Microsoft Dynamics 365 ERP Mentorship & AMA Initiative
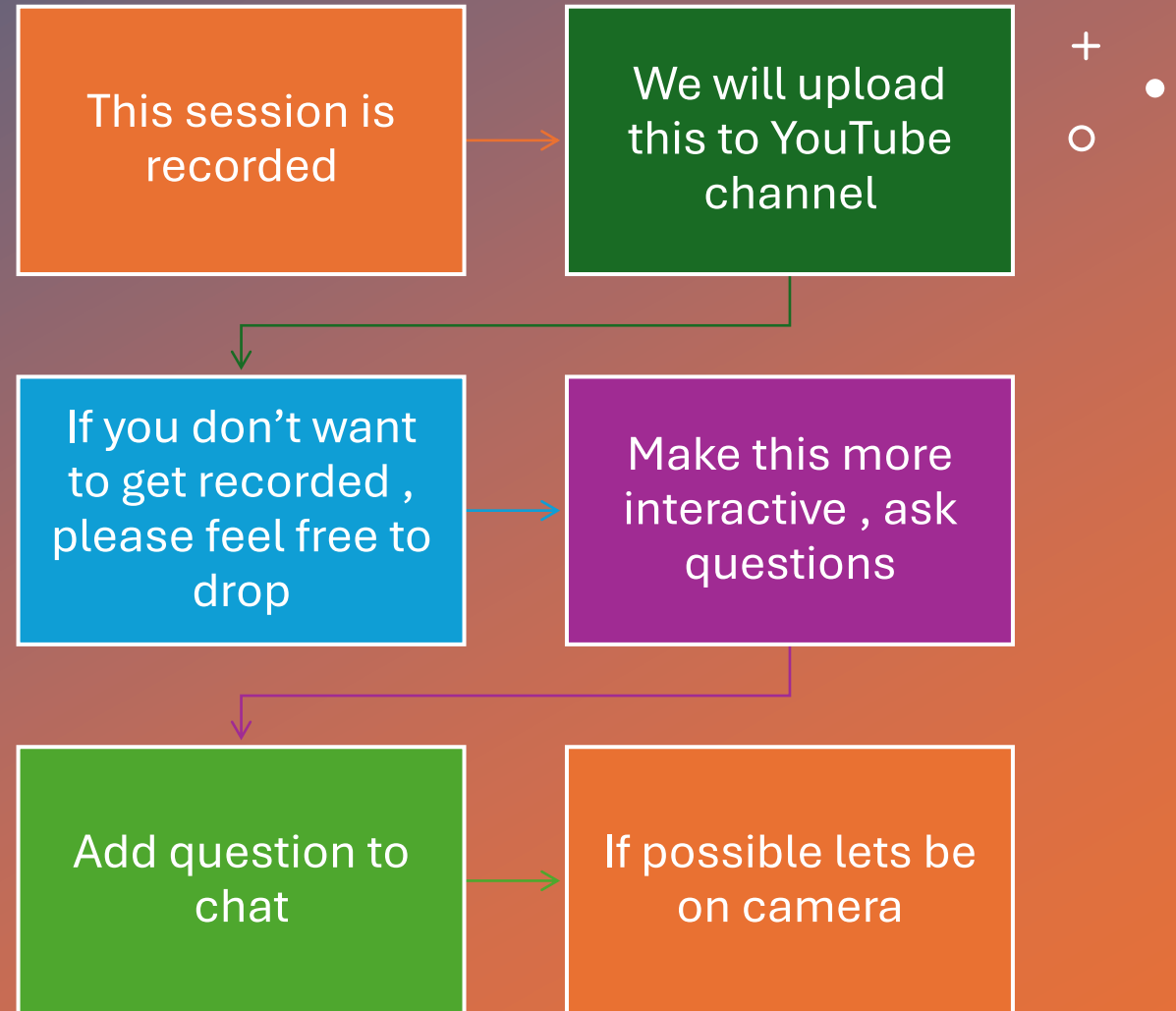
Session-4: 05-July-2025

Dynamics Class.

Some Housekeeping

This session is recorded → **We will upload this to YouTube channel**

If you don't want to get recorded , please feel free to drop → **Make this more interactive , ask questions**

Add question to chat → **If possible lets be on camera**

Disclaimer

The views and opinions shared in this session are my personal insights and do not represent the views of my employer or any other entity. This session is solely for knowledge sharing and mentorship purposes.

Agenda

- Introduction and Recap (5 Mins)

- Expert topic: Path to become solution architect (45 Mins)

- Topic of the Day: Prep for Dynamics 365 Interviews (15 Mins)

- Pre-submitted question

- Q&A (25 Mins)

About Me

Saurabh Bharti

- Fasttrack Senior Solution Architect at Microsoft
- Over 12 Years of experience in ERP space
- Former MVP
- YouTube: http://www.youtube.com/@DynamicsClass
- LinkedIn: linkedin.com/in/saurabhbharati
- Blog Site: exploredynamics365.home.blog

Recap

- Expert topic: Data Management in Dynamics 365 F& O

- Topic of the Day: Certifications in Dynamics 365

- Open AMA

YouTube Playlist

Key resources

1. [End to End Guide for functional consultant](#)

2. [Monthly Mentorship and AMA playlist](#)

3. [GitHub](#)

Expert Topic

Path to Become Solution Architect

Your Expert: Rakesh Darge

Who AM I?

- Rakesh Darge

- Global Lead, Customer Success Architect at TCS

- Over 23 years of experience in IT & 17 Years of experience in ERP space

- Microsoft Most Valuable Professional in Business Applications (MVP)

- Microsoft Fasttrack Recognized Solutions Architect

  Aka.ms/ftrsa

- User Group Leader, Mumbai India D365 & Power Community

- YouTube: http://www.youtube.com/@IndiaDynamics365PowerCommunity

  http://www.youtube.com/@rakeshdarge

- LinkedIn: https://www.linkedin.com/in/rakeshdarge/

- Blog Site: https://d365cliffsnotes.com/

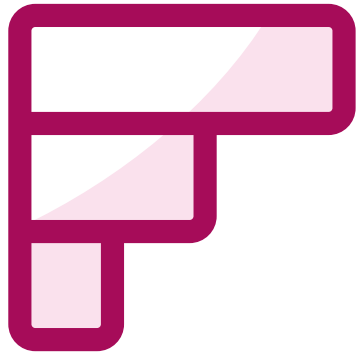What comes to mind when you hear that title "Solutions Architect"?

Who Can Become a Solutions Architect?

What do you think is the most common background for a Solutions Architect? A computer science degree? Years as a software developer? Someone from a business background perhaps?

Key Traits of an SA - "Beyond Background: Common Threads

✓ **A strong technical background**

✓ **Really strong people and business acumen**

How many of you feel you already have a technical background, or are actively building one? And how many are focusing on developing those crucial business and people skills

slido

What Does a Solutions Architect Do?

✓ **Consulting with customers**

✓ **Articulating the value**

✓ **Enabling existing teams**

The SA's Role: Pre-Sales to Implementation - "The Trusted Advisor"

✓ **Educate the customer**

✓ Explain **why they would implement**

✓ Provide insights

Why Become a Solutions Architect?

✓ **Business and people and technology**

✓ **Keeps things interesting**

How to Become a Solutions Architect?

✔ **Build your technical foundation**

✔ **Focus on learning about people and business**

✔ **Develop a genuine interest and passion**

Practical Steps and Conclusion - "Your Journey to Becoming an SA"

✓ **Network**

✓ **Mentorship**

✓ **Passion & Perseverance**

Today's Topic

How to Prepare for Dynamics 365 Interviews

Key Aspects for preparing for interview

Know your resume → **Know the job profile**

Know basics → **Know your strength and weaknesses**

Drive your interview :Its about your story

My journey

2016

2022

2013

2017

2024

Coextrix Technologies

Know your resume

Your resume should be in right format

Your resume's first page should highlight your key skills which matches to the job description

For beginners : Highlight the list of modules with proficiency (Expert etc..)

Your resume's first page should have a summary of your profile

Know your job profile

- You should be very clear in understanding your job profile for which you are applying

- You should know each aspect of your job role e.g. functional, technical, testing, solution architect etc...

- Read job description very carefully

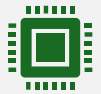- Ask clarity when you get call from recruiter about role and skills required

- Say No if the job role doesn't align with your skill

Know basics

Project lifecycle with phases

Key terms used during project like Cutover, Data migration, Fit-Gap, FDD,TDD, DevOps, ADO, Hypercare, UAT, Discovery, End user training etc...

Know at least tools used in project LCS, PPAC, DevOPS, Excel, PowerPoint, Visio etc..

Type of projects implementation, upgrade, support and project roles

Know your strength and weaknesses

Strength

- -Good understanding of functional finance modules
- Good understanding of processes like finance or accounting
- Rich experience in specific industry
- Communication

Weakness

- -Not an expert in SCM or budgeting finance modules
- Not been part of global rollouts
- Only support experience
- Only End user experience

Q. Have you implemented Budget planning ?
A. I didn't get chance to implement this in my projects but I have good knowledge on how basic budgeting works, and I am happy to learn budget planning as well.

Drive your interview :Its about your story

- You should prepare for interview with three key segments
    - About you and your story
    - Your experience with companies and projects you worked
    - Technical knowledge like modules configuration etc..
- You story should be connecting in all three components
- You should end your answer by giving clue for next topic which is your strength
- For Experience : Bring your previous experience as strength not as weakness
- For Beginners : Show your commitment towards learning

Key takeaways

- Its your story and you are responsible to tell that

- Leverage past experience as advantage

- Know your strength and weaknesses

- Prep for Basics

Pre-Submitted Questions

Solution Architect Related Question

- Currently I am d365 F&O professional with 2-3 years of experience and working in consulting firm. What should I aim for in future towards the path of solution architect - Yogesh kumar

- How to upgrade ourself for the next designation . From senior functional Consultant to solution architect. - Mahendra Mhaske

- Key areas of knowledge that one should possess to become a Solution Architect in Dynamics FnO ERP. - Dewang

- What are key factors or skills required for solution Architect? - lalitha

- Does coding is required to become architect - Ramesh Raman

- Do we need to master in all modules to become solution architect? - Devanshi

- Being functional, how to bridge gap for technical aspects for solutionn landscape? - Poonam Soni

Other Questions

Just cleared my F&O exam and starting job search. What entry-level roles in the UK suit someone from an accounting background? Also, how can I prepare for the implementation side (like FDDs)? If you've covered this already, please share any helpful blogs or YouTube links- Kinza

https://www.youtube.com/watch?v=77yeMCkxAoA&list=PLoW3GUbPgvmizKeRx151J2lQmXKcJYMBZ

- How to integrate copilot Studio in D365 Finance and Operation – Pranit

- https://www.youtube.com/watch?v=uKQjsiAGbYw&list=PLoW3GUbPgvmhHa3jNSmbdnQK4kZYsGpGY

- Generic guidance on gaining hands on experience (on live projects) to ensure I gain practical work experience.- Vinod G

- How can one stay updated with standard D365 functionalities while primarily working on customizations? —Saurabh Khatri

Other Questions

- Is it possible to use CSV format for the advance bank reconciliation? If yes, please provide steps to configure the same – Vinay

- More about automating Data imports and exports - anji

- Dynamics training - Moiz Ahmed soomro

- I would love to know and understand budget planning, cost accounting and production. Project accounting as well- Nasiru Sani Galadima
  (refer Microsoft Learn Document)

- Any technical mentorship then please provide us the link- Abhishek Kumar

- I would like to know how can we plan the changes happening in Microsoft dynamics as AI jumping how can we plan for the future? - Harsh Paliwal

- https://www.youtube.com/watch?v=7hFQ6BAYfeg&list=PLoW3GUbPgvmhHa3jNSmbdnQK4kZYsGpGY&index=9

Other Questions

- Price agreement related and postings. - Abhishek
  (Refer Microsoft Learn Doc.)

- How to restrict user access to all transactions based on site/warehouse/location? - Sahar

- How to prepare for MS certification – Durgesh
  (Refer Previous session)

- https://www.youtube.com/watch?v=uX9SJJ2_HlE&list=PLoW3GUbPgvmiuiKXgiqzBQgVUAkENRgpP&index=3

- Due to a conversion factor error, an exchange rate of 113.49 was entered instead of 1.1349 (USD to EUR), causing a large variance in accounting (e.g., 300 EUR booked as 33,404.73 instead of 340.47). What's the best way to correct such exchange rate issues, especially if the period is already closed, with minimal impact on the system?" - Devanshi

- How data verse, fabric, power app, azure each are connected to D365 - Nazim

Other Questions

- Exchange rate when added backdated and the transactions are already posted. In this case what is best advice a consultant should give the users. - Devanshi

- Resume preparation - Sredevi

- Intercompany end-to-end and consolidation – Ronak (Refer Microsoft Learn doc.)

- I might ask regarding the Inventory closing part - Biswojit

- About D365 version – Danish

- Hi, I'm a beginner in d365. My question is, how a real-time conversation works between a functional consultant and customer or stakeholders and how many years of experience is required to do that ? -Siva

- Is it possible to get a job in Dynamics with just one year of experience and certification. - succey

Other Questions

- In Dynamics 365, entering an IBAN auto-fills bank details, but updating the bank address later triggers format errors (e.g., account number length). Is this validation based on the IBAN structure, and what's the best practice to manage this? -Nilesh Kumar

- Are there any demo on any end to end project implementation that one can partake off? - Elijah Aremu

- Integrations with Legacy applications – Ram Neeli

- My question is all about how to do complete configuration of E-invoice for electronic invoice in D365 – Balachandra V

- Transition from LCS to Power platform - Nazim

Mike is yours