Business Central Accounts Receivable

TruNorth Training Course Curriculum

Course Description

This course is designed to equip participants with the skills to efficiently manage customer receivables in Microsoft 365 Business Central, with a focus on using sales journals for recording transactions. Participants will learn how to set up and manage customer accounts, process transactions through sales journals, handle overdue balances, and apply payment discounts and tolerances. This course does not include Sales Order Processing or Relationship Management.

This course is ideal for sales professionals, account managers, and finance teams who are responsible for processing sales transactions, collecting customer payments and open receivables using Business Central.

Learning Objectives:

- Set up and manage customer accounts to maintain accurate receivables records.
- Utilize Sales journals to process header level sales transactions.
- Track and reconcile customer payments to maintain up-to-date receivables.
- Use tools to monitor overdue balances and issue payment reminders.
- Handle payment discounts and payment tolerances for customer payments.
- Generate and analyze receivables reports to support informed decision-making.

Additional Details:

Format: Virtual delivery with up to 5 users and a provided recording.

Course Level: Beginner

Skills Prerequisites: Understand basic navigation within Business Central. Basic Accounting or Sales knowledge required.

Typical Attendees: The typical attendees of an Accounts Receivables in Microsoft 365 Business Central course are professionals who work in finance or sales related roles or are responsible for overseeing financial or sales related processes within Business Central.