Microsoft Dynamics – Introduction Training

Overview & Learning Outcomes

This is a one-day introduction course, suited to people ready to deploy Microsoft Dynamics 365, and technical implementers who want to understand the basic functionality. It provides an overview of the main features available in Dynamics 365.

At the end of this course, you will understand:

- Navigation of the CRM
- Ways the CRM manages your customers – giving that single source of truth
- Communication management
- How the CRM supports sales, service and marketing
- Introduction to reporting with CRM

This course is delivered using vanilla (out of the box) CRM, so you will develop an understanding of the functionality that you get before embarking on configuration or customisation.

Target Audience

- People thinking of deploying Microsoft Dynamics CRM
- Technical Implementers who need to increase their understanding of CRM functionality

Prerequisites

The training course assumes little or no knowledge of Microsoft Dynamics 365.

Duration:

1 Day

Courseware:

High quality learning materials are available for purchase by participants.

Microsoft Dynamics - Introduction
Training Course Outline

Introduction to Microsoft Dynamics 365

What are your aims from this course?
What business challenges are you hoping to address with Microsoft Dynamics 365?
Introduction to CRM
What is CRM
Using Microsoft Dynamics 365 via your browser, Outlook, and mobile device
Configurability of Microsoft Dynamics 365, and what that means to you
Navigation and Key terms
Different ways of searching for data in Microsoft Dynamics 365
B2B and B2C - which is most important to you?

Sales in Dynamics 365

The customer model in Microsoft Dynamics 365
Handling more complex relationships with Connections
The transition points within a sale – in plain English
Sales Processes in Microsoft Dynamics 365
Interacting with a lead
Qualifying a Lead
The entire Sale Process

Marketing in Dynamics 365

Overview of marketing automation functionality in Microsoft Dynamics 365
Marketing Lists
Campaigns
Quick Campaigns
Campaigns
Quick Campaigns
What marketing does not include

Customer Service in Dynamics 365

Introduction to Customer Service
Incident management
Entitlement management
Knowledge Management
Getting to grips with Incident Management
Using more detailed activities
An overview of Entitlement management
An introduction to Knowledge Management
Articles
Article Templates

Introduction to the Product Catalogue in Dynamics 365

Families and Products
Discount lists and discount levels
Units and Unit Groups
Price Lists and Price List items
Setting up the Product Catalogue

Getting more from Dynamics 365

Understanding Views and Forms
Charts
Advanced Find
Dashboards
Standard reports
Custom reports
SSRS Reports
Report Wizard