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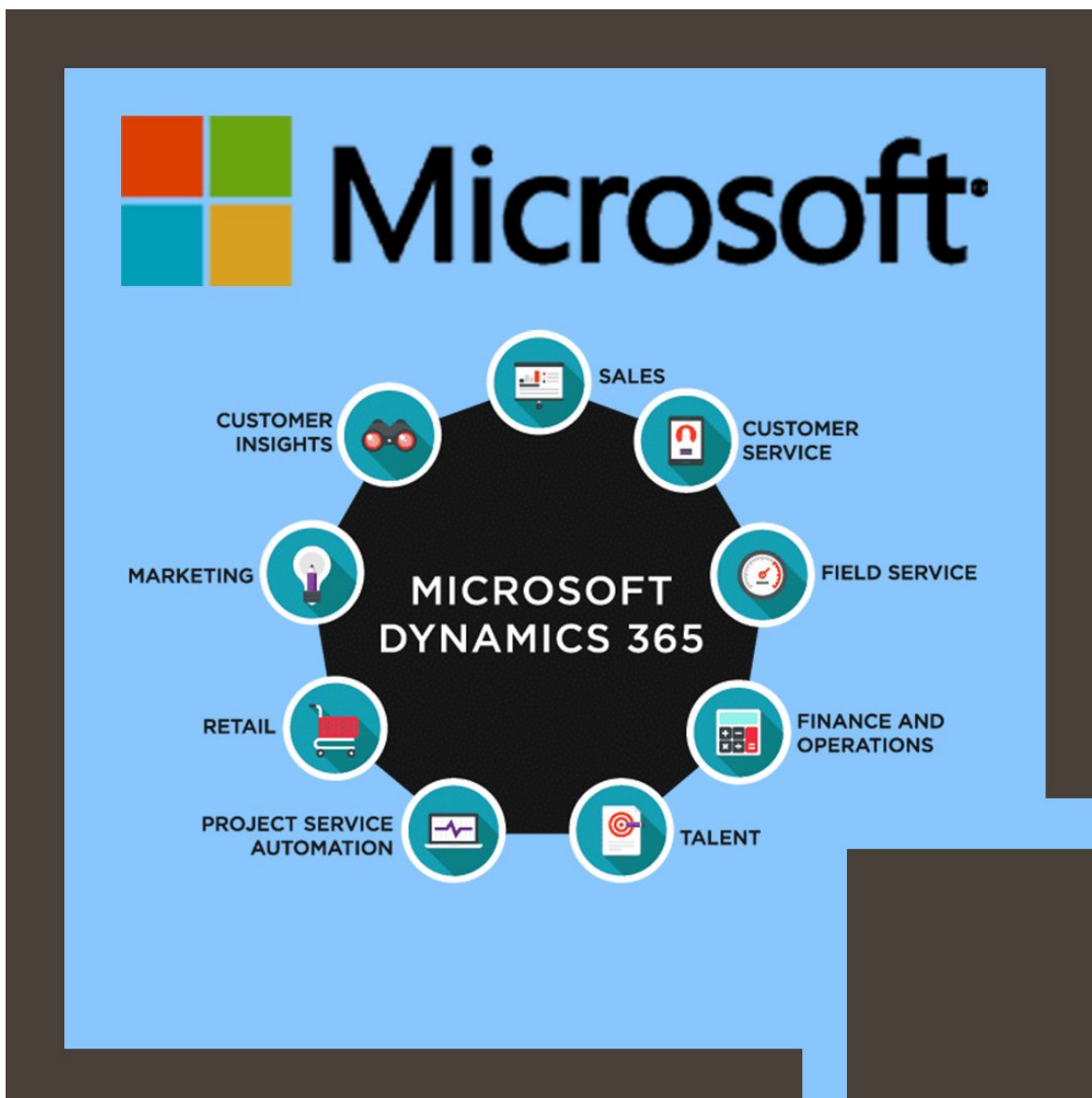
Learning Style: Virtual Classroom

Provider: Microsoft

Difficulty: Intermediate

Course Duration: 1 Day

Introduction to Microsoft Dynamics 365 (MS-55250)

About this course:

This course provides students with an introduction to Microsoft Dynamics 365 by building a foundation for all subsequent courses and learning. The main features and apps are introduced including Sales, Service and Marketing. 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 Web, Unified Client Interface (UCI) and the Dynamics 365 for Outlook App.

No previous experience of Microsoft Dynamics 365 is needed to sit this course. The course applies to both Business and Enterprise Editions of Microsoft Dynamics 365 Version 9 as well as online and on-premise deployments.

The average salary of a Dynamics CRM Consultant is **$115,000** per year.

Course Objective:

- Be familiar with the Apps and Hubs in Microsoft Dynamics 365 Version 9, including Sales, Service and Marketing
- Understand the differences between the Web and Unified Client Interface (UCI)
- Be able to Create, Update, Relate, Assign and Delete records in Microsoft Dynamics 365
- Create Posts, Notes and Activities. Interact with the Relationship Assistant
- Manage, Assign and Complete Activities
- Understand Connections and use them to relate records together
- Create and save a Personal View of records
- Share records and views with other Users
- Perform bulk operations on records
- Configure Personal Options to customize the user experience
- Track Email, Appointments and Tasks 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

Audience:

This course has been designed to apply to end users of Microsoft Dynamics 365, 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.

Prerequisite:

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.

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

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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

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