Introduction to finance in Dynamics 365

Category: Business Applications | **Vendor:** Microsoft

Duration: 8.00 hours (1 days) **6.5 CPD Hours** **Rating:** ⭐ 4.6 (5,878 reviews)

Course Information

Delivery Format: Instructor Led - Online

Course 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.

About This Course

- 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
- Manage general ledger and cash and bank management processes in Dynamics 365 Finance
- Gain insights into accounts payables and receivables in Dynamics 365 Finance
- Describe expense tracking, asset control, and budgeting processes in Dynamics 365 Finance

Who Should Attend

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.

Detailed Course Outline

Describe Dynamics 365 finance and operations apps: ERP introduction, AI tools, user interface

Describe reporting and integration capabilities: built-in reporting, Power BI, Microsoft 365 integration, Power Platform integration, business events, Copilot-based insights

Describe shared features: security, workflow, batch jobs, organizations and legal entities, record templates, global address book, alerts, number sequences, attachments

Describe Dynamics 365 Finance core capabilities: features, reporting and accounting currencies, tax capabilities, cost accounting concepts, electronic payment formats

Describe general ledger and cash and bank management: fiscal and ledger calendars, charts of accounts, financial dimensions, accounting structures, financial journals, financial reporting, cash and bank management, allocations and accruals, periodic financial processes

Describe accounts payables and receivables: payment setup, AP and AR components, vendor posting profiles, vendor payments and settlements, customer/vendor netting, credit management, collections, subscription billing

Describe expense tracking, asset control, and budgeting: expense management, fixed asset management, budgeting, project management and accounting

Frequently Asked Questions

Q: What delivery options are available for Introduction to finance in Dynamics 365?

We offer multiple delivery formats:

- Live Instructor-Led Classroom Online (Virtual/Live Online)
- Traditional Instructor-Led Classroom Training (ILT)
- On-site delivery at your offices anywhere in United Kingdom
- Private dedicated courses customized for your team

Q: How many CPD hours does this course provide?

The 1-day Introduction to finance in Dynamics 365 course provides up to 6.5 CPD hours of structured learning. CPD certificates can be provided upon request.

Q: What is the duration of the Introduction to finance in Dynamics 365 training?

The training takes place over 1 day(s), with each day lasting approximately 8.00 hours including breaks for lunch and refreshments.

Q: Do you provide corporate training for Introduction to finance in Dynamics 365?

Yes, we provide corporate training, dedicated training, and closed classes for Introduction to finance in Dynamics 365. Training can take place anywhere in United Kingdom including London, Manchester, Birmingham, Edinburgh, or live online allowing teams from across United Kingdom or internationally to attend.

Q: What related terms do people search for?

Popular related searches include: Introduction to finance in Dynamics 365, Microsoft Dynamics 365, AB-6002

Q: Why choose Nexus Human for Introduction to finance in Dynamics 365?

Nexus Human is recognized as one of the leading training providers. Our trainers have won multiple awards including:

- Small Firms Best Trainer Award
- National Training Partner of the Year (Ireland) - Multiple Years
- Global Top 30 Instructor Awards (2012, 2019, 2021)
- Tech Excellence Award Nominations
- Learning Performance Institute (LPI) External Training Provider Sponsor 2024

Q: Are there any discount codes available?

Yes! Use discount code **PENPAL5** when booking your Introduction to finance in Dynamics 365 training. Please note that only one discount code can be used per booking and cannot be combined with other special offers.

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