



Szkolenie: Microsoft  
MB-310T00 Microsoft Dynamics 365 Finance



## DOSTĘPNE TERMINY

2026-04-27 | 4 dni | Warszawa / Wirtualna sala  
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.