Financial Setups

For those looking for the essential primer of what to set up in your new Business Central system and how, or those that want to check if their original setup is correct and what should change as your business has grown, this is invaluable half-day walk-through. We'll cover the essential elements of financial setup, review of key setups for the general ledger, sales & receivables, and purchase and payables, touch on the setup of supporting areas like accounting periods, payment terms, journal batches, and number series, and highlight your options for using Banking and processing Sales Tax.

Class topics
- Master Data
- Master Setups (General Ledger, Purchasing and Payables, Sales and Receivables, Inventory)
- Banking Setup
- Sales Tax Setup

Who Should Attend?
Any member of the Finance/Accounting or IT teams seeking to set up their new system correctly or check their existing configuration and understand the reasons behind how transactions are processed.

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

- Identify the key categories and elements of overall financial setup
- Explain the setup options available and the impacts of those options
- Identify the common setup choices
- For existing users, identify key setup items to change and the steps for executing

Field of Study: Accounting

Program Level: Basic

Prerequisites: None

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 4 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.