Dynamics 365 Business Central Training Modules

Dynamics 365 Business Central Basic Orientation

Financial Master Data
Finance Focused Role Centers
Financial Processes in Dynamics 365 Business Central

D365 BC Admin Training

Sync Business Central Accounts with CRM
Setup Sales Tax in Business Central
Import Sales Invoices to Business Central - ADMIN
Create a New Training Instance
Workflow Notifications and Approval User Setup
Invoice Approval Workflow Overview
Customer Approval Workflow Overview
Item Approval Workflow Overview
Automation Workflow Overview

D365 BC Project Management

Project Management Overview
Project Management - Manage Existing Jobs

Inventory Management

Location Setup Overview
Inventory Adjustment Overview
Inventory Count Overview
Item Availability Overview
Sales Forecast Overview
Warehouse Management and Inventory Control Quick Links

Sales and Purchasing Training

Sales

Sales Quote Process Overview
Sales Order Process Overview
Sales Invoice Process Overview
Correct or Cancel Sales Invoice
Sales Documents via Outlook
Credit Memo Overview

Purchasing

Purchase Process Overview
Purchase Ordering and Receiving

Note: Many of the Sales processes are parallel in function and instructions to the Purchasing processes. Please refer to Correct or Cancel a Sales Invoice and Sales Documents via Outlook for reference.

Prices and Discounts

Setup and Use Sales and Purchase Prices
Line Discount Overview
Invoice Discount Overview
Allow and/or Disallow Discounts

Incoming Documents

Incoming Documents - Manual
Incoming Documents - OCR

Dynamics 365 Business Central Training Modules

Accountant Training

Cash Management

Bank Account Overview
Customers and Vendors in Cash Management
Cash Receipt Journals and Payment Journals Overview
Applying Payments in Business Central
Payment Registration Overview
Suggest Vendor Payments Overview
Check Management Process Overview
Payment Reconciliation Process Overview
Payment Services Overview
Bank Reconciliation Process Overview

Cash Flow Forecasts

Cash Flow Forecast Setup
Cash Flow Forecast Creation
Cash Flow Manual Revenues and Expenses
Cash Flow Worksheet Overview
Cash Flow Forecast Reporting
Sales Forecast Overview

Chart of Accounts

G/L Account Card Overview
G/L Account Entries Overview
G/L Account Management
G/L Account Categories
Assigning Dimensions to G/L Accounts

Incoming Documents

Incoming Documents – Manual and OCR

General Journals

Creating Journal Entries
Processing Journal Entries
Standard Journal Process Overview
Reoccurring Journals
Deferrals and Reversals

Power BI Reports

Power BI Overview
Enable Your Business for Power BI
Embed Power BI Reports in D365 Business Central
Reports Data, Report Selection, and Report Layouts

Closing a Fiscal Year

Creating or Closing a Fiscal Year in Business Central
Year End Closing Processes in Business Central

D365 CRM – Sales and Customer Service

CRM Admin

Sync Business Central Accounts with CRM
Enable Email for CRM
Using Email Templates in Dynamics 365 for Sales

Customer Service

CRM Portal: Create and Monitor Invitations
Subject and Category Management for CRM Portal
Knowledge Article Creation and Publishing

https://www.trimaxsecure.com 1 (844) 874-6297 info@trimaxsecure.com