Business Central Sales and Receivables - Lite

TruNorth Training Course Curriculum

Course Description

This course provides a comprehensive overview of sales management in Microsoft 365 Business Central, enabling participants to handle the entire sales process efficiently. The training will cover key aspects such as setting up customers, managing sales quotes and orders, tracking shipments, creating invoices, and analyzing sales data. Participants will learn how to process transactions through sales journals, handle overdue balances, and apply payment discounts and tolerances.

This course is ideal for sales professionals, account managers, and finance teams who are responsible for managing customer relationships, processing sales transactions, and analyzing sales performance using Business Central.

This is the “lite” version of the training on Sales and Receivables within Business Central

Learning Objectives:

- Set up and manage customer accounts for accurate sales tracking and relationship management.
- Create and process sales quotes and sales orders in Business Central.
- Manage sales returns and credit memos to handle returned goods and adjustments.
- Track and reconcile customer payments to maintain up-to-date receivables.

Additional Details:

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

Course Level: Beginner

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

Typical Attendees: Any users of Business Central who work in finance or sales related roles or are responsible for overseeing financial or sales related processes within Business Central.