



Navigation and Personal Options in Dynamics 365

Dynamics 365 provides users with a flexible and dynamic interface for viewing and manipulating data. Frequently used items can be prioritized, and access can be granted or withheld to parts of the system based on security roles. There are multiple navigation tools to allow easy access to your data. Personal options also allow each user control over how data is consumed.

COURSE OBJECTIVE: To become familiar with Dynamics 365 navigation and how to customize your individual user experience by using personal options.

LESSON 1: Navigating the Toolbar options (classic view)

- TASK 1: Identify the Sitemap Modules, Entities and Records (follow the breadcrumbs)
- TASK 2: Using and Customizing the Global Search
- TASK 3: Recent Records and Views: Pin your Favorites for Quick Access
- TASK 4: Quick Create for Dynamics 365 Entities
- TASK 5: Identify the Advanced Find

LESSON 1: Navigating the Toolbar options (UI view)

- TASK 1: Using the left side Toolbar to access Dynamic Sitemap Applications, Entities and Records (follow the breadcrumbs)
- TASK 2: Recent Records and Views: Pin your Favorites for Quick Access
- TASK 3: Using and Customizing the Global Search
- TASK 4: Access Task Flows if applicable
- TASK 5: Relationship Assistant Insights on Customers
- TASK 6: Quick Create for Dynamics 365 Entities
- TASK 7: Identify the Advanced Find

LESSON 2: Viewing and Updating Records

- TASK 1: Identify Record types in CRM
- TASK 2: Understand Record Status and Status Reason and Why They Matter
- TASK 3a: (RAMCO) At A Glance Details on Contact records
- TASK 3: Navigating Forms to View Customer Data
- TASK 4: Record Relationships in the Toolbar and Through Links
- TASK 5: Saving Updates

LESSON 3: Using Views and Search Options

- TASK 1: Access a view (Accounts) switch Views
- TASK 2: Editable Grids
- TASK 3: Personal vs. System Views
- TASK 4: Find an Individual Record through a View, Global Search and Quick Find
- TASK 5: Searching tips and Wildcard Searches

LESSON 4: Personal Options

TASK 1: Set Options to personal needs

**Default Landing Page, Advanced Find Options, Time Zones etc.

TASK 2: Identify Personal vs. Organization Email Templates

LESSON 5: Dashboards

TASK 1: Out of the box Dashboards and Charts

TASK 2: Creating a Custom Dashboard

TASK 3: Personal vs System Dashboards and data