Microsoft Dynamics 365 Business Central

Starter Pack

Base configuration
Content

- Activating and providing with Microsoft Dynamics 365 Business Central environment.
- Assiging license, configuration and security & access rights to Microsoft Dynamics 365 Business Central users (first 3 users)
- Creating 1 production company with minimal settings and 1 sandbox environment

Remarks

- Outlook integration is not included
- Security and access rights setup is based on standard profiles and roles

Workshop 1: Introductory training
Content

- Getting acquainted with Microsoft Dynamics 365 Business Central user interface
  - » Explanation of role centre
  - » Navigating the user interface

- Getting acquainted with base functionalities
  - » Overview of shortcuts
  - » Printing reports and documents
  - » Searching, filtering and sorting data

Remarks

- Executing of base configuration is crucial

Workshop 2: Base configuration Master Data
Content

- Master Data implementation in order to have real data throughout the remainder of the workshops
  - » Contacts
  - » Customers
  - » Shipping addresses
  - » Bankrekeningen
  - » Suppliers
  - » Products
  - » Units
  - » Prices
  - » Product surcharge
  - » Resources
  - » Booking groups and settings

Remarks

- Microsoft Dynamics 365 Business Central licenses are essential
- The customer will implement most settings personally
- The customer will import all Master Data personally (customers, suppliers, etc, …)
- All necessary Master Data templates must be completed

Workshop 3: Merchandising (Sales/Purchasing)
Content

- Getting acquainted with the sales and purchase flow in Microsoft Dynamics 365 Business Central.
- This training contains exercises based on customer documents.

Sales flow:
- » Debt management
- » Sales reductions and prices
- » Sales order management
- » Sales billing
- » Sellers & commissions
- » Announcing orders
- » Calendar management
- » Return order and credit notes

Purchase flow:
- » Credit management
- » Purchase order management
- » Purchase invoicing
- » Return order/Credit note
- » Price management and purchase reductions
- » Vendors- and alternative settings
- » Buyers

Remarks

- Master Data Base configuration must be completed before starting this workshop.
- Topics below are not part of this workshop and can only be addressed on request in extra workshops.

Sales flow:
- » Forwarding
- » Speciale orders
- » Approval flow of purchase documents
- » Periodic sales invoices
- » Collect billing
- » Reservations & lot management

Acquisition flow:
- » Forwarding
- » Special orders
- » Approval flow of purchase documents
- » Acquisition proposal

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Workshop 4: Warehouse
Content

- Getting acquainted with the basics of warehousing and article flow Microsoft Dynamics 365 Business Central.
- The workshop features the most important settings and master data.
- Topics:

  Warehousing basics:
  - » Stock movement
  - » Facility management
  - » Transfer orders
  - » Product journal
  - » Inventory journal
  - » Reclassification journal
  - » Revaluation journal
  - » Assembly

  WMS basics:
  - » Receiving
  - » Shipping
  - » Series and lot numbers
  - » Bins
  - » Cycle Counting

Remarks

- This workshop contains subjects that can go into more detail:
  - » Warehouse receiving
  - » Warehouse storage
  - » Warehouse shipping
  - » Warehouse picking
  - » Warehouse movement
  - » Warehouse product journal

Workshop 5: Accounting
Content

- Going through the standard accounting flow in Microsoft Dynamics 365 Business Central
- Going through the standard flow of making and sending reminders in Microsoft Dynamics 365 Business Central
- The workshop features the most important settings and master data.
- The exercises in the workshop are based on real documents
- Topics:

  * Basic accounting
    » Chart of accounts
    » Booking groups
    » Financial journals
    » Purchasing journals
    » Sales journals
    » Miscellaneous journals
  * Cash/Bank
  * Tax-registry and settlement
  * Intracommunautaire declaration
  * Credit controller (Customer card management)
  * Reminders
  * Periodic activities
    » Creating number series
    » Closing the books
    » Setting up accounting period
    » Verifying ledgers
    » Closing of profit and loss accounts

Remarks

- The customer will personally implement necessary settings according to his needs
- The documents is in possession of real or example documents at the start of the exercises
- This workshop contains subjects that can go into more detail:
  » Non-current assets
  » E-banking
  » Intrastat
  » Intercompany
  » Extended accounting

Workshop 6: Management
Content

- Going through report settings in order to the right documents
- Workshop 'building and installing' Word layouts in Microsoft Dynamics 365 Business Central
- Mailing reports and documents in Microsoft Dynamics 365 Business Central
- Going through general user settings in Microsoft Dynamics 365 Business Central

Remarks

- The workshop 'making and installing Word layouts' requires Microsoft Word 2013 or later

Extra services to get separately

- Assitence for building Word Layouts in Microsoft Dynamics 365 Business Central.
- Custom Layouts

Included extras

- 4-Hr phone support during office hours (valid one month after last workshop)
- 2-Hr Go-Live review and Go-Live Checklist
- Training calendar
- Reference documents and tutorials

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