

Business Central Training Custom Training Topics

Create and configure a new company

- Create a configuration worksheet
- Describe the process for migrating data
- Create and export a configuration package
- Import and apply a configuration package
- Create journal opening balances
- Validate migrated data by using trial balances

Managing security

- Create and manage user profiles
- Set up new user and user groups
- Create and assign permission sets and permissions
- Apply security filters

Customers / Sales Order Management

- Configure core customer settings
- Create customer-specific selling prices and discounts
- Create customer-specific item aliases
- Creating Quotes / Sales Orders / Invoices
- Managing customer prepayments / deposits
- Understanding returns / exchanges / refunds
- Managing customer payments
- Managing customer adjustments / write-offs
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Vendors / Purchase Order Management

- Configure core vendor settings
- Create vendor-specific item aliases
- Creating Purchase Orders
- Understanding PO item costs / last cost
- Managing vendor prepayments

- Understanding blanket POs
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- Managing vendor

Reporting

- Configuring forms (SO, PO, Invoice, etc.)
- Operational reports (AR & AP Aging, Sales Reports, etc.)
- Financial Reports (Income Statement, Balance Sheet, etc.)

Automation – workflows and alerts

- Managing alerts and notifications
- Creating and managing approval workflows & hierarchy