

# Dynamics CRM Basic Training

**Duration: Half Day**

## The Basics

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- Accessing Dynamics
- Personal Options
- Navigating Dynamics
- Key Data Entities
- Searching for Records
- Quick Find
- Global Search
- Filtering and Sorting

## Working with Account / Contact Records

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- Types of Fields
- Quick Create / Create from Global Search
- Adding Child records
- Parent / Company Hierarchy
- Active & Inactive records

## Activity Management

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- Viewing and Completing Activities
- Linking Notes and Files

## Personal Views

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- Creating New Views / Using Advanced Find
- Adding / Removing Columns
- Sort Criteria

## Dashboards

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- Creating a Dashboard
- Adding personal views to your Dashboard

## Microsoft Outlook Integration

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- Integrating with Microsoft Outlook
- Synchronising Tasks and Appointments
- Email Tracking / Set Regarding