Enterprise Computing Solutions - Education Services

TRAINING OFFERING

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

CODE:	LÄNGE:	PREIS:
MCS_MB-300T00	16 Hours (2 Tage)	€1,775.00

Description

In diesem Training werden die folgenden Kernfeatures in Dynamics 365 behandelt: allgemeine Kernfeatures, Kernkonfiguration, Datenmigration und Vorbereitung auf die Go-Live-Phase.

Zielgruppe

Berater*in (funktional und technisch) sammeln und analysieren Geschäftsanforderungen und übersetzen diese Anforderungen in vollständig realisierte Geschäftsprozesse und Lösungen, die die von der Branche empfohlenen Verfahren umsetzen.
Sie dienen als wichtige Ressource bei der Implementierung und Konfiguration von Anwendungen zur Erfüllung von Geschäftsanforderungen.
Berater*innen sollten in der Lage sein, Kernkomponenten und -funktionen von Dynamics 365 Finance and Operations-Apps zu implementieren. Sie sollten auch wissen, wie Dynamics 365 Finance and Operations-Apps mit externen Systemen und Tools wie Power Platform integriert werden können.
Der Berater/die Beraterin nutzt Lifecycle Services (LCS), Azure DevOps und andere Microsoft-Tools und -Plattformen, um den Prozess des Application Lifecycle Management (ALM) zu erleichtern.
Berater*in bilden sich kontinuierlich weiter, indem sie die Produktversionshinweise lesen, die Produkt-Roadmaps prüfen, an Konferenzen teilnehmen oder sich mithilfe von Microsoft Learn, Microsoft Docs, Schulungen unter Anleitung, Blogs und Benutzer-Communities weiterbilden.
Sie sollten auch rollenbasierte Zertifizierungen und Bewertungen durchführen, um sicherzustellen, dass ihr Wissen anerkannt wird.

Voraussetzungen

Allgemeine Kenntnisse von Microsoft Windows
Die Fähigkeit, Dynamics 365 for Finance and Operations für die grundlegende Bearbeitung und Navigation zu nutzen
Erfahrung als funktionaler oder technischer Berater, der Dynamics Finance Apps zum Sammeln und Analysieren von Geschäftsanforderungen verwendet hat
Allgemeine Kenntnisse der grundlegenden Funktionen und der Navigation auf mobilen Geräten
Der Teilnehmer/ die Teilnehmerinnen sollte in der Lage sein, an einem synchronen, virtuellen Kurs teilzunehmen und Feedback in einer positiven, konstruktiven Art und Weise zu kommunizieren

Inhalt

Introduction to Microsoft Dynamics 365
- Digital transformation is business transformation
- Microsoft business applications
- Artificial intelligence
- Mixed reality

Navigate finance and operations apps

Benefits of Dynamics 365 Finance
Overview
General ledger
Cash and bank management
Tax
Accounts payable
Navigation elements
Accounts receivable
See how workspaces drive productivity
Credit and collections
Use filtering techniques
Budgeting
Search in finance and operations apps
Fixed assets
Compare views
Cost accounting
How to use View and Edit modes
Get started with Dynamics 365 Finance
Electronic invoicing
Get started with production control in Dynamics 365 Supply Chain Management
Core concepts in production control
Understand unified manufacturing
Manufacturing principles
Overview of the production process and production life cycle
Batch orders
Discrete manufacturing
Process manufacturing
Lean manufacturing
Configure production control for unified manufacturing
Capacity planning
Integration between the General ledger and the Production control modules
IoT intelligence and insights
Describe the value proposition for mixed-reality Guides for production floor workers
Microsoft Learn site
In-product help
Customize help topics
Get help and learn more about finance and operations apps
Protecting the privacy and personal data of your customers
Understand the functionality and tools of Lifecycle Services
Determine licensing requirements
Lifecycle Services security
Reuse existing assets, copy, and share data
Perform actions in the Asset library
Work with the Task recorder
Business process modeler (BPM)
Support options
Get started with Lifecycle Services for finance and operations apps
Get product updates from Lifecycle Services
Design and plan an implementation of finance and operations apps
Use implementation methodologies for a successful implementation
Cloud implementation - analysis
Cloud implementation - design and develop
Cloud implementation - test
Cloud implementation - deploy and operate
On-premises implementation - analysis
On-premises implementation - design and develop
On-premises implementation - test, deploy, and operate
Gathering and analyzing the requirements
Create functional design documents (FDD)
Translate Dynamics 365 apps and documentation with Dynamics 365 Translation Service
Access Dynamics 365 Translation Service
Types of requests
Reuse translations (recycling)
Custom-trained machine translation system Plan and configure the global address book in finance and operations apps
How the global address book works
Plan for the global address book and other address books Plan and implement legal entities in finance and operations apps
Create a legal entity
Create a number sequence
Understand organizational hierarchies and operating units
Plan your organizational hierarchy
Decide whether to model internal organizations as legal entities or operating units
Decide whether to model internal organizations as legal entities or operating units (cont.)
Best practices for modeling organizations and hierarchies
Apply purposes and policies
Distributed order management (DOM) policy
Configure calendars and date intervals

Batch processing and batch servers
Batch processing of reports and setup of alerts
Copy a batch job
Batch job manager role
Set up batch jobs in finance and operations apps
Unlock a journal
Workflow types for business processes
Create and set up workflows
Assign users to workflow elements
Use the daily journal workflow
Work with workflows in finance and operations apps
Lab - Create a purchase requisition workflow
Demonstration
Overview of the Dynamics 365 Unified Operations mobile app
Page design guidelines
Action design guidelines
Form design requirements
Design considerations
Understand use cases for mobile apps
Design and build mobile apps for finance and operations apps
Get the Dynamics 365 Unified Operations mobile app
Understand the differences between customization and personalization
Apply user options
Implicit personalization
Explicit personalization
Administer personalization
Saved views
The personalization toolbar
Personalize a workspace
Personalize a dashboard
Personalize inventory dimensions
Personalize finance and operations apps
Create and maintain record templates
Implement common integration features in finance and operations apps
Microsoft Office integration
Excel workbook designer
Document management
Configure email (SMTP/Exchange)
Create an email template
Power BI in finance and operations
Print management
Integrate data from multiple sources into Microsoft Dataverse for Apps
Feature management in finance and operations apps
Feature management workspace
Feature states
Enable a feature
Reschedule a feature
Disable a feature
Prepare data for migration to finance and operations apps
Select a data integration (import/export) strategy
Common migration scenarios and tools
Bring your own database (BYOD)
Test a data migration and validate output
Work with data management in finance and operations apps
Data management concepts
Use data entities for data management and integration
Work with the Data management workspace
Using Standard and Enhanced views for tiles
Use templates in data management
Export, import, and copy data into a legal entity
Lab - Explore the Data management workspace
Lab - Export data using the Data management workspace
Database movement operations
Data sharing framework
Prepare to go-live with finance and operations apps
Understand the go-live process
Complete the Lifecycle Services methodology
Perform user acceptance testing (UAT) for your solution
FastTrack go-live assessment
Request a production environment
Work with analytics and reporting in finance and operations apps
Understand different types of reports and inquiries
Financial reporting
Find inquiries and reports
Generate and consume inquiries and reports
Configure finance and operations apps for Microsoft Power Platform
Configure electronic reporting in Dynamics 365 Finance
Configure electronic reporting
Use barcode data sources to generate bar code images

Kurstermine

Auf Anfrage. Bitte kontaktieren Sie uns

Zusätzliche Information

Diese Schulung ist auch als Vor-Ort-Schulung verfügbar. Bitte kontaktieren Sie uns, um mehr zu erfahren.