



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
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- Navigation elements
- See how workspaces drive productivity
- Use filtering techniques
- Search in finance and operations apps
- Compare views
- How to use View and Edit modes
- Get started with Dynamics 365 Finance
- 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

- Benefits of Dynamics 365 Finance
- Overview
- General ledger
- Cash and bank management
- Tax
- Accounts payable
- Accounts receivable
- Credit and collections
- Budgeting
- Fixed assets
- Cost accounting
- Electronic invoicing

- 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.