

Training: Microsoft  
**MB-300T00 Microsoft Dynamics 365: Core Finance and Operations**


## TRAINING TERMS

2025-05-22 | 2 days | Virtual Classroom

## TRAINING GOALS:

Dynamics 365 Finance and Operations apps include, but are not limited to, Dynamics 365 Finance, Dynamics 365 Supply Chain Management, and Dynamics 365 Supply Chain Management, Manufacturing. Dynamics 365 Finance helps you to: Automate and modernize your global financial operations. Monitor performance in real time, predict future outcomes, and make data-driven decisions to drive business growth. Drive strategic financial decisions with artificial intelligence (AI), unify and automate your financial processes, reduce operational expenses, and decrease global financial complexity and risk. Dynamics 365 Supply Chain Management helps you to: Transform your manufacturing and supply chain operations. Use predictive insights and intelligence from AI and the Internet of Things (IoT) across planning, production, inventory, warehouse, and transportation management. Maximize operational efficiency, product quality, and profitability. Innovate with intelligent manufacturing operations, modernize warehouse management, optimize production performance, maximize the life of your assets, and automate and streamline your supply chain. Note: For more information, please refer to <https://docs.microsoft.com/learn/paths/get-started-finance-operations/> In this module, we will focus on the core features and functionality for Dynamics 365 Dynamics 365 Finance apps that are most used by end users and consultants.

### 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.

### At Course Completion

After completing this course, students will be able to:

- How to navigate and efficiently use search, filtering and queries
- How to use operational workspaces
- Work with Business Document Management
- Work with record templates
- Integrate Power BI with Dynamics 365 Finance and Operations apps

- How to personalize workspaces
- Identify when to use Power Platform in Dynamics 365 Finance and Operations app.
- How to apply security roles to users
- Run and analyze security reports
- Create and use workflow for approval
- Work with Organization Hierarchy and its purposes.
- How to use personalization feature
- Use Data Management workspace
- Create and use and entity templates
- Copy configuration data between legal entities
- Import and Export data and manage data by using Office Integration
- Use Regression Suite Automation Tool (RSAT)
- Create User acceptance Tests (UAT) and test plans
- Create and work with Business Process Modeler (BPM)
- Understand how to use Issue search

## CONSPECT:

- Module 1: Use common functionality and implementation
  - Introduction
  - Identify and use common Dynamics 365 Finance and Operations apps features and functionality
  - Describe use cases for Power Platform apps and services
  - Module Summary
  - Lab : Work with an operational workspaceLab : Prepare, enable, and use Business document management
  - Lab : Perform searches and work with filters
  - Lab : Create search queries and save for future use
  - Lab : Work with record templates
- Module 2: Configure security, processes, and options
  - Introduction
  - Implement security
  - Design and create workflows
  - Configure Organization administration features
  - Configure System administration features
  - Module Summary
  - Lab : Create users and assign security rolesLab : Set up segregation of duties

- Lab : Run a security report and analyze the output
- Lab : Create a purchase requisition workflow
- Lab : Configure a new legal entity
- Lab : Create an operating unit
- Lab : Set up number sequences
- Lab : Create an Organization Hierarchy and assign purpose
- Lab : Use Excel workbook designer
- Lab : Create a batch job
- Module 3: Manage Dynamics 365 Finance and Operation data
  - Introduction
  - Manage data in Dynamics 365 Finance and Operations apps
  - Plan a migration strategy
  - Prepare data for migration and migrate data
  - Module Summary
  - Lab : Work with templates in the Data management workspace
  - Lab : Export and import data
  - Lab : Copy configuration data between legal entities
- Module 4: Validate and support the solution
  - Introduction
  - Test solutions in Dynamics 365 Finance and Operations apps
  - Implement Lifecycle Services tools
  - Module Summary

## REQUIREMENTS:

Before attending this course, students must have:

- General knowledge of Microsoft Windows
- The ability to use Dynamics 365 for Finance and Operations for basic processing
- General knowledge of basic mobile device features and navigation

## Difficulty level



## CERTIFICATE:

Certificate of completing an authorized Microsoft training

## TRAINER:

Microsoft Certified Trainer