

# **Course MB-300**

## **Dynamics 365 Unified Operations Core**

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**Duration: 3 days**

**Training Mode: Live Virtual and Classroom**

**Level: Intermediate**

**Language: English**

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# Course MB-300T01-A: Core common features of Dynamics 365 for Finance and Operations

## Course Objective

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 profile

A Dynamics 365 for Finance and Operations Functional Consultant is responsible for performing discovery, capturing requirements, engaging subject matter experts and stakeholders, translating requirements, and configuring the solution and applications. The Functional Consultant implements a solution using out-of-the-box capabilities, codeless extensibility, application, and service integrations.

**Job role:** Functional Consultant

**Preparation for exam:** [MB-300](#)

## Prerequisites

Basic understanding of ERP and 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, 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

Students will have an understanding of what Finance and Operations is, and the industries that it supports. They will 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 manage the project, including methodologies that can help manage the 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
- Practice Labs
- Module Summary

### **Students will be able to:**

- Understand the functionality and tools of 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, the Dynamics 365 for Finance and Operations implementation will be a success. After a customer signs the agreement to purchase licenses for Finance and Operations, the 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

### **Students will be able to:**

- Prepare documentation for gathered requirements by using a methodology in 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 the instance
- Practice Labs
- Module Summary

### **Students 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
- Practice Lab
- Module Summary

Students will have learned how to create a mobile app and publish it in Finance and Operations. Understanding the design considerations for a mobile app helps create the mobile app to match the user experience of a modern application. Students will also have learned that to use and work with a Finance and Operations, they need to download the Microsoft Dynamics 365 Unified Operations app. Additionally, they will have discovered how to run the Dynamics 365 Unified Operations app to connect to Finance and Operations, and 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
- Practice Lab
- Module Summary

In this module, students learned how to apply automation by using workflows and discovered that defining a specific type allows a business to control each step in a critical process. Students also

learned that workflows can be used as procedural steps that use approvals for several journal types. Additionally, they learned that one can define several versions for each workflow and modify an existing workflow without deleting the original. These workflow processes can require manual approval, workflow approval, or no approval. After gaining an understanding of the workflow architecture, elements, and actions, they then learned how to set up workflows, configure workflow properties, and add a manual or automated task in a workflow. Finally, they learned how to configure an approval process in a workflow, assign users to workflow touchpoints, configure an approval step in a workflow, and 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

# **Course MB-300T02-A: Core configuration in Dynamics 365 for Finance and Operations**

## **Course Objective**

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 how to configure core components of Microsoft Dynamics 365 for Finance and Operations.

## **Audience profile**

A Dynamics 365 for Finance and Operations Functional Consultant is responsible for performing discovery, capturing requirements, engaging subject matter experts and stakeholders, translating

requirements, and configuring the solution and applications. The Functional Consultant implements a solution using out of the box capabilities, codeless extensibility, application, and service integrations.

**Job role:** Functional Consultant

**Preparation for exam:** [MB-300](#)

## **Prerequisites**

Basic understanding of ERP and CRM concepts.

## **Course outline**

### **Module 1: Set Up and Configure Legal Entities**

This module explains the setup and configuration of legal entities and number sequences in Dynamics 365 for Finance and Operations.

#### **Lessons**

- Create a legal entity and generate number sequences
- Create a number sequence
- Create organization hierarchies
- Apply purposes and policies
- Configure calendars and date intervals
- Practice Labs
- Module summary

Students have learned how to create a legal entity and generate number sequences, manually or by using a wizard. Students also configured calendars and date intervals. Additionally, they learned how to create organization hierarchies, apply purposes, and set up policies in order to streamline business policies and reporting structures.

### **Module 2: Manage users and security**

Microsoft Dynamics 365 for Finance and Operations has an array of security and configuration options to help keep sensitive data safe. This all means that users can remain focused on their roles, while the system remains as streamlined as possible. Knowing how to implement different security options will help companies cover their security requirements. When the security architecture of Finance and

Operations are understood, one can more easily customize security to fit the requirements of a business.

### **Lessons**

- Understand the security architecture
- Manage users and security
- Setup and apply segregation of duties
- Run security reports
- Setup batch jobs and alerts
- Practice labs
- Module summary

### **In this module, students will have:**

- Understood the security architecture of Finance and Operations
- Managed users
- Managed security
- Applied segregation of duties
- Run security reports

### **Module 3: Perform Personalization**

Personalization saves time and effort when using the system.

### **Lessons**

- Describe and apply user options
- Create, export and import personalization
- Create and maintain record templates
- Practice labs
- Module summary

Students have now learned how to use and apply user options, create personalization, and export personalization to be used by other users, using the personalization feature of Finance and Operations. They also learned the difference between customization and personalization. In particular, how personalization helps save time personalizing often-used field values and allows for creation and maintenance of record templates.

### **Module 4: Implement Common Integration Features**

Microsoft Dynamics 365 integrates with many other common programs; for example, email, Microsoft Office, and Power BI.

## **Lessons**

- Microsoft Office integration
- Configure email
- Create and maintain email templates
- Use Power BI
- Setup network printing
- Integrate data into Common Data Services for Apps
- Practice Labs
- Module summary

In this module, students will have learned how to use Microsoft Office integration in Dynamics 365 for Finance and Operations, configure email (SMTP/Exchange), and create and maintain email templates to standardize the messages when sending emails to customers. By setting up network printing features, corporate network printers can be used remotely. Finally, this module provided an overview of how to integrate data from multiple sources into Common Data Service for Apps and integrate the data to Dynamics 365 for Finance and Operations using the Data Management workspace.

## **Module 5: 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

# Course MB-300T03-A: Data migration and preparing for go-live with Dynamics 365 for Finance and Operations

## Course Objective

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 data migration and go-live preparation for Microsoft Dynamics 365 for Finance and Operations.

## Audience profile

A Dynamics 365 for Finance and Operations Functional Consultant is responsible for performing discovery, capturing requirements, engaging subject matter experts and stakeholders, translating requirements, and configuring the solution and applications. The Functional Consultant implements a solution using out of the box capabilities, codeless extensibility, application, and service integrations.

**Job role:** Functional Consultant

**Preparation for exam:** [MB-300](#)

## Prerequisites

Basic understanding of ERP and CRM concepts.

## Course outline

## **Module 1: Prepare Data for Migration and Migrate Data**

This unit explores integration patterns, scenarios, and solutions for Finance and Operations. Although this unit does not include technical details about how to use or set up every integration pattern or how to work with sample code, it is always wise to be aware of available integration tools.

### **Lessons**

- Introduction
- Understand BYOD feature
- Perform a test migration and validate output
- Module summary

When it's time for data migration, the more one knows, the easier it is to control operational complexity and reduce costs. The customer's business continuity must be the priority. In this module, students will learn how to prepare data for a successful migration by identifying important factors such as legacy systems, and static and common data.

In this module, students learned how to:

- Choose a data integration (import/export) strategy
- Identify common migration scenarios and tools in Finance and Operations
- 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
- Perform a test migration and validate output
- Support the transition between the existing and migrated systems

## **Module 2: Use Data Management**

In this module, students will get an overview of the basic concepts of the Data management platform. Students will also learn how to import and export data in Dynamics 365 for Finance and Operations by using the Data management workspace.

Finally, they will learn how to use the asynchronous recurring integration features of the Data management platform. The Data management framework can be used to manage data entities and data entity packages in Finance and Operations.

### **Lessons**

- Introduction
- Understand data management and integration
- Data management workspace
- Templates in data management
- Import, export and copy data into a legal entity
- Practice Labs
- Module summary

### **In this module, students learned how 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

### **Module 3: Perform User Acceptance Testing**

In order to test and evaluate the customer solution prior to the go-live, one needs to have an environment of Dynamics 365 for Finance and Operations that has all the configurations and possible customizations via extensions.

It is always beneficial to have a methodology to ensure the creation and testing is organized and planned properly for a short, efficient, and role focused test case scenarios.

### **Lessons**

- Introduction
- Create and perform test cases for User Acceptance
- Practice Lab
- Module summary

### **In this module, students learned about:**

- How to understand the correlation between test cases and business requirements
- Best practices for recording test cases
- Task recorder

- How to create a Scenario Acceptance Testing BPM library
- How to synchronize and configure your test plan in Azure DevOps
- How to execute tests

## **Module 4: Prepare to Go Live**

All of the hard work becomes a success by moving the implemented solution in Dynamics 365 for Finance and Operations to the production environment. This is a crucial and final stage of this exciting experience of completing an implementation.

The goal is a happy customer, a quality solution, and peace of mind during this important phase, which is known as go-live. One cannot guarantee success without knowing how to prepare for Finance and Operations go-live and the final stage of implementation.

### **Lessons**

- Introduction
- Get ready to go live
- Module summary

### **In this module, students will have learned how to:**

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

## **Module 5: 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