

MB-800T00: Microsoft Dynamics 365 Business Central Functional Consultant
Course Overview (Duration: 68hrs)

Module 1: Introduction to Business Central

- Describe use cases and common features for Business Central modules
- Technology overview
- Navigate the user interface
- Perform basic user tasks in Business Central
- Master Data
- Sales and Purchase processes

Module 2: Application Setup

- i. Create and configure a new company
 - Create a new company by using the Assisted Setup
 - Copy a company
 - Copy data from an existing company
- ii. Migrate data to Business Central
 - Overview
 - Migrate data by using the Assisted Setup
 - Create a configuration worksheet
 - Create configuration questionnaires
 - Use configuration packages
 - Migrate data by using the **Edit in Excel** feature
 - Create journal opening balances
- iii. Manage Security
 - Set up new users and user groups
 - Create and assign permission sets
 - Apply security filters
 - Create and manage user profiles
 - Perform user-specific setup
- iv. Set up core app functionality
 - Set up company information
 - Set up printers
 - Set up reports
 - Set up and use job queues
 - Set up email
 - Set up number series
 - Set up base calendars
 - Set up change log

Module 3: Configure Financials

- i. Set up Finance Management
 - Configure accounting periods
 - Configure the general ledger setup

- ii. Set up the Chart of Accounts
 - Create G/L accounts
 - Create account categories and subcategories

- iii. Set up posting groups
 - Overview
 - Create specific posting groups
 - Create general posting groups
 - Configure general posting setup options
 - Set up VAT Posting Groups
 - Configure the VAT Posting Setup

- iv. Set up dimensions
 - Overview
 - Set up dimensions and dimension values
 - Set up global and shortcut dimensions
 - Set up default dimensions
 - Block combinations
 - Define default dimension priorities

- v. General Journals
 - Overview
 - Create general journal templates
 - Create general journal batches

- vi. Set up currencies
 - Set up currencies
 - Update exchange rates

- vii. Set up Cash Management
 - Set up bank accounts
 - Set up bank imports and exports
 - Set up payment reconciliation journals
 - Set up payment application rules
 - Explore data exchange definitions

- viii. Set up Accounts Payables
 - Create vendor accounts
 - Create Payment Terms
 - Configure Payment Methods
 - Merge vendor accounts
 - Configure the purchases and payables setup
 - Set up payment journals
 - Set up vendor bank accounts
 - Create document sending profiles

- ix. Set up Accounts Receivables
 - Create customer accounts
 - Merge customer records

- Configure the Sales & Receivables Setup
- Set up cash receipt journals
- Set up payment registration
- Set up customer bank accounts
- Enable customer payments through payment services
- Relationship between customer and customer ledger entries

Module 4: Configure Sales and Purchasing

- i. Set up Inventory
 - Create customer accounts
 - Merge customer records
 - Configure the Sales & Receivables Setup
 - Set up cash receipt journals
 - Set up payment registration
 - Set up customer bank accounts
 - Enable customer payments through payment services
 - Relationship between customer and customer ledger entries

- ii. Configure sales pricing and discounts
 - Create customer-specific discounts
 - Create customer-specific prices
 - Pricing customer groups
 - Best price calculation

- iii. Configure purchase pricing and discounts
 - Configure purchase prices
 - Configure purchase discounts

- iv. Configure Salespeople and Purchasers
 - Configure salespeople
 - Assign a salesperson to a customer
 - Configure purchasers
 - Assign a purchaser to a vendor

Module 5: Operations

- i. Sell items
 - Create quotations
 - Convert a quotation into an order or invoice
 - Analyze item availability
 - Ship items
 - Reverse shipments
 - Invoice items
 - Configure recurring sales lines
 - Post and review a sales transaction

- ii. Order Promising
 - Process customer payments
 - Process payments to vendors
 - Unapply entries
 - Reconcile bank accounts
 - Process journal entries
 - Reverse posted journals

- iii. Financial Transactions
 - Process purchase invoices
 - Reverse or correct a posted purchase invoice
 - Process sales invoices
 - Reverse or correct a posted sales invoice
 - Combine order shipments for invoicing
 - Process payments journals
 - Suggest vendor payments
 - Unapply entries
 - Reverse posted journals
 - Describe bank reconciliations
 - Create and process journal entries
 - Process periodic entries using standard journals
- iv. Inventory Costing
 - Create and manage inventory periods
 - Describe the inventory batch posting process
 - Describe costing methods

Module 6: Integration and Automation

- i. Set up and manage approvals by using workflows
 - Explore workflow in Business Central
 - Create workflows
 - Set up approval users
 - Set up notifications
 - Use approval workflows
- ii. Integrate Business Central with other applications
 - Integrate Business Central with Office apps
 - Describe use cases for integrating Business Central with Microsoft Teams and Microsoft Office
 - Describe use cases for AppSource (Marketplace)
 - Configure integration between Business Central and Microsoft Dataverse
 - Describe use cases connecting to Dynamics 365 Sales
- iii. Connect Power Automate
 - Describe use cases for enhancing Business Central by using Power Automate
 - Describe the process for creating flows and using standard connectors
 - Use embedded (built-in flows in Business Central) Power Automate flows
- iv. Connect Power Apps
 - Describe use cases for enhancing Business Central by using Power Apps
 - Create Power App with Standard API
- v. Connect Power BI
 - Consume Power BI reports within Business Central
 - Consume Business Central data by using Odata in Power BI Desktop

Module 7: Warehouse Management Overview

- Introduction to warehouse management features
- Warehouse configuration (locations, bins, zones)
- Warehouse setup parameters
- Warehouse document flow

Inbound Warehouse Operations

- Purchase order receiving
- Warehouse receipt creation and posting
- Put-away processes (Directed & Non-directed)
- Handling over-receipts and partial receipts

Outbound Warehouse Operations

- Sales order shipment
- Warehouse shipment creation and posting
- Picking processes (Basic & Advanced setups)
- Handling backorders and partial shipments

Internal Warehouse Processes

- Item movements and reclassifications
- Bin transfers
- Inventory adjustments
- Cycle counting and physical inventory

Warehouse Setup and Configuration

- Warehouse locations (Basic vs Advanced WMS)
- Bin policies and ranking
- Zone and bin setup
- Warehouse employees and permissions

Integration with Other Modules

- Assembly and production orders in warehouse
- Service and returns management

Reporting and Analysis

- Standard warehouse reports
- Using filters and saved views
- Creating warehouse dashboards with Power BI
- Inventory valuation and availability reports

Best Practices and Troubleshooting

- Common warehouse process issues
- Data correction strategies
- Testing scenarios for UAT
- Go-live and support strategies

Module 8: Procurement Module (Purchasing & Vendor Management)

Introduction to Procurement in Business Central

- Overview of the procurement lifecycle
- Integration with finance, inventory, and warehousing
- Key terminology (vendors, purchase orders, receipts, invoices)

Vendor Management

- Creating and managing vendor cards
- Vendor ledger entries and balances
- Vendor posting groups
- Blocking and unblocking vendors

Purchase Planning & Requisition

- Purchase quotes and converting to orders
- Requisition worksheets and planning worksheets
- Demand forecasting and planning
- Automatic replenishment and reorder points

Purchase Orders and Receipts

- Creating and managing purchase orders
- Purchase order lifecycle: order → receipt → invoice
- Handling partial receipts and returns
- Drop shipments and special orders
- Working with item charges (freight, duties, etc.)

Purchase Invoicing

- Posting and matching purchase invoices
- Invoice vs receipt reconciliation
- Prepayments and purchase credit memos
- Three-way match (PO → GRN → Invoice) process

Vendor Price and Discount Management

- Managing vendor pricing lists
- Line and invoice discounts
- Purchase agreements and blanket purchase orders

Approval Workflows

- Purchase document approval process
- Setting up approval users and flow
- Notifications and delegation

Reporting and Analysis

- Standard procurement reports (vendor aging, purchase analysis)
- Purchase statistics and vendor performance metrics
- Using dimensions for analysis

Integration with Other Modules

- Inventory (stock levels, reorder, costing)
- Warehouse (receipts, put-away)
- Finance (AP ledger, GL posting)
- Projects or Jobs module (procure-to-project)

Procurement Best Practices & Real-World Scenarios

- Vendor negotiation tips
- Audit and compliance in purchasing
- Error handling and document corrections
- Hands-on exercises (e.g., PO creation, GRN posting, invoice matching)

HR and Administration Module – Course Content

Introduction to HR in Business Central

- Overview of HR capabilities
- Difference between Business Central HR and Dynamics 365 Human Resources
- Use cases and limitations

Employee Master Data Management

- Creating and managing employee records
- Employee personal details, job title, department, manager
- Employment history, contract types, and positions
- Custom fields for tracking HR-specific data (e.g., next of kin, certifications)

Absence and Leave Management

- Setting up leave types (annual, sick, maternity, etc.)
- Recording absences and leave requests
- Leave balance tracking
- Basic reporting on employee availability and absence trends

Document Management

- Attaching HR documents to employee records (contracts, IDs, etc.)
- Managing employee-related documentation with security control

HR Reporting & Analytics

- Employee lists and statistics
- Absence reports
- Turnover analysis
- Integration with Power BI for advanced reporting

Administration Tools

- Company policies and compliance document tracking
- Approval workflows for employee-related actions
- Internal notifications and reminders (e.g., contract expiry)
- Role and responsibility assignments (integration with user security roles)

Module 8: Introduction to Fixed Asset

Lesson 1: Basic Overview

- Fixed Assets Overview
- Fixed Assets Reports and Analytics

Lesson 2: Managing Assets

- Acquire Fixed Assets
- Maintain Fixed Assets
- Insure Fixed Assets
- Transfer, Split, or Combine Fixed Assets
- Revalue Fixed Assets
- Lesson 3: Disposal of Assets

- Depreciate or Amortize Fixed Assets
- Dispose of or Retire Fixed Assets
- Manage Budgets for Fixed Assets
- Troubleshooting FA Ledger Entries

Module 9: Budgeting

- Multiple budgets functionality
- Budget combination
- Budget revision
- Create a new general ledger budget.
- Enter budget entries manually.
- Create budgets by using the Copy Budget function.
- Export budgets to Excel.
- Import budgets from Excel.

Module10: Workshop Demo