

Introduction to Microsoft Dynamics 365 (MS-55250)

Modality: Virtual Classroom

Duration: 1 Day

About this course:

This course gives understudies an introduction to MS Dynamics 365 by building an establishment for every single subsequent learning and course. The main applications and features are introduced including Service, Sales, and Marketing. Understudies will learn significant end-client aptitudes including how to capably function in MS Dynamics 365 to find information rapidly and effectively using the good instruments, for example, the Report Wizard, Advanced Find, Unified Client Interface (UCI), Charts and Dashboards through the Web, and the Dynamics 365 for Outlook App.

No past experience of MS Dynamics 365 is expected to sit this course. The course applies to both Enterprise and Business Editions of MS Dynamics 365 Version 9 and also on-premise and online deployments.

The normal compensation of a Dynamics CRM Consultant is \$115,000 annually.

Course Objective:

- Be comfortable with the Hubs and Apps in MS Dynamics 365 Version 9, including Service, Sales, and Marketing
- Comprehend the differences between the Unified Client Interface (UCI) and the Web.
- Have the option to Update, Create, Assign, Relate, and Delete records in MS Dynamics 365
- Make Notes, Posts, and Activities. Interact with the Relationship Assistant
- Oversee, Assign and Complete Activities
- Make and save a Personal View of records
- Get Connections and use them to relate records together
- Share views and records with other Users
- Perform the mass procedure on records
- Arrange Personal Options to modify the client experience
- Capably find information using Quick Find, Global Search, and Advanced Find
- Track Appointments, Email, and Tasks in Outlook against records in Dynamics 365
- Make a Personal Dashboard and Chart and set as your homepage
- Investigate the out of the box Reports and make a Custom Report utilizing the Report Wizard

Audience:

This course has been intended to apply to end clients of MS Dynamics 365, including:

- Sales Representatives
- Marketing Personnel

- Customer Service Representatives
- Project Managers
- End Users who are looking to improve aptitude in Dynamics 365
- It is suggested that participants of this course have existing working information on MS Office, MS Excel, and MS Outlook. Notwithstanding, this course assumes no earlier information on MS Dynamics 365.

Prerequisite:

Working information on Microsoft Excel, Microsoft Office, and Microsoft Outlook. However, this course expects no earlier information on MS Dynamics 365.

Course Outline:

Module 1: Introduction

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

Lessons

- What is Dynamics 365?
- The benefits of Dynamics 365
- The Sales Apps and Hubs
- The Customer Service Apps and Hubs
- The Marketing Apps
- The Unified Client Interface (UCI)
- The Web Interface
- The Outlook Interface
- Where to get Help
- Further reading and resources

Lab : Setting up your lab environment

- Install Sample Data

Lab : Web Interface Orientation

- Explore the Web Interface in Microsoft Dynamics 365

Lab : Unified Client Interface Orientation

- Explore the Unified Client Interface in Microsoft Dynamics 365

After completing this module, students will be able to:

- Describe the key features and benefits of Microsoft Dynamics 365
- Be familiar with the Sales, Customer Service and Marketing Apps and Hubs
- Understand the differences between the Web, Unified Client Interface (UCI) 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. 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 control.

Lessons

- Records and Relationships
- Activities
- Posts, Assistant, Activities and Notes
- Connections
- Setting your Personal Options

Lab : Set Personal Options

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

Lab : Using 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

After completing this module, students will be able to:

- Work with Records and Activities
- Interact with Posts, Notes, Assistant Insights and Attachments
- 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 an end user requires to efficiently perform work in Microsoft Dynamics 365. You will learn how to work with Records, create Personal Views, Reassign Records to a different Owner and Share a Record with another 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

Lab : Managing Records

- Create Account and Contact 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

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, Tasks 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
- Navigation considerations
- Tracking Activities in Outlook

Lab : Tracking Activities in Outlook

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

After completing this module, students will be able to:

- Be familiar with the Dynamics 365 for Outlook App
- Understand the differences between the Browser 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. 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

Lab : Using Global Find

- Use Global Find to search for Information

Lab : Using Quick Find

- Use Quick Find to search Account Records

Lab : Using Advanced Find

- Use Advanced Find to search for Information

After completing this module, students will be able to:

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

Module 6: Reports, Charts and Dashboards

This module looks at the different methods available in Microsoft Dynamics 365 to analyse 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

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

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