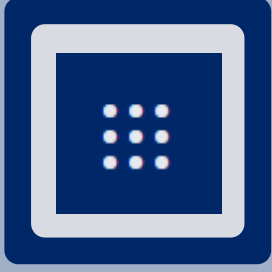


In this document, we will take a look at the different options on the buttons that are on every view of the DofE Operations app.

The Navigation Bar



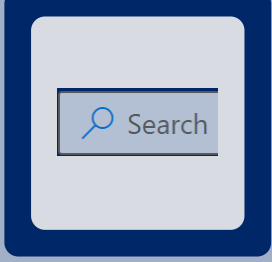
Office 365

This is the Office Apps menu. To open a different Office app, click on it and choose the app you want to switch to.

App Selector

The app selector is where we switch to a different app.

Once you've selected the correct app, it's unlikely that you'll need to use this feature again.



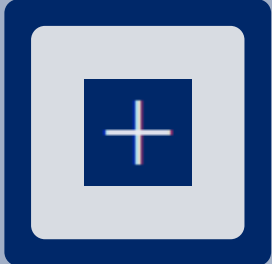
Search Bar

This is the global search bar.

You can search for any Lead, Organization, or Contact from here. We will take a closer look at the search bar later in this course.

Dynamics Assistant

This is the Dynamics Assistant. It isn't used very often, but it can display notifications and suggestions.

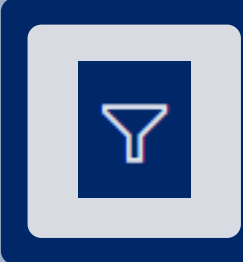


Quick Create

This is the Quick Create button. It is rarely used in the day-to-day usage of Dynamics.

Advanced Filter

This option is the Advanced Filter or more informally known as the 'Martini Glass'. You won't use it in most cases, unless you're trying to create a specific view of the data.



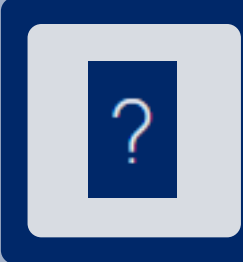
Settings

This is the settings menu, where you can make global changes to how Dynamics works for you. It is recommended that you avoid changing any settings unless directed to do so.

Help

Here is a link to Microsoft's extensive knowledge library.

While it can help you understand how Dynamics operate, it does not cover specific DofE issues. For that, refer to the user guides on the hub.



Teams

The Teams panel allows you to use Microsoft Teams without switching screens from within Dynamics.

Profile

Your user profile picture gives you access to your account settings across all of Microsoft's apps.



The Sidebar



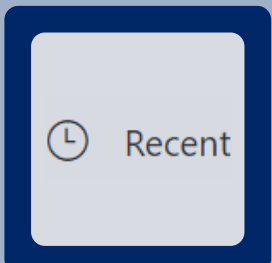
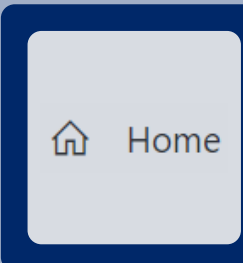
Expand/Collapse

This option expands and collapses the sidebar. This can be useful if you are working on a smaller screen.

Home

The home button will take you back to the Activities page.

Think of this button as an "emergency exit" option if you are unsure of what to do.



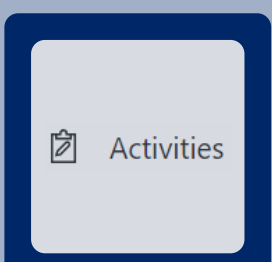
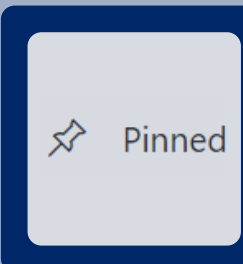
Recent

The "Recent" option provides access to pages and views that you have recently accessed. You can use this feature to quickly switch between pages, as well as save pages by pinning them.

Pinned

The pinned option provides access to any pages and records you have pinned.

To remove a pinned item, hover over it and select "unpin."

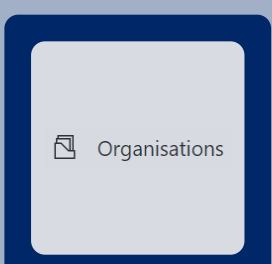
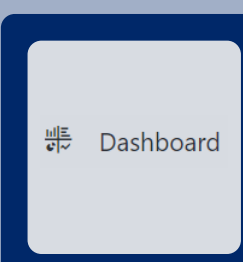


Activities

The activities page is kind of like your Dynamics to-do list. It presents you with a list of all the tasks and appointments you have created within your organization.

Dashboard

The dashboard option gives you the option to view several lists or graphs all in one space. This can be useful to have an overview of all your current work.

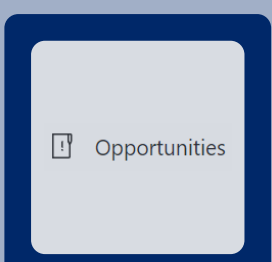
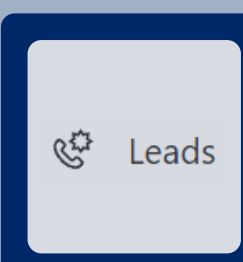


Organisations

The page for organisations encompasses all the entities for which we possess data, including those that are licensed or in the process of obtaining a license.

Leads

This page includes a compilation of the leads you are currently handling. In this context, a lead refers to an organisation that has shown interest in joining the DofE program, or an organisation that you are actively reaching out to in order to promote the program.

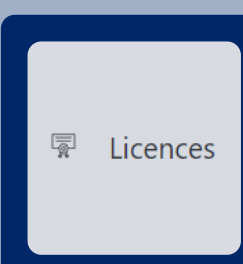


Opportunities

This page encompasses all the opportunities in progress. In this context, opportunities refer to organisations that have demonstrated a sincere interest in acquiring a DofE license and are currently in the process of obtaining it.

Licences

This page provides oversight of licenses that are nearing their expiration date. It allows you to keep track of licenses that are soon to expire and take appropriate actions or renewals as needed.



Task: Play

Take some time to press all the above buttons to become familiar with the system.

As long as you are in the testing site (Orange banner at the top) you cannot break anything.

For further Dynamics guides, make sure to check out the Digital Systems page on the hub.

This page can also be used to access an array of other learning material.

For further help, reach out to systemstraining@dofe.org