

Microsoft Dynamics 365 Public Courses

CRM Dynamics Ltd run a series of public courses covering key areas of Microsoft Dynamics CRM.

These courses are open to anyone. You may be a customer of CRM Dynamics, a company who has Dynamics 365 installed but require some training, or an individual looking to build your skills in this area.

All courses run on our standard training database. All delegates are provided with a computer to use for the training and a course manual to take away.

Software Version:

These courses are designed for users of Microsoft Dynamics 365 v9 and differences may be found with earlier or later versions.

Foundation with Sales:

This is the ideal starter course and assumes no prior knowledge of Microsoft Dynamics 365.

- Getting Started with Dynamics 365
- Searching
- Creating and updating records
- Personal Views and Charts
- Activity Management
- Working with Leads
- Opportunity Management
- Quote Management
- Charts, Goals & Metrics

Case Management:

This course is designed to give new users practical experience setting up and using the Case Management module Dynamics 365.

Although some prior experience would be an advantage it is not essential.

- Overview of Dynamics 365
- Service Management Settings
- Holiday & Customer Service Schedules
- Entitlements, SLAs
- Articles
- Creating & Managing Cases
- Parent & Child Cases
- Goals, Dashboards & Metrics

Advanced User:

This course is designed to give "key" or "super" users practical experience in managing their Microsoft Dynamics 365 system. The course concentrates on the functionality which aids data management and is often only available to users with higher security permissions.

- Advanced Views, Charts & Dashboards
- Excel Templates
- Connection Roles
- Dealing with Duplicates
- Importing and Exporting
- Merge records
- Bulk Edit
- Bulk Delete
- Setting up Goals & Metrics
- Auditing

Customisation:

This is a practical workshop where delegates are provided with a basic new Instance to work on. The scenario is a course booking system, and you will be creating a related entity to the Course entity already set up, and will include the following functionality:

- Security Roles
- Entities and Entity Relationship
- Forms, fields and option sets
- Business Process Rules
- Business Process Flow
- Workflow

Duration:

Each course will run from 10:00 – 16:30 / 17:00. Refreshments and lunch are available from a small on-site snack bar.

Venue:

The courses will be held in Milton Keynes.

How to Book:

Phone us on 01908 929555 or email rachel@crm-dynamics.co.uk