KOENIG
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Microsoft
Solutions Partner

Microsoft Cloud
Training Services

55250BC: Introduction to Microsoft Dynamics 365

Duration: 08 Hours (1 Day)

Overview

The Introduction to Dynamics 365 course, designated as 55250BC, provides learners with foundational knowledge of Microsoft Dynamics 365. It is designed for individuals who are new to this versatile business management solution. The course covers a broad range of topics, from understanding the core concepts and benefits of Dynamics 365 to navigating its various apps and interfaces such as sales, customer service, and marketing passthrough a combination of lectures and hands-on labs, participants will learn how to manage records, utilize activities, and personalize options to enhance their workflow. They will also gain proficiency in Searching within the platform, as well as Creating and interpreting reports, Charts, and Dashboards. By the end of the course, learners will be well-equipped to use Dynamics 365 effectively in a business setting, improving productivity and customer engagement. This introduction to Dynamics 365 will also lay the groundwork for further specialized training or certification within the Dynamics 365 suite.

Audience Profile

This course offers a foundational understanding of Microsoft Dynamics 365, ideal for professionals seeking to leverage its business solutions.

- Sales associates and managers looking to improve customer engagement
- Customer service representatives and managers seeking to enhance service delivery
- Marketing professionals aiming to utilize Dynamics 365 for campaigns
- IT professionals responsible for implementing and managing Dynamics 365 environments
- Business analysts interested in leveraging Dynamics 365 for data insights
- Dynamics 365 administrators and customizers
- Project managers overseeing Dynamics 365 deployments
- System integrators and consultants specializing in CRM solutions
- PowerApps developers interested in integrating with Dynamics 365
- Technical support staff involved with Dynamics 365 maintenance and troubleshooting

Course Syllabus

Module 1: Introduction

- 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

Lab 2: Dynamics 365 Orientation

Module 2: Records, Activities and Personal Options

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

Lab 1: Set Personal Options

Lab 2: Working with Activities

Module 3: Performing Work in Dynamics 365

- 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