

Dynamics 365 for Business Professionals

Course Overview

The Dynamics 365 for Business Professionals package comprises the Introduction to Dynamics 365, Dynamics 365 for Sales and Dynamics 365 for Customer Service modules. Ideal for managers who want an overarching perspective of Dynamics and how it can support the key areas of your business. Each attendee will receive a course manual and will be guided through lab scenarios by a Microsoft Certified Trainer. Includes 3 months On-Demand access to each module.

New Horizons can also provide options for companies wanting to give their whole organisation an overview, and then to pull the Sales or Customer Services teams together to focus on training in their specific fields of expertise. Ask us about tailoring a program for your company.

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 2: 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
- Invoices
- Competitors
- Sales literature
- Product catalogue

Demonstration - How to enter customer data

- Create a new account
- Create contacts
- Import contacts
- Bulk update records
- Competitors

Our credentials

Gold
Microsoft
Partner



- Customise an entity

Demonstration - How to monitor existing customers

- Find existing records
- Sort and filter records
- Use advanced search
- Modify views
- See what's new

Demonstration - Sales lifecycle

- Marketing list
- Qualify a lead
- Send a quote
- Insert an activity
- Close an opportunity

Demonstration - Follow up with your contacts

- Drill down into a sales report
- Create a dashboard
- Export data to Excel
- Send bulk email

Module 3: 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 Sales process flow:

- Learn how to resolve issues in an organisation

Microsoft Dynamics 365 Sales Navigation:

- Dynamics 365 Ribbon
- Various Entities that belong to the sales category
- Use default sales entity forms and check what kind of information's are stored by the sales entities

Working with the Interactive service sub

- Create a new case
- Create SLA
- Add activities to the timeline

- View related cases
- Merge cases
- Research similar cases
- Research knowledgebase
- Add case to a queue
- Resolve a case
- Convert case to an article

Module 4: Dynamics 365 for Customer Service

In this module, you will gain an understanding the various Customer Service entities in Dynamics 365

- Cases
- Queue
- Activities
- Articles
- Contracts

Microsoft Dynamics 365 Customer Service process flow

Microsoft Dynamics 365- Customer Service navigation

Working with the Interactive service sub

- Create a new case
- Create SLA
- Add activities to the timeline
- View related cases
- Merge cases
- Research similar cases
- Research knowledge-base
- Add case to a queue
- Resolve a case
- Convert case to an article

Practice Lab

Audience

This course is designed for

- new and existing end-users of Dynamics – from all walks of life within the office environment
- Sales agents and managers
- any employees with a customer service management, service-focus or customer-centric role

Pre-Requisites

No previous experience is required for this course, however students must have a beginner-intermediate understanding of the Windows Operating System, Microsoft Office Applications and/or previous versions of Microsoft Dynamics is desirable.

Learning Outcomes

After completing this course, students will be able to:

- Login and navigate Dynamics 365
- Create a new case
- Create SLA
- Add activities to the timeline
- View related cases
- Merge cases
- Research similar cases
- Research knowledge base
- Add case to a queue
- Resolve a case
- Convert case to an article