

Microsoft Dynamics 365 Business Central:

Introduction to Project Management

2 Days (8Hrs/Day)

Lesson 0: Introduction to Business Central

- Describe use cases and common features for Business Central modules
- Navigate the user interface
- Perform basic user tasks in Business Central
- Master Data

Lesson 1: Manage Security

- Set up new users and user groups
- Perform user-specific setup

Lesson 2: Configure Financials

i. Set up the Chart of Accounts

- ☐ Create G/L accounts
- ☐ Create account categories and subcategories

ii. Set up posting groups

- Overview
- Create specific posting groups
- Create general posting groups
- Configure general posting setup options
- Set up VAT Posting Groups
- Configure the VAT Posting Setup

Lesson 3: Project Management Overview

- Project Management Overview
- Project Reports

Lesson 4: Managing of Projects

- Create Projects
- Use Resources for Projects
- Use Time Sheets
- Manage Projects Budgets
- Record Usage for Projects
- Manage Projects Supplies

Lesson 5: WIP Methods

- Understand WIP Methods
- Monitor Job Progress and Performance
- Invoice Jobs

Lesson 6: Sales Invoice

- Create quotations
- Convert a quotation into an order or invoice