

Introduction to finance in Dynamics 365

Duration: 1 Day **Course Code: M-AB6002**

Overview:

Gain a solid foundation in Microsoft Dynamics 365 Finance, including ERP basics, navigation, security, and shared features. Explore advanced tools like Copilot automation, AI forecasting, and intelligent collections. Hands-on labs cover financial reporting, budgeting, AP/AR, and integration with Microsoft 365 and Power Platform. Learn to optimize operations through business events, electronic reporting, and personalization for better decision-making.

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Target Audience:

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.

Prerequisites:

Participants are recommended to have a basic understanding of business finance concepts and familiarity with Microsoft Dynamics 365 or similar business applications before attending this course

Testing and Certification

None

Follow-on-Courses:

None

Content:

Module 1: Introduction to finance in Dynamics 365

- Describe Dynamics 365 finance and operations apps
- Describe reporting and integration capabilities in Dynamics 365 finance and operations apps
- Describe shared features in Dynamics 365 finance and operations apps
- Describe Dynamics 365 Finance core capabilities
- Describe general ledger and cash and bank management processes in Dynamics 365 Finance
- Describe accounts payables and receivables in Dynamics 365 Finance
- Describe expense tracking, asset control, and budgeting processes in Dynamics 365 Finance

Further Information:

For More information, or to book your course, please call us on Head Office 01189 123456 / Northern Office 0113 242 5931

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