



# GTech Learn

*"Our focus is your Success"*



## Self-Paced Course

# 81060-SP: Configuration in Dynamics 365 Sales & Customer Service

<b>Duration:</b> 3.5 Hours	<b>Level:</b> Intermediate	<b>Role:</b> Functional Consultant
<b>Certification:</b> Not-Available	<b>Register:</b> <a href="#">Click Here</a>	<b>Instructor-Led:</b> <a href="#">Click Here</a>

### What's included?

- ✓ Learn from Microsoft Certified Trainer (MCT's)
- ✓ Lifetime Access over Videos
- ✓ Exam Preps / Practice Tests
- ✓ Achievement Badges from Microsoft
- ✓ Completion Certificate
- ✓ Discounted Exam Vouchers

### What do you get?

- ✓ Full HD Recorded Videos
- ✓ Lab Guides
- ✓ Embedded Quizzes
- ✓ Official Courseware from MS Learn
- ✓ Access From Anywhere
- ✓ Completion Certificate



Business Applications

Training Services

Email: [info@gtechlearn.com](mailto:info@gtechlearn.com)

## Overview

This learning course provides students with the tools to configure a Dynamics 365 implementation for Sales and Service. The focus is on the using and understanding how the platform tools that are provided can be leveraged to create and maintain an organizational security structure, create guided business processes, automate tasks, and other specific customizations.

## Audience Profile

Required Professional who have the knowledge of Business related to Sales and Customer Service Industry.

## Contents

### Module 01: Configuring Dynamics 365.

Course Overview.

Module Overview.

- Configuring Dynamics 365.
- Security.
- User Management.
- Email System Settings and Configuration.
- Teams.

Module Review..

Test Your Knowledge Questions:

### Module 02: The Dynamics 365 Security Model

Module Overview..

- Purpose of the Security Model
- Security Roles Explained.
- Defining Permissions.
- Privileges.
- Access Levels.
- Options for creating Security Roles.
- Security Roles and Business Units.
- Assigning Security Roles.
- Multiple Security Roles.
- Security Roles: Layered Approach.
- Teams and Security Roles.

Module Review.

Test Your Knowledge Questions:

### Module 03: Implementing Hierarchical Security.

Module Overview..

#### Hierarchy Security.

#### Managerial Hierarchy Security.

#### Positional Hierarchy Security.

Module Review.

### Module 04: Knowledge Management.

Module Overview.

- The Big Picture
- Searching the Knowledge Base.
- Enabling Knowledge Search.

Module Review.

Test Your Knowledge Questions:

## **Module 05: Introduction to Processes.**

Module Overview.

- Processes and Automation.
- Business Process Flows.
- Workflow Basics.
- Creating a Basic Workflow.
- Convert a Workflow.

Module Review.

Test Your Knowledge Questions.

## **Module 06: Business Process Flows.**

Module Overview.

- What are Business Process Flows?.
- Enabling Business Process Flows.
- Steps, Stages, and Categories.
- Working with Multiple Entities.
- Conditional Branching.
- Create a Business Process Flows.
- Mobile Task Flows.

Module Review.

Test Your Knowledge Questions.

## **Module 07: Dynamics 365 and Office 365.**

Module Overview.

- Integration Options.
- Folder Tracking.
- Exchange Folder Mapping.
- Types of Office Group 365 Groups Integrations.
- SharePoint Integration Overview.
- OneNote in Dynamics 365.
- Module Review.
- Test Your Knowledge Questions.

## **About GTech Learn**

Established in 2011 in the USA, GTech Learn is one of the leading IT training organizations in North America & South East Asia. Driven by its unique USPs, GTech Learn is spurring competition, meeting the unmet needs of customers, assisting in skills upgrade, and supplementing talent pools with its presence in the USA, Canada, Singapore and India. This is consistent with our vision to help our Learners with skills upgrade for enhanced career opportunities.

As a Microsoft Learning Partner, we offer a broad range of learning solutions across the full Microsoft technology stack that can be customized.

Since 2011, GTech Learn has been developing custom-fit learning solutions that involve creating and delivering maximum results.

We have successfully helped all types of businesses, government entities, and individuals. For this reason, GTech has been chosen by Microsoft to deliver comprehensive learning programs around the globe.

With flexible learning options, state-of-the-art delivery methods, numerous language preferences, experienced instructors, and complete dedication to our students, GTech Learn has the capabilities to help students develop their Microsoft skill sets and achieve increasingly high standards of productivity while organizations of all sizes realize the full potential of their technology investments.


## Our Accreditations with Microsoft



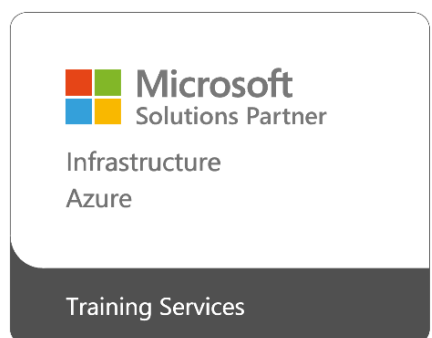
Microsoft Solutions Partner  
Security  
Training Services



Microsoft Solutions Partner  
Modern Work  
Training Services



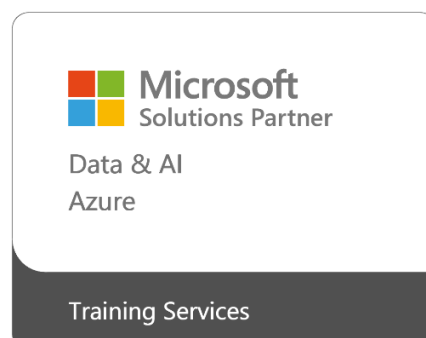
Microsoft Solutions Partner  
Business Applications  
Training Services



Microsoft Solutions Partner  
Infrastructure  
Azure  
Training Services



Microsoft Solutions Partner  
Digital & App Innovation  
Azure  
Training Services



Microsoft Solutions Partner  
Data & AI  
Azure  
Training Services