

# 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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