

## MS-MB920T00: INTRODUCTION TO MICROSOFT DYNAMICS 365 (ERP)



| DURATION | LEVEL    | TECHNOLOGY   | DELIVERY METHOD | TRAINING CREDITS |
|----------|----------|--------------|-----------------|------------------|
| 1 Day    | Beginner | Dynamics 365 | Instructor-led  | NA               |

### INTRODUCTION

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 apps. Then we will discuss each of the apps individually, focusing on Dynamics 365 Finance and Dynamics 365 Supply Chain Management. This course will include lecture and hands-on-labs.

### AUDIENCE PROFILE

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

Before attending this course, delegates should have:

- General IT knowledge or relevant work experience in an IT environment.
- A fundamental understanding of financial principles and business operations.

### COURSE OBJECTIVES

After completing 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)
- Describe the core capabilities of Dynamics 365 finance and operations apps

### COURSE CONTENT

#### Module 1: Describe the finance and operations apps

This module discusses the general capabilities and business value of finance and operations apps, including use cases and descriptions of the user interfaces.

##### Lessons

- Introduction
- Describe enterprise resource planning (ERP)
- Describe the business value of Dynamics 365 Finance
- Describe the business value of Dynamics 365 Supply Chain Management
- Describe the business value of Dynamics 365 Commerce
- Describe the business value of Dynamics 365 Human Resources
- Describe the business value of Dynamics 365 Project Operations
- Describe finance and operations apps use cases

- Describe the finance and operations apps user interfaces
  - Module assessment
  - Summary and resources
- This module familiarizes you with the following topics:
- Enterprise resource planning (ERP).
  - Capabilities of the different finance and operations apps.
  - Use cases for finance and operations apps.
  - User interface of finance and operations apps.

#### Module 2: Describe shared features of the finance and operations apps

This module describes some of the core capabilities across the Microsoft Dynamics 365 suite of finance and operations apps.

##### Lessons

- Introduction
- Describe security capabilities
- Describe workflow capabilities

- Describe the concept of batch jobs
  - Describe Copilot capabilities
  - Module assessment
  - Summary and resources
- This module familiarizes you with the following topics:
- Security capabilities.
  - Workflow capabilities.
  - The concept of batch jobs.
  - Copilot capabilities.

#### Module 3: Describe reporting and integration capabilities in finance and operations apps

This module discusses the general capabilities of the finance and operations apps including built-in reporting and integration with other Microsoft products.

##### Lessons

- Introduction
- Describe built-in reporting capabilities
- Describe how to use Microsoft Power BI to analyze data

- Describe Microsoft Office 365 integration capabilities
  - Describe options for integrating finance and operations apps with Microsoft Power Platform
  - Explore business events integration capabilities
  - Module assessment
  - Summary and resources
- This module familiarizes you with the following topics:
- Built-in reporting capabilities.
  - Options for analyzing data.
  - Options for working with data in Microsoft Office.
  - Integration capabilities with Microsoft Power Platform.
  - Business events.

## Module 4: Describe Dynamics 365 Finance core capabilities

This module introduces you to the core capabilities of Dynamics 365 Finance. We cover legal entities, managing regional tax reporting requirements, and cost accounting concepts.

### Lessons

- Introduction
- Describe Finance capabilities and features
- Describe organization and legal entities
- Describe reporting currency and accounting currency
- Describe tax capabilities
- Describe cost accounting concepts
- Module assessment
- Summary and resources

After completing this module, students will be able to:

- Describe Finance capabilities, features, and use cases.
- Describe organization and legal entities.
- Describe reporting currency and accounting currency.
- Describe tax capabilities.
- Describe cost accounting concepts.

## Module 5: Describe the general ledger in Dynamics 365 Finance

This module introduces you to chart of accounts, financial dimensions, accounting structure, and periodic financial processes

### Lessons

- Introduction
- Describe the chart of accounts functionality
- Describe the concept of a fiscal calendar
- Describe financial dimensions and dimension set concepts
- Describe the accounting structure
- Describe journaling concepts
- Describe periodic financial processes

- Module assessment
- Summary and resources

After completing this module, students will be able to:

- Describe chart of accounts, including main accounts.
- Describe the concept of a fiscal calendar.
- Describe financial dimensions and dimension sets concepts.
- Describe the accounting structure.
- Describe journaling concepts.
- Describe periodic financial processes.

## Module 6: Describe accounts payable and accounts receivable in Dynamics 365 Finance

This module explores the capabilities of Dynamics 365 Finance to manage the accounting processes involved in paying vendors or suppliers for good or services received and receiving payments for goods and services delivered.

### Lessons

- Introduction
- Describe core accounts payable components
- Describe vendor payments and settlements
- Describe core accounts receivable components
- Describe credit management processes
- Describe credit and collection processes
- Describe the concept of subscription billing
- Module assessment
- Summary and resources

After completing this module, students will be able to:

- Describe core accounts payable components, including vendors, purchase orders, and vendor invoices.
- Describe vendor payments and settlements, including three-way matching concepts.
- Describe core accounts receivable components, including customers, customer invoices, and free text invoices.
- Describe credit management.
- Describe the collection process.
- Describe the concept of subscription billing.

## Module 7: Describe expense management, fixed asset management, and budgeting in Dynamics 365 Finance

Explore cash and bank management and discover the core functionality of expense management. Learn how to manage fixed assets and review

the budgeting capabilities of Dynamics 365 Finance.

### Lessons

- Introduction
- Describe cash and bank management concepts
- Describe expense management
- Describe fixed asset management
- Describe budgeting capabilities
- Module assessment
- Summary and resources

After completing this module, students will be able to:

- Describe cash and bank management concepts.
- Describe expense management, including cash advances.
- Describe fixed asset management and fixed asset creation, acquisition, and depreciation.
- Describe budgeting capabilities.

## Module 8: Describe Dynamics 365 Supply Chain Management core capabilities

This module introduces learners to Dynamics 365 Supply Chain Management and how it allows organizations to manage and have insight into their operations.

### Lessons

- Introduction
- Describe use cases for Dynamics 365 Supply Chain Management
- Describe products and released products
- Describe product master records, product variants, and product dimensions
- Describe pricing and discounts
- Describe intercompany capabilities
- Module assessment
- Summary

After completing this module, students will be able to:

- Describe use cases of Supply Chain Management.
- Describe products and released products.
- Describe product master, product variant, and product dimensions.
- Describe pricing and discounts.
- Describe intercompany capabilities.

## Module 9: Describe the sales and procurement processes in Dynamics 365 Supply Chain Management

This module discusses how to use the capabilities of Dynamics 365 Supply Chain Management to

control the day-to-day operations of purchases and sales procedures.

## Lessons

- Introduction
- Describe the order-to-cash process
- Describe the sales order creation process
- Describe the fulfillment process
- Describe the procure-to-pay process
- Describe purchase requisitions
- Describe the purchase order creation process
- Describe purchase order receipts
- Module assessment
- Summary

After completing this module, students will be able to:

- Describe the order-to-cash process.
- Describe the sales order creation process.
- Describe the fulfillment process, including inventory reservations and picking and packing.
- Describe the procure-to-pay process.
- Describe purchase requisitions.
- Describe the purchase order creation process.
- Describe purchase order receipts.

## Module 10: Describe inventory and warehousing capabilities in Dynamics 365 Supply Chain Management

In Dynamics 365 Supply Chain Management, you can control the day-to-day operations of a warehouse, including costing methods, quality management, and inventory management.

## Lessons

- Introduction
- Describe costing methods
- Describe on-hand inventory capabilities
- Identify types of inventory journals
- Describe quality management capabilities
- Describe use cases for Warehouse Management Systems (WMS)
- Describe use cases for Transportation Management Systems
- Describe use cases for landed cost
- Module assessment
- Summary

After completing this module, students will be able to:

- Describe costing methods.
- Describe on-hand inventory capabilities.
- Identify types of inventory journals
- Describe quality management capabilities.
- Describe use cases for Warehouse Management Systems (WMS).
- Describe use cases for Transportation Management Systems (TMS).
- Describe use cases for landed cost.

## Module 11: Describe the manufacturing process in Dynamics 365 Supply Chain Management

This module discusses how to implement production processes based on different manufacturing strategies. It also covers shop floor management and production planning.

## Lessons

- Introduction
- Describe lean, discrete, and process manufacturing
- Describe manufacturing strategies
- Describe bills of materials (BOMs), routes, and operations
- Identify the production lifecycle stages
- Describe shop floor management
- Describe master planning and planning optimization
- Module assessment
- Summary

After completing this module, students will be able to:

- Describe lean, discrete, and process manufacturing.
- Describe manufacturing strategies.
- Describe bills of materials (BOMs), routes, and operations as they relate to production orders.
- Identify the production lifecycle stages.
- Describe shop floor management.
- Describe master planning and planning optimization.

## ASSOCIATED CERTIFICATIONS & EXAM

This course will prepare delegates to write the Microsoft MB920: Microsoft Dynamics 365 Fundamentals Finance and Operations Apps (ERP) exam.