

MICROSOFT DYNAMICS CRM

OBJECTIVES

At the end of the course, the participant will be able to use the various functions of the Microsoft Dynamics CRM editing software, so as to help customer relations management and provide all the tools and functions to get a clear picture of the customers, from the first contact to after-sales service. The familiar and intuitive work environment promotes user adaptation.



TARGET CLIENTELE

Anyone working in accounting

PREREQUISITES

Microsoft Windows

Knowledge of accounting

COURSE SYLLABUS

1. Basics

- Introduction
- Daily accounting procedures
- Finance functions
- Daily fund and bank management procedures
- Daily procedures of the purchasing section
- Daily sales procedures
- Budgeting
- Use and manage budgets
- Accounting for budgetary commitments
- Cash management
- Multicurrency
- Advance payments

- Accounting intercorporate
- Consolidation
- Management of reminders
- End of year closing
- Analysis tables
- Asset transactions

2. Integration with Outlook

3. The Application Settings

- Setup procedures
- Accounting Setup
- Setting up the chart of accounts
- Log setup
- Setting up tax
- Setting up fund and bank management
- Setting up purchases
- Setting up sales
- Setting up fixed assets

4. Report Production

- Financial workflows
- Research and reports

5. Communicating with your Other Applications