Tecman Online Learning Platform

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Tecman Courses

Home | Course Catalogue | My Training Dashboard | Edit

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tecman | Tecman Courses | Home | Course Catalogue | My Training Dashboard

Tecman Courses

My Training Dashboard

Training Dashboard

Welcome to the online learning portal from Tecman, powered by LMS365

Choose **Tecman Courses** above to see all the courses, or choose **My Training Dashboard** to see the courses you are enrolled on and your progress through them.

Enrolling on all courses requires approval by us (the Training Team). If you have paid for access via a Training Plan then you will be signed up for all the courses on that plan in one go. You will receive an email confirming once you are enrolled on a course.
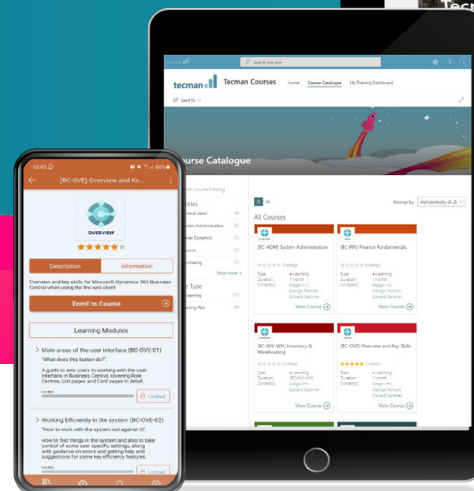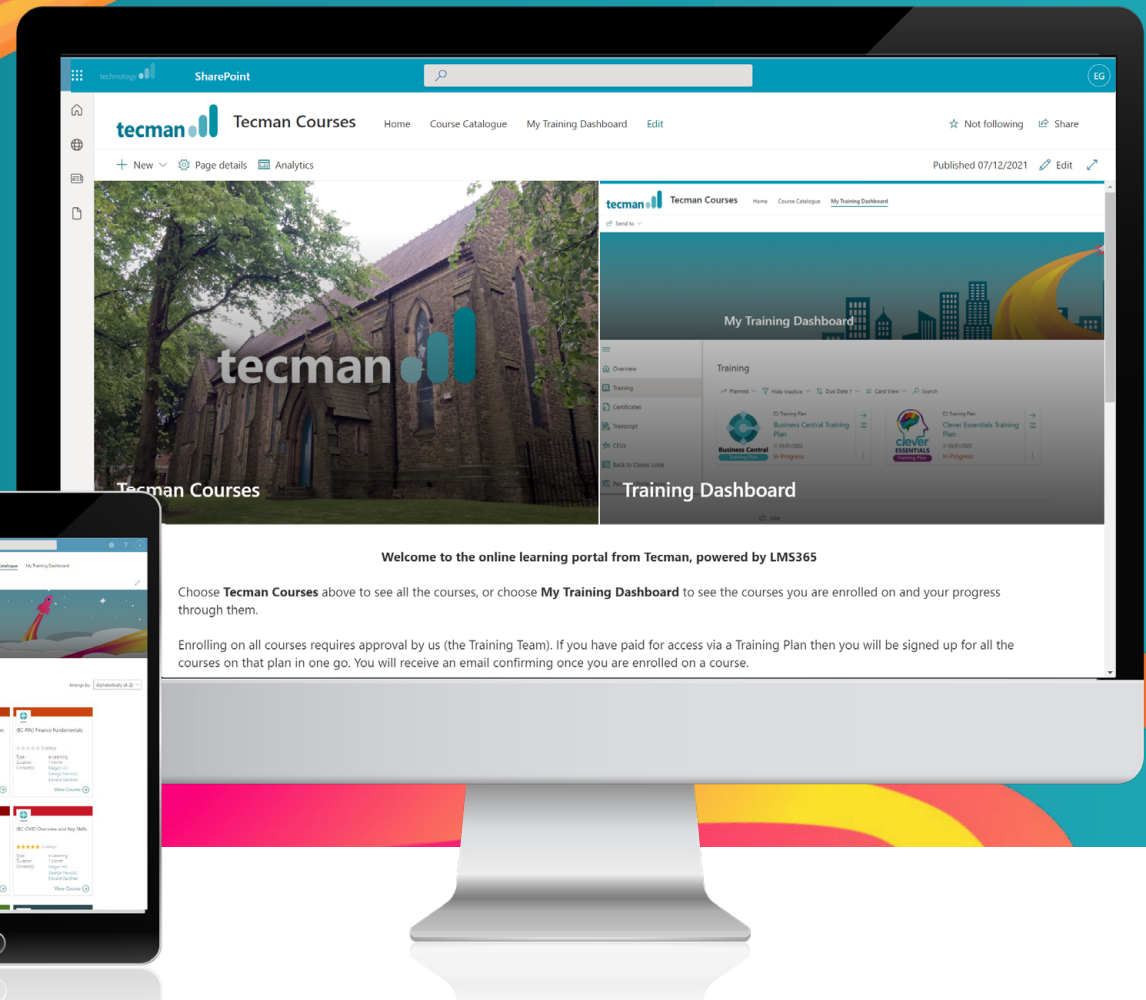
Call: 01902 578 300   Email: hello@tecman.co.uk   Visit: www.tecman.co.uk

Do you?

Want to improve your skills in Dynamics 365 Business Central?

Struggle to find the features you need to work more effectively?

Have new staff you need to get up to speed?

Finding it hard to find the time for training during the working day?

We can provide training that is:

- ✓ On demand – you log in to a website or use the free mobile app

- ✓ Well-structured and very comprehensive

- ✓ Focused on practical business needs

- ✓ Contains variety of materials – videos, handouts, quizzes, presentations

- ✓ Easy to work with

- ✓ Very cost effective

- ✓ Created by our team of trainers and

- ✓ Being updated regularly

All Courses

(BC-ADM) System Administration

★★★★★ 0 ratings

Type: e-Learning
Duration: 1 Month
Contact(s): Megan Hill,
George Murcott,
Edward Gardiner

View Course →

(BC-FIN) Finance Fundamentals

★★★★★ 0 ratings

Type: e-Learning
Duration: 1 Month
Contact(s): George Murcott

View Course →

(BC-INV-WH) Inventory & Warehousing

★★★★★ 0 ratings

Type: e-Learning
Duration: (BC-INV-WH)
Contact(s): Megan Hill

View Course →

(BC-OVE) Overview and Key Skills

★★★★★ 2 ratings

Type: e-Learning
Duration: 1 Month
Contact(s): Megan Hill,
George Murcott,
Edward Gardiner

View Course →

(BC-POP) Purchase Order Processing

★★★★★ 0 ratings

Type: e-Learning
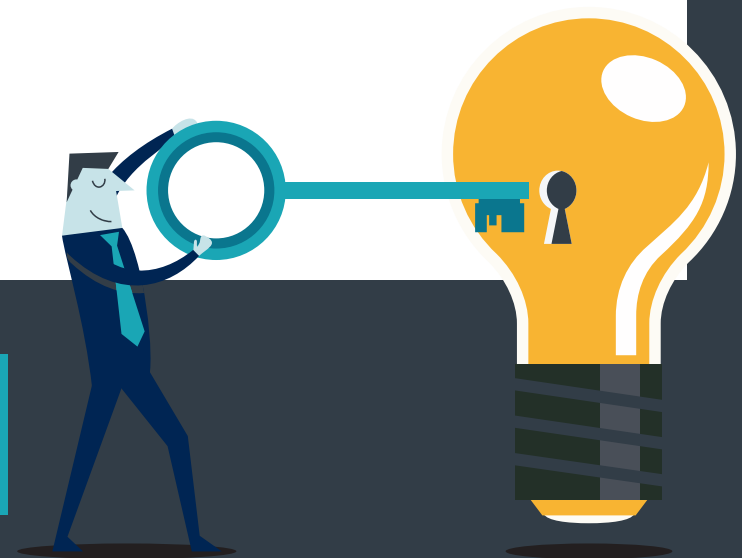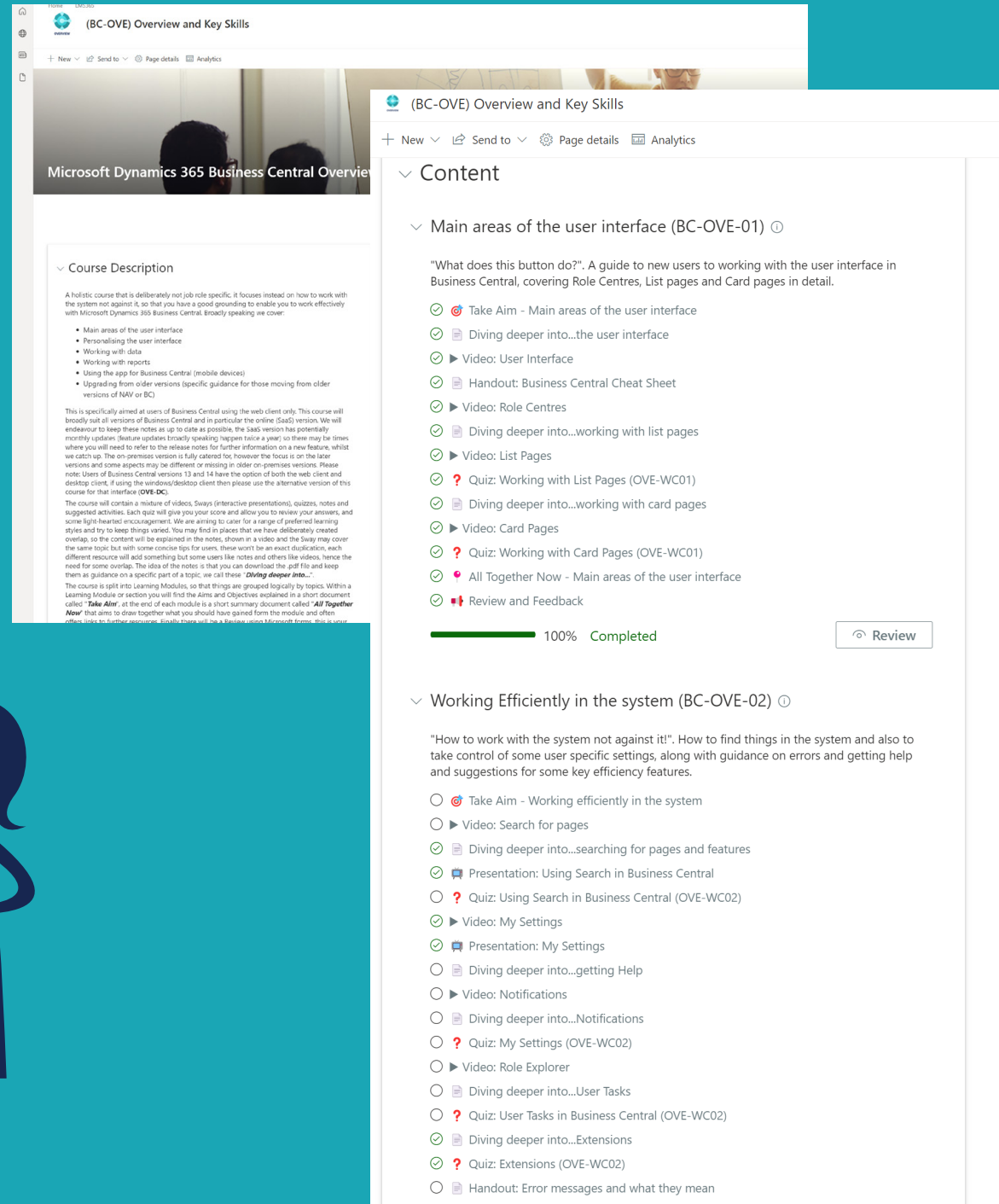Duration: 1 Month
Contact(s): Megan Hill,
George Murcott,
Edward Gardiner

View Course →

(BC-SOP) Sales Order Processing

★★★★★ 0 ratings

Type: e-Learning
Duration: 1 Month
Contact(s): Megan Hill,
George Murcott,
Edward Gardiner

View Course →

(CLV-CC) Clever Credit

★★★★★ 0 ratings

Type: e-Learning
Duration: 1 Month
Contact(s): Megan Hill,
George Murcott

View Course →

(CLV-DD) Clever Document Delivery

★★★★★ 0 ratings

Type: e-Learning
Duration: 1 Month
Contact(s): Megan Hill,
George Murcott

View Course →

(CLV-DL) Clever Document Links

★★★★★ 0 ratings

Type: e-Learning
Duration: 1 Month
Contact(s): Megan Hill,
George Murcott

View Course →

(CLV-DV) Clever Data Validation

★★★★★ 1 ratings

Type: e-Learning
Duration: 1 Month
Contact(s): Megan Hill,
George Murcott

View Course →

(CLV-GS) Clever Global Search

★★★★★ 0 ratings

Type: e-Learning
Duration: 1 Month
Contact(s): Megan Hill,
George Murcott

View Course →

(CLV-WMS) Clever Handheld

★★★★★ 0 ratings

Type: e-Learning
Duration: 1 Month
Contact(s): Megan Hill,
George Murcott

View Course →

(NAV-OVE) Overview and Key Skills

★★★★★ 2 ratings

Type: e-Learning
Duration: 1 Month
Contact(s): Megan Hill,
George Murcott

View Course →

(SYS-RS) RapidStart and Configuration Packages

★★★★★ 0 ratings

Type: e-Learning
Contact(s): Megan Hill,
George Murcott

View Course →

(SYS-WF) Workflows and the approvals process

★★★★★ 0 ratings

Type: e-Learning
Duration: 1 Month
Contact(s): Megan Hill,
George Murcott

View Course →

Business Central Training Plan

★★★★★ 0 ratings

Type: Training Plan
Contact(s): Megan Hill,
George Murcott,
Edward Gardiner

View Training Plan →

Clever Essentials Training Plan

★★★★★ 0 ratings

Type: Training Plan
Duration: 1 Month
Contact(s): Megan Hill,
George Murcott

View Training Plan →

Courses contain a variety of different types of content, either to reinforce the learning, or to provide alternative methods for you to dig into the topic.

- Course Booklets which we call "Diving Deeper into..." – These are the backbone of our courses and are developed for you to keep for future reference. Each one is a focused document on an area, feature, or topic.

- Videos – Custom created by us and focused on your practical needs

- Quizzes – Test your knowledge, then build it further by reviewing the answers

- Interactive Presentations – These guide you swiftly through a process in a more interactive fashion

Home · LMS365
(BC-OVE) Overview and Key Skills
+ New ∨   Send to ∨   Page details   Analytics

Microsoft Dynamics 365 Business Central Overview

Course Description

A holistic course that is deliberately not job role specific, it focuses instead on how to work with the system not against it, so that you have a good grounding to enable you to work effectively with Microsoft Dynamics 365 Business Central. Broadly speaking we cover:

- Main areas of the user interface
- Personalising the user interface
- Working with data
- Working with reports
- Using the app for Business Central (mobile devices)
- Upgrading from older versions (specific guidance for those moving from older versions of NAV or BC)

This is specifically aimed at users of Business Central using the web client only. This course will broadly suit all versions of Business Central and in particular the online (SaaS) version. We will endeavour to keep these notes as up to date as possible, the SaaS version has potentially monthly updates (feature updates broadly speaking happen twice a year) so there may be times where you will need to refer to the release notes for further information on a new feature, whilst we catch up. The on-premises version is fully catered for, however the focus is on the later versions and some aspects may be different or missing in older on-premises versions. Please note: Users of Business Central versions 13 and 14 have the option of both the web client and desktop client, if using the windows/desktop client then please use the alternative version of this course for that interface (OVE-DC).

The course will contain a mixture of videos, Sways (interactive presentations), quizzes, notes and suggested activities. Each quiz will give you your score and allow you to review your answers, some light-hearted encouragement. We are aiming to cater for a range of preferred learning styles and try to keep things varied. You may find in places that we have deliberately created overlap, so the content will be explained in the notes, shown in a video and the Sway may cover the same topic but with some concise tips for users, these won't be an exact duplication, each different resource will add something but some users like notes and others like videos, hence the need for some overlap. The idea of the notes is that you can download the .pdf file and keep them as guidance on a specific part of a topic, we call these "*Diving deeper into...*".

The course is split into Learning Modules, so that things are grouped logically by topics. Within a Learning Module or section you will find the Aims and Objectives explained in a short document called "*Take Aim*", at the end of each module is a short summary document called "*All Together Now*" that aims to draw together what you should have gained form the module and often offers links to further resources. Finally there will be a Review using Microsoft forms, this is your

(BC-OVE) Overview and Key Skills
+ New ∨   Send to ∨   Page details   Analytics

Content

Main areas of the user interface (BC-OVE-01) ⓘ

"What does this button do?". A guide to new users to working with the user interface in Business Central, covering Role Centres, List pages and Card pages in detail.

- ✓ 🎯 Take Aim - Main areas of the user interface
- ✓ 📄 Diving deeper into...the user interface
- ✓ ▶ Video: User Interface
- ✓ 📄 Handout: Business Central Cheat Sheet
- ✓ ▶ Video: Role Centres
- ✓ 📄 Diving deeper into...working with list pages
- ✓ ▶ Video: List Pages
- ✓ ❓ Quiz: Working with List Pages (OVE-WC01)
- ✓ 📄 Diving deeper into...working with card pages
- ✓ ▶ Video: Card Pages
- ✓ ❓ Quiz: Working with Card Pages (OVE-WC01)
- ✓ 📍 All Together Now - Main areas of the user interface
- ✓ 📄 Review and Feedback

▬▬▬▬▬ 100% Completed   👁 Review

Working Efficiently in the system (BC-OVE-02) ⓘ

"How to work with the system not against it!". How to find things in the system and also to take control of some user specific settings, along with guidance on errors and getting help and suggestions for some key efficiency features.

- ○ 🎯 Take Aim - Working efficiently in the system
- ○ ▶ Video: Search for pages
- ✓ 📄 Diving deeper into...searching for pages and features
- ✓ 📊 Presentation: Using Search in Business Central
- ○ ❓ Quiz: Using Search in Business Central (OVE-WC02)
- ✓ ▶ Video: My Settings
- ✓ 📊 Presentation: My Settings
- ○ 📄 Diving deeper into...getting Help
- ○ ▶ Video: Notifications
- ○ 📄 Diving deeper into...Notifications
- ○ ❓ Quiz: My Settings (OVE-WC02)
- ○ ▶ Video: Role Explorer
- ○ 📄 Diving deeper into...User Tasks
- ○ ❓ Quiz: User Tasks in Business Central (OVE-WC02)
- ✓ 📄 Diving deeper into...Extensions
- ✓ ❓ Quiz: Extensions (OVE-WC02)
- ○ 📄 Handout: Error messages and what they mean

The course content is broken down into easier to consume sections, to help you get an understanding of your key areas. These are downloadable pdf files, designed to be kept by you, which when combined, form the overall course 'booklet'. These focus on both how to use features and set them up.

Diving deeper into...Sales Documents

System Behaviours

There is wide variation between companies using Business Central as to which documents they use, some may not be required. The list includes: **Sales Quotes**, **Sales Orders**, **Blanket Sales Orders**, **Sales Invoices**, **Sales Return Orders**, **Sales Credit Memos.** In all of these documents certain common themes or behaviours exist:

### Where the document is created from matters

If a new **Sales Order** or **Sales Invoice** is created from the list page i.e. the **Sales Orders** list page, then the header of the sales order will be empty, the user needs to select which customer we are selling to.

If the new Sales Order is created from the ribbon of a Customer card (make sure you press tab), then the header will be pre-populated with that Customer's details, saving the user time.

Diving deeper into...**Sales Documents** Page 1 of 8 (V 2.1) **technology management**
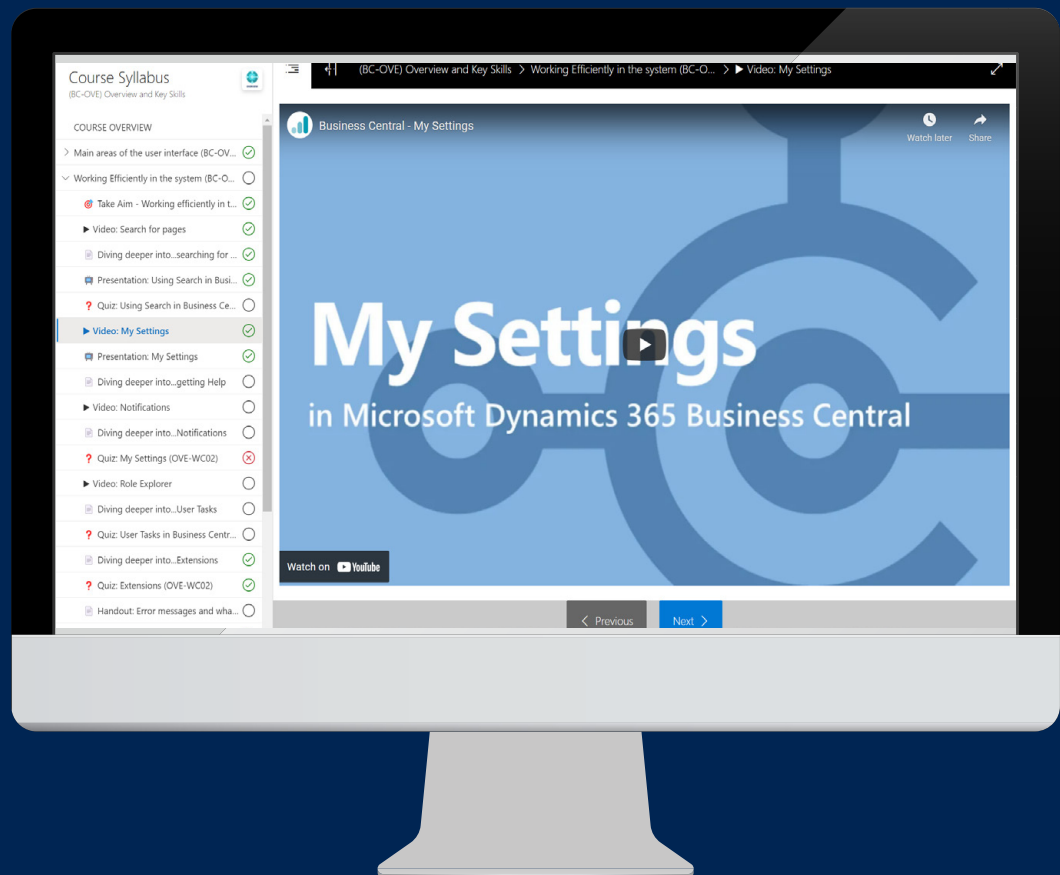
We have created clear, concise videos developed by our Dynamics trainers to introduce the concepts and features in bitesize chunks.

We keep things lively with presentations with animated demos, clear screenshots and visual breakdowns of processes and concepts, perfect for those who would like a mix somewhere between formal documentation and video.
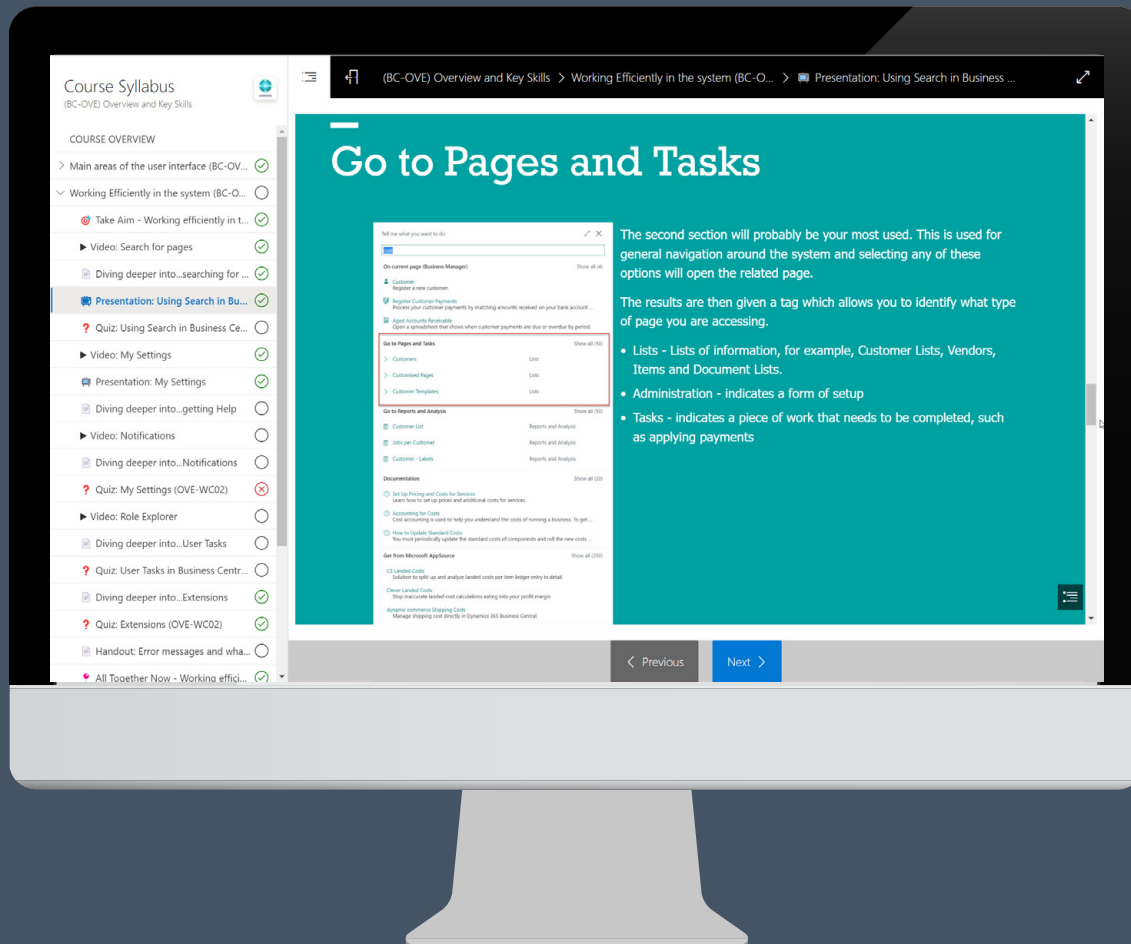
Regular quizzes are included to test your knowledge and reinforce the key points. This information is tracked and reportable as it is fed back to us so we can see how users are performing in these quizzes.
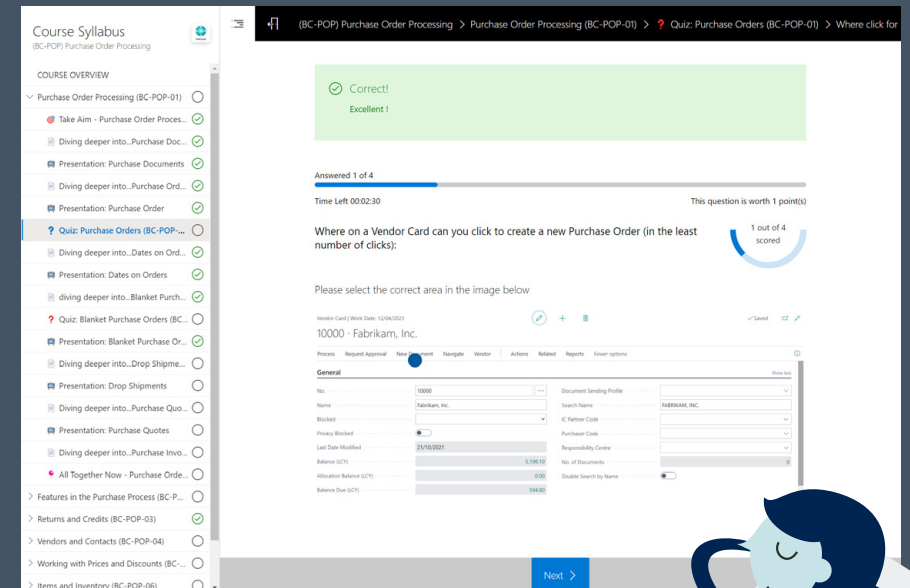
We're always looking to improve, and welcome feedback from you at many points, even including options for your own suggestions to help us include more of what you need in our courses.
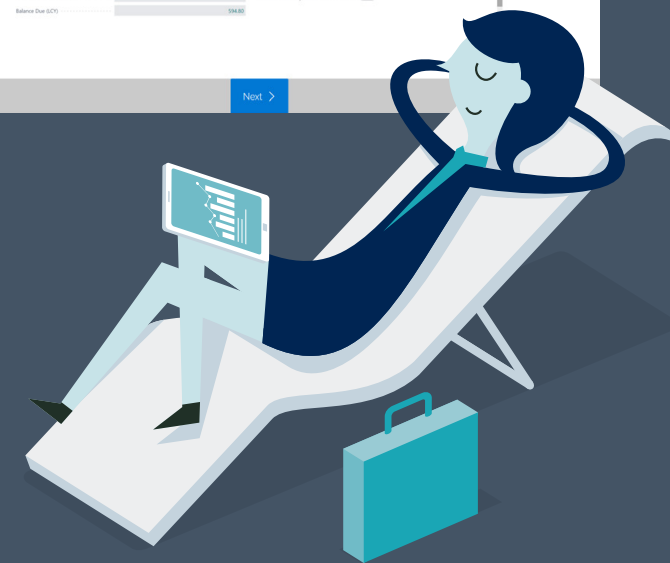
We have detailed reporting on our side to analyse the progress between courses and quiz results, allowing us to track if your users are doing their training.
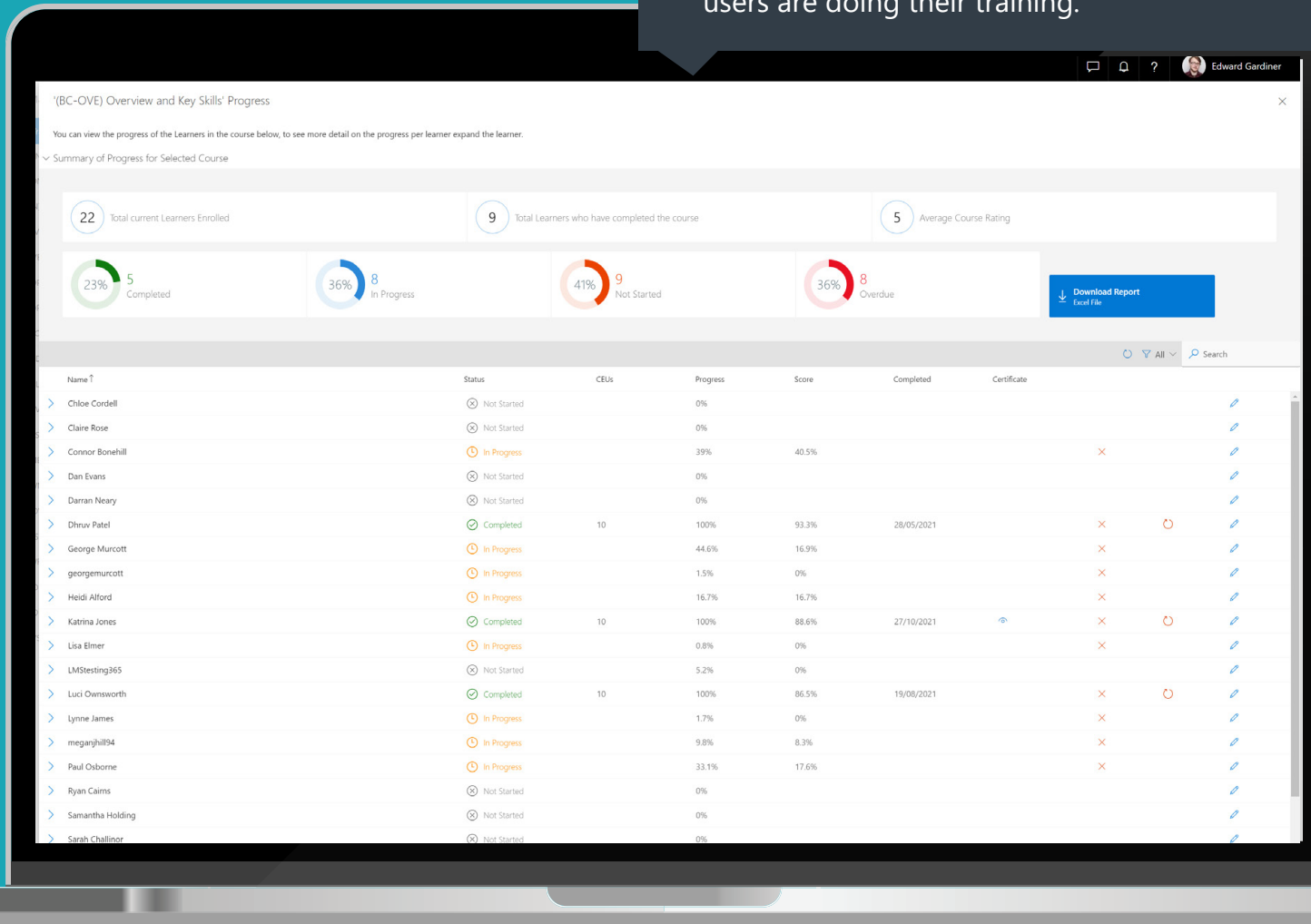
The Tecman Online Learning Platform is powered by LMS365, a Microsoft preferred solution and the only learning platform built into Microsoft 365 and Teams.

Like to find out more?

Ask your Tecman Account Manager for more information

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