Introduction to finance in Dynamics 365 Training

Duration: **1 Day**

BİLGİNÇ IT Academy
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Overview

Introduction to Finance in Dynamics 365 is a **1-day foundational course** designed to help learners understand how Dynamics 365 Finance transforms financial operations through **AI-driven insights, Copilot automation, intelligent reconciliation, and embedded analytics**.

Participants explore how to optimize forecasting, collections, reporting, and compliance across global finance operations, while leveraging **Microsoft 365** and **Power Platform** integrations.

Prerequisites

Participants should have:

- Basic understanding of business processes and financial principles,
- Experience using Microsoft 365 applications,
- Familiarity with customer engagement concepts.

Who Should Attend

This course is ideal for:

- Finance and accounting professionals,
- Business analysts and ERP users,
- Teams integrating **Microsoft 365 and Dynamics 365 Finance** to automate processes.

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What You Will Learn

By the end of the course, participants will be able to:

- Understand the role of **Dynamics 365 Finance and Operations apps**,
- Use reporting and integration tools effectively,
- Identify shared features for **security, compliance, and consistency**,
- Explore key **Dynamics 365 Finance capabilities** for automation and efficiency,
- Manage **general ledger, cash and bank processes**,
- Navigate **accounts payable and receivable**,
- Apply **expense tracking, asset management, and budgeting**.

Outline

Module 1: Describe Dynamics 365 finance and operations apps

Explore how Dynamics 365 finance and operations apps enhance financial operations through AI-powered agents and Copilot-driven workflows. Intelligent reconciliation and embedded analytics streamline forecasting, collections, and reporting.

- Introduction
- 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 assessment
- Summary

Module 2: Describe reporting and integration capabilities in Dynamics 365 finance and operations apps

Utilize reporting and integration features within finance and operations apps and their integration with Microsoft products

- Introduction
- 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
- Knowledge check

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- Summary

Module 3: Describe shared features in Dynamics 365 finance and operations apps

Learn about the shared features in finance apps that ensure consistency, compliance, and efficiency in organizational operations.

- Introduction
- 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
- Knowledge check
- Summary

Module 4: Describe Dynamics 365 Finance core capabilities

Learn about core Dynamics 365 Finance features to manage financial processes globally, ensure tax compliance, and improve cost efficiency.

- Introduction
- 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
- Knowledge check
- Summary

Module 5: Describe general ledger and cash and bank management processes in Dynamics 365 Finance

Understand key financial management tools for managing ledgers, financial reporting, allocations, and reconciliations in Dynamics 365 Finance

- Introduction
- 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

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- 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 assessment
- Summary

Module 6: Describe accounts payables and receivables in Dynamics 365 Finance

Learn to navigate accounts payables, receivables, settlements, and credit management features in Dynamics 365 Finance.

- Introduction
- 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
- Knowledge check
- Summary

Module 7: Describe expense tracking, asset control, and budgeting processes in Dynamics 365 Finance

Learn how to describe and apply expense management, fixed asset management, budgeting, and project accounting capabilities in Dynamics 365 Finance.

- Introduction
- Describe expense management capabilities
- Describe fixed asset management capabilities
- Describe budgeting capabilities
- Describe project management and accounting capabilities
- Knowledge check
- Summary