

Master Records and Data Cleanup

Have you noticed some odd postings or data in your system related to Customers, Vendors or Items? Are you concerned that bad data is causing problems with postings? Do you have a process to review these records for inactivity or inaccuracy? Let us help you understand what's lurking beneath the surface of your Microsoft Dynamics 365 Business Central / NAV system, how to find suspect transactions and data, and map out a plan for cleanup and regular maintenance. With this class, we'll walk through data cleaning activities to help you get your master records back under control and your transactions squeaky clean.

Class topics

- Researching suspect transactions and data
- Techniques for data cleanup
- Map a plan for regular data maintenance

Who Should Attend?

Any System Administrator or member of the Finance/Accounting team interested in saving time and effort, and improving the accuracy of your transactions and your confidence in them.

Learning Objectives:

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

- Identify improper or outdated setups
- Explain how to conduct research into and correct suspect data
- Implement a regular data review and cleanup program

Field of Study: Computer Software & Applications

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](#).