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55250BC: Introduction to Microsoft Dynamics 365

Course 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 App and Hub
- The Customer Service App and Hub
- The Marketing App
- Dynamics 365 and PowerApps
- The Web Interface
- The Outlook Interface
- Lists and Grids
- Forms
- Look ups and Related Records
- Where to get Help
- Further reading and resources

Lab 1: Setting up your lab environment

- Install Sample Data

Lab 2: Dynamics 365 Orientation

- Explore Microsoft Dynamics 365

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

Lab 1: Set Personal Options

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

Lab 2: 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

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 Records, Views and Charts with other Users. 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 1: Managing Records

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

Lab 2: 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 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

Lab 1: 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 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

Lab 1: Using Global Find

- Use Global Find to search for Information

Lab 2: Using Quick Find

- Using Quick Find to search Account Records

Lab 3: 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 using 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 1: Create a custom Report

- Create a Custom Report
- Test your new Report

Lab 2: Explore the Charts

- Explore the Charts
- Create a Custom Chart

Lab 3: 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