Sales Cycle

If you feel like you're not taking full advantage of the robust sales features in your Microsoft Dynamics 365 Business Central / NAV system, you're not alone. The system offers a surprising list of functions to support your sales process, and we want to share the full scope and the embedded best practices with you. It's a great opportunity to fine-tune your sales function or learn the right setup from the start. For those on the accounting team responsible for managing receivables, this class is arguably a critical supplement to your A/R training to understand "upstream" how the system works, how to research transactions and make corrections when needed, and how your role fits into your company's lifecycle.

Class topics

- Customer Creation
- Sales Quotes, Orders and Invoicing
- Pricing and Discounting
- Sales Credit and Rebills
- Sales Reporting

Who Should Attend?

Any member of the sales team or related to the sales function in an organization that wants to optimize their sales processes leveraging the system's built-in best practices, as well as any member of the Accounting Team interested in understanding how receivables are created and the details behind them.

Learning Objectives:

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

- Create customers, sales quotes, and sales orders
- Explain different options for adjusting quotes and orders
- Manage order corrections
- Run needed sales related reports

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.