

Course duration

- 1 day

Course Benefits

- Become familiar with the Apps and Hubs in Microsoft Dynamics 365 Version 9, including Sales, Service, and Marketing.
- Understand the differences between the Web and Unified Client Interface (UCI).
- Be able to create, update, relate, assign, and delete records in Microsoft Dynamics 365.
- Create posts, notes, and activities and interact with the Relationship Assistant.
- Manage, assign, and complete activities.
- Understand connections and use them to relate records together.
- Create and save a Personal View of records.
- Share records and views with other users.
- Perform bulk operations on records.
- Configure personal options to customize the user experience.
- Track email, appointments, and tasks 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.

Course Outline

1. Introduction

1. What is Dynamics 365?
2. The benefits of Dynamics 365
3. The Sales Apps and Hubs
4. The Customer Service Apps and Hubs
5. The Marketing Apps
6. The Unified Client Interface (UCI)
7. The Web Interface
8. The Outlook Interface
9. Where to get Help
10. Further reading and resources
11. Lab 1: Setting up your lab environment
12. Install Sample Data
13. Lab 2: Web Interface Orientation
14. Explore the Web Interface in Microsoft Dynamics 365
15. Lab 3: Unified Client Interface Orientation
16. Explore the Unified Client Interface in Microsoft Dynamics 365

2. Records, Activities and Personal Options

1. Records and Relationships
2. Activities
3. Posts, Assistant, Activities and Notes
4. Connections
5. Setting your Personal Options
6. Lab 1: Set Personal Options
7. Change Your Homepage
8. Change Records Per Page
9. Configure Format Settings
10. Lab 2: Using Activities
11. Create a Task Activity
12. Track an Activity using the Set Regarding field
13. Assign an Activity using the Owner Field
14. Find and Complete an Activity
3. Performing Work in Dynamics 365
 1. Working with data and records
 2. Security considerations
 3. System Views and Personal Views
 4. Creating a Record
 5. Editing an existing Record
 6. Deleting a Record
 7. Related Records
 8. Reassigning a Record to a new Owner
 9. Sharing a record with another User or Team
 10. Performing operations on multiple Records
 11. Lab 1: Managing Records
 12. Create an Account Record
 13. Relate a Contact to an Account
 14. Reassign an Account Record
 15. Share an Account Record
 16. Make an Account Inactive
 17. Lab 2: Create a Personal View
 18. Create a Personal View
 19. Set a default Personal View
4. Dynamics 365 for Outlook
 1. 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, Tasks and Appointments against records in Dynamics 365 and how to synchronize your work with the Dynamics 365 server.
 2. Introduction to Dynamics 365 for Outlook
 3. Navigation considerations
 4. Tracking Activities in Outlook
 5. Lab 1: Tracking Activities in Outlook
 6. Track an Email in Dynamics 365 for Outlook
 7. Track an Appointment in Dynamics 365 for Outlook
5. Searching in Dynamics 365
 1. In this module we will learn how to search for and find information in Microsoft

Dynamics. We will look at all the out of the box search tools including Global Find, Quick Find and Advanced Find.

2. Introduction to searching in Dynamics 365
3. Global Search
4. Quick Find
5. Advanced Find
6. Lab 1: Using Global Find
7. Use Global Find to search for Information
8. Lab 2: Using Quick Find
9. Use Quick Find to search Account Records
10. Lab 3: Using Advanced Find
11. Use Advanced Find to search for Information
6. Reports, Charts and Dashboards
 1. Introduction to Reports, Charts and Dashboards
 2. The Default Reports
 3. The Reporting Wizard
 4. Working with Charts
 5. Working with Dashboards
 6. Lab 1: Create a custom Report
 7. Create a Custom Report
 8. Test your new Report
 9. Lab 2: Explore the Charts
 10. Explore the Charts
 11. Create a Custom Chart
 12. Lab 3: Explore the Dashboards
 13. Explore the Dashboard
 14. Create a Custom Dashboard

Class Materials

Each student will receive a comprehensive set of materials, including course notes and all the class examples.

Class Prerequisites

Experience in the following *is required* for this Dynamics 365 class:

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

Follow-on Courses

- [Microsoft Dynamics 365 for Customer Service](#)
- [Microsoft Dynamics 365 for Sales](#)