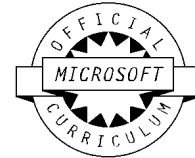


Course Outline

80435-Application Setup in Microsoft Dynamics[®] NAV 2013

Duration: 2 days (12 hours)



Target Audience:

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.

Prerequisites:

Before attending this course, students must have:

- Completed course 80439A: Introduction in Microsoft Dynamics NAV 2013
- Knowledge of basic accounting principles and ERP user roles

Topics Covered:

- 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

After completing this module, students will be able to:

 - Explain the dependencies between RapidStart Services and manual setup work.
 - Describe the different components and processes of RapidStart Services.
 - Explain and demonstrate all tasks in a RapidStart Services process.
 - Create a configuration worksheet.
 - Create a configuration package.
 - Create a configuration questionnaire.
 - Create a configuration template.
 - Initialize a new company with a configuration package.
 - Migrate customer data.
 - Transfer opening balances.
- 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

- Lab : Set Up New Users

After completing this module, students will be able to:

- Explain how authentication works in Microsoft Dynamics NAV.
- Manage security for Windows client users.
- Set up a new user.
- Explain the concepts of permission sets and permissions.
- Create a new permission set, and assign permissions to it.
- Apply security filters in Microsoft Dynamics NAV.
- Perform user-specific setup.
- Create, assign, and work with user profiles.

➤ Module 3: Set Up Number Series

- Number Series
- Lab : Create a Number Series

After completing this module, students will be able to:

- Explain the purpose of company-wide number series.
- Set up number series.
- Create number series relations.

➤ Module 4: Set Up Trail Codes

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

After completing this module, students will be able to:

- Explain and set up trail codes, source codes, and reason codes.

➤ Module 5: Set Up General Journals Templates and Batches

- Journal Templates, Batches, and Lines
- Create Journal Templates and Batches
- Lab : Create a Journal Batch

After completing this module, students will be able to:

- Explain the purpose and organization of journal templates and journal batches.
- Create general journal templates and general journal 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
- Lab : Set Up and Assign a Vendor Posting Group

- Lab : Set Up and Assign a Product Posting Group
- Lab : Copy a General Posting Setup Line
- Lab : Create and Assign a VAT Product Posting Group
- Lab : Copy a VAT Posting Setup
- Lab : Post and Review a Purchase Transaction

After completing this module, students will be able to:

- Explain and set up specific posting groups.
- Explain and set up general posting groups.
- Create a General posting setup.
- Create an Inventory posting setup.
- Explain and set up VAT posting groups.
- Create a VAT posting setup.
- Describe posting setups based on the chart of accounts.
- Demonstrate how posting groups direct 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
 - Lab : Set Up a Dimension with Dimension Values
 - Lab : Set Up a Dimension Combination
 - Lab : Assign Default Dimensions to a Single Account
 - Lab : Assign Default Dimensions to Multiple Accounts
 - Lab : Assign Vendor Account Type Default Dimensions

After completing this module, students will be able to:

- Explain and set up dimensions and dimension values.
- Explain and set up global and shortcut dimensions.
- Explain and show how dimension combinations are set up.
- Explain and show how single and multiple default dimensions are set up.
- Explain and show how account type default dimensions are set up.
- Explain and show how default dimension priorities are set up.
- Explain the possibility and resolution of conflicting default dimensions.
- Show how to use dimension and dimension values in journals and documents under different dimension setup scenarios.

➤ **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

- Lab : Set Up a Purchase Document Approvals System

After completing this module, students will be able to:

- Set up the general features of the document approval system.
- Set up approval templates.
- Set up user logons for use with document approvals.
- Set up approval users in a hierarchy.
- Set up the notification system for approvals.
- Send an approval request.
- Approve a sales or purchase document.
- Maintain substitute approvers.
- Manage overdue notifications.

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