

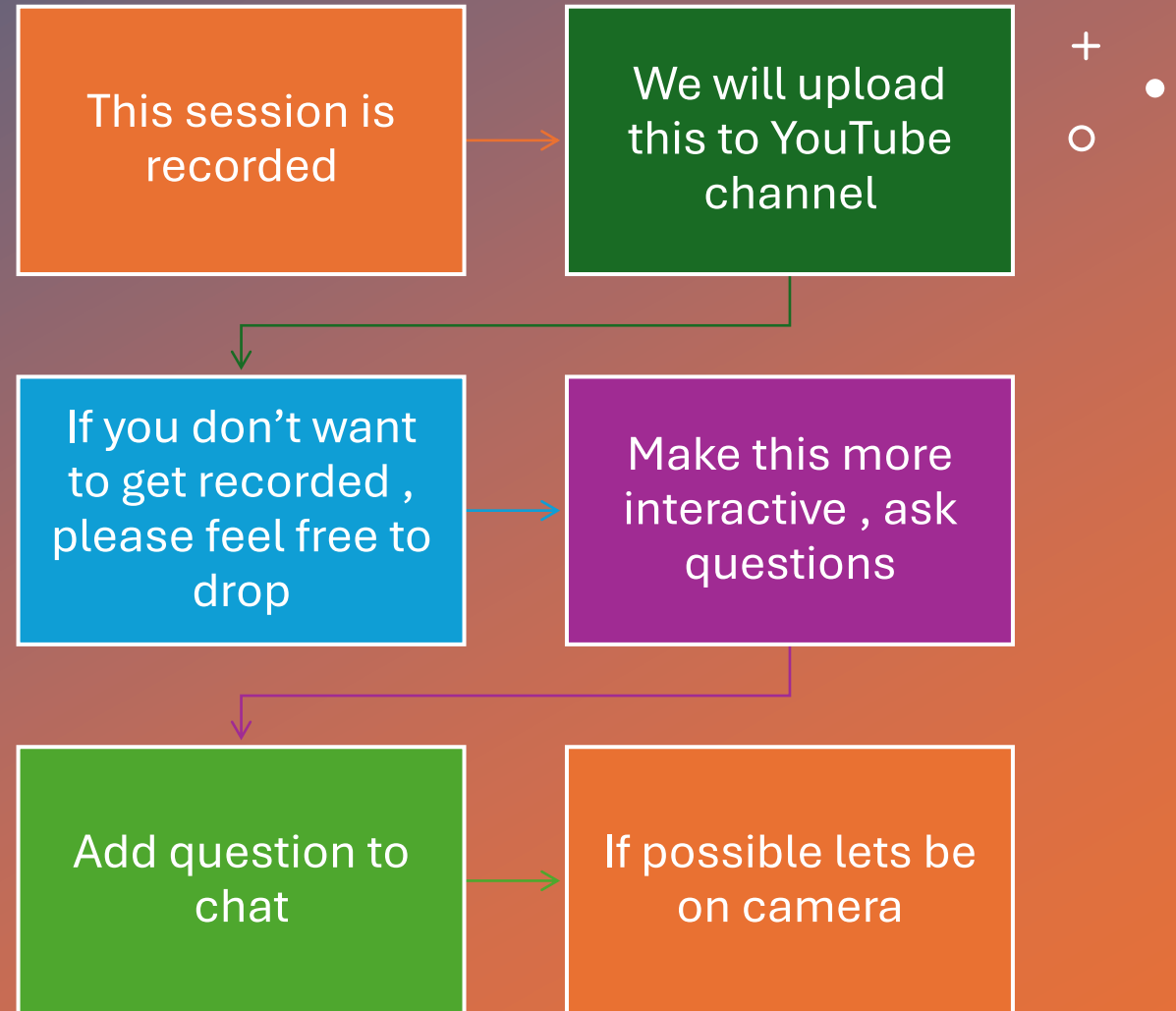
Microsoft Dynamics 365 ERP Mentorship & AMA Initiative

Session-3: 07-June-2025

Dynamics Class.



Some Housekeeping



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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.

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Agenda

- Introduction and Recap (5 Mins)
- Expert topic: Data Management in Dynamics 365 F& O (45 Mins)
- Topic of the Day: Certifications in Dynamics 365 (15 Mins)
- Pre-submitted question
- Q&A (25 Mins)

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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](https://www.linkedin.com/in/saurabhbharati)
- Blog Site: exploredynamics365.home.blog

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Recap

- Expert Topic: Copilot studio with Dynamics 365
- Topic of the day : Day in Life of a Functional consultant
- Open AMA

YouTube Playlist

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Key resources

1. [End to End Guide for functional consultant](#)
2. [Monthly Mentorship and AMA playlist](#)
3. [GitHub](#)

Expert Topic

Introduction Data Management in Dynamics 365 F&O

Your Expert: Yellampalli Venkatesh

Data management resources

Here are some helpful blogs on data management:

Data migration: <https://exploredynamics365.home.blog/2023/06/12/migrate-data-using-data-templates-in-microsoft-dynamics-365-finance-and-operations-part-1/>

Template creation: <https://exploredynamics365.home.blog/2023/06/22/create-and-manage-your-own-data-templates-in-microsoft-dynamics-365-finance-and-operations-part-2/>

Data validation check list : <https://exploredynamics365.home.blog/2022/06/28/data-validation-checklist-workspace-in-microsoft-dynamics-365-finance-and-operations/>

Master data strategy : <https://exploredynamics365.home.blog/2020/06/14/master-data-strategy-planning-using-data-management-data-entity-upload-sequence-approach-for-effective-implementation-part-3-for-microsoft-dynamics-365-finance-and-operations/>

Data templates: [Migrate Data using Data templates in Microsoft Dynamics 365 finance and operations: Part-1](#)

Create Excel add in template: <https://exploredynamics365.home.blog/2020/10/18/design-your-own-open-in-excel-template-in-microsoft-dynamics-365-finance-and-operations/>

Today's Topic

**Certification in
Dynamics 365: Why
They Matter**

Experience



Certification



Saurabh Bharti • You
Senior Solution Architect | Former MVP | MCT ...
10mo •



Absolutely, certifications can be valuable and might help you get your foot in the door, but they are just the beginning.

Real growth and career progression come from hands-on experience and sharpening your skills in the field.

It's the combination of skills and experience that will truly set you apart and push you forward in your career.

[#CareerAdvice](#) [#SkillDevelopment](#)
[#ExperienceMatters](#) [#d365](#) [#dynamics](#)
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229

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Nandish Kothari • 1st
Functional Solution Architect D365 F&O ...

10mo ...

You just hit the bulls eye 🍷

Love · ❤️ 1 | Reply



Mussab Abbasi • 1st
Digital Transformation Consultant | Oracl...

10mo ...

I like the certified resource pose 🤪 dump certifications.

Funny · 😄 1 | Reply

Microsoft Dynamics 365 Finance and SCM certifications

MCT (Microsoft Certified Trainer)

Solution Architect: MB-700

Finance: MB-310

Basic
SCM:MB-330

SCM
Expert:MB-335

Manufacturing
:MB-320

Commerce:
MB-340

Developer:
MB-500

Functional

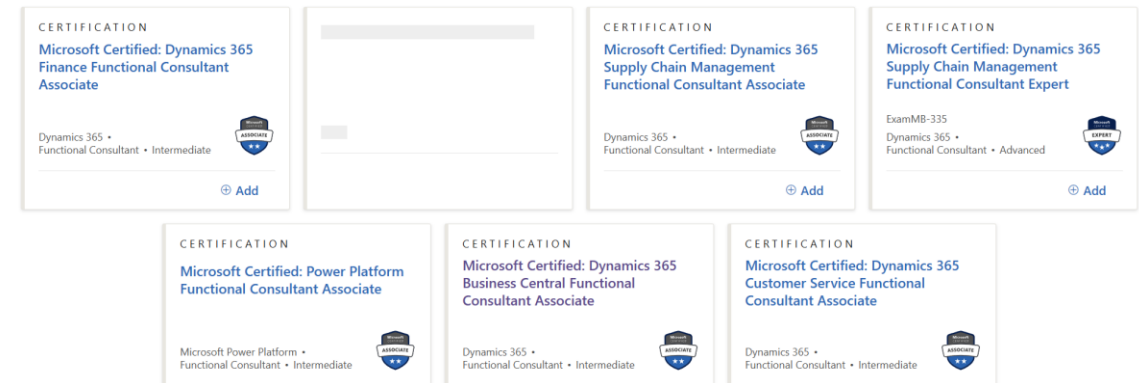
Technical

Microsoft Dynamics 365 Fundamentals (ERP):MB-920

Key resources

- Browse all trainings: [All trainings learning path](#)
- All trainings path: [Get started with all trainings by role](#)
- Practice for assessment: [Exam practice free resource](#)
- Certification Process Overview: [Certification process](#)

Credentials for functional consultants



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Key takeaways

- Certifications are important to get your profile shortlisted at entry level but practical knowledge is what will take you to final interview process
- Start with basic certification like MB-920
- Do not look for shortcuts to get pass in certification
- Create a long-term plan for your certification journey
- Example : MB 920 > Mb 310 > MB 700

Pre- Submitted Questions

Impact of Copilot/AI

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- What is the role of AI in D365 F&O - Shaik Nagoor
- Can Copilot agents and other AI tools help optimize work by automating repetitive tasks like FDD preparation? For example, can AI-generated summaries from recorded client workshops save time and improve efficiency? - Linas
- How do you set up Basic Budgeting using one financial dimension and multiple main accounts? What should be considered when defining the CoA, and what are the best practices for Accounting Structures and Advanced Rules? - Jeelani
- What are the Go-to skill sets to stay relevant and ahead for D365 FO SCM functional consultant with respect to paradigm shift of AI ? - Vijay Kumar

Impact of Copilot/AI

How the AI is going to create impact for Finance and Operations - Subash Murugesan

What learning path should a functional consultant follow to effectively understand and work with AI Agents and Copilot features in D365? - Sunny Rastogi

Wanted to know what's new with d365 - Raman

- What AI skills should I learn to complement my work with D365 F&O, and where can I start learning them while continuing in this domain? - Serwat

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Career Transition to D365 F&O



- How to learn D365 quickly? - Andy Zhang
- What are the challenges one might get while being a Functional Consultant handling the client stakeholders? - Niles
- Question regarding functional process as I am technical consultant. - Rahul
- I have solid experience in D365 Sales and want to understand how learning ERP—particularly D365 Finance & Operations—can broaden my job opportunities and enhance my overall skill set. - Santhosh
- For those without a finance background, how can we effectively keep up with financial terminology while learning Dynamics 365 Finance? Also, could you suggest some of the best resources to build a strong foundation in finance relevant to D365? - Nisha Sharma
- How can a consultant consolidate their knowledge effectively, and does it really matter whether one works in support or delivery? I'd like to understand the key differences and why they matter in a consulting career. - Ashish Kumar Sharma

Career Transition to D365 F&O

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- I have hands-on experience in support projects but lack implementation experience, which is preventing my current company from assigning me to implementation projects. How can I overcome this barrier? - Konda Sravan Kumar Reddy
- I'm new to ERP and currently work as a support executive handling security configuration and admin tasks. Will these sessions cover such topics as well? Please suggest, as these sessions are very helpful to me. - J LENIN KUMAR
- Is the Dynamics 365 Finance industry open to professionals with 16 years of finance domain experience who have recently trained as Functional Consultants? Also, is there any age limit for hiring new candidates in this sector? - Venkateswarlu
- What skills are needed for a D365 Project Manager role? Also, why is Dynamics 365 less known in Western Canada? - Wole Famakinwa

Career Transition to D365 F&O

As an ERP Functional Consultant experienced in Microsoft Dynamics 365, what roadmap and skills should I focus on over the next 6–12 months to become a Solution Architect and successfully manage cross-platform ERP integration projects? -

Muneer Ahmed Khan

- What interview preparation is needed for Dynamics 365 F&O roles? I've just passed my F&O exam and am starting my job search. What are the best entry-level roles in the UK for someone transitioning from accounting? Also, how should I prepare for implementation aspects like FDD documentation? If these topics have been covered elsewhere, please share relevant YouTube channels or blogs. - Kinza

Other Questions

- When is the next Microsoft Dynamics 365 Finance & SCM Training? I missed enrolling for the May 24th batch. -Rahul Desai
- Benefits of this course -Nikhath kouser
- What are common pitfalls companies face when implementing D365 F&SCM?-Saranya Sarangan Ramesh
- How to know which entities for a form? for example, Inventory management-Setup-Posting-posting. I want to get all information about the form. How do I know which entities I need to export? If I can't access visual studio.
where I can get D365 F&O all tables and fields list and table relation? Thanks
-Andy Zhang
- What are the new features to know in Finance modules. The intracompany configuration -Mia Andria

Other Questions

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- I wonder what the best way is to migrate party addresses if there are multiple of them per vendor, for example. Because initially, you need to import vendor accounts. Then, this vendor account number must match the party ID of the corresponding record in the party postal address data template. The primary key is different for both tables. So, what is the best way for such entities that use party ID as the key.-Yeldem
- Why quality of support from Microsoft is going down recently - Nitish
- Subledger to ledger reconciliation -Sujoy Naskar
- Regarding custom role and security configuration -Nikhil Kumar saw
- What are the latest features introduced in the Finance module of Dynamics 365, and how is intracompany configuration set up and managed within the system? - Mia Andria

Other Questions

- Want to know more about ERP Mentorship & AMA Session – Kranthi
- [AMA Initiative Youtube Playlist](#)
- Session for inventory management - Alex
- <https://youtu.be/7aF8fye1slQ?si=-FKxAS-74QfBBWf3>
- Intercompany orders 2 way and 3 way- Sruthi
- https://youtu.be/1ceR_GNaI1c?si=uHD07zAj9h2M25UA
- Production Scheduling- Sanjiv
- [LinkedIn](#)

Other Questions

- How to create an agent for Dynamics 365 F&O – David
- <https://youtu.be/7hFQ6BAYfeg?si=PbtePLAQwSf8aXmB>
- It's possible to share COA for multiple legal entity? - Abdessamed
- [Plan your chart of accounts - Finance | Dynamics 365 | Microsoft Learn](#)
- Do we have any document for learning more on financial tags – Vemula
- <https://youtu.be/ODG8A0VaW44?si=shexnHK0z8JWxabX>

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Mike is yours



Thank You!



Next Session Date:
5th July 2025

Submit Question and feedback