RSM TECHNOLOGY ACADEMY

eLearning Syllabus and Agenda

INTRODUCTION TO BUDGETING

FOR MICROSOFT® DYNAMICS 365 FOR OPERATIONS

RSM

Course Details 3
Audience 3
At Course Completion 3
Registration and Payment 3
Refund Policy 4
Prerequisites 4
Participant Requirements 4
Technology Requirements 4
Course Outline 5
Module: Introduction to Budgeting 5
Module: Budgeting Integrations 5

Course Details

This eLearning course is designed to introduce users to budgeting, along with the necessary setup and module integrations accessible in Microsoft Dynamics 365 for Operations.

AUDIENCE

- CFO
- Controller
- Accountant
- Budget manager
- Budget users
- Fixed assets manager

AT COURSE COMPLETION

After completing this course, students will have an understanding of the required setup and the integration for the Budgeting module in Microsoft® Dynamics 365 for Operations.

REGISTRATION AND PAYMENT

You can register for a course online at academy.rsmsus.com by browsing the catalog and selecting courses to add to your cart. You can also email your request to academy@rsmus.com.

Payment must be received and verified before you can gain access to the course content. When purchasing through our website, all payments are made through PayPal. You can use an existing PayPal account to pay with your credit card or other method of payment configured in your PayPal account. If you do not have a PayPal account you can use the guest check out feature to use your credit card to pay. If you prefer to pay by using another method of payment, please contact us at academy@rsmus.com to make arrangements. We cannot guarantee all methods of payment will be accepted but we will try to accommodate your requests.

REFUND POLICY

Once an eLearning course has been purchased, no refunds will be provided. If you have any questions about this policy, you may contact us at by clicking the Support button on our site or email us at academy@rsmus.com. Formal complaints or errors found in the content should be reported in writing to academy@rsmus.com. Complaints will be reviewed to determine what action needs to be taken.

Prerequisites

PARTICIPANT REQUIREMENTS

Students attending this section of the course should have a basic understanding of:

- General knowledge of Microsoft® Windows®
- General knowledge of basic navigation within Dynamics 365 for Operations
- General understanding of basic accounting
- General understanding of budgeting

TECHNOLOGY REQUIREMENTS

- The site has been optimized for Internet Explorer. Although other browsers may work, it is recommended that you use Internet Explorer for the best experience.
- Silverlight must be installed in order to use the practices.
- A screen resolution with a minimum of 1024x768 is recommended. You can use full screen icons within the eLearning to maximize your view. A smaller resolution may result in content being cut off from your screen.

Course Outline

MODULE: INTRODUCTION TO BUDGETING

This module discusses how you can use basic budgeting to define the financial dimensions for budgets, create budget models, and set up and use budget register entries. It also describes how to set up optional Budgeting workflows to automate the review of budget register entries, including budget transfers.

Lessons

- Discuss budgeting overview.
- Define budgeting terminology.
- Perform basic budgeting setup.
- Discuss budget register entries.
- Discuss budgeting workflow.
- Discuss budgeting inquiries and reporting.

MODULE: BUDGETING INTEGRATIONS

This module explains how Basic Budgeting can be integrated with General Ledger, Project management and accounting, and Fixed assets.

Lessons

- Discuss basis budgeting integration.
- Discuss project management and accounting integration.
- Define fixed assets integration.

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