MB-800 Study Guide

Microsoft Dynamics 365 Business Central Functional Consultant

PURPOSE

The following resources have been assembled to help you prepare for the MB-800 Microsoft Dynamics 365 Business Central Functional Consultant learning track during Microsoft Certification Week.

Use this guide to understand what knowledge is needed to complete the exam and as a learning tool to help you understand areas where you feel you need additional training. It is not required that you leverage all the resources in this guide to participate in Microsoft Certification Week.

AUDIENCE

All Pax8 Partners

Table of Contents

MB-910: Exam Resources

Audience Profile for the Exam

Candidates for this exam are Functional Consultants who implement core application setup processes for small and medium businesses. They implement and configure the Dynamics 365 Business Central app, including setting up core app functionality and modules and migrating data to Business Central.

Candidates run the user interface in collaboration with the implementation team to provide the business with manageability and ease of navigation. They configure role centers, including adapting insights, cues, action tiles, reports, charts, and extending Business Central by using Microsoft Power Platform components.

Candidates have applied knowledge of meeting user needs through the Business Central app, including basic understanding of financial management, sales, purchasing, and inventory.

Candidates for this exam typically specialize in one or more feature sets of Business Central. They understand the role of Business Central in relationship to the Dynamics 365 suite of applications.

Preparing for the Exam

It is highly recommended when preparing for a Microsoft exam, that you have had some level of hands- on experience with the services within the objectives. Microsoft courses have a GitHub repository for labs that are recommended and available to the public.

- Suggested Lab Guides: https://github.com/MicrosoftLearning/MB-800-Business-Central- Functional-Consultant

All lab guides can be found at this link: https://github.com/MicrosoftLearning

Exam Objectives

The following are the learning objectives for the exam. In line with each objective are links to Microsoft documentation around the specific concept or service. In addition to the documentation, there are also online courses from Microsoft Learn and the Microsoft Partner virtual training series available for additional learning resources.

Objective: Describe Dynamics 365 Supply Chain Management (25-30%)

Identify General Capabilities

- Describe manufacturing types including Discrete, Lean, and Process manufacturing
  Production process overview
- Describe production control elements including bills of materials (BOMs), formulas, Kanban's, resources, and routing
  Mixed mode planning - Combine discrete, process, and lean sourcing
  Bills of materials and formulas
- Describe product master records and product variants
  Product information overview
  Create a new product
  Create a product master
  Create predefined product variants

Objective: Set Up Business Central (20-25%)

Create and Configure a New Company

- Create a new company in the on-premises version of Business Central
  [How to Create a New Company](#)
- Create a new company in the cloud-based version of Business Central by using Assisted Setup
  [Create new companies using an assisted setup guide](#)
- Create a new company by copying data from an existing company
  [Create new companies using an assisted setup guide](#)
  [How to Copy Data to New Companies](#)
- Describe the use cases and capabilities of RapidStart Services
  [Set Up a Company With RapidStart Services](#)
- Create a configuration worksheet
  [Set Up Company Configuration](#)
  [How to Manage Company Configuration in a Worksheet](#)
- Describe the process for migrating data
  [Migrate Customer Data](#)
- Create and export a configuration package
  [How to Create Custom Company Configuration Packages](#)
- Import and apply a configuration package
  [How to Prepare a Configuration Package](#)
- Create journal opening balances
  [How to Create Journal Opening Balances](#)
- Migrate on-premises data to a cloud-based version of Business Central
  [Migrate from on-premises deployments to Business Central online](#)
  [Migrate to Business Central online from on-premises](#)
- Validate migrated data by using trial balances
  [Migrate Customer Data](#)

Manage Security

- Create and manage user profiles
  [Manage users and roles](#)
- Set up a new user and user groups
  [Define Granular Permissions](#)
- Create and assign permission sets and permissions
  [Define Granular Permissions](#)
- Apply security filters
  [Using Security Filters in Business Central](#)

Set Up Core App Functionality

- Set up company information
  [How to Set Up Company Information](#)
- Set up printers for on-premises and cloud-based installations
  [Setting Up Printers](#)
- Set up report selections
  [Report Selection in Business Central](#)
- Set up and use job queues
  [Schedule jobs to run automatically](#)
- Set up email
  [Set up email in Business Central](#)
- Set up number series
  [Create Number Series](#)

Set Up Dimensions

  [Working with Dimensions to Track and Analyze Data Easily](#)
- Set up dimensions and dimension values
- Set up global dimensions and shortcut dimensions
- Set up default dimension for a single account and for multiple accounts

- Set up default dimensions for an account type
- Block combinations of dimensions or dimension values

Set Up and Manage Approvals by Using Workflows
- Set up a purchase document approval system
  [Setting Up and Using a Purchase Approval Workflow](#)
- Set up a sales document approval system
  [Workflow for sales documents](#)
  [Approve or Reject Documents in Workflows](#)
- Set up document approvals
  [Approve or Reject Documents in Workflows](#)
  [Set Up Approval Users](#)
- Set up a notification system
  [Workflow Notifications](#)
- Set up an approval hierarchy
  [How to Set Up Workflow Users](#)

Objective: Configure Financials (25-30%)

Set Up the Finance Module
- Create a fiscal year
  [Fiscal Periods and Fiscal Years](#)
  [How to Open a New Fiscal Year](#)
- Define General Ledger Setup options
  [Understanding the General Ledger and COA](#)
- Create accounting periods
  [Working with Accounting Periods and Fiscal Years](#)
- Create payment terms
  [Set Up Payment Terms](#)

Configure the Chart of Accounts
- Create general ledger accounts
  [Set Up the Chart of Accounts](#)
- Configure direct posting
  [Posting Group Setup](#)
- Create account categories and subcategories
  [Understanding the General Ledger and COA](#)

Set Up Posting Groups
  [Posting Group Setup](#)
- Create specific posting groups including bank, customer, vendor, and inventory posting groups
- Create general posting groups
- Configure General Posting Setup

Set Up Journals and Bank Accounts
- Create journal templates
  [Working with General Journals](#)
  [How to Set Up Journal Templates and Batches](#)
- Create batches
  [How to Set Up Journal Templates and Batches](#)
- Implement number series in journals
  [Create Number Series](#)
- Set up bank accounts
  [Manage Bank Accounts](#)

Set Up Accounts Payables

- Describe the relationship between vendors, vendor ledger entries, and detailed vendor ledger entries
  [Overview of Tasks to Manage Accounts Payable](#)
- Create vendor accounts
  [Create a Vendor Card to Register a New Vendor](#)
- Define Purchases & Payables Setup
  [Overview of Tasks to Set Up Purchasing](#)
- Set up payment journals
  [Create Payment Journal Templates and Batches](#)
- Set up payment information for vendors
  [Set Up Payment Methods](#)
  [Overview of Tasks to Manage Payments to Vendors](#)

Set Up Accounts Receivables

[Overview of Tasks to Manage Receivables](#)
- Describe the relationship between customers, customer ledger entries, and detailed customer ledger entries
- Create customer accounts
- Define Sales & Receivables Setup
- Set up cash receipt journals set up payment registration
- Set up payment information for customers
- Enable customer payments through payment services
- Create document sending profiles

Objective: Configure Sales and Purchasing (15-20%)

Set Up Inventory

- Create items
  [Setting Up Inventory](#)
  [Define the General Inventory Setup](#)
  [Create Item Cards for Goods or Services](#)
- Set up units of measure
  [How to Set Up Item Units of Measure](#)
- Create locations
  [Set Up a Location Card and Define Transfer Route](#)

Configure Master Data for Sales and Purchasing

- Configure core customer settings including lead time, shipping agents, locations, and shipping addresses
  [Overview of Tasks to Manage Sales](#)
  [Register New Customers by Creating a Customer Card](#)
- Configure core vendor settings including order address, lead time, locations, and delivery terms
  [Create a Vendor Card to Register a New Vendor](#)
- Configure core item settings
  [Create Item Cards for Goods or Services](#)

Configure Pricing and Discounts

- Create vendor-specific purchase prices
  [Set Up Prices and Discounts](#)
  [Special and Alternate Vendor Pricing and Discounts](#)
- Configure purchase line and invoice discounts

Set Up Special Sales Prices and Discounts for Customers
- Create customer-specific sales prices
  Set Up Special Sales Prices and Discounts for Customers
- Configure sales line and invoice discounts
  Set Up Prices and Discounts
- Configure best price calculations
  Extending Price Calculations

Objective: Perform Business Central Operations (30-35%)

Perform Basic Tasks in Business Central
- Differentiate between designing pages, customizing roles, and personalizing users
  Customizing the User Interface for User Roles
- Customize roles
  Customizing Pages for Roles
- Apply and save filters
  Save and Personalize List Views
  Sorting, Searching, and Filtering Lists
- Find all related entries by using the Navigate action
  Adding Actions to a Page
- Use the Inspect pages and data feature
  Inspecting Pages in Business Central
- Perform data updates by using the Edit in Excel feature
  Viewing and Editing in Excel From Business Central

Purchase Items
- Create a purchase order
  Overview of Tasks to Manage Purchasing
- Receive items associated with a purchase order
  How to Receive Items
- Describe the over-receipt feature
  How to Receive Items
- Undo a receipt
  Undo a Posting by Posting a Reversing Entry
- Create a posted invoice from a purchase order
  Understanding How To Post Purchase Documents
- Create purchase returns
  Process Returns or Cancellations
- Use the Navigate action to view a posted purchase transaction
  Adding Actions to a Page

Sell Items
- Create quotations
  Make a Sales Offer to a Customer
- Convert a quotation into an order or invoice
  Create a Purchase Quote to Request an Offer
- Analyze item availability
  Get an Availability Overview
- Ship items associated with a sales order
  How to Ship Items
- Undo shipments
  Undo Shipment
- Create an invoice from a sales order
  Invoice Sales
- Create sales returns
  Process Sales Returns or Cancellations

- Configure recurring sales lines
  Setup Standard Lines for Recurring Sales and Purchases
- Use the Navigate action to view a posted sales transaction
  Actions Overview

Process Financial Documents
- Process purchase invoices
  Record Purchases with Purchase Invoices
- Process purchase credit memos
  Process Returns or Cancellations
- Process sales invoices
  Invoice Sales
- Process sales credit memos
  Process Sales Returns or Cancellations
- Combine order shipments into a single invoice
  How to Combine Shipments on a Single Invoice
- Correct a posted purchase invoice
  Amend or Cancel Unpaid Purchase Invoices
- Correct a posted sales invoice
  Correct or Cancel a Posted Sales Invoice

Process payments and journals
- Process payment journals
  Apply Payments to Related Documents and Post Them
- Process cash receipt journals
  Apply Customer Ledger Entries to Reconcile Payments
- Process payment registrations
  Apply Payments to Unpaid Sales Documents
- Reverse posted journals
  Undo a Posting by Posting a Reversing Entry
- Run the Suggest Vendor Payments action
  Use the Suggest Vendor Payments Batch Job
- Remove customer ledger entries
  How to Remove and Reapply Item Entries
- Remove vendor ledger entries
  Check Ledger Entry - Void/Delete
- Complete a bank reconciliation
  Reconcile Bank Accounts
- Create and process general journal entries
  Working with General Journals to Post Directly to G/L

Manage Inventory Costing
- Create and manage inventory periods
  How to Work with Inventory Periods
- Describe the adjust cost item entries posting process
  Manually Adjust the Costs of Items
- Set up automatic cost posting
  Design Details - Expected Cost Posting
- Set up expected cost posting
  Design Details - Expected Cost Posting
- Describe the relationship between items, item ledger entries, and value entries
  Understanding Item Types
  How to Apply General Ledger Entries

On-Demand Training from Microsoft Learn

New to Dynamics 365? The learning path will provide foundational level knowledge of how Dynamics 365 apps are used. Learn about cloud concepts, Microsoft Power Platform, and how to get started with Dynamics 365 apps.

Microsoft Dynamics 365 Fundamentals

Virtual Training Series

In this online course, you will learn about Microsoft Dynamics 365 Business Central as a cloud based end-to-end business solution. Business Central is an application for companies that have outgrown their entry-level business applications or are replacing outdated legacy systems and need an end-to-end solution for financials, sales, service, and operations.

All Virtual Training Series http://aka.ms/vts