Introduction to finance in Dynamics 365 (AB-6002)

ID AB-6002 **Price** CHF 690.—(excl. VAT) **Duration** 1 days

Who should attend

This course is designed for finance professionals, business users, and ERP beginners who want to learn the fundamentals of Microsoft Dynamics 365 Finance. Ideal for those with little to no prior experience, it focuses on building foundational skills for managing core financial processes and system navigation.

Course Content

Describe Dynamics 365 finance and operations apps

- Introduction
- Describe enterprise resource planning (ERP)
- Describe use cases for using AI tools in finance and operations apps
- Explore the finance and operations user interface
- Module assessment
- Summary

Describe reporting and integration capabilities in Dynamics 365 finance and operations apps

- Introduction
- Describe built-in reporting capabilities
- Describe options for analyzing data with Power BI
- Describe integration capabilities with Microsoft 365
- Describe integration options for Microsoft Power Platform
- Describe capabilities and use cases for business events
- Configure and edit business documents
- Describe how Copilot-based insights support finance and operations apps
- Knowledge check
- Summary

Describe shared features in Dynamics 365 finance and operations apps

- Introduction
- Describe security capabilities in finance and operations apps
- Describe workflow capabilities in Dynamics 365 finance and operations apps
- Describe batch jobs in finance and operations apps
- Manage organizations and legal entities
- Create and maintain record templates
- Describe global address book features
- Set up alerts in finance and operations apps
- Describe number sequences in finance and operations apps
- Describe attachment capabilities in finance and operations apps
- Knowledge check
- Summary

Describe Dynamics 365 Finance core capabilities

- Introduction
- Describe Dynamics 365 Finance capabilities and features
- Describe reporting and accounting currencies
- Describe tax capabilities in Dynamics 365 Finance
- Describe cost accounting concepts in Dynamics 365 Finance
- Describe electronic payment formats in Dynamics 365 Finance
- Knowledge check
- Summary

Describe general ledger and cash and bank management processes in Dynamics 365 Finance

- Introduction
- Define fiscal and ledger calendars in Dynamics 365 Finance
- Describe charts of accounts and main accounts
- Describe financial dimensions and set concepts
- Describe accounting structures in General ledger
- Describe financial journals in Dynamics 365 Finance
- Describe financial reporting capabilities in Dynamics 365 Finance
- Describe cash and bank management in Dynamics 365 Finance
- Describe use cases for allocations and accruals
- Describe periodic financial processes in Dynamics 365 Finance
- Module assessment
- Summary

Describe accounts payables and receivables in Dynamics 365 Finance

- Introduction

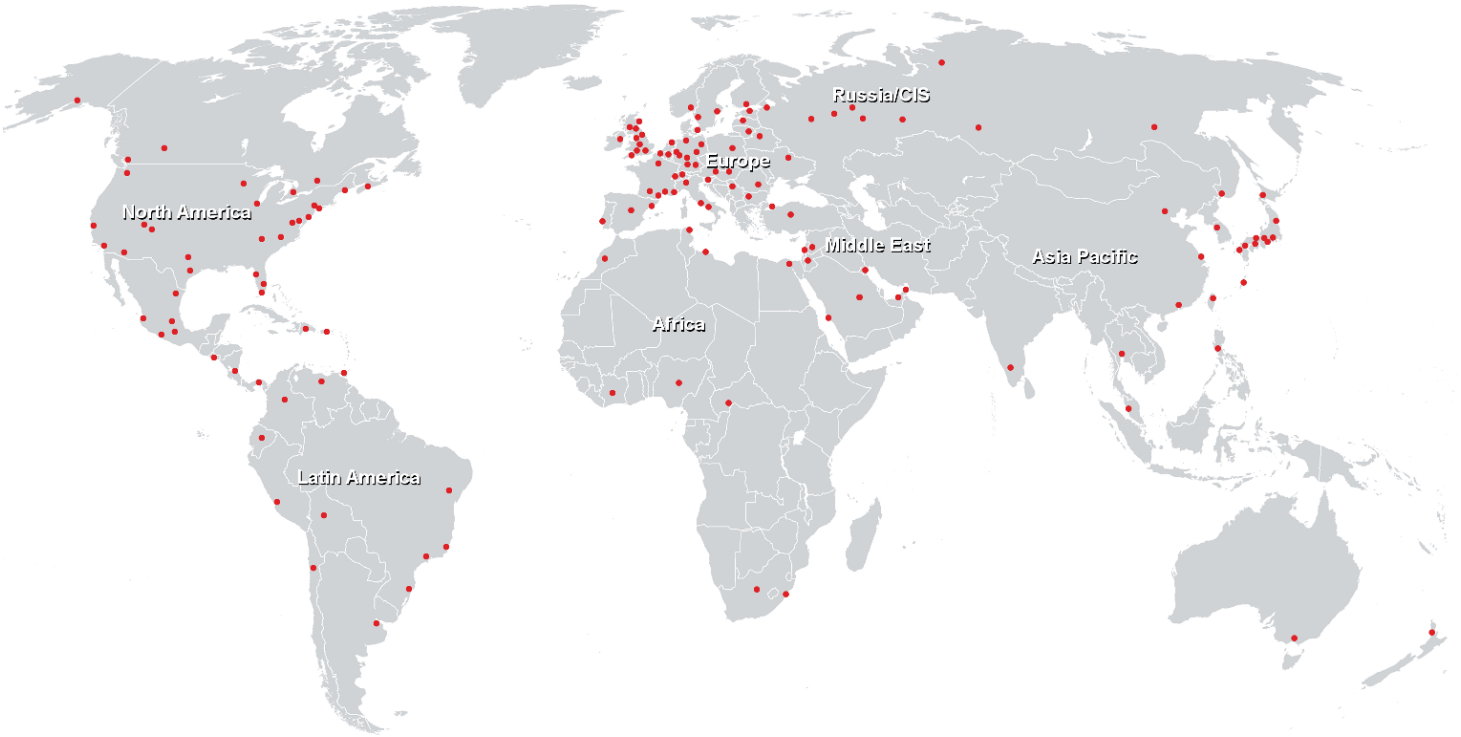
- Describe payment setup
- Describe core accounts payable components in Dynamics 365 Finance
- Describe vendor posting profiles in accounting
- Describe vendor payments and settlements
- Describe core accounts receivable components
- Describe customer/vendor netting in Dynamics 365 Finance
- Describe credit management processes in Dynamics 365
- Describe the collections process in Dynamics 365 Finance
- Manage subscription billing in Dynamics 365 Finance
- Knowledge check
- Summary

Describe expense tracking, asset control, and budgeting processes in Dynamics 365 Finance

- Introduction
- Describe expense management capabilities
- Describe fixed asset management capabilities
- Describe budgeting capabilities
- Describe project management and accounting capabilities
- Knowledge check
- Summary

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