

KOENIG SOLUTIONS · COURSE OUTLINE

Microsoft Dynamics Business Central Functional and Project Management

Learn to configure, manage and operate Microsoft Dynamics Business Central across security, sales, purchasing, projects and automation.

28 Hours

DURATION

7

MODULES

36

TOPICS

COURSE OVERVIEW

This course covers setting up a new company in Microsoft Dynamics Business Central, including configuration worksheets, data migration and opening balances, followed by managing security through user profiles, permission sets and security filters. It then addresses customer and sales order management, including quotes, invoices, prepayments and returns, and vendor and purchase order management, including item costs, blanket orders and vendor prepayments. Project management is covered through jobs, resources, time sheets, budgets and WIP methods, and the course closes with workflow automation, alerts, and integration with Power BI.

WHO THIS COURSE IS FOR

Functional Consultants

Project Managers

System Administrators

Sales Order Managers

Purchase Order Managers

Business Analysts

LEARNING OBJECTIVES

- Create and configure a new company using a configuration worksheet
- Import and validate migrated data using trial balances
- Set up user profiles, user groups and permission sets
- Apply security filters to control data access
- Create quotes, sales orders, invoices and customer prepayments
- Create purchase orders and manage vendor prepayments
- Manage jobs, resources, time sheets and job budgets
- Configure approval workflows, hierarchies and alerts

7 Modules, 36 Topics

01

Create and Configure a New Company

TOPICS

- 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

02

6 hours

Managing Security

TOPICS

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

03

3 hours

Customers / Sales Order Management

TOPICS

- 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

04

3 hours

Vendors / Purchase Order Management

TOPICS

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

05**8 hours**

Project Management

MANAGING OF JOBS

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

WIP METHODS

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

06**4 hours**

Automation - Workflows and Alerts

TOPICS

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

07

Integration of Power BI

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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