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Manage business solutions with Microsoft Dynamics 365 Business Central (MB-800)

Duración: 5 Días   Código del Curso: M-MB800   Método de Impartición: Curso Remoto (Virtual)

Temario:

Business course built and optimized for small and medium businesses.
Built and optimized for small and medium businesses, Dynamics 365 Business Central is an application for companies that have outgrown their entry-level business applications. Growing businesses often outgrow their basic accounting software or legacy enterprise resource planning (ERP) systems that are unable to handle increased inventory and transactions, lack integration with other line-of-business systems, and have reporting limitations. Businesses are also challenged with the logistics of providing services that have more scalability, increased mobility, and availability in the cloud. With Business Central, you can manage your financials, automate and secure your supply chain, sell smarter, improve customer service and project performance, and optimize your operations.

Curso Remoto (Abierto)

Nuestra solución de formación remota o virtual, combina tecnologías de alta calidad y la experiencia de nuestros formadores, contenidos, ejercicios e interacción entre compañeros que estén atendiendo la formación, para garantizar una sesión formativa superior, independiente de la ubicación de los alumnos.

Dirigido a:

Candidates for this exam are functional consultants who implement core application setup processes for small and medium businesses. They implement and configure Microsoft Dynamics 365 Business Central including setting up core functionality and modules and migrating data to Business Central. Candidates configure the application in collaboration with the implementation team to provide the business with manageability and ease of use. They may configure role centers including adapting insights, cues, action tiles, reports, charts, and extend Business Central by using Power Platform components. Candidates have applied knowledge of meeting business needs by using Business Central, including basic understanding of financial management, sales, purchasing, and inventory. Candidates for this exam typically specialize in one or more feature sets of Business Central. They understand the role of Business Central in relationship to the Microsoft 365 and Dynamics 365 suites of applications.

Objetivos:

- Students will learn to,

- Create new companies in Business Central

- Create and process journal entries in Dynamics 365 Business Central

- Administer Dynamics 365 Business Central online

- Migrate data to Business Central

- Manage users and implement security in Business Central

- Work with reports in Dynamics 365 Business Central

- Set up dimensions in Dynamics 365 Business Central

- Create workflows in Dynamics 365 Business Central

- Introduction to Microsoft Power Platform and Business Central

- Introduction to integrating Dataverse with Dynamics 365 Business Central

- Get started with the Shopify connector in Dynamics 365 Business Central

- Set up general ledger configuration options in Dynamics 365

- Set up discounts for your customers in Dynamics 365 Business Central

- User interface essentials in Dynamics 365 Business Central

- Personalize the Microsoft Dynamics 365 Business Central user interface

- Use alternative interfaces for Dynamics 365 Business Central

- Change how documents look in Business Central

- Configure Business Central for Excel and Power BI

- Migrate on-premises data to Dynamics 365 Business Central

- Work with pages in Dynamics 365 Business Central

- Master, supplemental and personal data in Business Central

- Post purchase item charges in Dynamics 365 Business Central

- Estimate purchase order receipt dates in Dynamics 365 Business Central

- Receive and invoice items in Dynamics 365 Business Central

- Create purchase documents in Dynamics 365 Business Central

Business Central

- Set up cash management in Dynamics 365 Business Central

- Set up the chart of accounts in Dynamics 365 Business Central

- Set up posting groups in Dynamics 365 Business Central

- Set up general journal templates in Dynamics 365 Business Central

- Post periodic journal entries in Dynamics 365 Business Central

- Set up Trade in Microsoft Dynamics 365 Business Central

- Create items in Dynamics 365 Business Central

- Create new bins in Dynamics 365 Business Central

- Create sales documents in Dynamics 365 Business Central

- Ship and invoice items in Dynamics 365 Business Central

- Set up returns management in Dynamics 365 Business Central

- Manage customer returns in Dynamics 365 Business Central

- Perform a bank reconciliation in Dynamics 365 Business Central

- Set up payment reconciliation journals in Dynamics 365 Business Central

- Use the payment reconciliation journal in Dynamics 365 Business Central

- Set up assembly management in Dynamics 365 Business Central

Prerequisitos:

- A Dynamics 365 Business Central core functional consultant must have applied knowledge of Business Central and have an understanding of industry terminology, priorities, standards, methodologies, and best practices. The consultant must have applied knowledge of meeting business needs by using Dynamics 365 Business Central, including basic understanding of financial management, sales, purchasing, and inventory. The consultant's knowledge should include a comprehensive understanding of the Business Central application's role in relationship to the Microsoft 365 and Dynamics 365 suites of applications.

Exámenes y certificación

- Microsoft Certified: Dynamics 365 Business Central Functional Consultant Associate

Contenido:

Module 1: Create new companies in Business Central

- Create new companies.
- Set up a company.
- Enter company information.

Module 2: Create and process journal entries in Dynamics 365 Business Central

- Create and post general journal entries.
- Use standard journals to save and retrieve general journal lines.
- Preview the posting of general journal lines.
- Reverse journal entries.

Module 3: Administer Dynamics 365 Business Central online

- Know how to sign up for the Cloud Solution Provider program.
- Use the administration center to manage environments.
- Set up tenant notifications and inspect environment telemetry.
- Manage support requests for customers.
- Export a database.
- Enable features ahead of time.

Module 4: Migrate data to Business Central

- Perform data migration using the Data migration assisted setup wizard.
- Work with data templates.
- Import data from Excel and other finance systems.

Module 5: Manage users and implement security in Business Central

- Manage users and user groups
- Implement and configure security
- Setup profiles, and role centers
- Audit changes to data

Module 6: Work with reports in Dynamics 365 Business Central

- Preview and run reports.
- Set up printers.

Module 7: Set up dimensions in Dynamics 365 Business Central

- Set up dimensions and dimension values.
- Enter dimensions manually in sales and purchase documents.
- Set up global and shortcut dimensions.
- Assign default dimensions to accounts.
- Prioritize default dimensions of certain account types.
- Block dimension combinations.

Module 15: Set up posting groups in Dynamics 365 Business Central

- Learn about the purpose of posting groups in Business Central.
- Set up posting groups to link receivables, payables, bank accounts, and inventory accounts.
- Map sales and purchase G/L accounts in the general posting setup.

Module 16: Set up general journal templates in Dynamics 365 Business Central

- Explain the purpose and organization of journal templates and journal batches.
- Create general journal templates and general journal batches.

Module 17: Post periodic journal entries in Dynamics 365 Business Central

- Understand how to use recurring journals.
- Use recurring journals with fixed and variable amounts.
- Record accruals by using recurring journals.

Module 18: Set up Trade in Microsoft Dynamics 365 Business Central

- Set up sales and receivables.
- Set up purchases and payables.
- Assign number series for sales and purchase documents.
- Create locations.
- Make locations mandatory by using inventory setup.

Module 19: Create items in Dynamics 365 Business Central

- Understand the different item types.
- Create a new item.
- Copy an item.
- Enter the unit cost and unit price for an item.
- Set up an item template

Module 20: Create new bins in Dynamics 365 Business Central

- Set up templates to create multiple bins at once
- Create multiple bins at once

Module 21: Set up discounts for your customers in Dynamics 365 Business Central

- Create an item discount for one customer.
- Create an item discount for customer

Module 29: Master, supplemental and personal data in Business Central

- Understand which information is stored and in which way for master and supplemental data
- Understand if, how, and with what consequences master and supplemental data can be deleted
- Understand how to handle personal data

Module 30: Post purchase item charges in Dynamics 365 Business Central

- Set up item charges.
- Process item charges in a purchase order and purchase invoice.
- Assign item charges to multiple items.
- Allocate item charges based on volume and weight.
- Analyze the direct unit cost of an item.

Module 31: Estimate purchase order receipt dates in Dynamics 365 Business Central

- Set up lead times for vendors and items.
- Estimate purchase order receipts.

Module 32: Receive and invoice items in Dynamics 365 Business Central

- Receive items from vendors.
- Post partial receipts.
- Post a purchase invoice for one receipt.
- Post a purchase invoice for multiple receipts.
- Review posted purchase documents.

Module 33: Create purchase documents in Dynamics 365 Business Central

- Create purchase quotes and convert them to orders.
- Create blanket orders and convert them to orders.

Module 34: Create sales documents in Dynamics 365 Business Central

- Create sales quotes and convert them to orders or invoices.
- Create blanket orders and convert them to orders.
- Understand how to fulfill sales orders for products not kept in stock.
- Create drop shipment orders.

Module 35: Ship and invoice items in Dynamics 365 Business Central

- Ship items to customers
- Deliver partial shipments
- Invoice one shipment

Module 8: Create workflows in Dynamics 365 Business Central

- Create workflows manually.
- Create workflows from templates.
- Set up users.
- Set up notifications.
- Set up approvals by using Assisted Setup.

Module 9: Introduction to Microsoft Power Platform and Business Central

- Identify the components and features of Microsoft Power Platform.
- Identify when to use each Microsoft Power Platform component application to create business solutions.
- Understand what Data Connectors are and how they can be used with Business Central.
- Understand how you can use Power Automate embed in Business Central.

Module 10: Introduction to integrating Dataverse with Dynamics 365 Business Central

- Learn basic information about Dataverse.
- Learn how to create an environment
- Learn how you can extend Dataverse.
- Make a difference in standard and custom tables.
- Learn about publishers.
- Identify the basic set of standard fields in Dataverse.
- Complete the connection-assisted setup.

Module 11: Get started with the Shopify connector in Dynamics 365 Business Central

- Learn about the Shopify features.
- Create a Shopify account.
- Install the Shopify app in Business Central.

Module 12: Set up general ledger configuration options in Dynamics 365 Business Central

- Set up general features such as date range and currency settings.
- Create global and shortcut dimensions.
- Set up background posting and reporting.
- Establish rounding and tolerance in the application.

Module 13: Set up cash management in Dynamics 365 Business Central

- Create bank accounts in Business Central.
- Create customer and vendor bank accounts.
- Consolidate customer and vendor balances.
- Enter receivables information for customers.
- Enter payables information for vendors.

Module 14: Set up the chart of accounts in Dynamics 365 Business Central

groups.
- Create discounts for item groups.
- Get an overview of available discounts when selling items.
- Create an invoice discount for a customer.
- Use invoice discounts in sales documents.

Module 22: User interface essentials in Dynamics 365 Business Central

- Understand, activate, and work with role center pages.
- Understand and work with list, card, and document pages.
- Use the app menu and app bar.
- Find help on topics within the application.

Module 23: Personalize the Microsoft Dynamics 365 Business Central user interface

- Change the theme for your organization.
- Change user role centers.
- Personalize list and card pages.

Module 24: Use alternative interfaces for Dynamics 365 Business Central

- Install and use Business Central on a smartphone or tablet.
- Configure and use Microsoft Outlook as an interface for Business Central.

Module 25: Change how documents look in Business Central

- Manage report and document layouts
- Create and modify report or document layouts
- Implement report selections and manage saved settings for reports

Module 26: Configure Business Central for Excel and Power BI

- Create Business Central web services that can be used as data sources in Power BI
- View data in Power BI reports in Business Central
- Enable business data for Power BI
- Export business data to Excel

Module 27: Migrate on-premises data to Dynamics 365 Business Central

- Understand the steps to migrate to Business Central online.
- Meet requirements and weigh considerations of migration.

Module 28: Work with pages in Dynamics 365 Business Central

- Invoice multiple shipments
- Review posted sales documents

Module 36: Set up returns management in Dynamics 365 Business Central

- Understand the return-related setup in the sales and purchase application areas
- Make exact cost reversing mandatory
- Create return reasons
- Assign return locations

Module 37: Manage customer returns in Dynamics 365 Business Central

- Understand how return orders can be used to enter return-related tasks
- Enter replacement items in a sales return order
- Charge restock fees to customers
- Return defective items to vendors
- Post sales return documents and review posted entries

Module 38: Perform a bank reconciliation in Dynamics 365 Business Central

- Populate bank reconciliation lines.
- Import bank statements.
- Match reconciliation lines.
- Post the bank account reconciliation.

Module 39: Set up payment reconciliation journals in Dynamics 365 Business Central

- Set up bank accounts for payment reconciliation journals.
- Understand the payment application rules.
- Modify the payment application rules.

Module 40: Use the payment reconciliation journal in Dynamics 365 Business Central

- Import bank statements.
- Review the match confidence of each payment reconciliation journal line.
- Modify automatic applications.
- Map text to a G/L account.
- Post and reconcile the payment reconciliation journal.

Module 41: Set up assembly management in Dynamics 365 Business Central

- Assign an assembly location
- Assign assembly bins

- Use the chart of accounts.
- Create new G/L accounts.
- Assign account categories.
- Set up and assign account subcategories.
- Set up a review policy for general ledger entries.

- Identify the different page types.
- Discover the different page properties.
- Learn how to build the layout of new pages.
- Link pages with page parts.
- Use snippets to create pages in Visual Studio Code.
- Enable end users to search for a page.
- Define actions on a page and set its properties.

Más información:

Para más información o para reservar tu plaza llámanos al (34) 91 425 06 60

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