

KOENIG SOLUTIONS • COURSE OUTLINE

Comprehensive Dynamics 365 Business Central Course

Learn to configure companies, manage customers, vendors and projects, automate workflows, and handle fixed assets and reporting in Business Central.

8

MODULES

50

TOPICS

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.

WHO THIS COURSE IS FOR

Functional Consultants

Finance Managers

Sales Administrators

Purchasing Administrators

Project Managers

Business Analysts

PREREQUISITES

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

LEARNING OBJECTIVES

- Configure a new company using configuration worksheets and packages
- Validate migrated data using trial balances
- Manage customer settings, quotes, orders and payments
- Manage vendor settings, purchase orders and blanket POs
- Create and monitor jobs, budgets and time sheets
- Create approval workflows and manage alerts
- Integrate Power BI with Business Central
- Manage fixed assets including acquisition, depreciation and disposal

8 Modules, 50 Topics

01

6 hours

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

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

03

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

04

8 hours

Project Management

TOPICS

- 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

05**4 hours**

Automation - Workflows and Alerts

TOPICS

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

06

Integration of Power BI

TOPICS

- Details to follow within the integration module

07**16 hours**

Introduction to Fixed Assets

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

08

Reporting

TOPICS

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

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.

FLEXIBLE DELIVERY

Learn the Way That Suits You

Classroom Training

Live Online Classes (ILO)

Fly-Me-A-Trainer (FMAT)

Flexi (Self-Paced)

1-on-1 Training

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