COURSE OUTLINE

Microsoft Solutions Partner
Security
Training Services

Course Code: MB-700T00

Course Name: Microsoft Dynamics 365: Finance and Operations Apps Solution Architect

DURATION	SKILL LEVEL	DELIVERY METHOD	TRAINING CREDITS	TECHNOLOGY
5 days	Advanced	VILT/ILT	N/A	Dynamics 365

Course Overview

The Dynamics 365 Finance and Operations solution architect is a trusted advisor who consults with organizations and implementation team members to refine business needs into a well-defined and cost-effective solution. The architect is accountable for the integrity and successful delivery of the complete solution design. The architect provides critical guidance and support from pre-sales throughout the remainder of the project lifecycle. They have great breadth of knowledge and experience designing solutions that meet business needs. The solution architect may have a technical, functional, or industry background. The solution architect must demonstrate knowledge of all Dynamics 365 apps and Power Platform. They must have deep understanding of Finance and Operations apps. In addition, they have extensive domain knowledge in one or more industry verticals. This course is designed to prepare those who are aspired to be solution architects and those who are new to this role to learn more about the technical information that solution architects will be dealing with during implantation.

Target Audience

- The audience for this course should have previous experience with functional or technical focus in Dynamics 365: Finance and Operations Applications. Primarily for those who are aspired to be solution architect role

Job role:	Exam Requirements
Solution Architect	MB-700

Prerequisites

- General knowledge of Microsoft Windows
- Basic understanding of finance and operations apps, including core concepts and basic application navigation skills
- Basic understanding of adding entities, fields, and relationships to finance and operations apps

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Topics

Module 1

Becoming a solution architect for Dynamics 365 and Microsoft Power Platform

- 1 hr 43 min
- Module
- 7 Units

Feedback

Advanced

Solution Architect

Dynamics 365

Microsoft Power Platform

The Solution Architect leads successful implementations and focuses on how solutions address the broader business and technical needs of organizations. This module covers what it takes to get started as a Solution Architect and as key member of the overall project team.

Learning objectives

In this module, you will:

- Learn about what is expected of a solution architect.

- Learn about the role of a solution architect during the project phases

Module 2:

Discover customer needs as a Solution Architect for Dynamics 365 and Microsoft Power Platform

- 36 min

- Module

- 6 Units

Feedback

Advanced

Solution Architect

Dynamics 365

Microsoft Power Platform

Learn how to ask customers questions about their business processes and feature requirements to create a viable solution.

Learning objectives

In this module, you will:

- Learn about initial customer discovery.

- Discover customer communication strategies.

Module 3:

Propose a solution as a Solution Architect for Microsoft Power Platform and Dynamics 365

- 40 min

- Module

- 7 Units

Feedback

Advanced

Solution Architect

Dynamics 365

Microsoft Power Platform

Learn how to propose a solution.

Learning objectives

In this module, you will:

- Identify solution components.

- Develop and validate a demo.

Module 4:

Work with requirements for Microsoft Power Platform and Dynamics 365

- 23 min
- Module
- 7 Units

Feedback

Advanced

Solution Architect

Dynamics 365

Finance

Business Central

Customer Service

Field Service

Human Resources

Customer Insights - Journeys

Commerce

Sales

Supply Chain Management

Power Automate

Power BI

Power Apps

Microsoft Power Platform

It is important to capture the customer's needs accurately. This module explains how to capture requirements and identify functional and non-functional items.

Learning objectives

In this module, you will:

- Learn about leading requirement capture sessions.
- Learn about functional and non-functional requirements.

Module 5:

Perform fit gap analysis

- 44 min
- Module
- 7 Units

Feedback

Advanced

Solution Architect

Dynamics 365

Microsoft Power Platform

A fit gap analysis identifies the difference between the known requirements and the proposed or current solution. This module covers performing a fit gap analysis.

Learning objectives

In this module, you will:

- Determine feasibility of requirements.
- Refine requirements from proof of concept insights.
- Categorize business requirements and perform a fit gap analysis.
- Evaluate Dynamics 365 and Microsoft Power Platform apps.

Module 6:

Get started with Lifecycle Services for finance and operations apps

- 1 hr 50 min
- Module
- 15 Units

Feedback

Intermediate

Functional Consultant

Solution Architect

Administrator

Dynamics 365

Finance

Supply Chain Management

To install and maintain finance and operations apps in the Microsoft Azure cloud or on-premises, you must use Microsoft Dynamics Lifecycle Services to manage the process. Let's get started by looking at the overall functionality and tools.

Learning objectives

In this module, you will:

- Understand the functionality and tools of Lifecycle Services for finance and operations apps
- Determine licensing requirements
- Reuse existing assets, copy and share data
- Understand Task recorder functionality
- Create a business process model

- Identify and analyze gaps using the Business Process Modeler

- Run the Issue Search tool and analyze results

Module 7:

Design and plan an implementation of finance and operations apps

- 42 min

- Module

- 13 Units

Feedback

Advanced

Functional Consultant

Solution Architect

Administrator

Dynamics 365

Finance

Supply Chain Management

With proper planning, your finance and operations apps implementation will be a success. After a customer signs the agreements to purchase licenses for finance and operations apps, your job as a functional consultant starts by managing the application lifecycle and moving toward predictable, repeatable, high-quality implementation.

Learning objectives

In this module, you will:

- Prepare documentation for gathered requirements by using methodologies in Lifecycle Services.

- Define use case scenarios.

- Learn how to participate in the creation of Business requirement documents (BRD).

- Understand the importance of creating and maintaining documented processes.

- Participate in phase-based planning processes and solution design.

- Describe the future state business processes based on a proposed solution.

- Determine when to build versus buy.

- Create Functional Design Documents (FDD).

Module 8:

Translate Dynamics 365 apps and documentation with Dynamics 365 Translation Service

- 1 hr 3 min

- Module

- 10 Units

Feedback

Intermediate

Solution Architect

Functional Consultant

Administrator

Dynamics 365

Finance

Supply Chain Management

Sales

Field Service

Commerce

Customer Service

Business Central

Translate your Microsoft Dynamics 365 solutions and documentation, or add language support for existing Dynamics 365 products by using Microsoft Dynamics 365 Translation Service through Microsoft Dynamics Lifecycle Services.

Learning objectives

In this module, you will:

- Learn about the functionality and features of Dynamics 365 Translation Service.
- Submit translation requests for user interface and documentation files of supported Dynamics 365 products.
- Review and edit a translation request's output to regenerate new translations.
- Use the Align tool to create translation memory for future translation requests.

Module 9:

Prepare data for migration to finance and operations apps

- 1 hr 24 min
- Module
- 7 Units

Feedback

Advanced

Functional Consultant

Developer

Dynamics 365

Finance

Supply Chain Management

- Identify the correct pattern for a given scenario to use the Data management platform for integration by using data entities.

- Work with the Data management workspace.

- Export data from a legal entity.

- Import data into a legal entity.

- Work with data import and export jobs.

- Clean up the staging tables.

- Work with database movement operations.

- Work with the data sharing framework.

Module 11

Perform user acceptance testing in finance and operations apps

- 1 hr 33 min

- Module

- 9 Units

Feedback

Intermediate

Functional Consultant

Solution Architect

Developer

Dynamics 365

Finance

Supply Chain Management

After all customer requirements have been handled by either configuration, customization, and integration, you need to know how to perform user acceptance testing (UAT) in finance and operations apps to validate the solution. User acceptance testing is an important step in the go-live preparation. You can perform automated tests by using the Regression suite automation tool (RSAT).

Learning objectives

In this module, you will learn about:

- Test cases and business requirements

- Best practices for recording test cases

- Task recorder

- How to create a BPM library

- How to synchronize and configure your test plan in Azure DevOps

- How to run test cases manually and automatically

- The Regression suite automation tool (RSAT)

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Module 12

Get started with a finance and operations implementation project

- 49 min
- Module
- 7 Units

Feedback

Intermediate

Functional Consultant

Solution Architect

Developer

Dynamics 365

Finance

Supply Chain Management

The implementation lifecycle for finance and operations will help you to understand the best practices recommended to accomplishing a successful journey through a finance and operations implementation, the roles involved, and the tools available to support it.

Learning objectives

In this module, you will:

- Learn about the implementation journey for a successful finance and operations project.
- Identify the different phases of a finance and operations implementation.

Module 13

FastTrack Customer Success Program for finance and operations

- 32 min
- Module
- 6 Units

Feedback

Intermediate

Functional Consultant

Solution Architect

Dynamics 365

Finance

Supply Chain Management

The Microsoft FastTrack service is intended to ease your project implementation by offering guidance on best practices and answering your how-to questions from Microsoft engineering resources, who are committed to making your experience with Dynamics 365, and finance and operations, a great success.

Learning objectives

In this module, you will:

- Learn the benefits of being part of the FastTrack program for the success of your implementation.
- Discover the engagement level from the Microsoft FastTrack team with your project.
- Define the roles that are needed for a finance and operations implementation.
- Learn about the resources that will support your project.
- Learn how to become a FastTrack recognized solution architect.

Module 14

Implement application lifecycle management in finance and operations apps

- 1 hr 2 min
- Module
- 7 Units

Feedback

Advanced

Developer

Functional Consultant

Solution Architect

Administrator

Dynamics 365

Finance

Supply Chain Management

Project Operations

Human Resources

Application Lifecycle Management (ALM) is the management of computer programs, which includes managing requirements, software architecture, software development, software maintenance, change management, continuous integration, project management, and released management. Learn about ALM to plan, create, test, and implement code for finance and operations apps.

Learning objectives

In this module, you will:

- Define ALM.

- Learn about the different ALM methodologies.

- Build models.

- Create a project plan for building and testing solutions.

- Identify upgrade scenarios and appropriate tools

- Create processes for release management, change management, and risk management.

Module 15

Explore extensions and the extension framework in finance and operations apps

- 1 hr

- Module

- 9 Units

Feedback

Intermediate

Developer

Solution Architect

Dynamics 365

Finance

Supply Chain Management

Finance and operations apps are customized by using extensions, which let you add functionality to model elements and source code in the Application Object Tree (AOT) by using Visual Studio.

Learning objectives

In this module, you will:

- Learn about the reasons for creating extensions.

- Determine when to use the extensibility request form.

- Learn about the risk of intrusive customizations.

- Develop code that will extend the functionality of finance and operations apps.

- Create pre-event and post-event handler classes.

- Implement the SysOperationSandbox framework.

Module 16

Consume business events in finance and operations apps

- 1 hr 43 min

- Module

- 10 Units

Feedback

Intermediate

Developer

Solution Architect

Dynamics 365

Finance

Supply Chain Management

Business events provide a mechanism that lets external systems receive notifications from finance and operations apps. In this way, the systems can perform business actions in response to the business events.

Learning objectives

In this module, you will:

- Learn about the business events framework.
- Implement new business events through class extension.
- Consume business events.
- Extend and existing business event
- Business events in Microsoft Power Automate.
- Role based security for business events.

Module 17

Consume business events in finance and operations apps

- 1 hr 43 min
- Module
- 10 Units

Feedback

Intermediate

Developer

Solution Architect

Dynamics 365

Finance

Supply Chain Management

Business events provide a mechanism that lets external systems receive notifications from finance and operations apps. In this way, the systems can perform business actions in response to the business events.

Learning objectives

In this module, you will:

- Learn about the business events framework.
- Implement new business events through class extension.

- Consume business events.

- Extend and existing business event

- Business events in Microsoft Power Automate.

- Role based security for business events.

Module 18

Identify data integration patterns and scenarios in finance and operations apps

- 47 min

- Module

- 6 Units

Feedback

Intermediate

Developer

Solution Architect

Dynamics 365

Finance

Supply Chain Management

As a developer, you are generally part of the data integration scenarios during and after a finance and operations apps implementation. This module explores web application programming interfaces (APIs) that are available for finance and operations apps and will help you understand the key differences between synchronous and asynchronous integrations for the application.

Learning objectives

In this module, you will:

- Identify integration web application programming interfaces.

- Explore available data integration scenarios.

- Identify the key differences between synchronous and asynchronous integrations.

Module 19

Identify data integration patterns and scenarios in finance and operations apps

- 47 min

- Module

- 6 Units

Feedback

Intermediate

Developer

Solution Architect

Dynamics 365

Finance

Supply Chain Management

As a developer, you are generally part of the data integration scenarios during and after a finance and operations apps implementation. This module explores web application programming interfaces (APIs) that are available for finance and operations apps and will help you understand the key differences between synchronous and asynchronous integrations for the application.

Learning objectives

In this module, you will:

- Identify integration web application programming interfaces.
- Explore available data integration scenarios.
- Identify the key differences between synchronous and asynchronous integrations.

Module 20

Work with analytics and reporting in finance and operations apps

- 1 hr 33 min
- Module
- 9 Units

Feedback

Intermediate

Business User

Functional Consultant

Solution Architect

Dynamics 365

Finance

Supply Chain Management

Business leaders can make important decisions in their company if they have accurate insight into the underlying financial and operational data. Without data visibility, business leaders are challenged with a nearly impossible task. By using analytics and reporting in finance and operations apps, you can empower every business user, depending on their security rights, to get the insights they need to make those important decisions.

This module helps prepare you for [Exam MB-500: Microsoft Dynamics 365: Finance and Operations Apps Developer](#).

Learning objectives

In this module, you will learn about:

- Different types of reports and inquiries in finance and operations apps

- Financial reporting

- Configuring finance and operations apps for Microsoft Power Platform

- Generating and consuming inquiries and reports

Module 21

Describe the business value of the Microsoft Power Platform

- 53 min

- Module

- 12 Units

Feedback

Beginner

Business Analyst

Business User

AI Builder

Power Apps

Power Automate

Power BI

Microsoft Power Platform

Microsoft Copilot Studio

Learn about the components of Microsoft Power Platform, the business value for customers, and how the technology works with other Microsoft products.

This module helps prepare you for [Exam PL-100: Microsoft Power Platform App Maker](#).

Learning objectives

In this module, you will:

- Examine Microsoft Power Platform.

- Describe the business value of the Power Platform.

- Explore connectors in Power Platform.

- Review using Microsoft Dataverse to organize business data.

- Examine how Power Platform works together with Microsoft 365 apps and services.

- Explore solutions using Power Platform Microsoft Teams.

- Describe how Power Platform works with Dynamics 365.

- Describe how Power Platform solutions can consume Azure Services.

- Explore how Power Platform apps work together to create solutions.

Module 22

Identify foundational components of Microsoft Power Platform

- 1 hr 3 min

- Module

- 8 Units

Feedback

Beginner

Business Analyst

Business User

Microsoft Power Platform

Learn about some of the key foundational elements involved in creating Microsoft Power Platform solutions.

This module helps prepare you for [Exam PL-400: Microsoft Power Platform Developer](#).

Learning objectives

In this module, we will:

- Examine the different Power Platform administrative options available.

- Describe security and governance in Power Platform.

- Explore Microsoft Dataverse and how to use it to build business solutions.

- Examine Power Platform connectors.

Module 23

Set up and build mobile experiences for finance and operations apps

- 1 hr 41 min

- Module

- 9 Units

Feedback

Intermediate

Functional Consultant

Solution Architect

Developer

Dynamics 365

Finance

Supply Chain Management

You use mobile apps almost every day for your social engagements, online banking, and for booking hotels, flights, rental cars, and more. Therefore, it's natural to use finance and operations apps on your smart device by building mobile experiences.

Learning objectives

This module explains the following concepts:

- How to implement the components necessary for building mobile experiences

- How to connect to virtual entities to build mobile apps

Module 24

Updates and upgrades for finance and operations apps

- 1 hr 4 min

- Module

- 8 Units

Feedback

Intermediate

Administrator

Functional Consultant

Solution Architect

Dynamics 365

Finance

Supply Chain Management

The world of enterprise resource planning (ERP) is continuously evolving and helping customers scale up in productivity and streamline their operations. The evolution of finance and operations encourages customers to upgrade their earlier Microsoft Dynamics AX versions to the finance and operations cloud service.

Learning objectives

In this module, you will learn:

- How to upgrade from Dynamics AX legacy (AX 2012 and AX 2009).

- How to update from earlier finance and operations versions 7.0, 7.1, 7.2, 7.3, and 8.0 to version 10.

Module 25

Work with performance and monitoring tools in finance and operations apps

- 1 hr 26 min

- Module

- 9 Units

Feedback

Intermediate

Developer

Solution Architect

Dynamics 365

Finance

Supply Chain Management

Learn how to use performance tools and Lifecycle Services environment monitoring tools to enhance your validation and testing experience in finance and operations apps.

Learning objectives

In this module, you will:

- Diagnose performance issues by using Trace parser.

- Explore load testing by using the Performance SDK.

- Monitor performance by using the SQL Insights dashboard.

- Monitor server Health metrics in Microsoft Dynamics Lifecycle Services.

Module 26

Plan and implement security in finance and operations apps

- 1 hr 56 min

- Module

- 13 Units

Feedback

Intermediate

Functional Consultant

Solution Architect

Administrator

Dynamics 365

Finance

Supply Chain Management

If you understand the security architecture of finance and operations apps, you can customize it to fit the requirements of your business. finance and operations apps, helps keep your sensitive data safe, and users focused on their roles.

Learning objectives

In this module, you will:

- Understand security architecture of finance and operations apps

- Learn about encryption in finance and operations apps

- Manage users

- Manage security

- Apply segregation of duties

- Run security reports

- Stay compliant with user licensing requirements

Module 27

Implement role-based security in finance and operations apps

- 1 hr 15 min

- Module

- 9 Units

Feedback

Intermediate

Developer

Solution Architect

Dynamics 365

Finance

Supply Chain Management

Finance and operations apps use role-based security to assign access to components in the system. A user who is assigned to a security role has access to the set of privileges that is associated with that role.

Learning objectives

In this module, you will learn how to:

- Create and modify roles, duties, privileges, and permissions.

- Review the role-based security hierarchy.

- Use and enforce permissions policies.

- Define the extensible data security framework (XDS).

- Apply security permissions.

- Stay compliant with user licensing requirements

Module 28

Prepare to go-live with finance and operations apps

- 22 min

- Module

- 8 Units

Feedback

Advanced

Functional Consultant

Developer

Solution Architect

Dynamics 365

Finance

Supply Chain Management

All your hard work becomes a success by moving the implemented solution in finance and operations apps to the production environment. You want a happy customer, a quality solution, and peace of mind during this important phase, which is known as go-live. Learn how to prepare to go live with a finance and operations apps project by using Microsoft Dynamics Lifecycle Services.

Learning objectives

In this module, you will learn how to:

- Prepare for go-live

- Complete the Microsoft Dynamics Lifecycle Services methodology

- Perform User acceptance testing (UAT) for your solution

- Understand the FastTrack Go-live assessment

- Request the production environment

Module 29

Feature management in finance and operations apps

- 56 min

- Module

- 14 Units

Feedback

Intermediate

Administrator

Functional Consultant

Dynamics 365

Finance

Supply Chain Management

Commerce

Features are added and updated in every release. The Feature management experience provides a workspace where you can view a list of features that have been delivered in each release. Then, you can use the workspace to view feature documentation and to enable or disable features.

Learning objectives

In this module, you will:

- Learn about the Feature management workspace in finance and operations apps.

- Discover when and how to enable features, including how to disable and reschedule features.

- Learn how to check for feature updates and assign roles.

Module 30

Get started with Success by Design for Dynamics 365

- 1 hr 1 min

- Module

- 8 Units

Feedback

Intermediate

Solution Architect

Functional Consultant

Dynamics 365

Sales

Customer Insights - Journeys

Customer Service

Field Service

Finance

Supply Chain Management

Project Operations

Commerce

Human Resources

Success by Design is the prescriptive guidance (approaches and best practices) for designing, building, and deploying a

Dynamics 365 solution.

Learning objectives

In this module, you will:

- Learn how to use FastTrack techniques on your own project.

- Review the Success by Design processes and workshops.

- Identify the different phases of a project.

- Discover the available tools for tracking project progress.

Module 31

Create a solution blueprint for Dynamics 365 solutions

- 1 hr 4 min

- Module

- 8 Units

Feedback

Advanced

Solution Architect

Functional Consultant

Dynamics 365

Sales

Customer Insights - Journeys

Customer Service

Field Service

Finance

Supply Chain Management

Project Operations

Commerce

Human Resources

The Solution blueprint workshop is part of Success by Design. This module focuses on creating the blueprint, and conducting the workshop to create it.

Learning objectives

In this module, you will:

- Learn how to identify project goals
- Learn about the project's tenant strategy
- Consider any non-functional requirements
- Learn how to prepare, and conduct the Solution blueprint workshop

Module 32

Plan a testing strategy for your Dynamics 365 solution

- 55 min
- Module
- 6 Units

Feedback

Advanced

Solution Architect

Functional Consultant

Dynamics 365

Sales

Customer Insights - Journeys

Customer Service

Field Service

Finance

Supply Chain Management

Project Operations

Commerce

Human Resources

Testing strategy, identifying gaps in testing plans, and potential risks are discussed in this module.

Learning objectives

In this module, you will:

- Identify measurable and non-measurable testing goals and results.

- Plan the entire testing strategy for an engagement.

- Learn how to prepare and conduct the Test strategy review workshop.

Module 33

Design data models for Dynamics 365 solutions

- 56 min

- Module

- 6 Units

Feedback

Advanced

Solution Architect

Functional Consultant

Dynamics 365

Sales

Customer Insights - Journeys

Customer Service

Field Service

Finance

Supply Chain Management

Project Operations

Commerce

Human Resources

A data model workshop is part of Success by Design. This module will provide a basic description of data modeling for

Microsoft Dynamics 365 and insight into how you can conduct a data model workshop.

Learning objectives

In this module, you will:

- Learn about data modeling in Dynamics 365.

- Review data modeling best practices and learn how they are related to a Dynamics 365 project.

Module 34

Business intelligence and analytics design for Dynamics 365 solutions

- 37 min

- Module

- 7 Units

Feedback

Advanced

Solution Architect

Functional Consultant

Dynamics 365

Sales

Customer Insights - Journeys

Customer Service

Field Service

Finance

Supply Chain Management

Project Operations

Commerce

Human Resources

The Business intelligence and analytics design workshop allows you to spend time reviewing the overall business

intelligence and analytics planning, fit-gap analysis, design blueprint to provide guidance on maximizing the use of standard

features, alignment to product roadmap, and general design guidance. This workshop isn't intended as a fit-gap review.

Learning objectives

In this module, you will:

- Learn about the Business intelligence and analytics design workshop

- Prepare for the Business intelligence and analytics design workshop

- Learn how to conduct the Business intelligence and analytics design workshop

Module 35

Gap solution design for Dynamics 365 solutions

- 37 min
- Module
- 7 Units

Feedback

Advanced

Solution Architect

Dynamics 365

Sales

Customer Insights - Journeys

Customer Service

Field Service

Finance

Supply Chain Management

Project Operations

Commerce

Human Resources

The Gap solution design workshop is designed for implementations that have critical requirements that the standard system doesn't support.

Learning objectives

In this module, you will:

- Learn about the Gap solution design workshop
- Prepare for the Gap solution design workshop
- Learn how to conduct the Gap solution design workshop

Module 36

Create a data migration strategy for Dynamics 365 solutions

- 47 min
- Module
- 6 Units

Feedback

Advanced

Solution Architect

Functional Consultant

Dynamics 365

Sales

Customer Insights - Journeys

Customer Service

Field Service

Finance

Supply Chain Management

Project Operations

Commerce

Human Resources

The overall goal of the Success by Design framework is to ensure a successful customer outcome for each implementation. The Data migration strategy workshop is designed to help ensure that the approach to data migration is heading for success.

Learning objectives

In this module, you will:

- Learn about the best practices of data migration.

- Discover how data migration relates to and can affect a project.

- Learn how to prepare and conduct the Data migration strategy workshop.

Module 37

Review the security model for your Dynamics 365 solutions

- 1 hr 28 min

- Module

- 4 Units

Feedback

Advanced

Solution Architect

Functional Consultant

Dynamics 365

Sales

Customer Insights - Journeys

Customer Service

Field Service

Finance

Supply Chain Management

Project Operations

Commerce

Human Resources

A security strategy is key to solutions, and a Security model workshop will help verify that the customer's security model is comprehensive and that it will support their long-term security strategy.

Learning objectives

In this module, you will:

- Evaluate the proposed security model.
- Provide feedback and recommendations that highlight technical risks and issues.

Module 38

Integration design for Dynamics 365 solutions

- 54 min
- Module
- 7 Units

Feedback

Advanced

Solution Architect

Functional Consultant

Dynamics 365

Sales

Customer Insights - Journeys

Customer Service

Field Service

Finance

Supply Chain Management

Project Operations

Commerce

Human Resources

The Integration workshop is part of Success by Design. This module discusses integration strategy and how the Integration workshop will help verify that the project's integration plans are comprehensive and will support initial implementation and long-term needs.

Learning objectives

In this module, you will:

- Learn about connecting one or more components to create a unified experience.

- Discover the process of integrating existing services without migrating or rebuilding.

Module 39

Dual-write implementation for Dynamics 365 solutions

- 33 min

- Module

- 6 Units

Feedback

Advanced

Solution Architect

Functional Consultant

Dynamics 365

Sales

Customer Insights - Journeys

Customer Service

Field Service

Finance

Supply Chain Management

Project Operations

Commerce

Human Resources

Dual-write offers an out-of-the-box infrastructure that can provide customers near real-time interaction between Customer engagement apps and finance and operations apps. The Dual-write implementation workshop guides you through key points to help identify and resolve potential blockers to a successful dual-write implementation.

Learning objectives

In this module, you will:

- Learn about the Dual-write implementation workshop

- Prepare for the Dual-write implementation workshop

- Learn how to conduct the Dual-write implementation workshop

- Follow up after the Dual-write implementation workshop

Module 40

Implement a performance strategy for Dynamics 365 solutions

- 1 hr 16 min

- Module

- 8 Units

Feedback

Advanced

Solution Architect

Functional Consultant

Dynamics 365

Sales

Customer Insights - Journeys

Customer Service

Field Service

Finance

Supply Chain Management

Project Operations

Commerce

Human Resources

The Solution performance workshop provides guidance and best practices for solution design in respect to performance.

The workshop will increase awareness of the impact that certain types of configurations and/or customizations have on the overall performance and user experience.

Learning objectives

In this module, you will:

- Learn about the Solution performance review.

- Prepare for the Solution performance workshop.

- Define performance benchmarks and success criteria.

- Learn how to conduct the Solution performance workshop.

Module 41

Cutover strategy for Dynamics 365 solutions

- 50 min

- Module

- 8 Units

Feedback

Advanced

Solution Architect

Functional Consultant

Dynamics 365

Sales

Customer Insights - Journeys

Customer Service

Field Service

Finance

Supply Chain Management

Project Operations

Commerce

Human Resources

The goal of the Cutover strategy workshop is to help ensure that a good approach is in place for the planning, incremental readiness, testing, and implementation of the cutover. You need to consider many different areas when you discuss a cutover strategy, and this workshop provides the necessary framework to review those key topics.

Learning objectives

In this module, you will:

- Learn about the Cutover strategy workshop

- Prepare for the Cutover strategy workshop

- Learn how to conduct the Cutover strategy workshop

- Follow up after the Cutover strategy workshop

Module 42

Post go-live strategy for Dynamics 365 solutions

- 38 min

- Module

- 7 Units

Feedback

Advanced

Solution Architect

Functional Consultant

Dynamics 365

Sales

Customer Insights - Journeys

Customer Service

Field Service

Finance

Supply Chain Management

Project Operations

Commerce

Human Resources

The Post go-live workshop gives the implementation team the opportunity to confirm that the solution has delivered the objectives that were initially set.

Learning objectives

In this module, you will:

- Learn about the Post go-live workshop

- Prepare for the Post go-live workshop

- Implement the Post go-live workshop

- Follow up after the Post go-live workshop

Module 43

Get started with configuration and personalization in Finance and Operations apps

- 11 min

- Module

- 6 Units

Feedback

Beginner

Administrator

Business Analyst

Business User

Developer

Functional Consultant

Solution Architect

Dynamics 365

Finance

Human Resources

Supply Chain Management

In this module, learners are introduced to the idea of personalizing finance and operations applications to fit their business needs.

Learning objectives

After this module, you'll be able to:

- Log in to your environment

- List several ways the environment can be customized without coding

- Demonstrate how to favorite menu items for quick navigation

Module 44

Configure your user interface in Finance and Operations apps

- 21 min
- Module
- 13 Units

Feedback

Beginner

Administrator

Business Analyst

Business User

Developer

Functional Consultant

Solution Architect

Dynamics 365

Finance

Human Resources

Supply Chain Management

In this module, learners were introduced to the idea of personalizing the Dynamics 365 Finance and Operations user interface to fit their business needs. They learned how to change menus, forms, and reports.

Learning objectives

At the end of this module, learners will be able to:

- Add a menu item to favorites
- Explain how different roles see different dashboards
- Add a KPI to a dashboard workspace
- Modify the fields in a form
- Modify the fields in a report

Module 45

Configure your data in Finance and Operations apps

- 16 min
- Module
- 8 Units

Feedback

Beginner

Administrator

Business Analyst

Business User

Developer

Functional Consultant

Solution Architect

Dynamics 365

Finance

Human Resources

Supply Chain Management

We learned that there are different options in updating data. Dynamics is made to integrate seamlessly with Office products.

Learning objectives

At the end of this module, learners will be able to:

- Modify an entity

- Add security to a user

- Download data to Excel, update, and upload

Exams and Certifications

A Certificate of completion is issued at the end of the Course.

Schedule your Microsoft exam here: Microsoft :: Pearson VUE

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