

Month End, Year End, and Budgeting

Imagine the confidence in your closing and budgeting processes after attending this class! We can't wait to share with you time-honed best practices, tips, and efficiencies for these critical accounting functions. You'll drive consistency, accuracy, and speed in the month-end close by learning how to control month-end cutoff for postings, which reports to use for reconciling accounts, and what exactly should be included on your company's month-end checklist. Then for those once-a-year activities you'll be equipped to establish or fine-tune your processes and checklists for your organization and team. And if you're not presently using the Budgeting features of Microsoft Dynamics 365 Business Central / NAV, prepared for an eye-opening experience with an invaluable and easy-to-learn tool.

Class topics

- Month End Close
- Year End Close
- Budgets

Who Should Attend?

Any member of the Finance/Accounting team interested in saving time and effort, and improving the efficiency and accuracy of their closings and budgeting lifecycle.

Learning Objectives:

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

- Identify best practices for complete, accurate, and expedient closings
- Develop their own closing checklists
- Explain the options for uploading, maintaining, and reporting budgets

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](#).