Build forms and optimize form performance in finance and operations apps

Forms are created and managed in Visual Studio and will display to the user as web pages. This module explains how forms are created and managed in the finance and operations apps developer environment, along with how to optimize the performance of forms.
Lessons

- Introduction.
- Add a new form to a project and apply a pattern.
- Add a data source to a form.
- Add grids, fields, and groups to a form.
- Form methods.
- Create and populate menu items.
- Create and extend menus.
- Test form functionality and data connections.
- Diagnose and optimize client performance.
- Optimize form loading and performance.
- Lab - Create a form.
- Check your knowledge.

After completing this module, students will be able to:

- Create a new form.
- Apply a form pattern.
- Add a data source to a form.
- Add grids, fields, and groups to a form.
- Understand form methods.
- Discover the types of menu items.
- Create a menu item and add it to a form.
- Create and extend menus.
- Run a form and test its functionality.
- Learn about browser-based and Performance Timer tools that are used to optimize form performance.

Module 14: Create classes in finance and operations apps

Classes are blocks of code that contain data and methods. When developing for finance and operations apps, you will use the X++ language to create new classes.
Lessons

- Introduction.
- Add a class to a project
- Add code and methods to meet business requirements
- Data manipulation
- Lab - Insert records by using a runnable class
- Check your knowledge.

After completing this module, students will be able to:

- Learn about the use of classes in developing for finance and operations apps.
- Create a new class that is added to a project.
- Add methods to a class.
- Review the types of methods that can be used in a class.

Module 15: Implement role-based security in finance and operations apps

Finance and operations apps use role-based security to assign access to components in the system. A user who is assigned to a security role has access to the set of privileges that is associated with that role.
Lessons

- Introduction
- Create and modify duties, privileges, and permissions
- Enforce permissions policy
- Extensible data security framework
- Apply security permissions
- Lab - Create a new security role and add duties
- Microsoft Entra ID and OAuth 2.0 authentication
- Check your knowledge.

After completing this module, students will be able to:

- Create and modify roles, duties, privileges, and permissions.
- Review the role-based security hierarchy.
- Use and enforce permissions policies.
- Define the extensible data security framework (XDS).
- Apply security permissions.
- Stay compliant with user licensing requirements

Module 16: Build reports for finance and operations apps

Organizations have a lot of data. When an organization grows, its ability to provide context for all that data becomes increasingly crucial. Reports can organize data in a meaningful way. finance and operations apps include reporting

tools to help you create reports for your organizations, SQL Server Reporting Services (SSRS), Microsoft Power BI, and Microsoft Excel reports. You can use these reporting tools to visualize a data set in many ways, including as a tabular layout with collapsible tables and by using dashboards. Throughout this module, you will build a foundation to design, create, and modify reports.

Lessons

- Implement Business document management.
- Create and modify reports that use SSRS.
- Implement query objects and query builder.
- Create and modify reports by using Power BI.
- Create and modify reports by using Excel.
- Exercise - Create and deploy a report.
- Check your knowledge.

After completing this module, students will be able to:

- Enable Business document management.
- Design, create, and modify SSRS reports.
- Create and modify a Power BI report by using finance and operations apps data.
- Create and modify an Excel report by using finance and operations apps data.
- Learn how to build SQL statement by using query objects.

Module 17: Build workspaces in finance and operations apps

Workspaces are personalized work centers with data, reports, and transactions and are designed to increase efficiency of daily tasks. Workspaces can be created and modified by developers. There are many reasons to design and create a workspace in the developer environment rather than the user interface. For instance, your business might want key performance indicator (KPI) tiles, analytical components, drillthrough components, or other advanced features that cannot be created or modified in the user interface.

Lessons

- Design KPIs.
- Create drill-through workspace elements.
- Create custom reusable report functions by using RDL.
- Implement built-in KPIs, charts, and other reporting components.
- Exercise - Create a workspace and add a tile, list, link, and Power BI element.
- Check your knowledge.

After completing this module, students will be able to:

- Design and build key performance indicators (KPIs).
- Create workspace elements.
- Use Report Definition Language (RDL) to create custom reports.
- Implement reporting components into workspaces.

Module 18: Explore extensions and the extension framework in finance and operations apps

Finance and operations apps are customized by using extensions, which let you add functionality to model elements and source code in the Application Object Tree (AOT) by using Visual Studio.

Lessons

- Introduction.
- Customization models.
- Extension points for frameworks.
- Develop code to extend a framework.
- Create pre-event and post-event handler classes.
- Implement the SysOperationSandbox framework.
- Lab - Extend an EDT.
- Check your knowledge.

After completing this module, students will be able to:

- Learn about the reasons for creating extensions.
- Determine when to use the extensibility request form.
- Learn about the risk of intrusive customizations.
- Develop code that will extend the functionality of finance and operations apps.
- Create pre-event and post-event handler classes.
- Implement the SysOperationSandbox framework.
- Implement a workflow framework.

Module 19: Extend elements in finance and operations apps

Elements in finance and operations apps are customized through extensions to help you modify properties, add components, or remove controls.

Lessons

- Introduction.
- Add a table extension to a project.
- Add a form extension to a project.
- Lab - Extend a form and add controls.
- Extend menus.
- Implement delegates.
- Check your knowledge.

After completing this module, students will be able to:

- Create extensions to customize finance and operations apps.
- Extend a table.
- Create a form extension.

Module 20: Consume business events in finance and operations apps

Business events provide a mechanism that lets external systems receive notifications from finance and operations apps. In this way, the systems can perform business actions in response to the business events.

Lessons

- Introduction.
- Business event framework.
- Create a new business event.
- Activate business events.
- Consume business events.
- Extend an existing business event.
- Role-based security for business events.
- Business events in Microsoft Power Automate.
- Check your knowledge.

After completing this module, students will be able to:

- Learn about the business events framework.
- Implement new business events through class extension.
- Consume business events.
- Extend and existing business event.
- Business events in Microsoft Power Automate.
- Role based security for business events.

Module 21: Work with class extensions in finance and operations apps

This module provides the tools and information that you need to

effectively use class extensions in finance and operations apps. It shows you how to enhance and extend the functionality of classes without altering their original source code. Additionally, the module covers key concepts, such as method wrapping and the chain of command, allowing for controlled, layered customization of system behavior.

Lessons

- Introduction
- Class extensions
- Chain of command and method wrapping
- Best practices
- Check your knowledge
- Summary

After completing this module,

students will be able to:

- Create and use class extensions.
- Modify existing functionality.
- Extend app capabilities.
- Follow best practices for upgradeability.
- Avoid customization conflicts.

Module 22: Explore data integration concepts in finance and operations apps

As a developer, you're usually part of the data integration scenarios during and after a finance and operations apps implementation. This module explores web application programming interfaces (APIs) that are available for finance and operations apps and helps you understand the key differences between synchronous and asynchronous integrations for the application.

Lessons

- Introduction
- Data integration overview
- Synchronous integration
- Asynchronous integration
- Check your knowledge
- Summary

After completing this module,

students will be able to:

- Identify integration web application programming interfaces.
- Identify the key differences between synchronous and asynchronous integrations.

Module 23: Work with synchronous integrations in finance and operations apps

Connect to your finance and operations apps data by using data entities, where data is accessed outside of the application and with different endpoint and external applications.

Lessons

- Introduction
- Develop an entity and enable it for data export
- Extend a data entity
- Implement custom services
- Implement custom services and the Batch OData API
- Expose OData endpoints from data entities
- Consume external web services
- Integrate finance and operations apps with Microsoft Excel
- Integrate finance and operations apps with external applications by using Power Apps
- Download electronic document interchange solutions
- Verify source and target data for auditing
- Debug with JSON Web Tokens
- Check your knowledge
- Summary

After completing this module,

students will be able to:

- Create a data entity.
- Enable data management capabilities.
- Create and extend data entities
- Expose Open Data Protocol (OData) endpoints with data entities.
- Identify custom service endpoints.
- Discover external web services that are available for use.
- Consume external web services.
- Connect to your data with the Microsoft Excel add-in.
- Connect to your data with Microsoft Power Apps.

Module 24: Implement the Data management package API for finance and operations apps

The Data management framework's package representational state transfer (REST) application programming interface (API) lets you integrate with finance and operations apps by using data packages.

Lessons

- Introduction.
- Import and export APIs.
- Monitor the status of APIs.
- Manage entity change tracking.
- Create wrapper classes to consume external web services.
- Create wrapper classes with C#.
- Check your knowledge.

After completing this module,

students will be able to:

- Import and export APIs between finance and operations apps cloud deployments and on-premises deployments.
- Import and export APIs between on-premises deployments.
- Use GetExecutionSummaryStatus to get the status and availability of APIs.
- Create wrapper classes with C# and X++

Module 25: Work with asynchronous integrations in finance and operations apps

Integrations are an important component of implementing finance and operations apps. By implementing recurring integrations, you can enable the exchange of documents or files between finance and operations apps and other applications or services.

Lessons

- Introduction
- Set up a data project and recurring data job
- Exercise - Create a data project and recurring data job
- Implement authorization to support integration
- Monitor status and availability of entities
- Develop data transformation
- Microsoft Dataverse integrations
- Integrate Dataverse by using virtual entities
- Work with composite data entities
- Azure Data Lake and Entity Store
- Connect to Azure Data Lake Storage
- Change data in Azure Data Lake
- Power Platform convergence
- Check your knowledge
- Summary

After completing this module,

students will be able to:

- Set up a data project.

- Set up a recurring data job.
- Define authorization for integrations by using OAuth.
- Monitor the status and availability of entities.
- Develop data transformations.
- Use Microsoft Dataverse to synchronize entities between Dynamics 365 applications.
- Use composite data entities.
- Integrate composite data entities.
- Export composite data entities.
- Learn about Azure Data Lake and Entity Store, and how to change data in Azure Data Lake
- Learn about Microsoft Power Platform convergence.

Module 26: Prepare data for migration to finance and operations apps

When it is time to migrate data, the more you know, the easier it is to control operational complexity and reduce costs. Your customer's business continuity must be your priority. Learn how to prepare data for migration, by using the data management framework to manage data entities and data entity packages in finance and operations apps.
Lessons

- Introduction.
- Select a data integration (import/export) strategy.
- Common migration scenarios and tools.
- Bring your own database (BYOD).
- Test a data migration and validate output.
- Check your knowledge.

After completing this module,

students will be able to:

- Choose a data integration (import/export) strategy.
- Identify common migration scenarios and tools in finance and operations apps.
- Understand the Bring your own database (BYOD) feature.
- Identify relevant (legacy) systems.
- Identify and import static data that is common between industries.
- Create and review test plans for data migration.
- Identify and extract source data.
- Identify relevant data entities and elements.
- Generate field mapping between source and target data structures.
- Test a data migration and validate output.
- Support the transition between the existing and migrated systems.

Module 27: Manage data sources with external data stores in finance and operations apps

Administrators often need access to their data from finance and operations apps, to perform analytics that will help ensure that certain parameters or business metrics are met.
Lessons

- Introduction
- Identify report data source requirements for external sources
- Create and manage custom data sources
- Optimize data entities to achieve better performance
- Lab - Create a data entity
- Check your knowledge
- Summary

After completing this module,

students will be able to:

- Learn about the core concepts of Bring Your Own Database (BYOD) and its advantages compared with the Entity Store.
- Create and manage custom data sources.
- Learn how to optimize data entities to achieve better performance

Module 28: Integrate finance and operations apps with Microsoft Azure

Finance and operations apps are integrated with Microsoft Azure to help power many of its built-in capabilities, such as search and intelligence. This module will focus on custom cloud integrations that you can build that are unique to your own project integration needs.
Lessons

- Introduction.
- Develop and integrate by using Logic Apps.
- Develop and integrate Microsoft Power Platform.
- Integrate finance and operations apps with enterprise applications.
- Automate EAI, B2B, EDI, and business processes with Logic Apps.
- Consume data from the Azure Machine Learning service.
- Enable connectivity with external services.
- Optimize data entities to achieve better performance.
- Check your knowledge.

After completing this module,

students will be able to:

- Develop and integrate by using Logic Apps.
- Integrate finance and operations apps with enterprise applications.
- Develop and integrate Microsoft Power Platform.
- Automate EAI, B2B, EDI, and business processes.
- Consume data from Azure Machine Learning (ML) service.
- Enable connectivity with external services.

Module 29: Connect to Microsoft Power Platform services with finance and operations apps

Microsoft Power Platform services like Power Apps and Power Automate, and the Common Data Model are tools that you can use to create efficient ways to get more work done with finance and operations apps.
Lessons

- Connect your finance and operations apps data using Power Automate.
- Triggers and actions used in Power Automate for finance and operations apps.
- Connect to your finance and operations apps data with Power Apps.
- Finance and operations data on Common Data Model and Microsoft Dataverse.
- Check your knowledge.

After completing this module,

students will be able to:

- Connect your finance and operations apps data with Power Automate.
- Learn about triggers and actions in Power Automate that are used in finance and operations apps.
- Connect to your finance and operations apps data with Power Apps.
- Learn about the Common Data Model to bring data from

multiple systems and applications together.

Module 30: Work with data management in finance and operations apps

You can export or import data in finance and operations apps by using the Data management workspace. Validate the data by staging the source data, and then move it to the target tables in the finance and operations apps database.

Lessons

- Introduction.
- Data management concepts.
- Use data entities for data management and integration.
- Work with the Data management workspace.
- Using Standard and Enhanced views for tiles.
- Use templates in data management.
- Export, import, and copy data into a legal entity.
- Lab - Explore the Data management workspace.
- Lab - Export data using the Data management workspace.
- Database movement operations.
- Data sharing framework.
- Check your knowledge.

After completing this module,

students will be able to:

- Identify the correct pattern for a given scenario to use the Data management platform for integration by using data entities.
- Work with the Data management workspace.
- Export data from a legal entity.
- Import data into a legal entity.
- Work with data import and export jobs.
- Clean up the staging tables.
- Work with database movement operations.
- Work with the data sharing framework.

Module 31: Perform user acceptance testing in finance and operations apps

After all customer requirements have been handled by either configuration, customization, and integration, you need to know how to perform user acceptance testing (UAT) in finance and operations apps to validate the solution. User acceptance testing is an important step in the go-live preparation. You can perform automated tests by using the Regression suite automation tool (RSAT).

Lessons

- Introduction.
- Create user acceptance test libraries.
- Record test cases and save to BPM.
- Synchronize and configure your test plan in Azure DevOps.
- Run user acceptance tests.
- Data task automation.
- Exercise - Build test scripts to test business functionality.
- Check your knowledge.

After completing this module,

students will be able to:

- Test cases and business requirements
- Best practices for recording test cases
- Task recorder
- How to create a BPM library
- How to synchronize and configure your test plan in Azure DevOps
- How to run test cases manually and automatically
- The Regression suite automation tool (RSAT)

Module 32: Prepare to go-live with finance and operations apps

All your hard work becomes a success by moving the implemented solution in finance and operations apps to the production environment. You want a happy customer, a quality solution, and peace of mind during this important phase, which is known as go-live. Learn how to prepare to go live with a finance and operations apps project by using Microsoft Dynamics Lifecycle Services.

Lessons

- Introduction.
- Understand the go-live process.
- Complete the Lifecycle Services methodology.
- Perform user acceptance testing (UAT) for your solution.
- FastTrack go-live assessment.
- Request a production environment.
- Check your knowledge.

After completing this module,

students will be able to:

- Prepare for go-live.
- Complete the Microsoft Dynamics Lifecycle Services methodology.
- Perform User acceptance testing (UAT) for your solution.
- Understand the FastTrack Go-live assessment.
- Request the production environment.

Module 33: Work with analytics and reporting in finance and operations apps

Business leaders can make important decisions in their company if they have accurate insight into the underlying financial and operational data. Without data visibility, business leaders are challenged with a nearly impossible task. By using analytics and reporting in finance and operations apps, you can empower every business user, depending on their security rights, to get the insights they need to make those important decisions.

Lessons

- Introduction.
- Understand different types of reports and inquiries.
- Financial reporting.
- Find inquiries and reports.
- Generate and consume inquiries and reports.
- Configure finance and operations apps for Microsoft Power Platform.
- Lab - Work with reports.
- Check your knowledge.

After completing this module,

students will be able to:

- Different types of reports and inquiries in finance and operations apps
- Financial reporting
- Configuring finance and operations apps for Microsoft Power Platform
- Generating and consuming inquiries and reports

Module 34: Configure electronic reporting in Dynamics 365 Finance

Instead of extending the code for Dynamics 365 Finance to meet regulatory features and compliance for different countries or regions, a business user can configure and use the electronic reporting tool without a single line of code. For example, you can adopt new regulatory requirements and generate business documents in the required format to electronically exchange information with

government bodies, banks, and other parties.

Lessons

- Introduction.
- Configure electronic reporting.
- Use barcode data sources to generate bar code images.
- Lab - Generate electronic documents for payments.
- Check your knowledge.

After completing this module, students will be able to:

- Configure electronic reporting.
- Use barcode data sources to generate bar code images.
- Add a new electronic reporting provider and mark it as active.
- Generate an electronic document in a specific format.
- Create electronic reporting configurations.

ASSOCIATED CERTIFICATIONS & EXAM

This course will prepare delegates to write the Microsoft MB-500: Microsoft Finance and Operations Apps Developer exam.