



Data Management

Dynamics 365 gives you tools to manage your data in the system. In this course we will look at duplicate detection rules, importing to create, and importing to update records. By utilizing these tools effectively, you can save time and increase the accuracy of your data.

COURSE OBJECTIVE: Utilize data management tools to reduce duplicate data, import new data, and update existing records.

LESSON 1: Duplicate Detection Rules

- Task 1: View default rules and discuss possible additional rules
- Task 2: Set up a rule using options on the rule form
- Task 3: Publish and deactivate rules
- Task 4: Understand different duplicate detection settings

LESSON 2: Duplicate Detection Jobs

- Task 1: Publish a duplicate detection rule
- Task 2: Set up a duplicate detection job using the wizard
- Task 3: View and save results

LESSON 3: Import to Create Data

- Task 1: Download a template for data import
- Task 2: Edit the import file in the correct format
- Task 3: Create your data map
- Task 4: Check results of the import process
- Task 5: Delete imported records

LESSON 4: Import to Update Data

- Task 1: Set up an Advanced Find
- Task 2: Make updates to the file
- Task 3: Confirm information in the import wizard
- Task 4: Check results of the import process