

Comprehensive Dynamics 365 Business Central Course

Course Overview

This course provides a comprehensive understanding of Microsoft Dynamics 365 Business Central with a focus on Reporting, Functional, and Fixed Assets. Participants will learn how to create and configure a new company, manage customers and vendors, handle project management, automate workflows, integrate Power BI, and manage fixed assets. The course is designed to equip learners with the skills needed to effectively use Dynamics 365 Business Central in a business environment.

Prerequisites

- Basic understanding of business processes
- Familiarity with Microsoft Office applications
- Prior experience with any ERP system is beneficial but not required

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1. Create and Configure a New Company (6 Hours)

- 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

2. Customers / Sales Order Management (3 Hours)

- 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

3. Vendors / Purchase Order Management (3 Hours)

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

4. Project Management (8 Hours)

- Managing of Jobs
- Create Jobs
- Use Resources for Projects
- Use Time Sheets
- Manage Job Budgets
- Record Usage for Jobs
- Manage Job Supplies
- Understand WIP Methods
- Monitor Job Progress and Performance

- Invoice Jobs

5. Automation – Workflows and Alerts (4 Hours)

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

6. Integration of Power BI

- Details to follow within the integration module

7. Introduction to Fixed Assets (16 Hours)

Lesson 1: Basic Overview

- Fixed Assets Overview
- Fixed Assets Reports and Analytics

Lesson 2: Managing Assets

- Acquire Fixed Assets
- Maintain Fixed Assets
- Insure Fixed Assets
- Transfer, Split, or Combine Fixed Assets
- Revalue Fixed Assets

Lesson 3: Disposal of Assets

- Depreciate or Amortize Fixed Assets
- Dispose of or Retire Fixed Assets
- Manage Budgets for Fixed Assets

8. Reporting

- Report Overview
- Report Description
- Report Layout
- Report Data Model
- Request Page
- Report Triggers and Functions
- Report Triggers execution flow