

Introduction to Finance in Business Central (NAV): Financial Reports with Account Schedules

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| Duration: | 3 Hours |
| Location: | Virtual |
| Instructor: | Breon Jennings |
| Workshop Objectives: | |
| <p>The goal of the workshop is to introduce you to budgets in Business Central and how to tie one in with an Account Schedule. During the budget overview, we will show you how to:</p> <ul style="list-style-type: none"> • Create and edit budgets • Copy budgets • Import and edit a budget in Excel <p>In the second half of the workshop, we will give you an overview of Account Schedules, by the end of which you will know how to:</p> <ul style="list-style-type: none"> • Create an Account Schedule • Use Analysis Views • Use Analysis Views in Account Schedules • Use Budgets and Schedules together | |
| Preparation: | |
| <p>What you will need for this Workshop:</p> <ul style="list-style-type: none"> • Laptop computer • Basic Knowledge of Microsoft Dynamics 365 Business Central (NAV) | |



| Schedule | |
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| Topic | Time |
| Introductions / Icebreaker | 15 Minutes |
| Budgeting <ul style="list-style-type: none"> • Creating New Budgets • Editing Budgets • Copying Budgets • Importing / Editing in Excel | 45 Minutes |
| Break | 15 Minutes |
| Reporting <ul style="list-style-type: none"> • Account Schedules • Analysis Views • Analysis Views in Account Schedules • Budgets and Account Schedules | 90 Minutes |
| Wrap Up <ul style="list-style-type: none"> • Discuss any additional questions or concerns • Recap of takeaways | 15 Minutes |