Dynamics 365 Finance - Revenue and AR Basics Training Course

Professional Development Training Course Outline

Category	Enterprise Resource Planning (ERP)	**Duration**	5 Days
Base Fee	$1,500 USD	**Delivery Mode**	Online / On-site Hybrid

Course Introduction

Dynamics 365 Finance - Revenue and AR Basics Training Course is designed to provide professionals with a comprehensive understanding of how to manage revenue and accounts receivable within Microsoft Dynamics 365 Finance. As businesses continue to leverage cloud-based solutions for financial operations, Dynamics 365 stands out as a robust tool for streamlining processes like revenue recognition, credit management, and collections. This course explores fundamental concepts, features, and functionalities that will equip learners with the essential knowledge to optimize these operations and improve financial outcomes. With practical, real-world case studies, participants will develop hands-on expertise in navigating and applying Dynamics 365's AR and revenue management modules.

This course is ideal for finance professionals, system administrators, and consultants who want to gain a solid grounding in revenue and accounts receivable management using Dynamics 365 Finance. Learners will discover how to automate key financial processes, manage customer invoices, track receivables, and ensure compliance with international standards. The objective is to ensure a seamless transition for organizations into digital financial management, driving efficiency, reducing errors, and enhancing visibility into financial data. By the end of this training, participants will have the skills needed to drive financial excellence, using Dynamics 365 to its full potential in revenue and accounts receivable operations.

Programme Curriculum

Dynamics 365 Finance - Revenue and AR Basics Training Course

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Course Duration

5 days

Course Objectives

1. Understand the core features and benefits of Dynamics 365 Finance in managing revenue and AR.
2. Learn how to configure and customize revenue recognition in Dynamics 365 to align with accounting standards.
3. Gain proficiency in automating accounts receivable processes such as invoice creation, payment receipt, and aging analysis.
4. Master credit management techniques to assess customer risk and mitigate financial exposure.
5. Explore the integration of Dynamics 365 Finance with other modules for improved financial insights and reporting.
6. Learn how to track and manage customer payments and apply them to the appropriate invoices.
7. Gain hands-on experience in revenue forecasting and how it integrates with overall financial planning.
8. Understand how to handle tax calculations and adjustments in the context of revenue and AR.
9. Explore how collections management works within Dynamics 365 and implement effective collection strategies.
10. Learn the best practices for ensuring regulatory compliance and auditing in AR processes.
11. Discover how to optimize the revenue recognition process for accurate and timely reporting.
12. Understand how customer relationship management (CRM) is integrated into Dynamics 365 to improve financial operations.
13. Get an overview of financial reporting and analytics tools available within Dynamics 365 to measure revenue performance and AR efficiency.

Target Audience

1. Finance Managers and Financial Analysts
2. System Administrators and Business Analysts
3. Dynamics 365 Consultants and Implementation Specialists
4. Accounts Receivable and Credit Management Professionals
5. CFOs and Finance Executives
6. Internal Auditors and Compliance Managers
7. IT and ERP Professionals

8. Business Process Owners and Change Managers

Course Modules

Module 1: Introduction to Dynamics 365 Finance for Revenue & AR

- Overview of Dynamics 365 Finance features
- Key concepts in revenue recognition and AR
- Architecture and integration capabilities
- Basic configuration settings for AR and revenue
- Case Study: Setting up a simple AR module for a small business

Module 2: Configuring Revenue Recognition

- Understanding revenue recognition principles
- Setting up revenue recognition rules in Dynamics 365
- Automating revenue recognition schedules
- Managing complex revenue arrangements
- Case Study: Recognizing revenue for subscription-based services

Module 3: Accounts Receivable Process Management

- Creating and managing customer invoices
- Payment receipt and application
- Handling partial payments and disputes
- Aging analysis and reporting tools
- Case Study: Managing large-scale AR for a multinational corporation

Module 4: Credit Management in Dynamics 365

- Setting credit limits for customers
- Assessing customer risk using credit scoring
- Automating credit checks and approvals
- Managing overdue invoices and collections
- Case Study: Implementing a credit management solution for a retail business

Module 5: Financial Reporting & Analytics in AR

- Using Dynamics 365's built-in financial reports
- Customizing AR reports for better insights
- Key metrics and KPIs for AR performance
- Integrating AR data with Power BI for advanced analytics
- Case Study: Designing an AR dashboard for real-time decision-making

Module 6: Handling Tax Calculations and Adjustments

- Tax setup in Dynamics 365 Finance
- Managing indirect taxes in AR
- Handling tax adjustments and reclassifications
- Ensuring compliance with international tax laws
- Case Study: Adjusting AR transactions due to tax rate changes

Module 7: Collections Management and Strategies

- Setting up collections processes in Dynamics 365
- Defining collection strategies and workflows
- Managing overdue invoices and collection notices
- Escalation procedures for high-risk accounts
- Case Study: Streamlining collections for a large enterprise

Module 8: Compliance and Auditing in AR

- Understanding compliance requirements for AR
- Conducting regular audits and reconciliations
- Ensuring transparency in customer transactions
- Managing exceptions and handling discrepancies
- Case Study: Performing a full AR audit for a public company

Training Methodology

This course employs a participatory and hands-on approach to ensure practical learning, including:

- Interactive lectures and presentations.
- Group discussions and brainstorming sessions.
- Hands-on exercises using real-world datasets.
- Role-playing and scenario-based simulations.
- Analysis of case studies to bridge theory and practice.
- Peer-to-peer learning and networking.
- Expert-led Q&A sessions.
- Continuous feedback and personalized guidance.

Register as a group from 3 participants for a Discount

Send us an email: info@fineskilltrainingcenter.org or call +254769199797

Certification

Upon successful completion of this training, participants will be issued with a globally- recognized certificate.

Tailor-Made Course

We also offer tailor-made courses based on your needs.

Key Notes

a. The participant must be conversant with English.

b. Upon completion of training the participant will be issued with an Authorized Training Certificate

c. Course duration is flexible and the contents can be modified to fit any number of days.

d. The course fee includes facilitation training materials, 2 coffee breaks, buffet lunch and A Certificate upon successful completion of Training.

e. One-year post-training support Consultation and Coaching provided after the course.

f. Payment should be done at least a week before commence of the training, to Fineskill Training Center account, as indicated in the invoice so as to enable us prepare better for you.

Upcoming Scheduled Sessions

Start Date	End Date	Location	Price
23 Nov 2026	27 Nov 2026	Online	$1,000
23 Nov 2026	27 Nov 2026	Physical	$1,500
23 Nov 2026	27 Nov 2026	Physical	$3,000
23 Nov 2026	27 Nov 2026	Physical	$3,000
23 Nov 2026	27 Nov 2026	Physical	$6,000
23 Nov 2026	27 Nov 2026	Physical	$4,500
23 Nov 2026	27 Nov 2026	Physical	$6,000
23 Nov 2026	27 Nov 2026	Physical	$6,000

Ready to enroll or request a customized program? Book online or contact us:

Register Online Now

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