

PROFESSIONAL COURSE OUTLINE

Microsoft

MB-310

Dynamics 365 Finance Functional Consultant Associate

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.

Microsoft Dynamics 365 & Power Platform Solutions

Intermediate

Dynamics 365

PROGRAM CODE

MB-310

DELIVERY

Virtual, On-site, or Hybrid

DURATION

4 days

CERTIFICATION

Microsoft Certified:
Dynamics 365 Finance
Functional Consultant
Associate

AUDIENCE PROFILE

Who This Program Is For

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.

PROGRAM SUMMARY

What This Course Covers

As a candidate for this certification, you analyze business requirements and translate them into fully realized business processes and solutions that implement industry-recommended practices.



Plan the next session

We can tune this outline around your delivery goals and team mix.

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TAILORED DELIVERY

Adapt the program around your team.

This outline can be adapted for virtual, on-site, or hybrid delivery, with emphasis adjusted for your team's platform priorities, role mix, and implementation goals.

Enterprise-ready delivery format

VNode ITeS can align labs, examples, delivery pace, and assessment checkpoints to the required audience profile while preserving the official program sequence where applicable.

COMPLETE MODULE SEQUENCE

Module Flow and Topic Coverage

The structure below presents the current delivery flow for this program, including the associated topics covered under each module.

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MODULE 1

Configure financial management

This learning path guides you through setting up the General ledger module, completing closing procedures, using analytics for decision-making, and managing financial transactions in Dynamics 365 Finance.

- 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
- Customer and vendor netting in Dynamics 365 Finance
- Set up taxes in Dynamics 365 Finance
- Work with taxes in Dynamics 365 Finance

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MODULE 2

Manage accounts receivable

This learning path covers the Accounts receivable module in Dynamics 365 Finance, including creating invoices, posting packing slips, receiving payments, managing delinquent invoices, and configuring recurring invoices and reimbursements.

- 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
- Implement cost management in Dynamics 365 Finance

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MODULE 3

Manage accounts payable

This learning path for Dynamics 365 Finance teaches you to configure Accounts payable, handle vendor invoices, streamline payments, use OCR for data extraction, and manage employee expenses in Project Operations.

- 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

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MODULE 4

Perform budgeting and forecasting

This learning path covers budgeting in Dynamics 365 Finance, including creating, managing, and monitoring budgets, setting budget parameters, and analyzing performance, while emphasizing collaboration to streamline the budgeting process.

- 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

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MODULE 5

Administer fixed assets and inventory

This learning path teaches you to configure and manage fixed assets in Dynamics 365 Finance, covering setup, acquisition, budgeting, transfers, and reporting, ensuring compliance with international accounting standards.

- 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 depreciation and disposal in Dynamics 365 Finance

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