

Introduction to Dynamics 365

Course Overview

A great course to learn how to start working with Dynamics 365 and all its features.

Includes working with Dynamics 365 through the popular Outlook integration.

Every attendee receives a course manual and are guided through lab scenarios by a Microsoft Certified Trainer.

Duration

1 Day

Course Outline

Students will complete the following modules

Module 1: What is Dynamics 365?

In this module we'll explore:

- What Dynamics 365 is
- What Dynamics 365 is used for
- The key components that make up Dynamics 365: Sales, Marketing and Customer Services

Module 2: Registering for a Microsoft Dynamics 365 Trial

The instructor will step you through registering for a trial version of Dynamics 365.

Module 3: Overview of Dynamics 365 for Sales

In this module we'll take you through the key components of Dynamics 365:

- Accounts
- Contacts
- Leads
- Opportunities
- Quotes
- Orders
- Invoice
- Competitors
- Sales Literature
- Product Catalogue

Dynamics 365 Sales process flow lessons:

- How to close a sale
- How to create a lead
- How to convert a lead into an opportunity
- Finalising payment by processing the quotes and invoices.

Microsoft Dynamics Sales Navigation:

- Dynamics 365 Ribbon
- Various Entities that belong to the sales category

Our credentials



- Use default sales entity forms and check what kind of information's are stored by the sales entities

Module 4: Overview of Dynamics 365 for Marketers

In this module we'll take you through the key components of Dynamics 365:

- Marketing Lists
- Campaigns

Marketing Dynamics 365 marketing process flow:

- Learn how to market your products by creating campaigns and executing various marketing activities

Marketing Dynamics Marketing Navigation:

- Browse through the Dynamics 365 Ribbon
- Review various entities that belong to the marketing category
- Open the default marketing entity forms and check what kind of information is stored by the marketing entities

Module 5: Overview of Dynamics 365 for Customer Services

In this module we'll take you through the key components of Dynamics 365:

- Cases
- Queue
- Activities
- Articles
- Contract

Microsoft Dynamics 365 service process flow:

- Learn how to resolve issues in an organisation

Microsoft Dynamics 365 service navigation:

- Browse through the Dynamics 365 Ribbon
- Review the various entities that belong to the service category
- Open the default service entity forms and check what kind of information is stored by the service entities

Module 6: Demonstration

- How to create a trial D365 account
- Navigate through the D365 interface

- How to close the sales process in an organisation. This involves creating a lead, converting the lead into an opportunity, sending the quote to the customer and finalising the payment
- How to market various products by creating campaigns and executing various marketing activities
- How to log and resolve an issue

Module 7: Practice Lab

In this section students will perform the following tasks

- Register for a D365 trial account
- Navigate through the various models in D365 (Sales, Marketing and Service)
- Create a lead and then convert the lead into an opportunity
- Send a quote to the lead and close the sales loop
- Create campaigns and market the products
- Log an issue and provide a resolution
- Filter and sort information in Dynamics 365
- Use the Search functions
- Browse through Dynamics 365 reports
- Review the sales activity dashboard

Audience

This course is designed anyone who has or is thinking of using Microsoft Dynamics 365 in their organisation.

Pre-Requisites

No previous experience is required for this course.

Learning Outcomes

After completing this course, students will be able to:

- Login and navigate Dynamics 365
- Create a lead and then convert the lead into an opportunity
- Send a quote to the lead and close the sales loop
- Create campaigns and market the products
- Log an issue and provide a resolution
- Filter and sort information in Dynamics 365
- Use the Search functions
- Browse through Dynamics 365 reports
- Review the sales activity dashboard