

Microsoft Dynamics CRM 2016 : Introduction

Référence : **MS80728**

Durée : **1 jour**

Certification : **Aucune**

CONNAISSANCES PREALABLES

- Knowledge of Windows operating system.
- Use Outlook, Word and Excel.

PROFIL DES STAGIAIRES

- Anyone who plans to implement , use, administer or support Microsoft Dynamics CRM in the enterprise.
- Anyone who wants to acquire the basic knowledge of Microsoft Dynamics CRM 2015.

OBJECTIFS

- Discover the features and benefits of the latest version of the solution proposed by Microsoft.

CERTIFICATION PREPAREE

- Aucune

METHODES PEDAGOGIQUES

- Mise à disposition d'un poste de travail par stagiaire
- Remise d'une documentation pédagogique papier ou numérique pendant le stage
- La formation est constituée d'apports théoriques, d'exercices pratiques, de réflexions et de retours d'expérience
- Le suivi de cette formation donne lieu à la signature d'une feuille d'émargement

FORMATEUR

Consultant-Formateur expert Microsoft CRM

METHODE D'EVALUATION DES ACQUIS

- Auto-évaluation des acquis par le stagiaire via un questionnaire
- Attestation de fin de stage adressée avec la facture

CONTENU DU COURS

Microsoft Dynamics CRM Overview

- Module Overview
- Microsoft Dynamics CRM Functionality
- Deployment Options
- Business and Branching Process Flows
- Entity Relationship Model
- Entities, Records, Forms & Fields
- Microsoft Help

Accessing Microsoft Dynamics CRM

- Module Overview
- Access Types
- Offline Capabilities
- Security

Navigating Microsoft Dynamics CRM

- Module Overview
- Navigating the Menu Bar
- Open and Create Records

- Accounts and Contacts
- Record Action Types
- Activities
- Interaction Wall
- Track Data in Microsoft Outlook
- Views
- Search for Data
- Processes

Sales in Microsoft Dynamics CRM

- Module Overview
- Leads : Show Me: Lead to Opportunity Process Flow
- Opportunities : Show Me: Manage Opportunities
- Communication Tracking
- Product Database
- Show Me: Product Catalog Hierarchy
- Sales Process Flow : Show Me: Sales Process

Customer Care in Microsoft Dynamics CRM

- Module Overview
- Case Management
- Knowledge Base : Show Me: Knowledge Base Life Cycle

Marketing in Microsoft Dynamics CRM

- Module Overview
- Plan and Budget
- Marketing Lists
- Campaigns
- Track and Report

Office 365 and Microsoft Dynamics CRM

- Module Overview
- Office 365 Groups

- Office 365 Delve
- OneDrive for Business
- Module Review

Working with Data

- Module Overview
- Filter Function on Views
- Export Data to Excel
- Default Reports
- Report Wizard
- Charts
- Dashboards
- PowerBI Dashboards
- Export Templates