A/R Boot Camp

As an accounting team member focused on receivables management, you know cash is king, and nevermore so than now. How can you speed up the entire process and get money in the bank sooner, while reducing errors, streamlining collections, reducing past-due accounts, and reconciling quicker? Is it an unachievable oasis? It's definitely doable, if you know how to use Business Central / NAV properly.

If you're like many, working remotely has only complicated your processes and issues more. What can you improve, and more importantly, how? Turning to Google results in zillions of answers, but what addresses your situation and follows best practices? Wouldn't it be great if you could learn how other companies are improving their processes using Business Central? Wouldn't it be great to talk with an expert to answer your questions?

When you're ready to learn about the right way to process receivables in Business Central / NAV, efficiencies you should be employing, and how to work smarter, this is the class for you. Designed by real users with many years of experience, the class is presented live with a real practice environment to reinforce your newfound knowledge. Get answers to your questions from someone that has been there and done that. We share the good and the not so good from what we have learned working daily with BC / NAV.

Class agenda

Day 1 (4 hours) – Excel for Accountants

- Data Manipulation and Formatting
- Data Analysis
- Lookups and References
- Key Functions
- Pivot Tables and Pivot Table Wizard
- Basic Charts/Graphs

Day 2 (4 hours) – Sales Cycle

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

Day 3 (4 hours) – Accounts Receivable

- Cash Receipt Journal for Payment Application
- Cash Receipt Journal for Payment Correction
- Deposits
- Receivables Reporting
- Customer Collections, Reminders, and Statements

Who Should Attend?

Accounting team members focused on processing Accounts Receivable.

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

- Understand how master data and upstream sales activities affect receivables and collections
- Use Excel more effectively for reporting
- Use the system features designed to streamline and automate cash receipts
- Become more efficient and accurate by utilizing "hidden gems" for receivables management

Field of Study: Accounting

Program Level: Basic

Prerequisites: Successful completion of Navigation & Personalization class.

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 12 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.