



Business Central Training Program (BC450)

Computer Software & Applications

Program Description

The Velixo Business Central Training Program is a self-paced course that teaches finance and operations professionals how to build live financial reports, retrieve ERP object data, and automate reporting workflows in Excel using Velixo and Microsoft Dynamics 365 Business Central. Participants progress from installation through financial reporting, dimensional analysis, object-based queries, report sharing, and writeback — developing practical skills they can apply immediately in their Business Central environment.

Learning Objectives

Upon successful completion of all modules, participants will be able to:

- Install the Velixo for Business Central extension and configure a live connection from Excel to Business Central
- Build financial reports using Velixo balance functions with dynamic period and company parameters
- Apply GL Account Categories and dimension parameters to build flexible, organized financial reports
- Use core Velixo ribbon features including Drilldown, Status, Freeze, and Snapshot
- Retrieve data from Business Central objects using BC.QUERY, BC.QUERYFILTER, and BC.EXPANDOBJECTRANGE
- Filter and segment reports using Business Central dimensions
- Automate personalized report delivery using Distribution Lists
- Push budget and journal transaction data from Excel into Business Central using writeback functions

Module Overview

Module / Level / Prerequisites	Key Topics	Learning Objectives
Module 1 Basic <i>Prerequisite: None</i> <i>Advance Prep: Register on Velixo Academy</i>	• Installing the Velixo for BC extension (AppSource Gallery) • Installing Velixo NX and configuring a BC connection • Microsoft login authentication and environment/company selection	<i>After completing this module, you will be able to:</i> • Install the Velixo for Business Central extension from BC's AppSource Gallery • Configure a connection from Excel to a Business Central environment

Module / Level / Prerequisites	Key Topics	Learning Objectives
Module 2 Basic <i>Prerequisite:</i> Module 1 <i>Advance Prep:</i> None	• Velixo financial functions (BC.CLOSINGBALANCE, BC.TURNOVER) • Building a first live financial report • Dynamic cell references for periods, companies, and parameters • Filtering with dimension parameters	<i>After completing this module, you will be able to:</i> • Build a live financial report using Velixo functions connected to Business Central • Apply cell references and dimension filters to make reports dynamic and reusable
Module 3 Basic <i>Prerequisite:</i> Module 2 <i>Advance Prep:</i> None	• GL Account Categories in Velixo reporting • Drilldown to underlying BC transactions • Freeze and Snapshot for report sharing	<i>After completing this module, you will be able to:</i> • Use GL Account Categories to build classification-based financial reports • Use Drilldown to analyze the transactions behind any report value • Use Freeze or Snapshot to share reports with non-Velixo users
Module 4 Intermediate <i>Prerequisite:</i> Module 3 <i>Advance Prep:</i> None	• BC.QUERY for Business Central object data retrieval • BC.EXPANDOBJECTRANGE for dynamic record ranges • BC.QUERYFILTER for server-side filtering	<i>After completing this module, you will be able to:</i> • Retrieve data from Business Central objects using BC.QUERY and BC.QUERYFILTER • Use BC.EXPANDOBJECTRANGE to return dynamically sized record sets
Module 5 Intermediate <i>Prerequisite:</i> Module 3 <i>Advance Prep:</i> None	• Velixo Status feature • Distribution Lists: setup, parameters, and delivery • Excel and PDF output formats • Business Central dimensions in Velixo formulas	<i>After completing this module, you will be able to:</i> • Use the Status feature to monitor Velixo workbook activity • Configure Distribution Lists to generate and deliver personalized reports by department or dimension • Apply Business Central dimension parameters in Velixo financial formulas
Module 6 Advanced <i>Prerequisite:</i> Module 5 <i>Advance Prep:</i> None	• Budget Writeback: template configuration and submission • Journal Transaction Writeback • Pre-submission validation and required permissions	<i>After completing this module, you will be able to:</i> • Configure a budget writeback template and push approved budgets into Business Central • Create and post journal entries directly from Excel into Business Central

Module / Level / Prerequisites	Key Topics	Learning Objectives
		Verify data validity and permissions before performing any writeback operation

Program Delivery Method

The Business Central Training Program (BC450) is delivered as a Self Study program through Velixo Academy (learning.velixo.com). Participants may start, pause, and resume the course at any time at their own pace. There are no scheduled sessions or live components.

Field of Study

The Business Central Training Program (BC450) is a course in Computer Software & Applications.

Registration Instructions

This course is available through Velixo Academy (learning.velixo.com). Once you have registered, the course will appear on your Velixo Academy home page. To begin, simply follow the course link. No additional registration is required — participants may start the self-study program immediately upon accessing the course.

For subscription inquiries, contact your Velixo Customer Success Manager at

Email: customersuccess@velixo.com Phone: 1-855-583-5496

Refund Policy

Velixo's current Self Study programs are included as part of the Velixo subscription at no additional charge. No separate course fee is assessed for access to this program.

In the event of significant technical issues directly attributable to Velixo that prevent access to the program for an extended period, Velixo will make reasonable efforts to provide alternative access or a pro-rated credit, as appropriate.

For questions regarding your subscription, contact customersuccess@velixo.com.

Complaint Resolution Policy

Velixo is committed to providing high-quality training programs. Should you experience any issue or concern regarding a Velixo training program, please follow these steps:

- **Initial Contact:** Contact your Velixo Customer Success Manager at customersuccess@velixo.com or 1-855-583-5496.
- **Escalation:** If unresolved, escalate in writing to the Customer Success leadership team at customersuccess@velixo.com with a description of the issue, relevant dates, and supporting documentation.
- **Review and Response:** Velixo will acknowledge escalated complaints within five (5) business days and provide a substantive response within fifteen (15) business days.

