

Configuration In Microsoft Dynamics 365 for Sales and Customer Service

Module 1: Introduction to Configuring Dynamics 365 Application

- Configuring Dynamics 365 application
- Create and Manage 365 Business Units
- User Management
- Using Teams to Extend Functionality

Module 2: Building a Security Model

- Overview of the Dynamics 365 Security Model
- Create, Configure and Manage Security Roles
- Users / Teams & Security Roles

Module 3: Hierarchical Security

- Dynamics 365 Hierarchy Security
- Configuration Hierarchy Security
- Manager Hierarchy
- Position Hierarchy

Module 4: Knowledge Management

- Review of Knowledge Options
- Knowledge Articles
- Knowledge Search

Module 5: Introduction to Processes in Dynamics 365

- Review Processes Available in Dynamics 365
- Business Process Flows
- Workflows
- Dialogs
- Custom Actions
- Examine how to create a Dynamics 365 workflow

Module 6: Business Process Flows

- Overview of Business Process Flows
- Using Stages, Steps, and Categories
- Reviews Options for Conditional Branching
- Workflows and Business Process Flows
- Role Driven Process Flows

Module 7: Dynamics 365 and Office 365

- Review the different options for connecting a Dynamics 365 and Office 365
- Use Folder Tracking to better track emails
- Use Office Groups for Collaboration
- Setup Server Side SharePoint Integration
- Configure OneNote Integration