Introduction and Basic Navigation – MSD



Lenovo Global Service Education

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Translations

SAP Term	Dynamics 365 CRM Term
Service Request	Case
Account	Contact
Object	Customer Asset
Service Order	Work Order

Course Objectives

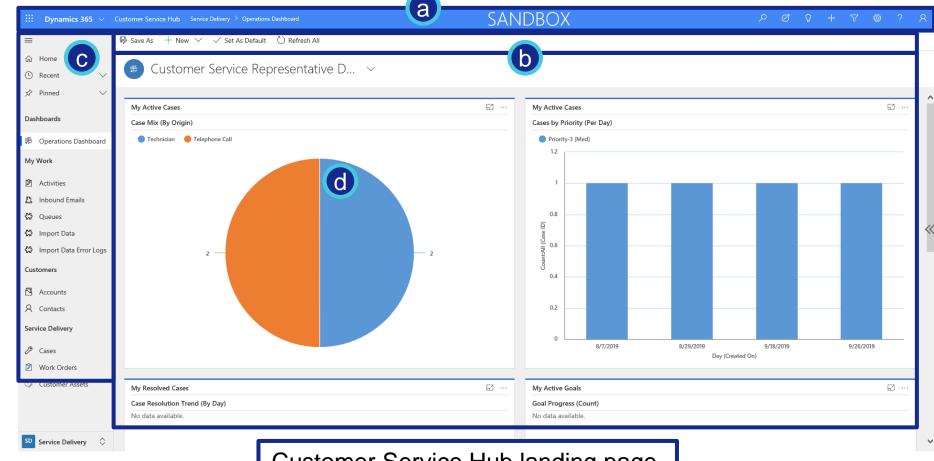
Objective	Slide
Describe the Microsoft Dynamics 365 CRM system.	4
Navigate the Dynamics 365 CRM system.	5
Identify the core functions and features that you will use to display, edit, and create records.	5

Identify the sections of the landing page.

- Enterprise resource planning (ERP) and customer relationship management (CRM) software program.
- Log in <u>here</u>.
- You will be working in the Customer Service Hub module.

- a. Navigation bar
- b. Command bar

- c. Navigation menu
- d. Customized dashboard



1. Describe Microsoft Dynamics 365 CRM.

2. Navigate Microsoft Dynamics 365 CRM.

Describe the functions on all navigation bars and menus.

Identify the three types of alerts.

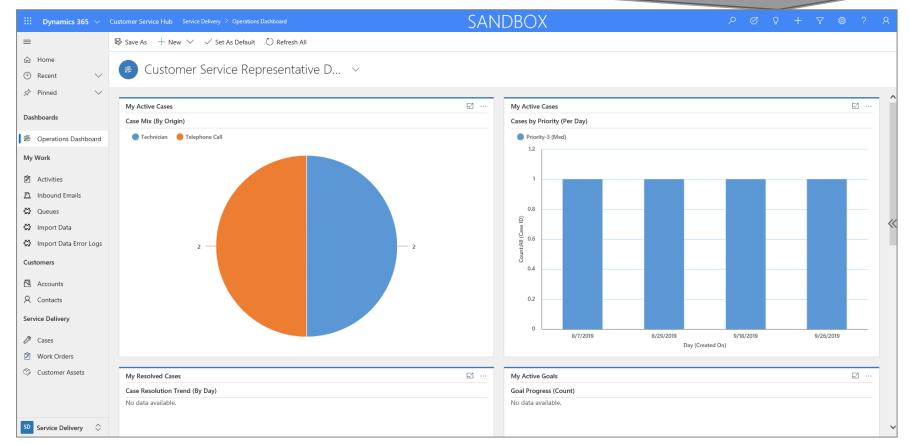
Describe the default dashboard.

Open a dashboard and view records.

- Located across the top of every page in the CRM.
- Offers many functions, including:
 - a. Global Search
 - b. Quick Create
 - c. Advanced Find
 - d. Settings
 - e. Help
 - f. Sign Out

Functions on the navigation bar.





Global Search

1. Describe Microsoft Dynamics 365 CRM.

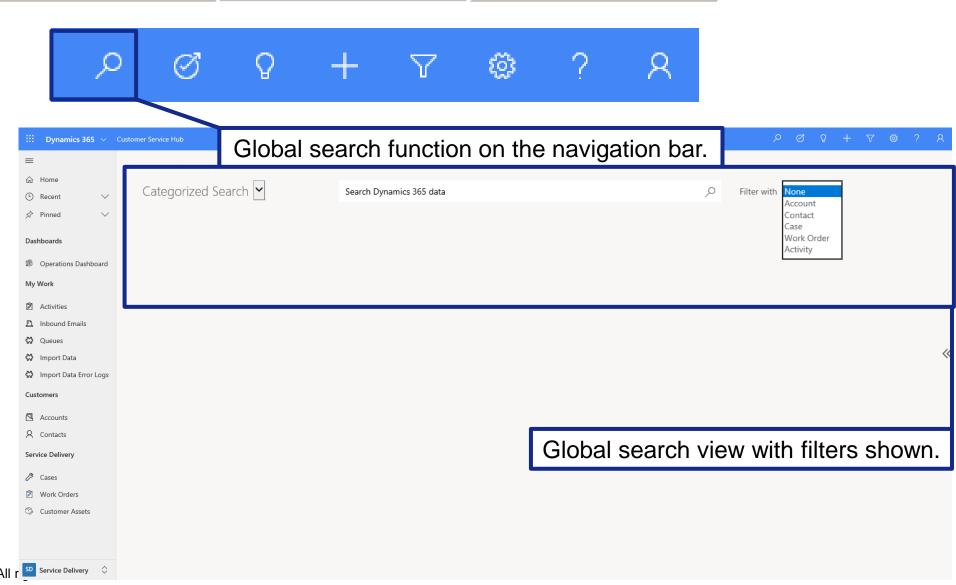
2. Navigate Microsoft Dynamics 365 CRM.

Describe the functions on all navigation bars and menus.

Identify the three types of alerts.

Describe the default dashboard.

- Allows you to search for records across multiple entities.
- Can be filtered to show only Accounts, Contacts, Activities, or Cases.
- "None" filter searches for all entities.



Task Flow

1. Describe Microsoft Dynamics 365 CRM.

2. Navigate Microsoft Dynamics 365 CRM.

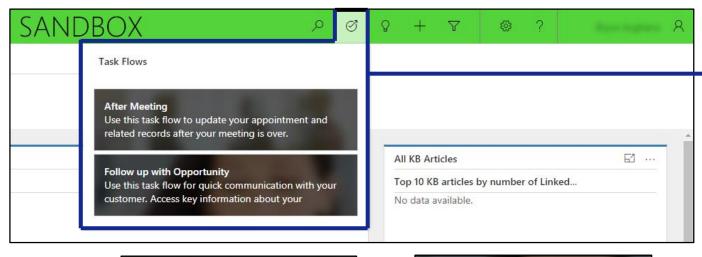
Describe the functions on all navigation bars and menus.

<u>Identify the three types</u> of alerts.

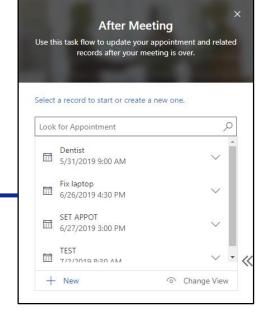
Describe the default dashboard.

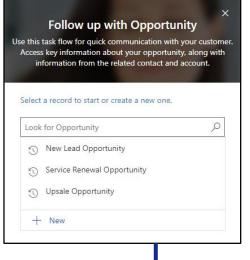
Open a dashboard and view records.

- Two options:
 - After Meeting –
 update an
 appointment and
 related records.
 - Follow up with
 Opportunity –
 access key
 customer
 information to
 follow up quickly.



Task flow function and dropdown on the navigation bar.





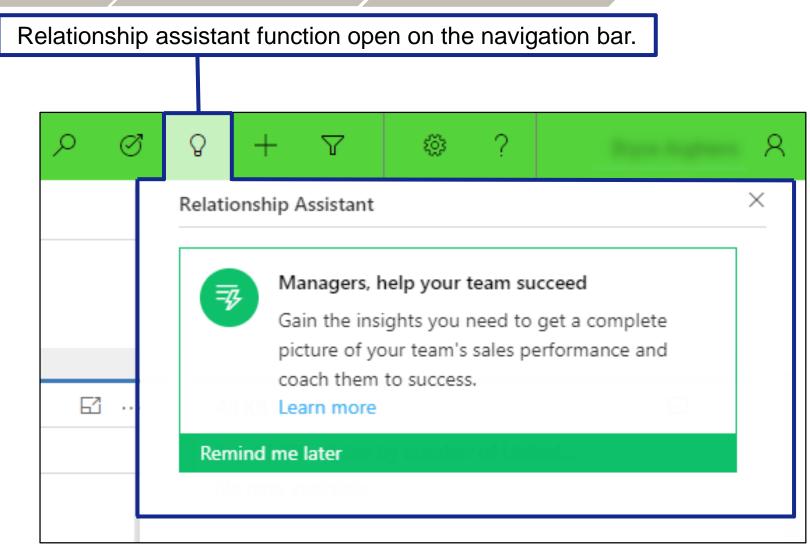
After Meeting form

Follow up with Opportunity form

<u>Identify the three types</u> of alerts.

Describe the default dashboard.

- Provides you with important updates and information about tasks you are working on.
- Reminds you of upcoming activities that may require action from you.

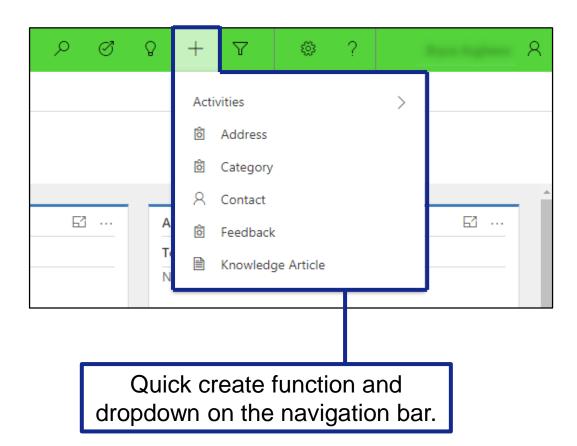


<u>Identify the three types</u> of alerts.

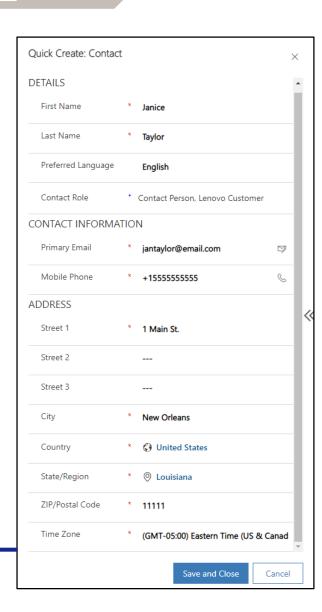
Describe the default dashboard.

Open a dashboard and view records.

- Allows you to create multiple types of entities quickly.
- Can be used to create Activities, Contacts, Knowledge Articles, and other records.



The Quick Create: Contact form.



. Describe Microsoft Dynamics 365 CRM.

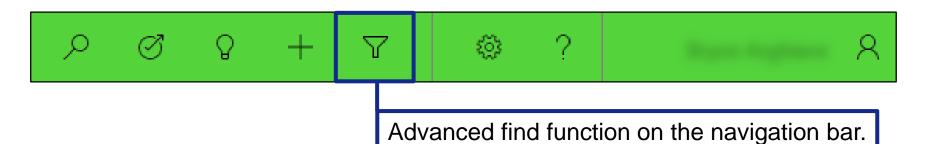
2. Navigate Microsoft Dynamics 365 CRM.

Describe the functions on all navigation bars and menus.

<u>Identify the three types</u> of alerts.

Describe the default dashboard.

- Allows you to use filters to perform advanced searches.
- Lets you search for any information in the CRM.
- Covered in detail in the Advanced Find topic of this training program.

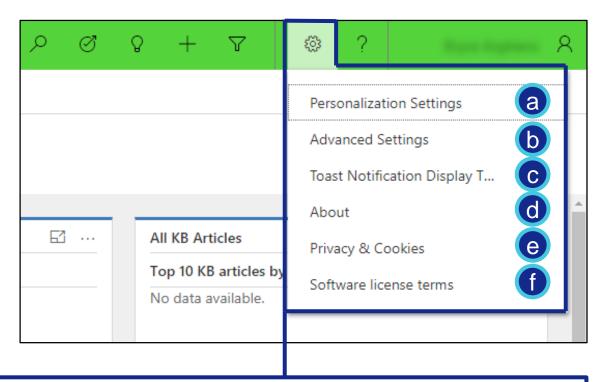


Identify the three types of alerts.

Describe the default dashboard.

Open a dashboard and view records.

- Allows you to view or edit many types of information:
 - a. User settings
 - b. Business management settings
 - c. Toast notification settings
 - d. CRM platform information
 - e. Security and privacy settings
 - f. Software license terms



Settings function and dropdown on the navigation bar.

. Describe Microsoft Dynamics 365 CRM.

2. Navigate Microsoft Dynamics 365 CRM.

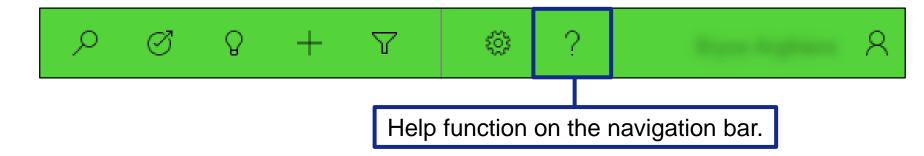
Describe the functions on all navigation bars and menus.

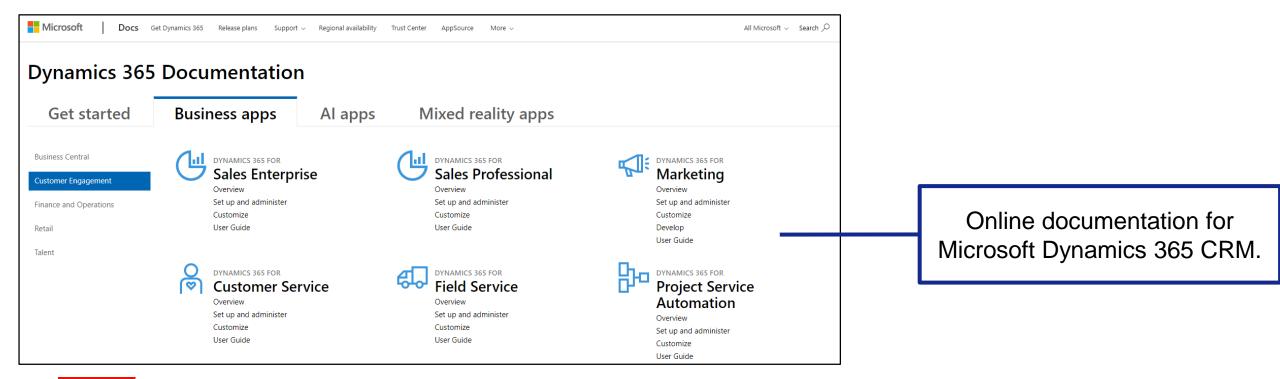
Identify the three types of alerts.

Describe the default dashboard.

Open a dashboard and view records.

 Connects you to Microsoft Dynamics 365 CRM help.





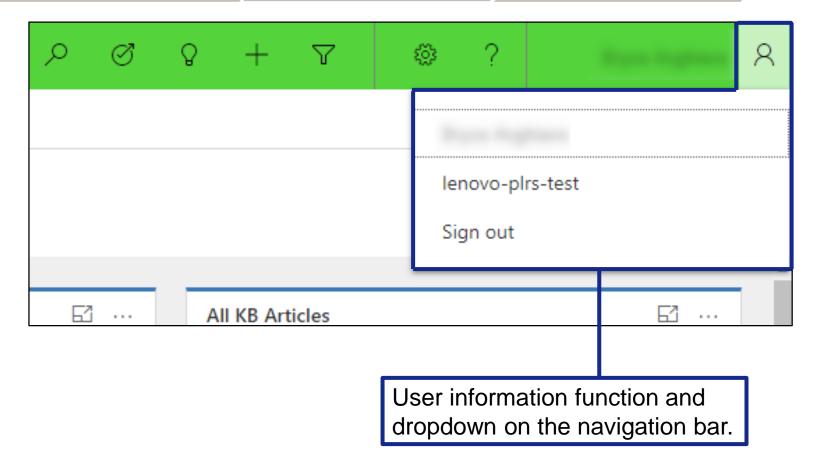
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<u>Identify the three types</u> of alerts.

Describe the default dashboard.

Open a dashboard and view records.

 Allows you to sign out of the CRM.



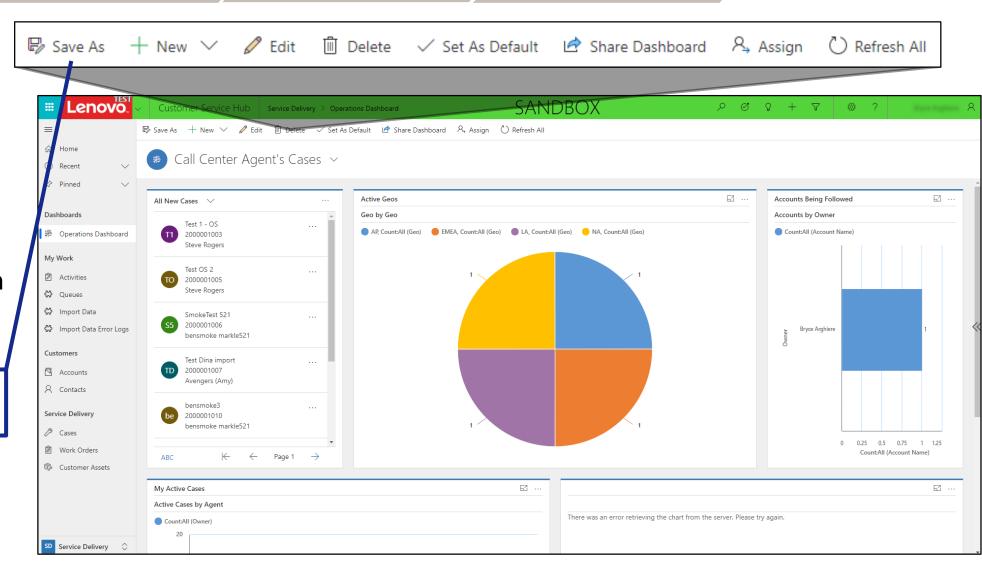
<u>Identify the three types</u> of alerts.

Describe the default dashboard.

Open a dashboard and view records.

- Located under the navigation bar.
- Appears on many pages in the CRM (but not all pages).
- Functions vary depending on which page you are on.

The command bar for a customized dashboard.



Navigation Menu

1. Describe Microsoft Dynamics 365 CRM.

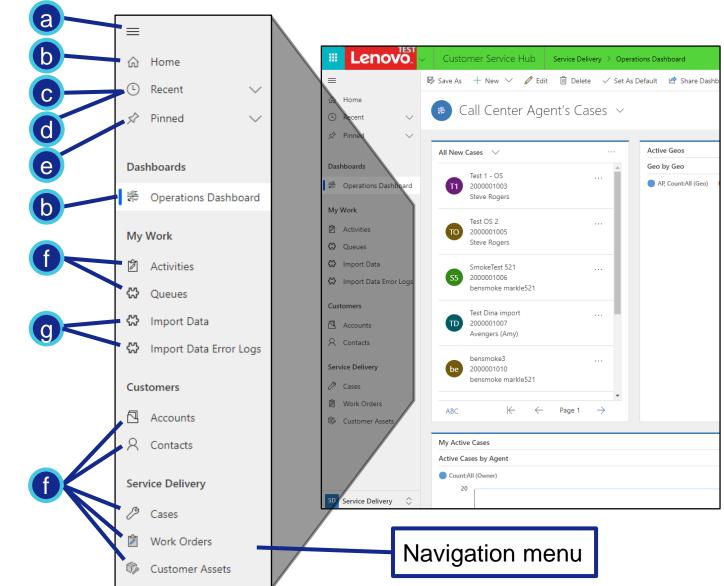
2. Navigate Microsoft Dynamics 365 CRM.

Describe the functions on all navigation bars and menus.

Identify the three types of alerts.

- Located along the left of every page in the CRM.
- Allows you to perform many actions:
 - a. Expand or collapse the menu
 - Return to the Customer Service Hub landing page
 - c. Visit recently viewed pages
 - d. Pin recently viewed pages
 - e. Visit pinned pages
 - f. Open views for many entities
 - g. Import data

Describe the default dashboard.



Recent and Pinned Pages

. Describe Microsoft Dynamics 365 CRM.

2. Navigate Microsoft Dynamics 365 CRM.

Describe the functions on all navigation bars and menus.

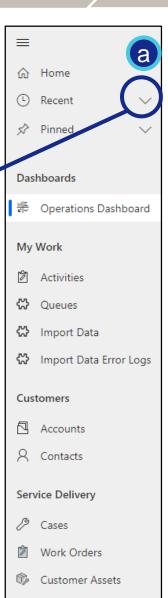
Identify the three types of alerts.

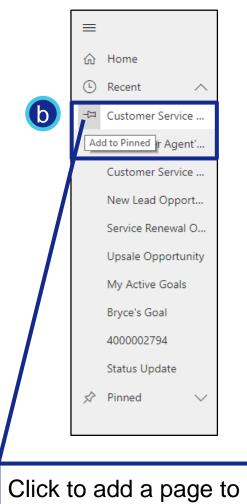
Describe the default dashboard.

Open a dashboard and view records.

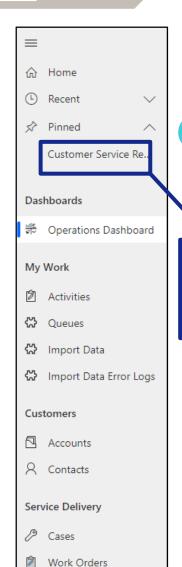
Expandable options at the top of the navigation menu.

Expand the recently viewed pages option.





Click to add a page to your pinned pages.



Customer Assets

Pinned page visible on the expanded Pinned menu.

Describe Microsoft Dynamics 365 CRM.

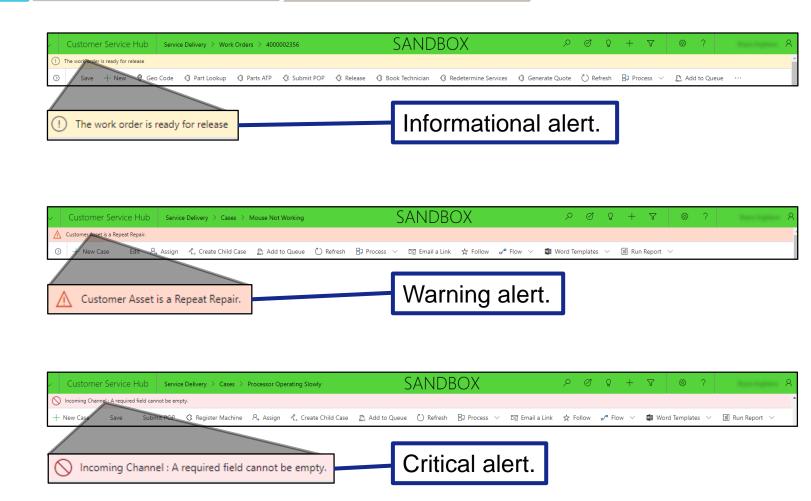
2. Navigate Microsoft Dynamics 365 CRM.

Describe the functions on all navigation bars and menus.

Identify the three types of alerts.

- Notices about a record's status or missing data.
- Three types:
 - Informational
 - Warning
 - Critical
- Critical alerts prevent you from saving a record until you fill in the required field(s).

Describe the default dashboard.



Default Dashboard

1. Describe Microsoft Dynamics 365 CRM.

2. Navigate Microsoft Dynamics 365 CRM.

Describe the functions on all navigation bars and menus.

Identify the three types of alerts.

Describe the default dashboard.

Open a dashboard and view records.

- The Customer Service
 Operations dashboard is the default dashboard and landing page for the CRM.
- Shows you a quick snapshot of:
 - Resolved Cases
 - Team members' resolved Cases
 - The 10 Knowledge Base Articles linked to the most Cases
 - Cases opened in the last seven days by category
 - Active Cases opened in the last seven days

Customer Service Operations dashboard

SANDBOX Lenovo Accounts Being Fo... Customer Service Operations Dash... > Call Center Agent' New Lead Opport. All KB Articles Cases resolved using KB articles (By Su.. Top 10 KB articles by number of Linked. No data available No data available # Operations Dashb. My Work Activities ⇔ Oueues ₩ Import Data Error Accounts A Contacts Service Delivery Cases Opened in the Last 7 day Work Orders Customer Asset SD Service Delivery

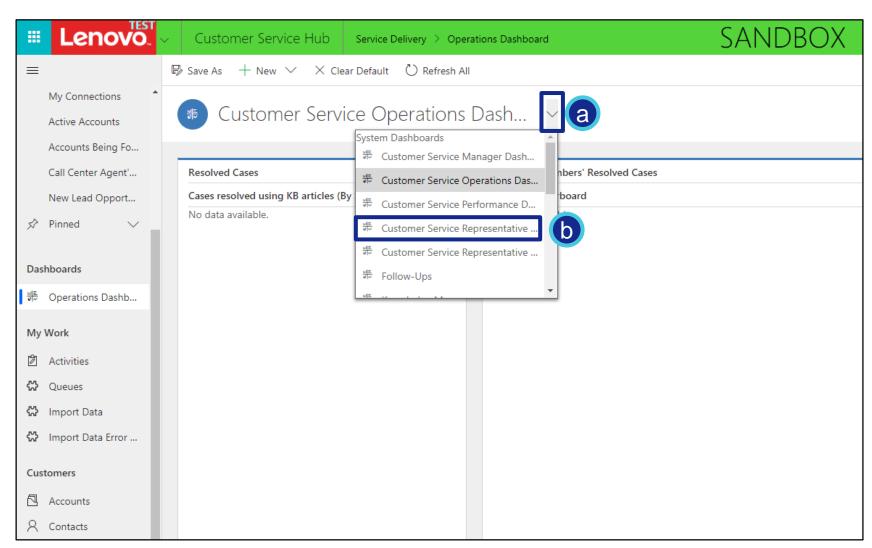
2. Navigate Microsoft Dynamics 365 CRM.

Describe the functions on all navigation bars and menus.

Identify the three types of alerts.

Describe the default dashboard.

- a. Click the chevron (v) to the right of the dashboard name.
- b. Select a dashboard from the dropdown list.



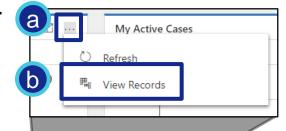
2. Navigate Microsoft Dynamics 365 CRM.

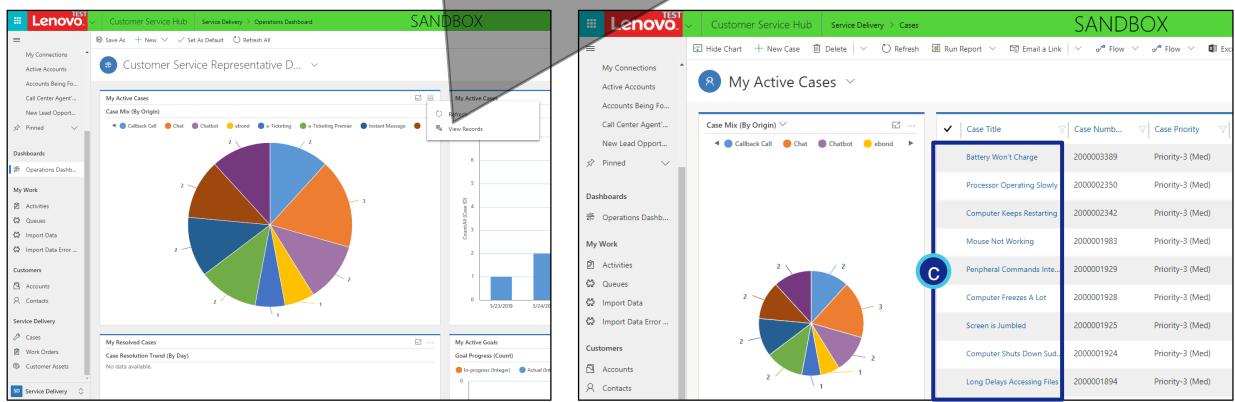
Describe the functions on all navigation bars and menus.

Identify the three types of alerts.

Describe the default dashboard.

- a. Click the three dots in the upper right corner of a chart.
- b. Select View Records.
- c. Double click a record to open it.





thanks.

