



Mastering Microsoft Dynamics 365 for
Finance and Operations



19 - 30 August 2024
London (UK)
Landmark Office Space



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Introduction:

This training program is designed to equip participants with comprehensive skills and knowledge of Microsoft Dynamics 365 for Finance and Operations. It empowers participants to leverage Dynamics 365 for enhanced business performance and strategic advantage.

Program Objectives:

At the end of this program, participants will be able to:

- Understand the core functionalities and modules of Microsoft Dynamics 365 for Finance and Operations.
- Configure and customize Dynamics 365 to meet specific business requirements.
- Optimize financial and operational processes using Dynamics 365 tools and features.
- Integrate Dynamics 365 with other systems and applications for seamless data flow.
- Implement best practices for security, compliance, and data management in Dynamics 365.
- Integrate Power BI with Dynamics 365 for Finance and Operations.

Targeted Audience:

- ERP Consultants and Specialists.
- Finance and Operations Managers.
- IT Professionals and System Administrators.
- Business Analysts and Project Managers.
- Individuals seeking to gain expertise in Dynamics 365 for Finance and Operations.

Program Outlines:

Unit 1:

Introduction to Microsoft Dynamics 365 for Finance and Operations:

- Overview of Microsoft Dynamics 365.
- Understanding the architecture and key components.

- Navigating the user interface and dashboards.
- Basic system setup and configuration.
- Introduction to key modules: Finance, Supply Chain, and Retail.

Unit 2:

Core Finance Functionalities:

- Managing General Ledger and Chart of Accounts.
- Accounts Payable and Accounts Receivable processes.
- Cash and Bank Management.
- Budgeting and Financial Reporting.
- Fixed Assets Management.

Unit 3:

Supply Chain Management:

- Inventory Management and Control.
- Procurement and Sourcing.
- Product Information Management.
- Sales Order Processing.
- Warehouse Management.

Unit 4:

Advanced Financial Configurations:

- Financial Dimensions and Advanced Financial Reporting.
- Intercompany Accounting and Consolidations.
- Multi-currency and Multi-entity Management.
- Financial Period Close and Year-End Processes.
- Financial Insights and Analytics.

Unit 5:

Advanced Supply Chain Configurations:

- Advanced Warehousing and Transportation Management.
- Demand Forecasting and Master Planning.
- Vendor Collaborations and Supplier Relationship Management.
- Production Control and Shop Floor Management.
- Quality Management in Supply Chain.

Unit 6:

Customizations and Extensions:

- Introduction to Dynamics 365 Development Tools.
- Using Power Platform: Power Apps, Power Automate, and Power BI.
- Customizing forms, views, and reports.
- Developing workflows and business rules.
- Extending Dynamics 365 with custom applications.

Unit 7:

Creating Reports and Dashboards with Power BI:

- Understanding Power BI and its capabilities.
- Creating and publishing Power BI reports and dashboards.
- Integrating Power BI with Dynamics 365 for Finance and Operations.
- Managing and sharing Power BI content.

Unit 8:

System Integration and Data Management:

- Integrating Dynamics 365 with other Microsoft and third-party applications.
- Data Migration Strategies and Tools.
- Managing Data Entities and Data Management Framework.

- Ensuring Data Quality and Consistency.
- Using Azure Integration Services.

Unit 9:

Security and Compliance:

- Implementing Security Roles and Permissions.
- Setting up Segregation of Duties.
- Managing User Access and Audits.
- Compliance with Regulatory Requirements.
- Data Privacy and Protection.

Unit 10:

Performance Optimization and Monitoring:

- Monitoring System Performance and Health.
- Troubleshooting and Resolving Performance Issues.
- Optimizing Database and Application Performance.
- Using Lifecycle Services for System Management.
- Regular Maintenance and Updates.