DYNAMICS 365 BUSINESS CENTRAL ONBOARDING

TRAINING COURSE LIST

TRUNORTH DYNAMICS

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About

At TruNorth, we believe that effective training is more than just delivering information—it's about empowering individuals and teams with the knowledge and skills they need to thrive in their roles.

Our philosophy is rooted in the idea that training should be practical, engaging, and directly applicable to real-world scenarios.

Each course is structured around clear learning objectives, ensuring participants achieve measurable results.

Whether it's navigating the features of Microsoft 365 Business Central or mastering specific modules like Fixed Assets, Inventory, or Accounts Payable, our training is tailored to equip attendees with the tools they need to work efficiently and effectively.

Each course is built around a well-defined curriculum with clear learning objectives, covering specific topics and skills within a predetermined timeframe.

By focusing on a fixed scope, we can deliver consistent, high-quality training that addresses core needs while providing exceptional value.

Please inquire for custom training courses.

TRUNORTH DYNAMICS

General Navigation

Description	This course is designed to provide participants with a solid understanding of navigation within Microsoft 365 Business Central. Participants will learn how to effectively move through the Business Central interface, utilize key tools for day-to-day tasks, and access relevant features efficiently. By the end of the course, attendees will feel confident exploring workspaces, performing search operations, using filters, and personalizing their user experience. The course caters to beginners who are either new to Business Central or need a comprehensive understanding of its interface and tools for smoother adoption and productivity. It combines theoretical walkthroughs with hands-on practice, making the learning experience engaging and practical.
Learning Objectives	• Navigate and understand the Business Central interface, including menus, role centers, and action panes. • Perform effective searches using Tell Me, global search, and navigation keys. • Use filters, sorting, and views to quickly find and manage data. • Personalize pages, actions, and role centers to align with specific job functions. • Understand and utilize keyboard shortcuts to enhance productivity. • Leverage in-product help and resources to independently troubleshoot and explore features.
Additional Details	**Format:** Virtual delivery with up to 5 users and a provided recording. **Course Level:** Beginner **Skills Prerequisites:** None **Typical Attendees:** Any users of Business Central who would like to review the navigation and personalization features and/or new Business Central users.

General Ledger and Banking

Description	This comprehensive course equips participants with the knowledge and practical skills to manage financial processes in Microsoft 365 Business Central effectively. Participants will explore core finance functionalities, including managing the general ledger, maintaining the chart of accounts, creating budgets, posting transactions, working with dimensions, and allocating revenue and costs. The course also covers advanced topics such as revaluing account balances, deferring revenue and expenses, and bank account management. Designed for finance professionals, the course combines theoretical understanding with hands-on exercises to ensure participants can confidently apply these tools to their real-world workflows.
Learning Objectives	• Set up and maintain the General Ledger and Chart of Accounts in Business Central. • Post transactions directly to the General Ledger and review accounts for accuracy. • Create, modify, and manage budgets. • Allocate revenue, costs, and revalue account balances. • Work with dimensions for advanced financial reporting and analysis. • Defer revenue and expenses for accurate reporting over time. • Manage bank accounts, including reconciliations and transactions.
Additional Details	**Format:** Virtual delivery with up to 5 users and a provided recording. **Course Level:** Beginner **Prerequisites:** Understand basic navigation within Business Central. Basic Accounting knowledge required. **Typical Attendees:** The typical attendees of a Financial Management in Microsoft 365 Business Central course are professionals who work in finance-related roles or are responsible for overseeing financial processes within Business Central.

Purchasing and Payables

Description	This course focuses on the purchasing management features in Microsoft 365 Business Central, enabling participants to handle procurement processes effectively. It covers key topics such as vendor setup, purchase order processing, receipt and invoicing, approvals, and analytics. By combining theoretical overviews with hands-on activities, participants will gain practical experience in streamlining their purchasing processes. In addition, key topics for payables; like vendor payments, vendor management, and purchasing journals will be included in the course. This course is ideal for procurement specialists, purchasing managers, and finance professionals who want to enhance their understanding of the purchasing module in Business Central and improve their organization's purchasing operations.
Learning Objectives	• Set up and manage vendors and understand the vendor lifecycle. • Create and process purchase orders efficiently, including modifying and canceling orders. • Record and track receipts and manage purchase invoices for accurate procurement tracking. • Handle purchase approvals and configure approval workflows in Business Central. • Monitor purchasing performance through analytics and reports to support data-driven decision-making. • Manage payment disputes and take corrective actions such as blocking vendors. • Configure and apply payment tolerances and discounts to streamline vendor payments. • Monitor accounts payable performance using analytics and reports to support better decision-making.
Additional Details	**Format:** Virtual delivery with up to 5 users and a provided recording. **Course Level:** Beginner **Prerequisites:** Understand basic navigation within Business Central. Basic Accounting and Purchasing knowledge required. **Typical Attendees:** Any users of Business Central who are procurement specialists, purchasing managers, finance teams, and operational staff responsible for purchasing.

Accounts Payable

Description	This course provides a deep dive into accounts payable management in Microsoft 365 Business Central, enabling participants to streamline their vendor payment processes. Attendees will learn how to manage vendors, process invoices and payments, handle payment disputes, block vendors, and configure payment tolerances and discounts. With practical examples and hands-on exercises, this course ensures that participants can efficiently manage their organization's accounts payable workflows using Business Central. This course is designed for accounts payable specialists, finance professionals, and ERP administrators who manage or oversee vendor payment processes and want to optimize the accounts payable module in Business Central.
Learning Objectives	• Set up and manage vendor accounts for seamless accounts payable operations. • Process vendor invoices and payments efficiently in Business Central. • Manage payment disputes and take corrective actions such as blocking vendors. • Configure and apply payment tolerances and discounts to streamline vendor payments. • Monitor accounts payable performance using analytics and reports to support better decision-making.
Additional Details	**Format:** Virtual delivery with up to 5 users and a provided recording. **Course Level:** Beginner **Prerequisites:** Understand basic navigation within Business Central. Basic Accounting and Payables knowledge required. **Typical Attendees:** The typical attendees of an Accounts Payable in Microsoft 365 Business Central course are professionals who work in finance or purchasing related roles or are responsible for overseeing financial or purchasing related processes within Business Central.

Sales & Receivables

Description	This course provides a comprehensive overview of sales management in Microsoft 365 Business Central, enabling participants to handle the entire sales process efficiently. The training will cover key aspects such as setting up customers, managing sales quotes and orders, tracking shipments, creating invoices, and analyzing sales data. Participants will learn how to process transactions through sales journals, handle overdue balances, and apply payment discounts and tolerances. This course is ideal for sales professionals, account managers, and finance teams who are responsible for managing customer relationships, processing sales transactions, and analyzing sales performance using Business Central.
Learning Objectives	• ·Set up and manage customer accounts for accurate sales tracking and relationship management. • ·Create and process sales quotes and sales orders in Business Central. • ·Record and track shipments and create sales invoices accurately. • ·Manage sales returns and credit memos to handle returned goods and adjustments. • ·Track and reconcile customer payments to maintain up-to-date receivables. • ·Use tools to monitor overdue balances and issue payment reminders. • ·Handle payment discounts and payment tolerances for customer payments. • ·Use Business Central's sales and receivables analytical tools to monitor performance and gain insights for decision-making.
Additional Details	**Format:** Virtual delivery with up to 5 users and a provided recording. **Course Level:** Beginner **Prerequisites:** Understand basic navigation within Business Central. Basic Accounting and Sales knowledge required**.** **Typical Attendees:** Any users of Business Central who work in finance or sales related roles or are responsible for overseeing financial or sales related processes within Business Central.

Accounts Receivable

Description	This course is designed to equip participants with the skills to efficiently manage customer receivables in Microsoft 365 Business Central, with a focus on using sales journals for recording transactions. Participants will learn how to set up and manage customer accounts, process transactions through sales journals, handle overdue balances, and apply payment discounts and tolerances. This course does not include Sales Order Processing or Relationship Management. This course is ideal for sales professionals, account managers, and finance teams who are responsible for processing sales transactions, collecting customer payments and open receivables using Business Central.
Learning Objectives	• ·Set up and manage customer accounts to maintain accurate receivables records. • ·Utilize Sales journals to process header level sales transactions. • ·Track and reconcile customer payments to maintain up-to-date receivables. • ·Use tools to monitor overdue balances and issue payment reminders. • ·Handle payment discounts and payment tolerances for customer payments. • ·Generate and analyze receivables reports to support informed decision-making.
Additional Details	**Format**: Virtual delivery with up to 5 users and a provided recording. **Course Level**: Beginner **Skills Prerequisites:** Understand basic navigation within Business Central. Basic Accounting or Sales knowledge required. **Typical Attendees**: Any users of Business Central who work in finance or sales related roles or are responsible for overseeing financial or sales related processes within Business Central.

Fixed Assets

Description

This course provides an in-depth introduction to the Fixed Assets module in Microsoft 365 Business Central, designed to help participants effectively manage their organization's fixed asset lifecycle. The course covers topics such as setting up and maintaining fixed assets, processing acquisitions and disposals, calculating depreciation, and generating reports for asset tracking and compliance.

This course is ideal for finance professionals, asset managers, and ERP administrators who want to efficiently manage fixed assets in Business Central.

Learning Objectives

- ·Set up and configure fixed assets in Business Central, including defining classes, categories, and depreciation books.
- ·Process fixed asset acquisitions, adjustments, and disposals accurately.
- ·Calculate and manage depreciation using multiple methods and settings.
- ·Record and track maintenance and insurance information for fixed assets.
- ·Reclassify and transfer assets as needed within the system.
- ·Generate and interpret fixed asset reports to monitor asset values, depreciation, and compliance.

Additional Details

Format: Virtual delivery with up to 5 users and a provided recording.

Course Level: Beginner

Prerequisites: Understand basic navigation within Business Central. Basic Accounting knowledge required.

Typical Attendees: Any users of Business Central who work in finance roles or are responsible for overseeing financial related processes within Business Central.

Basic Inventory Management

Description

This course introduces inventory management in Microsoft 365 Business Central, focusing on the tools and features used to manage inventory items, track stock levels, and maintain accurate records. Participants will learn how to set up items, manage stock transactions, perform inventory adjustments, and generate essential reports. This course does not include Assembly BOMs, Stockkeeping Units, Lot Numbers or Serial Numbers.

This course is ideal for inventory managers, warehouse staff, and ERP administrators seeking to streamline inventory processes and improve accuracy in their organizations.

Learning Objectives

- ·Set up and configure inventory items in Business Central, including defining item categories, units of measure, and other options.
- ·Manage item transactions, such as purchases, sales, and transfers, and record stock movements.
- ·Perform inventory adjustments to correct stock levels or account for discrepancies.
- ·Utilize Business Central tools to track item availability and monitor inventory balances.
- ·Generate and analyze inventory reports to support informed decision-making.

Additional Details

Format: Virtual delivery with up to 5 users and a provided recording.

Course Level: Beginner

Prerequisites: Understand basic navigation within Business Central. Basic Accounting and Inventory knowledge required.

Typical Attendees: Any users of Business Central who work in finance or inventory related roles or are responsible for overseeing financial or inventory related processes within Business Central.

Financial AP Core Package

- General Navigation
- General Ledger & Banking
- Accounts Payable

Description

The Financial AP Core Training Package is designed to provide a comprehensive foundation in Microsoft 365 Business Central, covering essential financial processes and system navigation. This course package combines General Navigation, General Ledger & Banking, and Accounts Payable, equipping participants with the skills needed to confidently manage financial transactions, vendor payments, and daily system interactions.

Participants will learn how to efficiently navigate Business Central's interface, access key financial data, manage the general ledger, reconcile bank accounts, process accounts payable transactions, and utilize reporting tools for financial decision-making.

This fixed-scope, fixed-fee training package is ideal for finance professionals, accounts payable specialists, ERP administrators, and business users seeking a structured and predictable learning experience. Whether new to Business Central or looking to reinforce core financial skills, this training ensures participants leave with the knowledge and confidence to effectively manage financial processes and navigate the system with ease.

Additional Details

Format: Virtual delivery with up to 5 users and a provided recording.

Course Level: Beginner

Prerequisites: Basic Accounting knowledge preferred.

Typical Attendees: Any users of Business Central who work in finance related roles or are responsible for overseeing financial related processes within Business Central.

Financial AP/AR Core Package

- General Navigation
- General Ledger & Banking
- Accounts Payable
- Accounts Receivable

Description

The Financial AP/AR Core Training Package is designed to provide a comprehensive foundation in Microsoft 365 Business Central, covering essential financial processes and system navigation. This package combines General Navigation, General Ledger & Banking, Accounts Payable, and Accounts Receivable, equipping participants with the skills needed to efficiently manage financial transactions, vendor and customer payments, and daily system interactions.

Participants will learn how to navigate Business Central's interface, access key financial data, manage the general ledger, reconcile bank accounts, process accounts payable transactions, track and collect accounts receivable, and leverage financial reporting tools for decision-making.

This fixed-scope, fixed-fee training package is ideal for finance professionals, accounts payable and receivable specialists, ERP administrators, and business users seeking a structured and predictable learning experience. Whether new to Business Central or looking to reinforce core financial skills, this training ensures participants leave with the knowledge and confidence to effectively manage financial processes and navigate the system with ease.

Additional Details

Format: Virtual delivery with up to 5 users and a provided recording.

Course Level: Beginner

Prerequisites: Basic Accounting knowledge preferred.

Typical Attendees: Any users of Business Central who work in finance related roles or are responsible for overseeing financial related processes within Business Central.

Distribution Package

- General Navigation
- General Ledger & Banking
- Purchasing & Payables
- Sales & Receivables
- Basic Inventory Management

Description

The Distribution Training Package is designed to provide a comprehensive foundation in Microsoft 365 Business Central, equipping participants with the skills needed to efficiently manage financials, purchasing, sales, and inventory. This package combines General Navigation, General Ledger & Banking, Purchases & Payables, Sales & Receivables, and Basic Inventory Management, ensuring a well-rounded understanding of Business Central's core distribution processes.

Participants will learn how to navigate Business Central's interface, manage financial transactions through the general ledger and banking module, process vendor invoices and payments, track customer receivables, and handle purchasing and sales workflows.

This fixed-scope, fixed-fee training package is ideal for finance professionals, supply chain managers, purchasing and sales teams, warehouse staff, and ERP administrators looking to strengthen their Business Central knowledge. Whether new to Business Central or refining existing skills, this training ensures participants leave with the expertise to effectively manage financial, purchasing, sales, and inventory processes within a distribution-focused environment.

Additional Details

Format: Virtual delivery with up to 5 users and a provided recording.

Course Level: Beginner

Prerequisites: Basic Accounting knowledge preferred.

Typical Attendees: Any users of Business Central who work in finance related roles or are responsible for overseeing financial related processes within Business Central.