MS-MB800T00: MICROSOFT DYNAMICS 365 BUSINESS CENTRAL FUNCTIONAL CONSULTANT

DURATION	LEVEL	TECHNOLOGY	DELIVERY METHOD	TRAINING CREDITS
5 Days	Intermediate	Business Applications	Instructor-led	NA

INTRODUCTION

Built and optimized for small and medium businesses, Dynamics 365 Business Central is an application for companies that have outgrown their entry-level business applications. Growing businesses often outgrow their basic accounting software or legacy enterprise resource planning (ERP) systems that are unable to handle increased inventory and transactions, lack integration with other line-of-business systems, and have reporting limitations. Businesses are also challenged with the logistics of providing services that have more scalability, increased mobility, and availability in the cloud. With Business Central, you can manage your financials, automate and secure your supply chain, sell smarter, improve customer service and project performance, and optimize your operations.

AUDIENCE PROFILE

Candidates for this course are functional consultants who implement core application setup processes for small and medium businesses. They implement and configure Microsoft Dynamics 365 Business Central including setting up core functionality and modules and migrating data to Business Central. Candidates configure the application in collaboration with the implementation team to provide the business with manageability and ease of use. They may configure role centers including adapting insights, cues, action tiles, reports, charts, and extend Business Central by using Power Platform components. Candidates have applied knowledge of meeting business needs by using Business Central, including basic understanding of financial management, sales, purchasing, and inventory. Candidates for this exam typically specialize in one or more feature sets of Business Central. They understand the role of Business Central in relationship to the Microsoft 365 and Dynamics 365 suites of applications.

PREREQUISITES

To take the MB-800 course for Microsoft Dynamics 365 Business Central Functional Consultant, you should have:

- A fundamental understanding of finance and accounting principles.
- Experience using and configuring Dynamics 365 applications.
- Basic knowledge of business processes and financial management.
- Familiarity with the Microsoft Windows operating system and its functionalities.

COURSE OBJECTIVES

After completing this course, students will be able to:

- Create and configure a company.
- Manage security and user permissions.
- Set up core functionality and modules.
- Create and configure a company.
- Manage security and user permissions.
- Set up core functionality and modules.
- Create and configure a company.
- Manage security and user permissions.
- Set up core functionality and modules.
- Customize and personalize pages.
- Perform data updates and manage documents.
- Integrate with Microsoft 365 and Power Platform

COURSE CONTENT

Module 1: Administer Dynamics 365 Business Central online

Learn how to administer your Business Central environment and tenants, from joining the Cloud Solution Provider program to configuring monitoring.

Lessons

- Introduction - Get started with the Cloud Solution Provider program.
- Extend a trial for a customer.
- Access the administration center.
- Manage sandbox and production environments.
- Set up tenant notifications.
- Inspect environment telemetry and troubleshoot issues.
- Export databases.
- Enable features.
- Describe and analyze telemetry.

- Monitoring and analyzing telemetry
- Analyze performance using the In-client performance profiler.
- Work with the Performance Toolkit extension.
- Configure a BCPT suite.
- Use APIs for automation and administration.
- Check your knowledge.
- Summary

By the end of this module, you will be able to:

- Sign up for the Cloud Solution Provider program.
- Use the administration center to manage environments.
- Set up tenant notifications and inspect environment telemetry.
- Manage support requests for customers.
- Export a database.
- Enable features ahead of time.

Module 2: Create new companies in Business Central

Learn how to create and set up new companies efficiently in Business Central.

Lessons

- Introduction - Create new companies with setup data.
- Create new companies without data.
- Create new companies with setup and demo data.
- Create new companies with demo data for manufacturing scenarios.
- Create a new company by copying data from an existing company.
- Set up company information.
- Exercise - Create a company with demo data.
- Check your knowledge.
- Summary.

By the end of this module, you will be able to:

- Create new companies.
- Set up a company.
- Enter company information.

Module 3: Migrate data to Business Central

After creating a new company, you can migrate your data to Business Central.

Lessons

- Introduction - Data migration concepts.
- Use the data migration assisted setup.
- Work with data templates.
- Import data from Excel.
- Migrate data using the Copy data from company function in the configuration worksheet.
- Create journal opening balances.
- Import business data from other finance systems.
- Set up a company with configuration tools.
- Set up and sync master data across companies.
- Exercise - Create a new customer template.
- Check your knowledge.
- Summary.

By the end of this module, you will be able to:

- Perform data migration using the Data migration assisted setup wizard.
- Work with data templates.
- Import data from Excel and other finance systems.

Module 4: Migrate on-premises data to Dynamics 365 Business Central

Are you looking to move to the cloud and easily migrate to Business Central online? This module covers how you can use the built-in migration tools to migrate data to Business Central online from specific product versions.

Lessons

- Introduction
- End-to-end process of migrating data
- Run the Cloud Migration tool
- Address common questions and issues with migrations
- Describe cloud migration APIs
- Check your knowledge
- Summary

By the end of this module, you'll be able to:

- Understand the steps to migrate to Business Central online.
- Meet requirements and weigh considerations of migration.

Module 5: Manage users and implement security in Dynamics 365 Business Central

Learn how to create and set up new companies efficiently in Business Central.

Lessons

- Introduction - Add users
- Create user groups
- Implement permissions and permission sets
- Configure user access times and logging
- Understand users, profiles, and role centers
- Perform user-specific setup
- Auditing changes
- Exercise - Add a new user
- Check your knowledge
- Summary

By the end of this module, you'll be able to:

- Manage users and user groups.
- Implement and configure security.
- Setup profiles, and role centers.
- Audit changes to data.

Module 6: Set up email in Dynamics 365 Business Central

Learn how to set up accounts, compose and send email messages, attach documents, assign scenarios, send sales documents, and check the outbox and sent emails in Business Central.

Lessons

- Introduction.
- Set up email accounts.
- Compose and send an email.
- Send documents by email.
- Document sending profiles.
- Assign email scenarios.
- Send a sales document by email.
- Check your sent emails.
- Check your email outbox.
- Check your knowledge.
- Summary.

By the end of this module, you will be able to:

- Set up email accounts.
- Learn how to compose and send an email.
- Learn how to send documents by email.
- Set up document sending profiles.
- Assign email scenarios.

Module 7: Integrate Dynamics 365 Business Central with Outlook

Learn how to integrate Business Central with Outlook to send email to your users.

Lessons

- Introduction.
- Set up email logging.
- Set up Outlook integration.
- Use the Contact insights Outlook add-in.
- Creating invoices from your meeting appointments.
- Do a quick document lookup.
- Exercise - Set up and send email.
- Check your knowledge.
- Summary.

By the end of this module, you will be able to:

- Integrate Business Central with Outlook
- Use the add-ins
- Creating invoices from meeting appointments
- Do a quick document lookup

Module 8: Set up email in Dynamics 365 Business Central

Learn how to set up accounts, compose and send email messages, attach documents, assign scenarios, send sales documents, and check the outbox and sent emails in Business Central.

Lessons

- Set up email accounts.
- Compose and send an email.
- Send documents by email.
- Document sending profiles.
- Assign email scenarios.
- Send a sales document by email.
- Check your sent emails.
- Check your email outbox.
- Check your knowledge.

By the end of this module, you will be able to:

- Set up email accounts.
- Learn how to compose and send an email.
- Learn how to send documents by email.
- Set up document sending profiles.
- Assign email scenarios.

Module 9: Integrate Business Central with Outlook

Learn how to integrate Business Central with Outlook to send email to your users.

Lessons

- Set up email logging.
- Set up Outlook integration.
- Use the Contact insights Outlook add-in.
- Creating invoices from your meeting appointments
- Do a quick document lookup.
- Exercise - Set up and send email.
- Check your knowledge.

By the end of this module, you will be able to:

- Integrate Business Central with Outlook.
- Use the add-ins.
- Creating invoices from meeting appointments.
- Do a quick document lookup.

Module 10: Integrate Dynamics 365 Business Central with Teams

Need to integrate Microsoft Dynamics 365 Business Central with Teams? This module gives you an overview of what you can do as developer to customize how to display Business Central data in Teams channels and chats. Business Central offers an app that connects Microsoft Teams to your business data in Business Central. So users can quickly share details with other team members and respond faster to inquiries.

Lessons

- Introduction
- Manage, install, and use the Business Central App for Teams
- Extend Teams cards
- Create Business Central tabs for Teams
- Get relevant session and environment details for Teams integration
- Check your knowledge
- Summary

By the end of this module, you will be able to:

- Install the Business Central App for Microsoft Teams
- Look up details of customers, vendors, and other contacts using Teams
- Share Business Central records in Teams conversations
- Extend Teams cards

Module 11: Create workflows in Dynamics 365 Business Central

You can set up and use workflows to connect business-process tasks that are performed by different users. To use workflows in Business Central, you must set up and enable workflows, set up workflow users, and specify how users receive notifications.

Lessons

- Create a workflow manually.
- Create a workflow from workflow templates.
- Create a Power Automate flow.
- Set up users.
- Set up notifications.
- Set up approval workflows by using Assisted Setup.
- Check your knowledge.

By the end of this module, you will be able to:

- Create workflows manually.
- Create workflows from templates.
- Set up users.
- Set up notifications.
- Set up approvals by using Assisted Setup.
- Creating invoices from meeting appointments.

Module 12: Use approval workflows in Dynamics 365 Business Central

This module uses the purchase order approval workflow as an example to show you how to use workflow templates that are included in Microsoft Dynamics 365 Business Central to create new approval workflows.

Lessons

- Request approval of a record.
- Cancel a request for approval.
- Approve or reject a request for approval.
- Delegate a request for approval.
- Manage overdue approval requests.
- Check your knowledge.

By the end of this module, you will be able to:

- Request approval of a record.
- Cancel a request for approval.
- Approve or reject a request for approval.
- Delegate a request for approval.
- Manage overdue approval requests.

Module 13: Set up general journal templates in Dynamics 365 Business Central

With general journals, users can enter data in general ledger accounts and other accounts, such as customer, vendor, and bank accounts. This module will focus on how to set up general journal templates and batches.

Lessons

- Introduction - Set up general journal templates
- Set up general journal batches
- Use business documents with general journal templates
- Check your knowledge
- Summary

By the end of this module, you will be able to:

- Explain the purpose and organization of journal templates and journal batches.
- Create general journal templates and general journal batches.

Module 14: Create and process journal entries in Dynamics 365 Business Central

If you want to know how to use general journals, then this module can help. This module explains how to use general journals to post information into the general ledger and other accounts. You can also use the general journal to post cost allocations and other adjustments to the accounts, and then you can reverse and correct entries that are incorrect.

Lessons

- Introduction - Create journal entries
- Correct dimensions on posted entries
- Process journal entries
- Use standard journals
- Use deferrals in journals
- Correct journal entries
- Set up checking documents and journals while you work
- Exercise - Create and post a journal entry
- Check your knowledge

- Summary

By the end of this module, you will be able to:

- Create and post general journal entries.
- Use standard journals to save and retrieve general journal lines.
- Preview the posting of general journal lines.
- Reverse journal entries.

Module 15: Post periodic journal entries in Dynamics 365 Business Central

When you frequently need to enter the same journal postings, Dynamics 365 Business Central provides recurring journals so you can post journal lines on a recurring basis. Additionally, when you use recurring journals, you can post cost allocations by using allocation keys that are based on amounts or percentages.

Lessons

- Introduction to recurring journals.
- Allocate amounts.
- Set up bank export and import formats.
- Edit recurring journals in Excel.
- Exercise - Create and post a recurring journal.
- Check your knowledge.

By the end of this module, you will be able to:

- Understand how to use recurring journals.
- Use recurring journals with fixed and variable amounts.
- Record accruals by using recurring journals.

Module 16: Use general ledger allocations in Business Central

This module discusses how to allocate costs and revenues to multiple accounts. You can create fixed or variable allocation accounts to allocate amounts to general ledger accounts.

Lessons

- Introduction
- Set up allocation accounts
- Use allocation accounts in documents
- Use allocation accounts in journals
- Check your knowledge
- Summary

This module explains how to:

- Set up allocation accounts.
- Create fixed and variable allocation accounts.
- Use allocation accounts on documents and journals.

Module 17: Introduction to report components in Dynamics 365 Business Central

Do you want to know how to start creating reports for Business Central? If so, this module will explain the different components that a typical report consists of.

Lessons

- Introduction
- Report descriptions
- Report properties and triggers
- Data items and columns
- Request page
- Work with report labels
- Report layouts
- Check your knowledge
- Summary

In this module, you'll:

- Learn about the report components.
- Review the report description.
- Discover the difference between data items and columns

Module 18: Use the report design process in Dynamics 365 Business Central

Do you want to learn about the report design process for Microsoft Dynamics 365 Business Central? If so, this module will explain the different steps that are involved in creating a report.

Lessons

- Introduction
- Report design process
- Use a snippet to create a report object
- Check your knowledge
- Summary

In this module, you'll:

- Learn about the report design process.
- Use a snippet to create a report object.

Module 19: Design the data model of a report in Dynamics 365 Business Central

Do you want to learn how to build the data model for a report in Microsoft Dynamics 365 Business Central? This module will discuss the different components of a report data model.

Lessons

- Introduction
- Create report data items and their properties
- Add columns to a report dataset
- Link, order, and indent data items
- Use a query to create a report dataset
- Check your knowledge
- Summary

In this module, you'll:

- Learn about the different report components.
- Create the data items for a report.
- Add columns to the dataset of a report.
- Order, link, and indent data items.

Module 20: Add a layout to a report in Dynamics 365 Business Central

Do you want to learn how to add a layout to a report in Microsoft Dynamics 365 Business Central? In this module, you'll learn about the client report definition (RDLC) layout and Word layout formats and how to create them.

Lessons

- Introduction
- Add an RDLC layout to a report
- Add a Word layout to a report
- Use the Word add-in for report layouts
- Add an Excel layout to a report
- Exercise - Create a basic report
- Check your knowledge
- Summary

In this module, you'll:

- Discover the different report layouts.
- Create an RDLC layout for a report.
- Create a Word layout for a report.
- Create an Excel layout for a report.

Module 21: Complete the report request page in Dynamics 365 Business Central

Do you want to learn how to complete the report request page for a report in Business Central? In this module, you'll learn about the report request page and how to create it.

Lessons

- Introduction
- Design the request page
- Design the request options page
- Check your knowledge
- Summary

In this module, you'll:

- Understand the report request page
- Create a report request page

Module 22: Add reports to Tell Me and substitute a report in Dynamics 365 Business Central

Do you want to learn how to add reports to Tell Me and substitute a report in Microsoft Dynamics 365 Business Central? In this module, you'll learn how to add reports to Tell Me and how to substitute a report.

Lessons

- Introduction
- Add reports to Tell Me
- Substitute a report
- Check your knowledge
- Summary

In this module, you'll:

- Add reports to Tell Me.
- Substitute a report.

Module 23: Use report triggers, functions, and processing-only reports in Dynamics 365 Business Central

Do you want to learn how to work with report triggers and functions in Microsoft Dynamics 365 Business Central? In this module, you'll learn how to create processing-only reports and how to use the report triggers and functions.

Lessons

- Introduction
- Report trigger implementation flow
- Use report functions
- Create a processing-only report
- Adding barcodes to a report
- Exercise - Create a processing-only report
- Check your knowledge
- Summary

In this module, you'll:

- Learn about and use report triggers and functions.
- Create a processing-only report.

Module 24: Implement multilingual reports in Dynamics 365 Business Central

Do you want to learn how to make your reports multilingual in Microsoft Dynamics 365 Business Central? In this module, you'll learn how to generate a report in the language of the user or the recipient.

Lessons

- Introduction
- Create a report in the language of the user
- Create a report in the language of the recipient
- Define regional settings in reports
- Check your knowledge
- Summary

In this module, you'll:

- Create a report in the language of the user.
- Create a report in the language of the recipient.

Module 25: Work with reports in Dynamics 365 Business Central

In this module, you'll learn how to work with reports in Dynamics 365 Business Central and the difference between preview, run, email, and print.

Lessons

- Introduction
- Preview and run reports
- Set the layout used by a report
- Set up printers
- Check your knowledge
- Summary

In this module, you'll:

- Preview and run reports.
- Set up printers.

Module 26: Analyze list data using data analysis mode in Business Central

With data analysis mode in Dynamics 365 Business Central, you can analyze data directly from the page without needing to run a report or switch to another application like Excel.

Lessons

- Introduction
- Prerequisites and getting started
- Work with data analysis mode
- Date hierarchies and pivot mode
- Share data analysis
- Check your knowledge
- Summary

This module explains the following concepts:

- Data analysis mode
- Date hierarchy and pivot mode
- How to share data analysis

Module 27: Extend reports in Dynamics 365 Business Central

Do you want to learn how to extend reports in Microsoft Dynamics 365 Business Central? In this module, you'll learn how to extend reports.

Lessons

- Introduction
- Anatomy of a report extension
- Examples of report extensions
- Check your knowledge
- Summary

In this module, you'll:

- Learn about different parts of a report extension.
- Extend reports.
- View report extension examples.

Module 28: Introduction to Microsoft Power Platform and Business Central

Do you want to use Microsoft Power Platform with Business Central? This module focuses on the business value and product capabilities of Microsoft Power Platform when you use it with Business Central.

Lessons

- Introduction
- Explore data connectors
- Explore Business Central connectors
- Get started with Power Apps
- Get started with Power Automate
- Embed Microsoft Power Platform in Business Central
- Check your knowledge
- Summary

In this module, you'll:

- Identify the components and features of Microsoft Power Platform.
- Identify when to use each Microsoft Power Platform component application to create business solutions.
- Understand what Data Connectors are and how they can be used with Business Central.
- Understand how you can use Power Automate embed in Business Central.

Module 29: Create a canvas app based on Business Central data

Do you want to create a canvas app using Business Central data? This module focuses on how to create canvas app using Business Central data and how to customize the created app.

Lessons

- Introduction
- Build an app using data
- Build an app from blank
- Make basic customizations in an app
- Save, publish, and share an app
- Embed an app
- Exercise - Create the customer financial details app in Power Apps
- Check your knowledge
- Summary

In this module, you will:

- Learn how to build an app in Power Apps based on Business Central data.
- Use different technologies to perform different tasks in Power Apps.
- Create a first app from Business Central data.

Module 30: Use Power Automate with Business Central

Do you want to configure workflows in Business Central? This module will focus on how to build workflows with Power Automate based on Business Central data and how to embed them in Business Central as well.

Lessons

- Introduction
- Explore Business Central triggers in Power Automate
- Create a Power Automate flow from scratch
- Create customer, vendor and item approvals in Power Automate

- Create approvals in a general journal with Power Automate
- Create documents approvals with Power Automate
- Create Power Automate flows for different business scenarios
- Create a button or instant flow in Power Automate
- Run a Power Automate flow on a schedule
- Troubleshoot and monitor flows
- Exercise - Create a flow for sending emails when a new item is created in Power
- Automate
- Check your knowledge
- Summary

In this module, you will:

- Identify what Power Automate is and how it can be used with Business Central.
- Identify existing Business Central actions and triggers available in Power Automate.
- See how to create an independent flow in Business Central that automates business processes.
- Create a flow that runs on a schedule or to create a button flow to send a reminder.

Module 31: Use model-driven apps and Dataverse with Business Central

This module focuses on the building blocks of Dataverse and model-driven apps as well as using them together with Business Central.

Lessons

- Introduction
- Identify entities and fields in Microsoft Dataverse
- Create an entity and connection to import data from Business Central
- Get started with model-driven apps
- Explore the user interface and logic in model-driven apps
- Create a model-driven app based on Business Central data
- Exercise - Create an entity in Microsoft Dataverse
- Check your knowledge
- Summary

In this module, you will:

- Learn about environments, entities, fields, and relationships in Dataverse.
- Discover the value and key features of Dataverse.
- Create some simple model-driven apps and understand the value and key features.
- Use a model-driven app together with Business Central.

Module 32: Create a custom connector to extend Microsoft Power Platform functionalities with Business Central

Do you need to create custom connectors for Business Central? Use this module to find out the details of creating custom connectors.

Lessons

- Introduction
- Create a custom connector for Business Central
- Use Business Central custom connector from Power Apps
- Use a Business Central custom connector in Power Automate
- Share Business Central custom connector across the organization
- Exercise - Create a testing process
- Check your knowledge
- Summary

In this module, you will:

- Learn about the concept of data connectors in Microsoft Power Platform.
- Create custom connectors for Business Central.
- Use and share custom connectors for Power Apps and Power Automate.

Module 33: Introduction to integrating Dataverse with Dynamics 365 Business Central

If you want to use Dataverse with Dynamics 365 Business Central, this module introduces the basic concepts to help you get started.

Lessons

- Introduction
- Create an environment
- Start with Dataverse
- Extend Dataverse
- Base Integration Solution
- Exercise
- Check your knowledge
- Summary

In this module, you will:

- Learn basic information about Dataverse.
- Learn how to create an environment
- Learn how you can extend Dataverse.
- Make a difference in standard and custom tables.
- Learn about publishers.
- Identify the basic set of standard fields in Dataverse.
- Complete the connection-assisted setup.

Module 34: Get started with the Shopify connector in Dynamics 365 Business Central

Explore the main features of the Shopify connector in Dynamics 365 Business Central. With the Shopify connector, you can import Shopify sales orders. To get started, it's important to become familiar with the main features of Shopify and how to create a Shopify account.

Lessons

- Introduction
- Create a Shopify account
- Activate test payments
- Install the Shopify app in Business Central
- Prerequisites to proceed with the learning path
- Check your knowledge
- Summary

In this module, you'll:

- Learn about the Shopify features.
- Create a Shopify account.
- Install the Shopify app in Business Central.

Module 35: Set up cash management in Dynamics 365 Business Central

Cash management in Dynamics 365 Business Central is used to manage a company's bank accounts. Before you can start processing bank transactions, you should first set up cash management by creating bank accounts and journals.

Lessons

- Introduction - Create bank accounts.
- Describe data exchange definitions.
- Configure payment methods.
- Set up customers and vendors in cash management.
- Relationship between customer and customer ledger entries.
- Relationship between vendor and vendor ledger entries.
- Set up customer bank accounts.
- Set up vendor bank accounts.
- Set up payment registration.
- Enable customer payments through payment services.
- Check your knowledge.

By the end of this module, you will be able to:

- Create bank accounts in Business Central.
- Create customer and vendor bank accounts.
- Enter receivables information for customers.
- Enter payables information for vendors.

Module 36: Set up the chart of accounts in Dynamics 365 Business Central

Do you want to know how to set up the chart of accounts in Business Central? This module will focus on managing the chart of accounts. The Chart of Accounts list provides quick access to G/L accounts and balances, and the budgets feature provides a comparison between actual amounts and budgeted amounts by using a combination of G/L accounts, periods, and dimensions.

Lessons

- Use the chart of accounts.
- Set up account categories and subcategories.
- Maintain the chart of accounts.
- Review general ledger entries.
- Check your knowledge.

By the end of this module, you will be able to:

- Use the chart of accounts.
- Create new G/L accounts.
- Assign account categories.
- Set up and assign account subcategories.
- Set up a review policy for general ledger entries.

Module 37: Work with pages in Dynamics 365 Business Central

Do you want to create new pages in Business Central that have the same appearance as existing pages? This module focuses on how to create new pages. It will also show you how to enable users to search for specific pages.

Lessons

- Introduction
- Get started with pages
- Identify different page types
- Configure the different page properties
- Build a page layout by using controls
- Link pages with page parts
- Use snippets in Visual Studio Code to create pages
- Set different control properties
- Use the built-in rich text editor to enter data
- Scan barcodes in the mobile app
- Enable users to search for a page
- Define actions on a page and its properties
- Add existing hidden fields to pages
- Exercise - Create a Card page
- Exercise - Create a List page
- Check your knowledge
- Summary

In this module, you will:

- Identify the different page types.
- Discover the different page properties.
- Learn how to build the layout of new pages.
- Link pages with page parts.
- Use snippets to create pages in Visual Studio Code.
- Enable end users to search for a page.
- Define actions on a page and set its properties.

Module 38: Create purchase documents in Dynamics 365 Business Central

Do you need to create purchase documents like blanket orders, orders, and invoices? This module will provide basic information that you should know to create these purchase documents in Business Central.

Lessons

- Create a blanket order.
- Manage purchase orders.
- Describe responsibility centers.
- Exercise - Create and process a purchase order and review the posted documents.
- Check your knowledge.

By the end of this module, you will be able to:

- Create purchase quotes and convert them to orders.
- Create blanket orders and convert them to orders.

Module 39: Create sales documents in Dynamics 365 Business Central

Do you need to create sales documents like quotes, orders and invoices? This module will provide basic information you should know to create these documents in Dynamics 365 Business Central.

Lessons

Introduction – Create a sales quote

- Create a blanket order.
- Manage sales orders.
- Configure recurring sales lines.
- Offer similar products to your customers.
- Map multiple references to an item.
- Sell catalogue items.
- Create purchasing codes.
- Process drop shipments.
- Process special orders.
- Exercise - Create a sales quote and convert it to an invoice, create a drop shipment and sell catalogue items.
- Check your knowledge.

By the end of this module, you will be able to:

- Create sales quotes and convert them to orders or invoices.
- Create blanket orders and convert them to orders.
- Understand how to fulfil sales orders for products not kept in stock.
- Create drop shipment orders.

Module 40: Perform a bank reconciliation in Dynamics 365 Business Central

Do you want to find out how to reconcile bank accounts in Dynamics 365 Business Central? If so, then this module is for you. The bank reconciliation feature is used to check the bank ledger entries and the balance on the accounts against the statement from the bank.

Lessons

Introduction to and completing the reconciliation process

Post the bank account reconciliation

Import a bank statement

Reconcile bank accounts with Copilot

Undo a bank account reconciliation

Check your knowledge

Summary

By the end of this module, you will be able to:

- Populate bank reconciliation lines.
- Import bank statements.
- Match reconciliation lines.
- Post the bank account reconciliation.

Module 41: Set up payment reconciliation journals in Dynamics 365 Business Central

Do you want to know how to set up payment reconciliation journals in Dynamics 365 Business Central? This module will focus on how to set up payment reconciliation journals. It also explains how to modify payment application rules to automatically apply payment lines.

Lessons

- Introduction to setting up payment for reconciliation journals.
- Set up number series.
- Set up automatic payment application and payment application rules.
- Set up bank statement file import.
- Check your knowledge.
- Summary.

By the end of this module, you will be able to:

- Set up bank accounts for payment reconciliation journals.
- Understand the payment application rules.
- Modify the payment application rules.

Module 42: Use the payment reconciliation journal in Dynamics 365 Business Central

Do you want to discover how to use payment reconciliation journals in

Business Central? If so, then follow this module, which shows how to use the payment reconciliation journal to import bank statements and automatically match payments. This module also explains how you can post and reconcile the payment lines.

Lessons

- Introduction - Import bank statements.
- Reconcile payments by using automatic applications.
- Map text on recurring payments.
- Post and reconcile the payment reconciliation.
- Check your knowledge.

By the end of this module, you will be able to:

- Import bank statements.
- Review the match confidence of each payment reconciliation journal line.
- Modify automatic applications.
- Map text to a G/L account.
- Post and reconcile the payment reconciliation journal.

Module 43: Set up general ledger configuration options in Dynamics 365 Business Central

The General Ledger Setup page is where you specify a default setting for the general ledger and other application areas. General ledger setup must be completed for each company that is set up in Business Central.

Lessons

- Set up the General FastTab.
- Set up the Dimensions FastTab.
- Set up the Background Posting FastTab.
- Set up the Reporting FastTab.
- Set up the Application FastTab.
- Enable data check.
- Check your knowledge.

By the end of this module, you will be able to:

- Set up general features such as date range and currency settings.
- Create global and shortcut dimensions.
- Set up background posting and reporting.
- Establish rounding and tolerance in the application.

Module 44: Set up number series and trail codes in Dynamics 365 Business Central

Do you need to set up number series for documents, journals, and other records? This module explains how to set up number series and how to number documents, journals, and master data. Additionally, it shows you how to create and use source codes and reason codes in Dynamics 365 Business Central.

Lessons

- Introduction to setting up number series
- Assign number series and number series relationships.
- Set up trail codes.
- Exercise - Create a number series.
- Check your knowledge.

By the end of this module, you will be able to:

- Learn about the purpose of number series.
- Set up number series.
- Create number series relations.
- Set up source codes and reason codes.

Module 45: Set up posting groups in Dynamics 365 Business Central

Do you want to know what posting groups do and how they are used in Business Central? This module will explain what posting groups are and what they are used for in Dynamics 365 Business Central. Additionally, this module focuses on showing you how to set up posting groups to create links between accounts in the different application areas to the G/L accounts in the General Ledger application area.

Lessons

- Introduction - Set up and assign specific posting groups
- Allow multiple posting groups for customers and vendors
- Set up and assign inventory posting groups
- General posting groups
- Configure the general posting setup
- Exercise - Set up and assign a customer posting group
- Check your knowledge
- Summary

By the end of this module, you will be able to:

- Learn about the purpose of posting groups in Business Central.
- Set up posting groups to link receivables, payables, bank accounts, and inventory accounts.
- Map sales and purchase G/L accounts in the general posting setup.

Module 46: Set up dimensions in Dynamics 365 Business Central

If you are responsible for financial reporting, then follow along with this module to learn how to set up dimensions. Dimensions are used to group posted entries for reporting purposes. Dimensions can be used throughout Business Central on entries in journals, documents, and budgets. Additionally, dimensions offer more extensive analysis and reporting functionalities.

Lessons

- Introduction – Set up dimensions and dimension values.
- Manually enter dimensions in a sales order.
- Set up global and shortcut dimensions.
- Set up default dimensions.
- Set up default dimensions for account types.
- Set up default dimension priorities.
- Set up dimension combinations.
- Exercise - Set up a dimension with dimension values.
- Check your knowledge.

By the end of this module, you will be able to:

- Set up dimensions and dimension values.
- Enter dimensions manually in sales and purchase documents.
- Set up global and shortcut dimensions.
- Assign default dimensions to accounts.
- Prioritize default dimensions of certain account types.
- Block dimension combinations.

Module 47: Work with Trade master data in Microsoft Dynamics 365 Business Central

Learn about the master data that is important when you work with Trade in Business Central. This module also provides an overview of items, customers, and vendors.

Lessons

- Introduction.
- Set up units of measure.
- Assign characteristics to an item.
- Set up item categories.
- Manage customers.
- Merge customer accounts.
- Manage vendors.
- Merge vendor accounts.
- Manage resources.
- Configure salespeople and purchasers.
- Use templates to create master data.
- Exercise - Create a new item and a new location and link them to a vendor.
- Check your knowledge.

By the end of this module, you will be able to:

- Create an item in Business Central.
- Create a customer in Business Central.
- Create a vendor in Business Central.
- Use templates to create key records.

Module 48: Set up Trade in Microsoft Dynamics 365 Business Central

Lessons

- Introduction
- Purchases and payables setup
- Set up locations
- Inventory setup
- Check your knowledge
- Summary

In this module, you'll:

- Set up sales and receivables.
- Set up purchases and payables.
- Assign number series for sales and purchase documents.
- Create locations.
- Make locations mandatory by using inventory setup.

Module 49: Enter payments in the cash receipt journal and the payment journal in Dynamics 365 Business Central

Do you want to know how to manually process customer payments in Business Central? If so, then this module is for you. This module will focus on how to enter payments manually in the cash receipt journal and payment journal, and it will also explain how to apply payments.

Lessons

- Introduction - Enter payments
- Apply payments
- Unapply customer and vendor ledger entries
- Process payment registrations
- Set up payment tolerances
- Set up G/L accounts for payment tolerances
- Process payment tolerances when posting payments
- Print customer statements
- Exercise - Register a customer payment
- Check your knowledge
- Summary

By the end of this module, you'll be able to:

- Process a customer payment manually.
- Enter a line in the payment journal manually.
- Apply a payment to customer and vendor ledger entries.
- Process a partial payment.
- Unapply entries to customer and vendor ledger entries.
- Process payment differences automatically.

Module 50: Suggest vendor payments in Dynamics 365 Business Central

Do you need to prepare vendor payments? If so, follow along with this module to discover how to process open vendor ledger entries and create payment suggestions based on criteria such as due dates and vendor priorities. This module also describes the available options to pay vendors.

Lessons

- Introduction - Suggest vendor payments.
- Suggest payments by using vendor priority and available amounts.
- Pay invoices on their due date.
- Exercise - Suggest vendor payments for a single vendor.
- Check your knowledge.

By the end of this module, you will be able to:

- Use the Suggest Vendor Payments function in Business Central.
- Create payment suggestions for one or multiple vendors.
- Suggest payments by using vendor priorities and available amounts.
- Pay invoices on their due dates.

Module 51: Use checks to pay vendors in Dynamics 365 Business Central

Do you want to know how to pay vendors by using checks? This module focuses on how to enter payment lines for manual checks, how to print computer checks, and how to financially void a check.

Lessons

- Introduction - Enter and post payables checks.
- Print and post payables checks.
- Void a check.
- Check your knowledge.
- Summary.

By the end of this module, you will be able to:

- Print and post payables checks.
- Void a check financially.
- Void and reprint computer checks.

Module 52: Create items in Dynamics 365 Business Central

Do you want to know how to create items in Business Central? This module explains how to set up inventory items, and items of the type service and non-inventory items.

Lessons

- Introduction
- Create a new inventory item
- Manage items, item categories, item attributes, and units of measure
- Create items with variants
- Create stock keeping units
- Set up item templates
- Create a new service item
- Create a new non-inventory item
- Check your knowledge
- Summary

This module explains how to:

- Understand the different item types.
- Create a new item.
- Copy an item.
- Enter the unit cost and unit price for an item.
- Set up an item template

Module 53: Adjust inventory in Dynamics 365 Business Central

Do you want to learn how to adjust inventory and count items? This module explains how you can use the item journals to adjust, count, and reclassify items.

Lessons

- Introduction
- Adjust inventory with the item journal
- Renumber document numbers and preview posting
- Adjust inventory from the item list or item card
- Adjust inventory with inventory documents
- Count inventory with the physical inventory journal
- Count inventory with physical inventory orders
- Reclassify items with the item reclassification journal
- Exercise - Count items
- Check your knowledge
- Summary

In this module, you will:

- Adjust an item's stock.
- Post negative and positive adjustments from the item journal.
- Prepare the physical inventory count.
- Adjust inventory based on the physical count.
- Reclassify items between locations and dimensions.

Module 54: Get started with warehouse management in Dynamics 365 Business Central

Do you want to discover the options that you have to use warehouse management in Microsoft Dynamics 365 Business Central? Take this module to discover how companies could benefit from using warehouse management in Business Central.

Lessons

- Introduction
- Reasons to use warehouse management in Business Central
- Set up a warehouse as a location
- Set up a demo company with complete sample data
- Configure a Warehouse Management System location
- Create warehouse employees
- Exercise - Create a location for the north warehouse
- Check your knowledge
- Summary

In this module, you will:

- Learn about warehouse management in Business Central.
- Discover how warehouse management can structure sales and purchase processes.
- Get an overview of the different options in Business Central for setting up warehouse management.
- Set up a warehouse as a location.
- Learn how to configure the warehouse layout in Business Central.
- Create warehouse employees in Business Central.

Module 55: Set up zones and bins in Dynamics 365 Business Central

Do you want to know how to set up zones and bins in Microsoft Dynamics 365 Business Central? This module explains how to set up zones with default warehouse parameters and use them to set up bins.

Lessons

- Introduction
- Set up a zone
- Set up a bin
- Create bin content
- Exercise - Create zones and bins for the NORTH warehouse
- Check your knowledge
- Summary

In this module, you'll:

- Set up new zones and bins.
- Assign items to a bin.
- Use rankings to prioritize bins.
- Assign conditions to a bin.
- Assign special equipment to a bin.
- Set capacities for a bin and items.

Module 56: Create new bins in Dynamics 365 Business Central

Do you want to know how you can create new bins in Business Central? This module explores the bin creation worksheets to create multiple bins at once.

Lessons

- Introduction
- Set up bin templates
- Create new bins with the bin creation worksheet
- Check your knowledge
- Summary

In this module, you'll:

- Set up templates to create multiple bins at once
- Create multiple bins at once

Module 57: Set up put-away templates in Dynamics 365 Business Central

Do you want to learn how to set up put-away rules in Business Central? This module discusses how to create put-away templates that contain the rules that the program applies when you're putting away items.

Lessons

- Introduction
- Create a put-away template
- Set up the default put-away template
- Assign a put-away template to an item
- Exercise - Set up a put-away template for the north warehouse
- Check your knowledge
- Summary

In this module, you'll:

- Discover which rules can be used when you're putting away items.
- Set up put-away requirements for fixed and floating bins.
- Set up multiple put-away templates.
- Assign the default put-away template.
- Assign put-away templates to items.

Module 58: Configure bins on the location card in Dynamics 365 Business Central

Do you need to set up default bins for your warehouse processes? This module shows how to configure bins on the location card.

Lessons

- Introduction
- Set up default bins for a location
- Configure bin policies for a location
- Check your knowledge
- Summary

In this module, you'll:

- Set up default bins for warehouse processes.
- Configure breakbulk options for a location.
- Apply pick according to the First-Expired-First-Out (FEFO) method.

Module 59: Prepare warehouse management for item tracking in Dynamics 365 Business Central

Do you want to know how to use serial numbers and lot numbers in the warehouse? This module explains how to enable item tracking in the warehouse.

Lessons

- Introduction
- Set up an item tracking code for the warehouse
- Assign an item tracking code to an item
- Check your knowledge
- Summary

In this module, you'll:

- Enable item tracking in the warehouse.
- Assign item tracking codes to items.

Module 60: Ship and invoice items in Dynamics 365 Business Central

Do you want to know how to ship items and invoice sales documents in Business Central? This module will focus on how to ship items to customers, and how to invoice items and services to customers.

Lessons

- Introduction – Ship items to customers.
- Reverse a shipment.
- Invoice customers.
- Review posted sales documents.
- Reverse or correct a posted sales invoice.
- Process prepayment invoices for sales and purchases.
- Check your knowledge.
- Summary.

By the end of this module, you will be able to:

- Ship items to customers.
- Deliver partial shipments.
- Invoice one shipment.
- Invoice multiple shipments.
- Review posted sales documents.

Module 61: Manage sales price lists in Dynamics 365 Business Central

Set up flexible pricing strategies to help attract and maintain customers. You can set up individual price agreements with large companies, set standard default prices, apply pricing agreements to groups of customers, or price items to reduce unwanted inventory and support marketing campaigns.

Lessons

- Introduction

- Set up price lists
- Set up a sales price for one customer
- Set up a sales price list for customer groups
- Use special prices in sales orders
- Copy sales prices
- Check your knowledge
- Summary

This module explains how to:

- Set up price lists.
- Target customers or customer groups.
- Use special prices in sales orders.

Module 62: Manage sales prices in Dynamics 365 Business Central

If you're responsible for managing item sales prices, complete this module about how to set up and maintain sales prices for items. It provides an overview of the conditions that can be uses for special prices and how to target individual customers or customer groups. It also explains how to use special prices in sales quotes and sales orders.

Lessons

- Introduction – Set up sales prices for a customer.
- Set up sales prices for customer groups.
- Use special prices in sales orders.
- Create new sales prices.
- Bulk edit the unit price on the item card.
- Exercise - Create a special price for a customer.
- Check your knowledge.
- Summary.

By the end of this module, you will be able to:

- Create a special price for one customer.
- Create a special price for customer groups.
- Update prices in sales orders.
- Create new sales prices for future periods.
- Create new sales prices for customer groups.
- Bulk edit the unit price on the item card.

Module 63: Set up discounts for your customers in Dynamics 365 Business Central

Do you offer sales discounts? This module focuses on how to set up and use sales discounts in Business Central.

Lessons

- Introduction – Set up line discounts.
- Use line discounts when selling items to customers.
- Set up invoice discounts.
- Use invoice discounts when selling items to customers.
- Exercise - set up invoice discounts.
- Check your knowledge.

By the end of this module, you will be able to:

- Create an item discount for one customer.
- Create an item discount for customer groups.
- Create discounts for item groups.
- Get an overview of available discounts when selling items.
- Create an invoice discount for a customer.
- Use invoice discounts in sales documents.

Module 64: Promising sales order delivery in Dynamics 365 Business Central

Do you want to calculate item delivery dates? This module will focus on sales order promising. It explains the date fields on sales orders and the relationships between them, with the primary objective to calculate item delivery dates.

Lessons

- Introduction - Sales order promising key concepts.
- Set up order promising.
- Promising sales order delivery.
- Check your knowledge.
- Summary.

By the end of this module, you will be able to:

- Understand the key concepts of order promising in Business Central.
- Set up order promising in Business Central.
- Use the promising sales order delivery functions.
- Use the Capable-to-Promise functions to replenish unavailable items.

Module 65: User interface essentials in Dynamics 365 Business Central

Understanding the user interface is essential to the efficient use of Business Central. This module shows you the components and possibilities of the Business Central interface.

Lessons

- Introduction to the user interface - The app bar
- App launcher
- Business Central main pages
- Search for Page or the Tell Me icon
- Search for a record in your data
- My settings
- Get help
- Chat with Copilot
- Tour Business Central
- Different types of pages in the user interface
- Use the Role Explorer
- More user interface features
- Exercise - Assign another role center, use the search for page icon, and find and use keyboard shortcuts
- Check your knowledge
- Summary

This module explains how to:

- Understand, activate, and work with role center pages.
- Understand and work with list, card, and document pages.
- Use the app menu and app bar.
- Find help on topics within the application.

Module 66: Personalize the Microsoft Dynamics 365 Business Central user interface

The user interface for Business Central can be optimized for personal use. This module explains and demonstrates the personalization options that are available to users.

Lessons

- Introduction - Personalize the Business Central user interface.
- Personalize the Role Center.
- Personalize list and card pages.
- Personalize document pages and add fields.
- Exercise – Personalize the customer list and clear personalization.
- Check your knowledge.
- Summary.

By the end of this module, you will be able to:

- Change the theme for your organization.
- Change user role centers.
- Personalize list and card pages.

Module 67: Use alternative interfaces for Dynamics 365 Business Central

The modern user interface experience for Business Central isn't limited to the web client. Business Central comes with smartphone, tablet, and Outlook interfaces.

Lessons

- Introduction
- Explore the user interface on your smartphone and tablet.
- Use the Outlook interface for Business Central.
- Use Microsoft Teams to share business data.

- Exercise - Use Outlook as your Business Central inbox.
- Check your knowledge.
- Summary.

By the end of this module, you will be able to:

- Install and use Business Central on a smartphone or tablet.
- Configure and use Microsoft Outlook as an interface for Business Central.

Module 68: Change how documents look in Business Central

Find out how to customize document layouts and reports in Business Central to follow your company's guidelines and preferences.

Lessons

- Overview of report and document layouts
- Create and modify a custom report or document layout
- Change which layout is currently used on a report
- Define document layouts for customers and vendors
- Implement report selections
- Manage saved settings for reports
- Set up printers
- Exercise - Change the layout currently used on a report
- Check your knowledge
- Summary

By the end of this module, you will be able to:

- Manage report and document layouts.
- Create and modify report or document layouts.
- Implement report selections and manage saved settings for reports.

Module 69: Configure Business Central for Excel and Power BI

Make Business Central data available for easy reporting with Excel and intelligent analysis with Power BI.

Lessons

- Create web services to link Power BI and Business Central
- Add Business Central as a data source in Power BI
- Create list data Power BI reports to display in Business Central
- Configure Business Central apps in Power BI
- Work with business data in Excel
- Analyze, group, and pivot data on list pages using data analysis mode
- Exercise - Create a Business Central web service to use as a Power BI data source
- Check your knowledge
- Summary

By the end of this module, students are able to:

- Create Business Central web services that can be used as data sources in Power BI
- View data in Power BI reports in Business Central
- Enable business data for Power BI
- Export business data to Excel

Module 70: Explore and modify information in Business Central

You'll work with different types of data in Business Central. Each type of data has its own possibilities and restrictions. This module shows you all the different types of data and fields and how to use them. It will also show you how you can change and add data.

Lessons

- Introduction - Explore the different types of fields
- Work with date fields
- Change existing data using keyboard shortcuts and Quick Entry
- Add new and delete data
- Change existing data by using Excel
- Configure cloud storage in OneDrive
- Exercise - Use mathematical expressions and date formula in a sales quote
- Check your knowledge
- Summary

By the end of this module, students will be able to:

- Work with number fields
- Work with the date fields
- Make advantage of date formulas
- Make use of calculated fields
- Add, change and delete data in Business Central
- Change existing data by using Excel
- Use keyboard shortcuts

Module 71: Search, filter, sort, and select data in Business Central

Searching for data is a frequent action in a business solution. Finding your data is crucial to the user experience. Understanding how to search makes all the difference. This module explains how to find your data efficiently.

Lessons

- Introduction - Sort and select data
- Search data
- Filter data
- Use data analysis mode to query and analyze data
- Use the Inspect Pages and Data feature
- Exercise - Use filter criteria and filter the item list and open in Excel
- Check your knowledge
- Summary

By the end of this module, you'll be able to:

- Find data efficiently by using search functionality.
- Learn how to filter data.
- Use data analysis mode to query data.
- Make use of the sort function.

Module 72: Master, supplemental and personal data in Business Central

Business Central is a modern business platform that handles core business processes like sales, purchases, stock, and finance. All these core domains include master and supplemental data. This module explores and lists the most important and frequently used data and describes how to handle personal data.

Lessons

- Introduction - Explore contact master data
- Review customer master data
- Explore vendor master data
- Get to know the item master data
- Explore general ledger accounts
- Deleting master data
- Overview of supplemental data
- How to handle personal data
- Exercise - Block contacts for privacy and try to register an opportunity for a contact blocked for privacy
- Check your knowledge
- Summary

By the end of this module, you'll be able to:

- Understand which information is stored and in which way for master and supplemental data
- Understand if, how, and with what consequences master and supplemental data can be deleted
- Understand how to handle personal data

Module 73: Receive and invoice items in Dynamics 365 Business Central

Do you want to know how to receive and invoice purchase documents in Business Central? This module will focus on how to receive items from vendors and how to process purchase invoices.

Lessons

- Introduction - Receive items
- Receive more items than ordered with over-receipt codes
- Reverse a receipt
- Process vendor invoices
- Review posted purchase documents
- Reverse or correct a posted purchase invoice
- Check your knowledge
- Summary

By the end of this module, you will be able to:

- Receive items from vendors.
- Post partial receipts.
- Post a purchase invoice for one receipt.
- Post a purchase invoice for multiple receipts.
- Review posted purchase documents.

Module 74: Set up purchase prices and discounts in Dynamics 365 Business Central

Do you need to set up item purchase prices and item discounts? If so, then follow along with this module, which will show you how. Additionally, this module provides an overview of the conditions that can be used for special prices. You will also learn how to set up and use purchase discounts.

Lessons

- Introduction – Set up purchase prices.
- Use special prices in purchase orders.
- Set up line discounts.
- Set up invoice discounts.
- Check your knowledge.
- Summary

By the end of this module, you will be able to:

- Create a special price for one vendor.
- Know the available sales prices when you are purchasing items.
- Create an item discount for one vendor.
- Know the available discounts when you are purchasing items.
- Create an invoice discount for a vendor.
- Use invoice discounts in purchase documents.

Module 75: Post purchase item charges in Dynamics 365 Business Central

Do you want to know how to process additional direct item costs, such as freight, in Business Central? This module shows how to process item charges in Business Central and how these charges affect the direct unit cost of an item.

Lessons

- Introduction – set up item charges.
- Process item charges in a purchase order.
- Process item charges in a purchase invoice.
- Analyze the direct unit cost of an item.
- Check your knowledge.

By the end of this module, you will be able to:

- Set up item charges.
- Process item charges in a purchase order and purchase invoice.
- Assign item charges to multiple items.
- Allocate item charges based on volume and weight.
- Analyze the direct unit cost of an item.

Module 76: Estimate purchase order receipt dates in Dynamics 365 Business Central

Do you want to estimate purchase order receipt dates? This module provides an overview of the date fields on purchase orders and explains the relationships between them.

Lessons

Introduction – Set up order promising.

- Estimate purchase order receipts.
- Check your knowledge.
- Summary.

By the end of this module, you will be able to:

- Set up lead times for vendors and items.
- Estimate purchase order receipts.

Module 77: Set up returns management in Dynamics 365 Business Central

Do you need to handle sales and purchase returns? In this module, learn how to set up returns management in Dynamics 365 Business Central.

Lessons

- Introduction - Set up sales return order management
- Set up purchase return order management
- Return reasons
- Check your knowledge
- Summary

By the end of this module, you'll be able to:

- Understand the return-related setup in the sales and purchase application areas
- Make exact cost reversing mandatory
- Create return reasons
- Assign return locations

Module 78: Manage customer returns in Dynamics 365 Business Central

Do you need to learn how Business Central handles sales returns? Learn how to enter return agreements and process and post return documents. You will also learn about return orders, and how to enter replacement items on a sales return order.

Lessons

- Introduction - Replace wrong items.
- Return defective items to vendors.
- Exercise - Return items in Dynamics 365 Business Central.
- Check your knowledge.
- Summary.

By the end of this module, you will be able to:

- Understand how return orders can be used to enter return-related tasks.
- Enter replacement items in a sales return order.
- Charge restock fees to customers.
- Return defective items to vendors.
- Post sales return documents and review posted entries.

Module 79: Manage returns to vendors in Dynamics 365 Business Central

Do you need to return items to a vendor? This module focuses on how to process returns to vendors.

Lessons

- Introduction - Register a compensation agreement with a vendor.
- Apply exact cost reversing.
- Check your knowledge.
- Summary.

By the end of this module, you will be able to:

- Understand how return orders can be used to enter return-related tasks.
- Return defective items to vendors.
- Post purchase return documents and review posted entries.

Module 80: Set up assembly management in Dynamics 365 Business Central

Do you assemble items? This module will focus on how to set up assembly management in Business Central and how to prepare warehouses in Business Central for assembling items.

Lessons

- Introduction - Assembly setup
- Set up warehouses for assembly

- Check your knowledge
- Summary

By the end of this module, you'll be able to:

- Assign an assembly location
- Assign assembly bins

Module 81: Set up assembly items in Dynamics 365 Business Central

Do you want to know how to set up assembly items in Business Central? This module provides information to set up assembly items. It explains how to create an assembly bill of materials and how to assign the assembly policy.

Lessons

- Introduction - Create a new assembly item
- Set up an assembly bill of material
- Exercise - Create and assemble a new assembly item
- Check your knowledge
- Summary

By the end of this module, students are able to:

- Create assembly items
- Set up assembly bill of materials
- Understand the assembly policy options on the item card

Module 82: Assemble to order in Dynamics 365 Business Central

Do you need to assemble items for orders? This module will focus on the assemble-to-order flows. It explains how to create and process assembly orders for sold items that are not kept in inventory. It demonstrates how to customize assembly orders based on customers' demand and how to check the availability of the assembly components.

Lessons

- Introduction - Create an assemble-to-order sales order
- Sell inventory items in assemble-to-order flows
- Assembly quotes
- Check your knowledge
- Summary

By the end of this module, you'll be able to:

- Understand when and why to use the Assemble-to-Order assembly policy
- Create an assemble-to-order sales order
- Customize linked assembly order lines
- Check the availability of assembly components
- Calculate the assemble-to-order cost and price
- Ship assembly items
- Post assemble-to-order sales orders

Module 83: Assemble to stock in Dynamics 365 Business Central

Assembly items that typically are not customizable and that companies want to keep in stock are set up with the Assemble-to-Stock assembly policy. This module explains how to create assembly orders manually and how to replenish assembly items by calculating a plan.

Lessons

- Introduction - Create an assemble-to-stock assembly order
- Replenish assembly items from the planning worksheet
- Check your knowledge
- Summary

By the end of this module, students are able to:

- Understand when and why to use the Assemble-to-Stock assembly policy
- Create an assembly order manually
- Post an assembly order
- Check assembly consumption and output
- Replenish assembly items from the planning worksheet

Module 84: Assemble for a project in Dynamics 365 Business Central

This module discusses assembling for a project by using Dynamics 365 Business Central. You can use the built-in assembly processes to help you assemble directly for use in a project.

Lessons

- Introduction
- Plan assembly items on projects
- Assemble items on projects
- Explode a BOM on project planning lines
- Check your knowledge
- Summary

This module explains the following concepts:

- Project assembly item planning
- Project item assembly
- Project planning line BOM exploding

ASSOCIATED CERTIFICATIONS & EXAM

This course will prepare delegates to write the Microsoft MB-800: Microsoft Dynamics 365 Business Central Functional Consultant exam.