

# 55250: Introduction to Microsoft Dynamics 365

Duration: 1 Day

## Course Content:

This training is offered by Microtek learning to help students understand the fundamentals of Microsoft Dynamics 365 Customer Engagement by creating a foundation for all subsequent learning and courses. Main apps and features are covered in the training including marketing, service, and sales. Professionals will also learn end-user skills such as working in Microsoft Dynamics 365 to quickly identify information and use tools such as Report Wizard, Advanced Find, Dashboard, and Charts through Dynamics 365 and the Web Browser.

The training is aligned with the objectives of the course variant 55250A.

## Who should attend?

This training program is designed to apply to end users of Microsoft Dynamics 365 Customer Engagement, including customer service representatives, project managers, sales representatives, marketing personnel, and general end-users who want to improve their skill in Dynamic 365.

## Prerequisites for this training

Working knowledge of Microsoft Office, Microsoft Excel, and Microsoft Outlook. However, this course assumes no prior knowledge of Microsoft Dynamics 365.

## Course Objectives

- Introduction to the Hubs and Apps in Microsoft Dynamics 365 Customer Engagement including marketing, service, and sales
- Learning the differences between the PowerApps and Dynamics 365 Apps
- Learning how to create, relate, update, assign, and delete records in Microsoft Dynamics 365
- Creating activities, notes, and posts in the Timeline control and interacting with the Relationship Assistant
- Managing, Assigning and Completing Activities
- Understanding Connections and using them to relate records together
- Working with Views and creating and saving a Personal View of records
- Understanding how to work with Related Records and Lookups
- Sharing records and viewing with other Users
- Performing bulk operations on records
- Configuring Personal Options to personalize the user experience
- Tracking Appointments and Email in Outlook against records in Dynamics 365



- Finding information using Advanced Find, Quick Find, and Global Search,
- Exploring tools such as Reports and creating a Custom Report using the Report Wizard
- Creating a Dashboard and Personal Chart and set as your homepage

### Detailed 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 Apps and Hubs
- The Customer Service Apps and Hubs
- 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: Setting up your lab environment

- Install Sample Data

##### Lab: 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: Set Personal Options

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

### Lab: 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: 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: 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: 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: 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 analyze 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

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