MICROSOFT DYNAMICS 365 FINANCE (MB-310T00)

Course Code: 100462

Explore the financial aspects of Dynamics 365.

This course covers the financial aspects of Dynamics 365: Configure and use essential financial components, accounts payable, accounts receivable, collections, budgeting, fixed assets, and additional functionality.

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Access this course and over 50 other instructor-led training courses for only $2,999.

Who Needs to Attend

As a Dynamics 365 for Finance and Operations Functional Consultant, you analyze business requirements and translate them into fully realized business processes and solutions that implement industry-recommended practices. You have a fundamental understanding of accounting principles and a deeper understanding of financial operations as they relate to core finance, manufacturing, retail, and supply chain management operations. You specialize in one or more feature sets of Dynamics 365 Finance including core finance, general ledger, tax, cost accounting, cost management, fixed assets, asset leasing, budgeting, revenue recognition, consolidation and elimination, credit and collections, cash and bank management, and expense management. You understand the relationships between finance and manufacturing, retail, and supply chain management.

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CLASSROOM LIVE	$2,595 CAD	4 Day

Classroom Live Outline

Module 1: Set up and configure financial management and work with General Ledger

- Get started with Dynamics 365 Finance
- Configure currencies in Dynamics 365 Finance
- Create fiscal calendars, years, and periods in Dynamics 365 Finance
- Get started with chart of accounts in Dynamics 365 Finance
- Set up chart of accounts in Dynamics 365 Finance
- Set up financial dimensions in Dynamics 365 Finance
- Set up ledgers and journals in Dynamics 365 Finance
- Perform general ledger daily procedures in Dynamics 365 Finance
- Intercompany accounting in Dynamics 365 Finance
- Configure ledger allocations and accruals in Dynamics 365 Finance
- Configure and perform periodic processes in Dynamics 365 Finance
- Work with analytics and reporting in finance and operations apps
- Configure cash and bank management in Dynamics 365 Finance
- Set up taxes in Dynamics 365 Finance
- Work with taxes in Dynamics 365 Finance

Module 2: Implement accounts receivable, credit, collections, and revenue recognition

- Set up accounts receivable in Dynamics 365 Finance
- Get started with accounts receivable daily procedures in Dynamics 365 Finance
- Set up credit and collections in Dynamics 365 Finance
- Process credit and collections in Dynamics 365 Finance

Module 3: Implement and manage accounts payable and expenses

- Configure Accounts payable in Dynamics 365 Finance
- Work with accounts payable daily procedures in Dynamics 365 Finance
- Work with accounting distributions, invoice validations, and settlements in Dynamics 365 Finance
- Set up and use Intelligent OCR for vendor invoices in Dynamics 365 Finance

- Get started with Expense management in Dynamics 365 Project Operations
- Set up and configure Expense management in Dynamics 365 Project Operations

Module 4: Manage budgeting

- Set up and use basic budgeting Dynamics 365 Finance
- Set up and use budget control in Dynamics 365 Finance
- Configure and use budget planning in Dynamics 365 Finance

Module 5: Manage fixed assets

- Configure fixed assets management in Dynamics 365 Finance
- Set up and acquire fixed assets in Dynamics 365 Finance
- Manage fixed assets in Dynamics 365 Finance
- Work with fixed asset deprecation and disposal in Dynamics 365 Finance

Classroom Live Labs

- Lab : Create and post vendor/customer/general ledger payments
- Lab : Configure a financial report
- Lab : Configure tax ledger posting group
- Lab : Create and apply an accrual scheme
- Lab : Configure financial dimensions and make a journal entry for the new financial dimension value
- Lab : Group discussion: creation of a number sequence
- Lab : Video: Vendor payment journal
- Lab : Configure an expense category
- Lab : Group discussion: Expense management module
- Lab : Configure payment methods, terms, and days
- Lab : Adjust a temporary credit limit for a customer
- Lab : Create a budget transfer rule
- Lab : Video: Create budget register entry
- Lab : Video: Use of two depreciation methods for Fixed Assets
- Lab : Acquire a fixed asset by using an AP invoice journal

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VIRTUAL CLASSROOM LIVE	$2,595 CAD	4 Day

Virtual Classroom Live Outline

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- Get started with Dynamics 365 Finance
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- Create fiscal calendars, years, and periods in Dynamics 365 Finance
- Get started with chart of accounts in Dynamics 365 Finance
- Set up chart of accounts in Dynamics 365 Finance
- Set up financial dimensions in Dynamics 365 Finance
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- Perform general ledger daily procedures in Dynamics 365 Finance
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- Configure and perform periodic processes in Dynamics 365 Finance
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- Configure cash and bank management in Dynamics 365 Finance
- Set up taxes in Dynamics 365 Finance
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Module 2: Implement accounts receivable, credit, collections, and revenue recognition

- Set up accounts receivable in Dynamics 365 Finance
- Get started with accounts receivable daily procedures in Dynamics 365 Finance
- Set up credit and collections in Dynamics 365 Finance
- Process credit and collections in Dynamics 365 Finance

Module 3: Implement and manage accounts payable and expenses

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- Work with accounts payable daily procedures in Dynamics 365 Finance
- Work with accounting distributions, invoice validations, and settlements in Dynamics 365 Finance
- Set up and use Intelligent OCR for vendor invoices in Dynamics 365 Finance

- Get started with Expense management in Dynamics 365 Project Operations
- Set up and configure Expense management in Dynamics 365 Project Operations

Module 4: Manage budgeting

- Set up and use basic budgeting Dynamics 365 Finance
- Set up and use budget control in Dynamics 365 Finance
- Configure and use budget planning in Dynamics 365 Finance

Module 5: Manage fixed assets

- Configure fixed assets management in Dynamics 365 Finance
- Set up and acquire fixed assets in Dynamics 365 Finance
- Manage fixed assets in Dynamics 365 Finance
- Work with fixed asset deprecation and disposal in Dynamics 365 Finance

Virtual Classroom Live Labs

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Mar 9 - 12, 2026 | 9:00 AM - 5:00 PM EDT

May 11 - 14, 2026 | 9:00 AM - 5:00 PM EDT

Aug 17 - 20, 2026 | 9:00 AM - 5:00 PM EDT

Nov 9 - 12, 2026 | 9:00 AM - 5:00 PM EST

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PRIVATE GROUP TRAINING	4 Day

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