Finance in Microsoft Dynamics 365

Training | Inlogica

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Training Objective:

Every business starts and ends with money, so regardless of the organization's size and the complexity of the business processes, a key challenge for companies is the practical work of their finance and accounting teams. The basis for the effectiveness of their operations is the knowledge of the system's capabilities on which they work. Most importantly, the system should be optimally adapted to the realities of the business and not the other way around - business to software. The training is designed to provide basic information on the configuration and functionalities offered by the Microsoft Dynamics 365 ERP system in finance.

The training is for companies that:

- I have decided to implement the Microsoft Dynamics platform,
- want to implement Microsoft Dynamics 365 but do not yet know whether this system is suitable for their organization in the area of finance,
- are working on one of the older versions of Microsoft Dynamics (AX2012, 2009, 4) and are considering the aspect of moving to the latest version of Microsoft Dynamics 365,
- are working with Microsoft Dynamics 365 and want to bring new finance and accounting team members on board.

The training is aimed at:

- Owners and Board Members,
- CFOs, COOs, leaders of finance and accounting teams,
- Accountants, analysts, and control specialists.

After the training, you will know the following:

- how modules related to the finance area work in Microsoft Dynamics 365,

- how to set the basic parameters of work,
- how the chart of accounts and the structure of funds look like, you will get acquainted with accounting profiles,
- how to record and post sales and purchase invoices,
- how to configure taxes and generate JPK,
- what are the methods of handling bank and cash transactions,
- how to organize and work with fixed assets,
- how to report basic financial information.

AGENDA

1. INTRODUCTION

- Structure of the program.
- Menu. Searching and filtering data.
- Personalization of settings.

2. GENERAL LEDGER.

- Module parameters.
- Chart of accounts.
- Dimensions.
- Structure of accounts.
- Accounting profiles.
- Financial sheets.
- Basic reports.

3. CASH AND BANK MANAGEMENT.

- Module parameters.
- Bank accounts and cash registers.
- Bank transactions.
- Cash transactions.
- Basic reports.

4 TAXES

- Module parameters.
- Uniform Control Files. Microsoft functionality standard.
- Basic reports.

5. PURCHASES

- Module parameters.
- Directories of suppliers.
- Purchase invoices. Methods and places of entry.
- Settlement of transactions.

- Basic reports.

6. SALES.

- Parameters of the module.
- Recipients' directories.
- Sales invoices. Methods and places of entry.
- Settlement of transactions.
- Basic reports.

7. FIXED ASSETS.

- Parameters of the module.
- She fixed asset files.
- She fixed asset sheets.
- She fixed asset transactions.
- Basic reports.

Number of participants: 10

Duration: Two days (16h)

Price per participant: 235 USD

The offer is for information purposes only and does not constitute an offer within the meaning of Article 66 § 1 of the Civil Code and other applicable laws.