Advanced Account Schedules Workshop

Take your knowledge about Account Schedules in Microsoft Dynamics 365 Business Central / NAV to the next level in this active hands-on workshop. Bring your trial balance and recent financials with you to class so we can dig in and show you how to map what you have to your balance sheet, income statement, and statement of cash flows, and then design and set up your financial statements in Account Schedules. We'll solve the mystery of how to layer in your budgets and dimensions to those reports and building your Excel shell to easily produce your financial statements each month by only refreshing the numbers. You'll learn too how to maintain your setups when changes happen. We round out this powerful class with several insights on how to make your setups truly dynamic to grow with your business, such as using RapidStart to populate account schedules to multiple companies. If you've never been able to set aside the time to finally build your financial statements, this class will provided the dedicated time and guidance you need check this off your list.

Class topics

- Building a Suite of Commonly Used Column Layouts
- Incorporating Budgets and Dimensions
- Creating an Excel Shell for Report Production
- Consolidations Using Account Schedules
- Using RapidStart for Account Schedules
- Setting up KPI Web Services
- Analysis Reports and Analysis by Dimensions

Who Should Attend?
CFOs, Controllers, and accountants seeking to truly unpack the power of Account Schedules and simplify their financial reporting ongoing.

Learning Objectives:
At the end of this class, participants will be able to:

- Create monthly financials with Account Schedules
- Set up automated processes for refreshing Account Schedule-based financials
- Use Account Schedules for consolidations

Field of Study: Accounting

Program Level: Advanced

Prerequisites: Financial Reporting with Account Schedules

Advanced Preparation: Each student will receive via email connection instructions to their individual virtual classroom link and hands-on practice environment shortly before class. Connections to both resources should be tested before class. We recommend using a second monitor while attending class.

Delivery Method: Group Internet-based

CPE Credits: By participating in this class, you are eligible to earn up to 12 CPE credits which will be distributed following class completion. In order to be awarded the full credit hours, you must notify your instructor of your intention to request credit before the start of the first class. To receive CPE credit, you must be present and actively engaged, which will be verified using polling questions and other means. You will not receive CPE credit for any portion of the class that you do not appear fully engaged.

Version: This class is taught in Microsoft Dynamics 365 Business Central.

Learning environment: As experienced trainers of adult learners, we understand how to make training "stick". We use proven practices to make sure you retain what you learn and are fully equipped to immediately apply what you discovered in class. Each day, you will spend more than 50% of your time doing hands-on exercises in our simulated learning environment.

Refund and Cancellation Policy: Please refer to our Refund and Cancellation policy here.