Finance and Operations Front Office User Training

Course Level: 100

This instructor-led course provides a key step for Microsoft Dynamics 365 for Finance and Operations application administrators and power users who are beginning or advancing their knowledge of core Functional and Financial areas within Finance and Operations. In this course, you will gain an understanding of the basic setup, features and core out-of-the-box capabilities of several primary modules within Finance and Operations. Learn these concepts through lecture, system demonstrations and hands-on-labs.

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At A Glance:
Finance and Operations Front Office User Training

Why Enroll?

Empower ERP Application Admins & Power Users to gain a wholistic understanding of the core Functional & Financial features within Finance and Operations.

Who to Enroll?

Application Administrators-
Power Users -
Core Financial Users -

Key Takeaways

Basics (Navigation & Reporting), Workflows, Office Add-in, General Ledger, Fixed Assets, Procurement and Sourcing, Accounts Payable, Accounts Receivable, Cash and Bank Management, Sales Orders, Product Information Management

Register

Register for an ERP Front Office Boot Camp today!

Click to Register.

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About this
Training

Intended Audience

This course is designed to support individuals who will be administrating or supporting Microsoft Dynamics 365 for Finance and Operations. This course provides attendees who have limited or no exposure to Finance and Operations a breadth understanding of the solution as well as a focus on the core Financial and Functional areas. Those who are migrating from a previous version of Microsoft Dynamics AX, ERP, or database solution will find value in learning new features and functionality of the most recent release. This course is not recommended for end users.

Recommended Prerequisites

Prerequisites are recommendations, and while not required, they are *highly* advised to ensure a successful learning experience:

- General knowledge and understanding of basic accounting and financial processes is helpful
- Exposure to Microsoft Dynamics 365 for Finance and Operations is helpful, but not necessary

Key Takeaways

This Training Will Allow You To:

- Gain an understanding of an ERP system, including navigation, workspaces, various functional areas, and various solutions included in Finance and Operations
- Become familiar with the basic setup, features and functionality within specific functional & financial modules
- Understand the reporting landscape, which includes generating basic SSRS reports, financial reports and Power BI
- Create and work with workflows
- Understand functionality of the Office Add-In for Finance and Operations
- Understand the basic concepts of the General Ledger module including Chart of accounts, Financial dimensions and Journals
- Become familiar with the basic concepts and processes within Accounts payable
- Create and work with Vendor accounts and Vendor invoices
- Understand the basic concepts and functionality of the Procurement and Sourcing module including purchase requisitions and purchase orders
- Gain an understanding of basic Fixed Assets functionality
- Become familiar with the basic concepts of the Accounts receivable module including Customer accounts and Invoices
- Understand basic Credit and Collections functionality
- Become familiar with the basic features of Sales Orders
- Gain and understanding of the Cash and Bank management module including Bank account reconciliation
- Understand the basic concepts and features of the Product information management module
- Create and work with Products and Product Masters

DAY 1

DAY 2

DAY 3

BASICS & NAVIGATION

- Navigation of Dynamics 365 for Finance and Operations
- Key Terminology
- Working with Dashboards and Workspaces
- Functional areas
- Industry solutions

BASIC REPORTING

- Overview of reporting and analytics
- Reporting types and tools
- SSRS Reports
- Overview of the Financial report designer

OFFICE ADD-IN/INTEGRATION

- General overview of the Microsoft Add-in
- Demonstrations of how the Office Add-in can be used
- Exporting views and information
- Learn how to use Office Add-in to upload attachments and update information in Finance and Operations

WORKFLOWS

- General overview of what workflows do in Finance and Operations
- Instructions on how to:
    - Create a workflow
    - Update a workflow
    - Activate/deactivate a workflow

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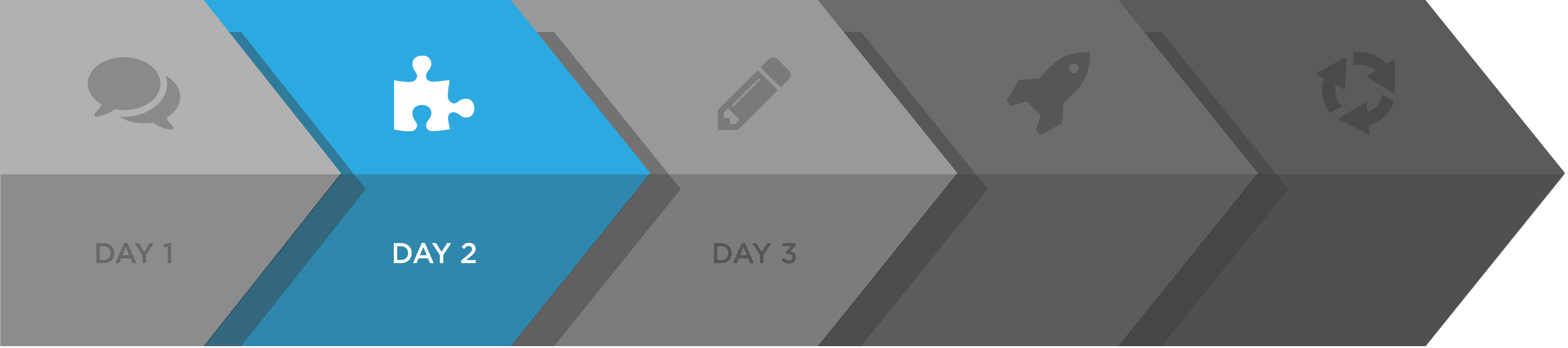

GENERAL LEDGER

- Overview of core setup and functionality
- Understand Chart of Accounts, Account structures and Financial dimensions
- General journal processing
    - Create and process a general journal
- Financial period close workspace
- Key inquiries and reports

FIXED ASSETS

- Overview of core setup and functionality
- Understand Fixed asset books and Depreciation profiles
- Fixed asset journals
- Review integration with other modules
- Key inquiries and reports

PROCUREMENT AND SOURCING

- Overview of key features and functionality
- Procurement categories, hierarchies and catalogs
- Understand Purchasing policies
- Purchase requisition overview
- Purchase order overview
    - Purchase order creation
    - Change management
    - Product receipts
- Vendor collaboration
    - Vendor catalogs

ACCOUNTS PAYABLE

- Overview of core setup and functionality
- Setup and maintain Vendor accounts
- Review the different types of Vendor invoice entry
- Invoice matching
- Understand the Vendor payment process
    - Vendor payments workspace
    - Payment journals

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DAY 1

DAY 2

DAY 3

ACCOUNTS RECEIVABLE

- Overview of core setup and functionality
- Setup and maintain Customer accounts
- Review the different types of Customer invoices
- Understand the Customer payment process
- Credit and Collections overview
  - Collection agents
  - Collection cases, activities
  - Write offs

CASH AND BANK MANAGEMENT

- Overview of key features and functionality
- Bank transactions and transaction types
- Review the bank account reconciliation process
- Manual vs. Advanced bank account reconciliation
- Advanced bank reconciliation matching rules

SALES ORDER PROCESSING

- Overview of key features and functionality
- Understand the Sales order process
  - Create a Sales order
- Review the different types of Sales orders
- Sales quotations and sales agreements

PRODUCT INFORMATION MANAGEMENT

- Understand Product setup and functionality
  - Products vs. Product masters
  - Product dimensions
  - Product variants
- Understand Released products
  - Releasing a product
- Review Inventory dimension groups

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DYNAMICS 365 UNIVERSITY

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Dynamics 365 University is designed to be foundational training for those responsible for implementing and supporting Dynamics 365 within your organization. Dynamics 365 University focuses on out-of-the-box features and functionality training for your core team. Participants get an understanding of how the Dynamics 365 processes and architecture can be leveraged and customized to support your unique organizational processes.

GET STARTED