

Navigation and Personalization

This class will teach you all the things you didn't know you needed to know about the basics of Business Central. If you find yourself repeatedly searching, filtering lists over and over, or scrolling through endless data to find what you need, don't wait another minute! Regardless if you're a new user or recently upgraded from Microsoft Dynamics NAV we'll uncover numerous nuggets to help you make the Role Center your own, so you can get to what you need in a single click. You'll see immediate improvements in your use of Business Central and insights into your operations. Come away from this class with a list of new tools to use yourself or to share with your team.

Class topics

- Navigation
- Understanding Lists and Cards
- Searching, Sorting, & Filtering
- Personalization

Who Should Attend?

Any and all users of Business Central interested in working in the system more efficiently and with greater insights.

Learning Objectives:

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

- Personalize common views and lists
- Personalize their role center
- Access their most frequently used data and functions with far fewer clicks
- Customize frequent lookups

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](#).