

# INTRODUCTION TO MICROSOFT DYNAMICS 365 (M55250)

Course Code: 100596

Introduction to Microsoft Dynamics 365.

This course provides students with an introduction to Microsoft Dynamics 365 Customer Engagement (CRM) and Power Apps.

The main features and apps are introduced including Sales, Service , Marketing and Power Apps.. Students will learn important end user skills including how to proficiently work in Microsoft Dynamics 365 to find information quickly and easily using the out of the box tools such as Advanced Find, the Report Wizard, Charts and Dashboards through the - the Browser and Outlook interfaces.

No previous experience of Microsoft Dynamics 365 is needed to sit this course.

This course has been updated to the October 2020 Release Wave 2 of Microsoft Dynamics 365 and the Power Platform.

## What You'll Learn

After completing this course, students will be able to:

- Be familiar with the Apps and Hubs in Microsoft Dynamics 365 Customer Engagement including Sales, Service and Marketing
- Understand the differences between the Dynamics 365 Apps and PowerApps
- Be able to Create, Update, Relate, Assign and Delete records in Microsoft Dynamics 365
- Create Posts, Notes and Activities in the Timeline control and Interact with the Relationship Assistant
- Manage, Assign and Complete Activities
- Understand Connections and use them to relate records together
- Work with Views and create and save a Personal View of records
- Understand how work with Lookups and Related Records
- Share records and views with other Users
- Perform bulk operations on records
- Configure Personal Options to customize the user experience
- Track Emails and Appointments in Outlook against records in Dynamics 365
- Proficiently find information using Global Search, Quick Find and Advanced Find

- Explore the out of the box Reports and create a custom Report using the Report Wizard
- Create a Personal Chart and Dashboard and set as your homepage

## Who Needs to Attend

This course has been designed to apply to end users of Microsoft Dynamics 365 Customer Engagement, including:

- Sales Representatives
- Customer Service Representatives
- Marketing Personnel
- Project Managers

General End Users who are looking to improve skill in Dynamics 365 It is recommended that attendees of this course have an existing working knowledge of Microsoft Office, Microsoft Excel and Microsoft Outlook. However, this course assumes no prior knowledge of Microsoft Dynamics 365.

## Prerequisites

Before attending this course, students must have:

- A working knowledge of Microsoft Office, Microsoft Excel and Microsoft Outlook.

However, this course assumes no prior knowledge of Microsoft Dynamics 365.

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CLASSROOM LIVE

\$675 CAD

1 Day

## Classroom Live Outline

### Module 1: Introduction

This module provides the attendee with an introduction to Microsoft Dynamics 365 Customer Engagement.

#### Lessons

- What is Dynamics 365?
- The benefits of Dynamics 365
- The Sales Apps and Hubs
- The Customer Service Apps and Hubs
- The Marketing Apps
- Power Apps
- The Web Interface
- The Outlook Interface
- Lists and Grids
- Forms
- Look ups and Related Records
- Where to get Help
- Further reading and resources

After completing this module, students will be able to:

- Describe the key features and benefits of Microsoft Dynamics 365 Customer Engagement
- Be familiar with the Sales Hub, Customer Service Hub and the Marketing App
- Understand the differences between the Web and Outlook Interfaces
- Know where to find help and further reading resources

### Module 2: Records, Activities and Personal Options

This module presents the basic concepts and features in Microsoft Dynamics 365 Customer Engagement. We examine the relevance of Records and Relationships, tracking Activities and configuring Personal Options. You will also learn how to work with the Posts, Activities and Notes in the Timeline control.

### **Lessons**

- Records and Relationships
- Activities
- The Timeline Control
- The Relationship Assistant
- Connections
- Setting your Personal Options

After completing this module, students will be able to:

- Work with Records and Activities
- Interact with Posts, Notes and Attachments in the Timeline control
- Create Record Connections
- Configure Personal Options
- Work with Activity Records
- Know where to find help and further reading resources

### **Module 3: Performing Work in Dynamics 365**

This module presents common skills the end user requires to efficiently perform work in Microsoft Dynamics 365 Customer Engagement. You will learn how to work with Records, create Personal Views, Reassign Records to a different Owner and Share a Record s, Views and Charts with other User. You will also learn how to perform bulk operations such as Edit Multiple.

### **Lessons**

- Working with data and records
- Security considerations
- System Views and Personal Views
- Creating a Record
- Editing an existing Record
- Deleting a Record
- Related Records
- Reassigning a Record to a new Owner
- Sharing a record with another User or Team
- Performing operations on multiple Records

After completing this module, students will be able to:

- Perform operations on Records
- Create and manage Personal Views
- Reassign and Share Records
- Perform bulk operations on Records

### **Module 4: Dynamics 365 for Outlook**

In this module we will learn how to use Dynamics 365 for Outlook. The Outlook Add-in will be considered including the Dynamics 365 navigation options, the process to track Emails and Appointments against records in Dynamics 365 and how to synchronize your work with the Dynamics 365 server.

### **Lessons**

- Introduction to Dynamics 365 for Outlook
- Dynamics 365 Pop-out Window
- Tracking Activities in Outlook
- Templates, Sales Literature and Articles
- Creating Dynamics 365 Records in Outlook
- Searching Dynamics 365 Records in Outlook

After completing this module, students will be able to:

- Be familiar with the Dynamics 365 for Outlook App
- Understand the differences between the Web and Outlook Interfaces
- Track Activities in Outlook against records in Dynamics 365

### **Module 5: Searching in Dynamics 365**

In this module we will learn how to search for and find information in Microsoft Dynamics Customer Engagement. We will look at all the out of the box search tools including Global Find, Quick Find and Advanced Find.

### **Lessons**

- Introduction to searching in Dynamics 365
- Global Search
- Quick Find
- Advanced Find

After completing this module, students will be able to:

- Use Global Search
- Use Quick Find
- Be proficient using the Advanced Find Tool

### **Module 6: Reports, Charts and Dashboards**

This module looks at the different methods available in Microsoft Dynamics 365 to analyze information. We look at the out of the box 'Default' reports and the process to create a custom report using the Dynamics 365 Report Wizard. This module also examines the out of the box Charts and Dashboards as well as the process to construct a custom Chart and Dashboard.

### **Lessons**

- Introduction to Reports, Charts and Dashboards
- The Default Reports
- The Reporting Wizard
- Working with Charts
- Working with Dashboards

After completing this module, students will be able to:

- Be familiar with the out of the box Reports
- Use the Reporting Wizard to create a custom Report
- Understand the Dynamics 365 Charts
- Create a custom Personal Chart
- Understand the Dynamics 365 Dashboards
- Create a custom Personal Dashboard

## Classroom Live Labs

### **Lab : Setting up your lab environment**

- Install Sample Data

### **Lab : Dynamics 365 Orientation**

- Explore Microsoft Dynamics 365

### **Lab : Set Personal Options**

- Change your Homepage
- Change Records Per Page
- Configure Format Settings

### **Lab : Working with Activities**

- Create a Task Activity
- Track an Activity using the Set Regarding field
- Assign an Activity using the Owner Field
- Find and Complete an Activity

### **Lab : Managing Records**

- Create an Account Records
- Relate a Contact to an Account
- Reassign an Account Record
- Share an Account Record
- Make an Account Inactive

### **Lab : Create a Personal View**

- Create a Personal View
- Set a default Personal View

### **Lab : Tracking Activities in Outlook**

- Track an Email in Dynamics 365 for Outlook
- Track an Appointment in Dynamics 365 for Outlook

### **Lab : Using Global Find**

- Use Global Find to search for Information

### **Lab : Using Quick Find**

- Use Quick Find to search for Information

### **Lab : Create a custom Report**

- Create a Custom Report
- Test your new Report

**Lab : Explore the Charts**

- Explore the Charts
- Create a Custom Chart

**Lab : Explore the Dashboards**

- Explore the Dashboard
- Create a Custom Dashboard

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VIRTUAL CLASSROOM LIVE

\$675 CAD

1 Day

## Virtual Classroom Live Outline

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- Where to get Help
- Further reading and resources

After completing this module, students will be able to:

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PRIVATE GROUP TRAINING

1 Day

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