

Plan de formation

Application Setup in Microsoft Dynamics NAV

Objectif

This two-day course provides students with the tools to implement and maintain cross-application setup data after the system components are installed. The focus is on the application-oriented work involved in setting up and maintaining company-wide rules, data, and users.

Durée

2 jour (14 heures)

Prérequis

Before attending this course, students must have:

- Attended or knowledge of the course Introduction in Microsoft Dynamics NAV
- Knowledge of basic accounting principles and ERP user roles

Profil du stagiaire

This course is intended to a partner that sells and implements the Finance module to customers. The typical partner has an ERP background and has a basic understanding of accounting principles.

Plan de formation

Module 1: Set Up a Company by Using RapidStart Services

- Manual Setup vs. RapidStart Services
- Rapid Start Services Process Flow
- Create and Export a Configuration Package
- Configure a New Company by Using RapidStart Services
- Data Migration by Using Rapid Start Services
- Transfer Opening Balances by Using RapidStart Services

Module 2: Manage User Rights and Profiles

- Authentication
- Set Up User Rights
- Create a New Permission Set
- Apply Security Filters
- User-Specific Setup
- User Profile Setup
- Best Practices

Module 3: Set Up Number Series

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Module 4: Set Up Trail Codes

- Lessons 1 to 3: Source Code and Reason Codes
- Navigate the Audit Trail

Module 5: Set Up General Journals Templates and Batches

- Journal Templates, Batches, and Lines
- Create Journal Templates and Batches

Module 6: Set Up Posting Groups

- Specific Posting Groups
- General Posting Groups
- General Posting Setup
- VAT Posting Groups
- VAT Posting Setup
- Best Practices
- Post and Review a Sales Transaction

Module 7: Set Up Dimensions

- Dimensions and Dimension Values
- Setting Up Dimensions in General Ledger Setup
- Dimension Combinations
- Lessons 4 to 5: Default Dimensions and Account Type Default Dimensions
- Default Dimension Priority
- Conflicting Default Dimensions

Module 8: Set Up and Manage Document Approvals

- Set Up Document Approvals
- Set Up the Notification System
- Set Up a Sales Document Approvals System
- Use the Document Approval System