# Dynamics 365 for Customer Engagement : the basics

The Dynamics 365 for Customer Engagement basics training contains the essentials you need to know to navigate the system, enter data, use dashboards, charts and reports effectively and more.

## Détails

- Code : MB-CRM-B
- Durée : 1 jour ( 7 heures )

**Public**

- Architectes
- Chefs de projets
- Consultants
- Consultants informatiques
- Developpeurs
- Ingénieurs
- Professionnels de l'IT

**Pré-requis**

Objectifs

## Programme

### Outline

- What is Dynamics 365 for Customer Engagement?
- What are the role based predefined business apps?
- Find your business apps
- How data is organized?
- What are business processes
- Navigation and basics
  - Records creation
  - Search and find
  - Personal options
  - Create connections between records
  - Use flow to automate processes
- Work with accounts and contacts
- Dashboards and charts
- Reports
- Activities and the activities feeds
- Collaboration
- Import and export data

## Modalités

- Type d'action :Acquisition des connaissances
- Moyens de la formation :Formation présentielle – 1 poste par stagiaire – 1 vidéo projecteur – Support de cours fourni à chaque stagiaire
- Modalités pédagogiques :Exposés – Cas pratiques – Synthèse
- Validation :Exercices de validation – Attestation de stages