



MICROSOFT DYNAMICS 365 Training courses




OVERVIEW



For users

-  CRM - BASIC FUNCTIONS
-  SALES
-  MARKETING
-  CUSTOMER SERVICE
-  PRODUCT MANAGEMENT
-  EVALUATION AND REPORTING

For administrators

-  ADMINISTRATION WITH THE POWER PLATFORM ADMIN CENTER
-  BASICS OF SYSTEM CUSTOMIZATION WITH POWER APPS
-  SYSTEM CUSTOMIZATION I
-  SYSTEM CUSTOMIZATION II
-  ADVANCED CUSTOMIZATION - FEATURES & FUNCTIONS



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ARRANGE AN INITIAL CONSULTATION

USER TRAINING



Would you like to build up your own skills in managing Microsoft Dynamics 365? Then these training courses will help you!

You assist your employees with developing their skills and building up know-how. Both software acceptance and use are increased, thus boosting the success rate of your software projects.

We offer a comprehensive portfolio. Users can choose from a wide range of topics – from basic training to product and price management.

Our training courses build on each other, but can also be booked individually. A training system set up specifically for this purpose enables attendees to actively apply and implement what they have learned in practice. Sufficient time is scheduled for this in each module.

- The training documents will be made available after the training course is completed.
- Max. 8 attendees
- Recording the training session is not permitted.



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MICROSOFT DYNAMICS 365 TRAINING COURSES FOR USERS



CRM-BASIC FUNCTIONS



As part of this training course, your users will receive a basic introduction into using Dynamics 365.

Training content

- Introduction to Microsoft Dynamics 365 CRM
- Navigation, user interfaces, searches and master data
- Management views: Company, Contact Activity
- Management and Microsoft Dynamics 365 App for Outlook
- Search functions
- Dashboards

Attendee requirements

- None

Duration

Approx. 180 minutes
incl. exercises and questions

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THE SALES PROCESS – FROM LEAD TO INVOICE



Microsoft Dynamics 365 offers a completely pre-planned process – from initial contact through to invoicing. In this training course, attendees will learn by means of practical exercises how to carry out the process themselves.

Training content

- Customer scenarios:
 - What are leads?
 - How do they differ from customer contacts?
- Creating and classifying leads in the CRM system and using the Outlook app
- Creating, processing and finalizing sales opportunities, quotations, orders and invoices
- Support by means of speeding up sales
- Information relating to the sales app

Attendee requirements

- Attendees should be familiar with the basic uses and functionality of Microsoft Dynamics 365.
- Basic knowledge of the topics covered in the basic training course is a must.

Duration

Approx. 180 minutes
incl. exercises and questions



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PRODUCT MANAGEMENT



Dynamics 365 contains an extensive product catalog. In this training course, attendees will discover all the components they need to create and manage products and prices correctly and then use them in the sales process.

Training content

- Product catalog overview
- Knowing and configuring basic components
 - Units and groups
 - Products and families
 - Price lists and price list elements
- Classifying and supplementing products
- Editing and managing active products

Attendee requirements

- Attendees should be familiar with Microsoft Dynamics 365 and have good knowledge of the sales process.

Duration

Approx. 180 minutes
incl. exercises and questions

EVALUATIONS & REPORTING



This training course is ideal if you would like to both record data and make it usable.

Training content

- Creating and using your own charts
- Creating and using personal dashboards
- Overview of available reports (standard reports)
- Creating Excel templates
- Editing data with Excel Online

Attendee requirements

- Attendees should be familiar with the basic uses and functionality of Dynamics 365.

Duration

Approx. 120 minutes
incl. exercises and questions

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MARKETING



In this course, you will learn how to coordinate sales and marketing activities by using the likes of marketing lists to create and carry out campaigns.

Training content

- Creating and editing marketing lists
- Setting up marketing campaigns and quick campaigns
- Creating and managing campaign responses
- Performing data imports / exports
- Creating and managing templates for bulk emails

Requirements

- Attendees should be familiar with the basic uses and functionality of Dynamics 365.
- Basic knowledge of the topics covered in the basic training course is a must.

Duration

Approx. 180 minutes
incl. exercises and questions



MICROSOFT DYNAMICS 365 TRAINING COURSES FOR USERS



SERVICE



In this course, you will learn how to use the Customer Service Hub to create and process service requests and manage queues and activities.

Training content

- Creating and managing requests
- Creating a subject organization structure
- Learning about similar cases
- Creating knowledge base articles
- Working with queues and routing
- Using service level agreements and omnichannel approaches
- Working with dashboards

Requirements

- Attendees should be familiar with the basic uses and functionality of Dynamics 365.
- Basic knowledge of the topics covered in the basic training course is a must.

Duration

Approx. 180 minutes
incl. exercises and questions



ADMINISTRATOR TRAINING



We would like to assist you with building up and ultimately expanding your Dynamics 365 expertise. The goal is for you to be able to independently maintain the CRM process to the desired extent. This is based on different levels of “independence”. Below, you will find an overview of suitable courses that will teach you the knowledge and skills you need to configure and further develop Dynamics 365:

Developers

Plugins	Development skills and personal coaching
JavaScript	Development skills and personal coaching
Interfaces	Development skills and personal coaching

Customizers

Security roles	System customization I and II
System area and business unit	System configuration
Workflows and business process flows	Advanced customization: features and functions
Configuring relationships	System customization II and advanced customization

Configurators

Entities	System customization I
Fields	System customization I
Forms	System customization I
Views	System customization I
Diagrams and dashboards	System customization II

ADMINISTRATOR TRAINING



There are currently five training courses available for administrators: from the basics of customization in Power Apps, to administrator training for managing the Microsoft 365 Power Platform Admin Center.

Using practical examples, attendees will have the opportunity to make initial adjustments and implement scenarios in the system with guidance.

A dedicated training system with demo access is available to all attendees for this purpose.

- The training documents will be made available after the training course is completed.
- Max. 3 attendees
- Recording the training session is not permitted.



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MICROSOFT DYNAMICS 365 TRAINING COURSES FOR ADMINISTRATORS



BASICS OF SYSTEM CUSTOMIZATION WITH POWER APPS



We recommend attending this course if you do not yet have any experience with customizing Microsoft Dynamics 365.

Training content

- Getting started with system customization
- Important customization terms and what they mean
- Initial adjustments and exercises
- Introduction to the security concept

Requirements

- Attendees should be familiar with how to use the CRM system.

Duration

Approx. 180 minutes
incl. exercises and questions

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SYSTEM CUSTOMIZATION I



By means of a specific example, you will learn how to independently customize the CRM system by integrating a new table.

Training content

- Creating and managing solutions
- Creating and customizing new tables
- Integrating customizations using the sitemap
- Configuring and assigning security roles
- Creating dashboards and charts

Requirements

- Attendees should be familiar with how to use the CRM system.
- Basic knowledge of relational databases (tables, attributes, relations)

Duration

Approx. 180 minutes
incl. exercises and questions

SYSTEM CUSTOMIZATION II



In this course, you will learn how to create an app in the Power Platform and how to configure other useful functions in a table. This course is rounded off by an overview of how to automate business processes.

Training content

- Creating a new app
- Creating and managing relationships
- Overview of how to map automated processes

Requirements

- Attendees should be familiar with how to use the CRM system.
- Contents from the “System customization I” training course

Duration

Approx. 180 minutes
incl. exercises and questions

MICROSOFT DYNAMICS 365 TRAINING COURSES FOR ADMINISTRATORS



ADVANCED CUSTOMIZATION – FEATURES & FUNCTIONS



This advanced course will familiarize you with how to further configure “relationships”. You will learn about advanced customization options for fields and forms, as well as how to actually create a flow.

Training content

- Configuring relationships
- Knowing and using advanced customization options for fields and forms
- Modeling business process flows
- Modeling flows

Requirements

- Attendees should be familiar with how to use the CRM system.
- Contents of the “System customization II” training course

Duration

Approx. 180 minutes
incl. exercises and questions

ADMINISTRATION WITH THE POWER PLATFORM ADMIN CENTER



We recommend this course when you switch to administration in the Power Platform. This course explains important basic terms and provides initial guidance in the new administration area.

Training content

- Overview of the Microsoft Dynamics 365 Admin Center
- Overview of the Power Platform Admin Center
- Knowing and configuring the settings in the Power Platform Admin Center

Requirements

- Attendees should be familiar with how to use CRM.
- Attendees should have attended at least one system customization training course.

Duration

Approx. 120 minutes
incl. exercises and questions



CONTACT



Are you interested in our products?

Then get in touch with us personally, we will be happy to advise you!

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