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**Microsoft Dynamics AX Configuration Workshop**

**On this page:**

* [Purpose](#purpose)
* [Description](#description)

**Purpose**

The Microsoft Dynamics AX Configuration Workshop is geared toward individuals who will be involved within Microsoft Dynamics AX system configuration. This audience typically includes subject matter exxperts who will be working with Microsoft Dynamics AX to configure the system to meet clients’ needs.

**Description**

# Day 1: Tuesday March 8th

Administration & Basic modules (9:00am – 4:00pm)

**Key processes:**

* User setup
* Employee setup

**Configurations:**

* Legal entities (companies)
* Organization model
* Number sequences
* Address books
* System parameters
* Employees & Titles
* Domains
* Users and User Groups
* Roles
* Virtual companies

# Day 2: Wednesday March 9th

General Ledger (9:00am – 4:00pm)

**Key processes:**

* Chart of accounts setup
* Account & dim sharing
* Journal processing
* Dimension setup
* Journal processing
* Financial reporting (FRx)
* Hyperion upload

**Configurations:**

* Fiscal calendars
* Periods
* Currencies
* Ledgers
* Account Structures
* Chart of Accounts
* Dimensions
* Journals
* System parameters
* System accounts
* Intercompany (GL)
* Divisional allocations
* Hyperion mapping

# Day 3: Thursday March 10th

Fixed Assets (9:00am – 12:00pm)

**Key processes:**

* Asset setup / procure
* Depreciation
* Disposal

**Configurations:**

* Depreciation profiles
* Value models
* Groups
* Posting profiles
* Locations
* Assets
* System parameters

Taxes (1:00am – 4:00pm)

**Configurations:**

* Sales tax authorities
* Sales tax settlement per
* Sales tax codes
* Sales tax groups
* Item sales tax groups

# Day 4: Friday March 11th

Bank (9:00am – 12:00pm)

**Key processes:**

* Account setup
* Transfers
* Account reconciliation
* Inquiries & reports

**Configurations**

* Bank accounts
* Bank groups
* Transaction types
* Transaction groups
* System parameters
* Positive pay

# Day 5: Monday March 14th

Accounts Receivable (9:00am – 4:00pm)

**Key processes:**

* Customer setup
* Receipt processing
* Misc transactions
* Inquiries & reports

**Configurations:**

* Terms of payment
* Method of payment
* Customer groups
* Posting profiles
* Aging
* System parameters
* Customers

# Day 6: Tuesday March 15th

Accounts Payable (9:00am – 4:00pm)

**Key processes:**

* Vendor setup
* Invoice processing
* Payment processing
* Positive pay
* Inquiries & reports

**Configurations:**

* Terms of payment
* Method of payment
* Vendor groups
* Posting profiles
* Aging
* Paid-when-paid
* System parameters
* Vendors

# Day 7: Wednesday March 16th

Projects and Estimates (9:00am – 4:00pm)

**Key processes:**

* Project request
* Project setup
* Sub-project setup

**Configurations:**

* Project Groups
* Categories & Groups
* Items
* Journal Names
* Project Periods
* Posting Profiles
* Workflow
* Cost Prices
* Sales Prices (Bill Rates)
* System parameters
* Contracts
* Projects

# Day 8: Thursday March 17th

Estimates and Quotes (9:00am – 12:00pm)

**Key processes:**

* Estimate creation & approval
* Quotes
* Invoice processing

**Configurations:**

* Estimate revisions
* Workflow
* Quote format

Requisitions & PO's (1:00am – 4:00pm)

**Key processes:**

* Purchase request
* Purch Order entry

**Configurations:**

* Workflow
* Paid-when-paid
* System parameters

# Day 9: Friday March 18th

Overflow (9:00am – 12:00pm)

**Open time to review past topics or questions**

# Day 10: Monday March 21st

Time (9:00am – 12:00pm)

**Key processes:**

* Time entry
* Time approval
* Inquies & reports

**Configurations:**

* Workflow
* Alerts
* System parameters

Expenses (1:00am – 4:00pm)

**Key processes:**

* Expense entry
* Expense approval
* Expense reimbursement
* Inquiries & reports

**Configurations:**

* Workflow
* Expense posting
* System parameters

# Day 11: Tuesday March 22nd

Job Matching & Revenue Recognition (9:00am – 12:00pm)

**Key processes:**

* Job matching
* Revenue reconciliation
* Inquiries & reports

**Configurations:**

* System parameters

Billing (1:00am – 4:00pm)

**Key processes:**

* Raise bill from estimate
* Quick Bill
* Direct billing
* Retainer billing
* Reconciliation billing
* Credit processing
* Project adjustments
* Inquiries & reports

**Configurations:**

* Workflow
* System parameters

# Day 12: Wednesday March 23rd

Intercompany (9:00am – 12:00pm)

**Key processes:**

* Time and expense entry
* Billing

**Configurations:**

* General setup
* System parameters

# Day 13: Thursday March 24th

Overflow (9:00am – 4:00pm)

**Open time to review past topics or questions**