

Szkolenie: Microsoft
MB-310T00 Microsoft Dynamics 365 Finance

Microsoft
Partner

DOSTĘPNE TERMINY

2026-05-26 | 4 dni | Kraków / Wirtualna sala
2026-06-30 | 4 dni | Warszawa / Wirtualna sala

Cel szkolenia:

This course covers the financial aspects of Dynamics 365: configure and use essential financial components, accounts payable, accounts receivable, collections, budgeting, fixed assets, and additional functionality

Course objectives:

- Understand and perform financial duties in Dynamics 365 Finance

Audience:

A Dynamics 365 Finance 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.

Plan szkolenia:

- Financial Management
 - Benefits of financial management
 - Financial management
 - Module summary
- Configure Currencies
 - Introduction
 - Setup legal entity currencies and conversions
 - Configure and import currency exchange rates
 - Practice lab
 - Module summary
- Create Fiscal Calendars, Years and Periods
 - Introduction

- Create fiscal calendars, years and periods
- Create date intervals
- Practice lab
- Module summary
- Configure Chart of Accounts
 - Introduction
 - Define and configure the chart of accounts
 - Define and configure the financial dimensions
 - Define and configure account structures and rules
 - Practice labs
 - Module summary
- Configure Ledger and Journals
 - Journals and their setup
 - Configure ledger and journal setup
 - User journals
 - Practice lab
 - Module summary
- Configure Cash and Bank Management
 - Registration number and account number
 - Address
 - Other contact information
 - Currency
 - Check setup
 - Main account for posting
- Use Cash and Bank Management
 - Make deposits and perform payment reversals
 - Use cash and bank management workspaces
 - Practice Labs
 - Module summary
- Configure Letters of Credit and Guarantees
 - Introduction
 - Configure letters of credit
 - Configure letters of guarantee
 - Module summary
- Perform Daily Procedures
 - Lessons

- Learn about general ledger processes
- Create voucher templates
- Setup journal controls
- Practice Lab
- Module summary
- Intercompany Accounting
 - Setup and use intercompany accounting
 - Practice Lab
 - Module Summary
- Configure Ledger Allocations and Accruals
 - Introduction
 - Configure and apply accrual schemes
 - Configure ledger allocation rules
 - Practice labs
 - Module summary
- Configure Sales Tax
 - Understand tax engine components
 - Practice lab
 - Module summary
- Configure Accounts Payable
 - Understand Task recorder functionality
 - Configure accounts payable parameters
 - Create and maintain vendors
 - Configure accounts payable charges
 - Configure and use positive pay
 - Practice Lab
 - Module Summary
- Perform Accounts Payable Daily Procedures
 - Introduction
 - Process orders, invoices, and payments
 - Manage and apply prepayments
 - Practice Labs
 - Module summary
- Use Accounting Distribution and Invoice Validations
 - Introduction
 - Settle transaction and undo settlements

- Distribute funds
- Configure invoice validation policies
- Practice labs
- Module summary
- Configure Accounts Receivable
 - Configure accounts receivable
 - Create and maintain customers
 - Setup customer posting profiles
 - Configure accounts receivable charges
 - Practice Lab
 - Module summary
- Perform Accounts Receivable Daily Procedures
 - Create free text invoices and record customer payments
 - Settle transactions and undo settlement
 - Practice Lab
 - Module summary
- Configure Credit and Collections
 - Introduction
 - Configure credit and collections components
 - Setup and manage interest
 - Waive, reinstate or reverse
 - Setup and manage collection letters
 - Practice Lab
 - Module Summary
- Process Credit and Collections
 - Introduction
 - Understand how to process collections
 - Manage customer credit and collections
 - Practice Labs
 - Module Summary
- Configure PostDated Checks
 - Introduction
 - Manage post dated checks
 - Practice Labs
 - Module Summary
- Configure and Use Basic Budgeting and Budget Control Processes

- Introduction
- Configure basic budgeting components
- Configure budget control components
- Create and test budget registry entries
- Use inquiries and reports
- Practice Labs
- Module summary
- Configure and Use Budget Planning Processes
 - Introduction
 - Configure budget planning components
 - Practice Lab
 - Module summary
- Configure Fixed Assets Management
 - Introduction
 - Configure fixed asset components
 - Enable fixed asset integration
 - Create fixed assets
 - Practice labs
 - Module summary
- Manage Fixed Assets
 - Introduction
 - Perform fixed assets tasks
 - Practice labs
 - Module summary
- Configure and Use Cost Accounting
 - Introduction
 - Cost control workspace
 - Practice lab
 - Module summary
- Configure and Use Periodic Processes
 - Introduction
 - Bank reconciliations
 - Configure financial period close
 - Prepare periodic filings
 - Run foreign currency revaluation processes
 - Perform financial consolidations

- Process end of year close
- Practice Labs
- Module summary
- Configure the Electronic Reporting Framework
 - Introduction
 - Configure electronic reporting
 - Formula designer in electronic reporting
 - Practice Lab
 - Module summary
- Configure Localized Features<
 - Introduction
 - Localization and regulatory features
 - Classification of Mexican localization features
 - Understand the global tax engine
 - Understand the features of fiscal establishments and documents for Brazilian localization
 - Bill of Exchange
 - Electronic Invoices
 - Practice Labs
 - Module summary
- Configure Financial Management for Public Sector
 - Introduction
 - Setup funds for the public sector
 - Setup derived financial hierarchies
 - Configure billing codes for free text invoices
 - Practice Labs
 - Module summary
- Course Conclusion
 - Final assessment
 - Course summary
 - Post-course survey

Wymagania:

Basic accounting skills
Core competencies in Dynamics 365 Core.

Poziom trudności



Certyfikaty:

The participants will obtain Microsoft certificates.

This course additionally prepares you for Microsoft certification exam: **MB-310: Microsoft Dynamics 365 Finance** available at Pearson VUE test centers.

Prowadzący:

Microsoft Certified Trainer.