KOENIG SOLUTIONS · COURSE OUTLINE

55250BC: Introduction to Microsoft Dynamics 365

Learn to navigate Dynamics 365 apps and interfaces, manage records and activities, and personalise options to support daily business tasks.

1 Day	3	29	4
8 HOURS	MODULES	TOPICS	HANDS-ON LABS

COURSE 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.

WHO THIS COURSE IS FOR

Who Should Attend

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

LEARNING OBJECTIVES

- Explain the core concepts and benefits of Dynamics 365
- Identify the Sales, Customer Service and Marketing apps
- Navigate the Web and Outlook interfaces, lists, grids and forms
- Manage records, relationships and related records
- Apply the Timeline Control, Relationship Assistant and Connections
- Configure personal options to suit individual workflow
- Create, edit, delete and reassign records
- Apply security considerations when sharing records

COURSE SYLLABUS

3 Modules, 29 Topics

01

2 Labs

Introduction

TOPICS

- 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

02

2 Labs

Records, Activities and Personal Options

TOPICS

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

03

Performing Work in Dynamics 365

TOPICS

- 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

HANDS-ON LABS

Practise What You Learn

#	MODULE	ACTIVITY
01	**Introduction**	■ Setting up your lab environment ■ Dynamics 365 Orientation
02	**Records, Activities and Personal Options**	■ Set Personal Options ■ Working with Activities

WHAT IS INCLUDED

Everything You Need to Succeed

- Koenig course material for every module
- Delivery by certified instructors and subject matter experts
- Hands-on exercises throughout the course
- Course completion certificate from Koenig

ABOUT KOENIG

Who We Are

Established in 1993, Koenig Solutions is a globally recognised training provider with 35+ technology partnerships, 5,000+ training programmes and a network of certified instructors and subject matter experts, supporting individuals and enterprise teams worldwide.

FLEXIBLE DELIVERY

Learn the Way That Suits You

Classroom Training | Live Online Classes (ILO) | Fly-Me-A-Trainer (FMAT) | Flexi (Self-Paced) | 1-on-1 Training

Ready to Get Started?

Talk to a learning advisor about schedules, group training and customised delivery.

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