Training: Microsoft
MS-55250 Introduction to Microsoft Dynamics 365

Microsoft Partner

TRAINING GOALS:

This course provides end users with the skills they need most to be productive using Microsoft Dynamics 365 Customer Engagement (CRM) Apps. The main features of all Dynamics 365 Apps are introduced including the Sales, Customer Service and Marketing, with an emphasis on handy tricks and techniques to become more productive in everyday tasks. Students will learn important end user skills including how to proficiently work in Microsoft Dynamics 365 to find information quickly and easily using the out of the box tools. After the training, students will be proficient in using Microsoft Dynamics 365 Apps through the browser and through the Outlook interfaces. No previous experience of Microsoft Dynamics 365 is needed to take this course. This course serves as a pre-requisite to all other Microsoft Dynamics 365 courses.

After completing the course, students will be able to:

- Be familiar with the Apps and Hubs in Microsoft Dynamics 365 Customer Engagement including Sales, Service and Marketing
- Understand the differences between the Dynamics 365 Apps and PowerApps
- Be able to Create, Update, Relate, Assign and Delete records in Microsoft Dynamics 365
- Create Posts, Notes and Activities in the Timeline control and interact with the Relationship Assistant
- Manage, Assign and Complete Activities
- Understand Connections and use them to relate records together
- Work with Views and create and save a Personal View of records
- Understand how work with Lookups and Related Records
- Share records and views with other Users
- Perform bulk operations on records
- Configure Personal Options to customize the user experience
- Track Email and Appointments in Outlook against records in Dynamics 365
- Proficiently find information using Global Search, Quick Find and Advanced Find
- Explore the out of the box Reports and create a custom Report using the Report Wizard
- Create a Personal Chart and Dashboard and set as your homepage

Audience profile:

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ul. Tatarska 5, 30-103 Kraków, tel.: (12) 298 47 77
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This course has been designed to apply to end users of Microsoft Dynamics 365 Customer Engagement, including:

- Sales Representatives
- Customer Service Representatives
- Marketing Personnel
- Project Managers
- General End Users who are looking to improve skill in Dynamics 365

CONSPECT:

- Introduction
- Records, Activities and Personal Options
- Performing Work in Dynamics 365
- Dynamics 365 for Outlook
- Searching in Dynamics 365
- Reports, Charts and Dashboards

REQUIREMENTS:

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

Difficulty level



CERTIFICATE:

Certificate of completing an authorized Microsoft training

ADDITIONAL INFORMATION:

Microsoft Certified Trainer

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