

AB-6002: Introduction to Finance in Dynamics 365

Course Overview

Explore how Dynamics 365 Finance enhances financial operations through AI-powered agents, Copilot-driven workflows, intelligent reconciliation, and embedded analytics to streamline forecasting, collections, and reporting.

Prerequisites

None

Module 1: Describe Dynamics 365 Finance and Operations Apps

- 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 2: Describe Reporting and Integration Capabilities in Dynamics 365 Finance and Operations Apps

- Describe built-in reporting capabilities
- Describe options for analyzing data with Power BI
- Describe integration capabilities with Office 365
- Describe integration options for Microsoft Power Platform
- Describe capabilities and use cases for business events
- Configure and edit business documents
- Use Finance insights for forecasting and anomaly detection

Module 3: Describe Shared Features in Dynamics 365 Finance and Operations Apps

- 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

Module 4: Describe Dynamics 365 Finance Core Capabilities

- 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

Module 5: Describe General Ledger and Cash and Bank Management Processes in Dynamics 365 Finance

- 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 6: Describe Accounts Payables and Receivables in Dynamics 365 Finance

- 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

Module 7: Describe Expense Tracking, Asset Control, and Budgeting Processes in Dynamics 365 Finance

- Describe expense management capabilities
- Describe fixed asset management capabilities
- Describe budgeting capabilities
- Describe project management and accounting capabilities