

# Course Outline | Dynamics 365 Introduction

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1 day(s)

## Overview

### About this course:

This course is a 'hands-on' introduction and is primarily focused on End Users and Managers everyday use of Dynamics 365 CRM.

### Prerequisites:

Before attending this course, students must have:

- General knowledge of Microsoft Windows.
- General knowledge of Microsoft Office.

### Audience Profile

User and Managers who want to learn and understand Dynamics 365's interface, adaptability and functionality to help them make best use of Dynamics 365 in their everyday work, resulting in increased productivity and empowerment.

## Course Outline

### Module 1: Microsoft Dynamics CRM Concepts

- Microsoft Dynamics 365 functionality
- Microsoft Dynamics 365 clients
- Microsoft Dynamics 365 records
- Application navigation
- Using Views
- Searching and Filtering

### Module 2: Working with the Application

- Dynamics 365 Security Settings
- Customer records
- Addresses
- Introduction to cases
- Recently Viewed and Related Records
- Business Processes
- Quick Create
- Importing and Exporting To and From Excel

### Module 3: Introduction Dashboards

- Data in Dashboards
- Dashboards Charts and Other Fields
- Dashboard Layouts

### Module 4: Using Activities

- Finding and Using Activities
- Add an Activity
- Attaching a Document to a note or task
- Completing an Activity

### Module 5: Introduction to Sales Management

- Sales Dashboard
- Working with Leads

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- Sales Process
- Opportunities
- Closing and Re-Opening a Lead

## Module 6: Introduction to Customer Service

- Using Activities for Customer Service
- Service Level Agreements
- Entitlements
- Queues
- Assigning Cases
- Grouping and Merging Related Cases
- Resolving a Case

## Module 7: Preferences

- Basic Preferences
- Setting a Home Page
- Setting Preferences for Views
- Changing Font Size
- Changing Activity Feed Display Picture