

KOENIG SOLUTIONS • COURSE OUTLINE

Microsoft Dynamics 365 Business Central: Introduction to Project Management

Learn to configure Business Central and manage projects,
from financials setup to job costing, budgets and invoicing.

2 Days

8 HOURS A DAY

7

MODULES

27

TOPICS

COURSE OVERVIEW

This course introduces Business Central, covering its user interface, master data and basic user tasks before moving into security setup for users and user groups. It then addresses financial configuration, including the chart of accounts and posting groups, followed by an overview of project management and its reports. The course covers managing projects, including creation, resources, time sheets, budgets, usage and supplies, then examines WIP methods for monitoring job progress and invoicing jobs. It closes with creating sales quotations and converting them into orders or invoices.

WHO THIS COURSE IS FOR

Project Managers

Finance Administrators

Business Central Users

System Administrators

Sales Administrators

LEARNING OBJECTIVES

- Describe use cases and common features of Business Central modules
- Navigate the Business Central user interface and master data
- Configure security through users, user groups and user-specific setup
- Set up the chart of accounts and general posting groups
- Explain project management concepts and available project reports
- Manage projects through resources, time sheets, budgets and usage
- Apply WIP methods to monitor job progress and invoice jobs
- Create sales quotations and convert them into orders or invoices

7 Modules, 27 Topics

00

Introduction to Business Central

TOPICS

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

01

Manage Security

TOPICS

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

02

Configure Financials

SET UP THE CHART OF ACCOUNTS

Create G/L accounts · Create account categories and subcategories

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

03

Project Management Overview

TOPICS

Project Management Overview · Project Reports

04

Managing of Projects

TOPICS

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

05

WIP Methods

TOPICS

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

06

Sales Invoice

TOPICS

Create quotations · Convert a quotation into an order or invoice

WHAT IS INCLUDED

Everything You Need to Succeed

- Koenig course material for every module
- Delivery by certified instructors and subject matter experts
- Hands-on exercises throughout the course
- Course completion certificate from Koenig

ABOUT KOENIG

Who We Are

Established in 1993, Koenig Solutions is a globally recognised training provider with 35+ technology partnerships, 5,000+ training programmes and a network of certified instructors and subject matter experts, supporting individuals and enterprise teams worldwide.

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