OnDemand4U Online Training Courses for Dynamics CRM

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Dynamics 365 Online Training Courses

The OnDemand4U Services

We support you from decision making and successful implementation to the optimization, adaptation and further development of your CRM strategy with the following services:

Consulting	Training	Support
Classical projects according to SureStep	Webinars & Training Material	Support Contract & OnDemand
Agile Projects	Individual Training	Support Prepaid
Starter Packages	Certifications	Health Checks

Licensing Advice

Microsoft Online Licenses

Dynamics 365 Add-ons

Consulting	allows you to implement Dynamics 365 and Office 365 according to different project procedures.
Training	helps your employees to use the applications safely and effectively through regular standard or individual training courses.
Support	ensures the reliability of the applications through various support options and health checks.
Licensing Consulting	provides you with the appropriate Microsoft licenses and add-ons on a monthly or annual basis

Dynamics 365 Online Training Courses

Online Training offered by OnDemand4U

OnDemand4U supports you not only with CRM consulting and long-term support, but also with regular training. You can choose between online standard training, individual training and self-study.

We offer both user training courses in which you learn or refresh standard Dynamics CRM activities, as well as administrator training courses so that you can make adjustments to the system yourself.

Our online training courses are divided into small units of 120 - 180 minutes and include both practical exercises and question rounds. An online training course consists of a general presentation in which questions can be asked via chat, followed by an open question round. Only questions on the respective topic are discussed. Finally, you will receive the presentation slides by e-mail.

Terms and Conditions

Depending on your Dynamics 365 CSP contract, you will receive discounts:

- Regular: 10%
- Silver: 20%
- Gold: 50%

Only the first participant of a company pays the regular price. All other receive an additional 50% discount if they attend the same training together.

In addition, we offer individual packages on request if you would like to combine training courses.

A training course takes place for a total of two participants. Registration deadline is two days before the start of the training.

You can cancel a course up to 24 hours before it starts. After that we charge the full price.

Dynamics 365 Online Training Courses

Online Trainings Courses for End Users

We regularly hold process training courses as webinars to familiarize users with the basics of Dynamics 365 or to refresh their knowledge.

The process training courses consist of three main topics of Dynamics CRM:

Basics		
CRM Basic Functions	**Evaluation and Reporting** (coming soon)	
Sales	**Marketing**	**Service**
Sales Process From Lead to Invoice	**Marketing Process** Campaigns & Lists	**Customer Service** (coming soon)
Product Management (coming soon)		
Sales Management (coming soon)		

Dynamics 365 Online Training Courses

CRM Basic Functions

During this first training session, your users will receive an introduction to the basic operation of Dynamics 365.

Training Contents:
- Introduction to Microsoft Dynamics CRM
- Navigation, user interfaces, searches and views
- Managing master data: Account, contact
- Activity management
- Search functions
- Dashboards

Requirements for Participants:
- None

The training takes in total 150 minutes including exercises and questions. Price: 200 €.

Evaluation and Reporting

If you not only want to enter data, but also make it usable, this course will give you the support you need.

Training Contents:
- Available reports (standard reports)
- Dashboards
- Creating an individual report
- Configuring an individual dashboard
- Dashboard sharing and reporting

Requirements for Participants:
- The participants should be familiar with the usage of Dynamics CRM.
- The use of existing reports would be an advantage.

The training takes in total 120 minutes including exercises and questions. Price: 200 €.

Dynamics 365 Online Training Courses

Sales Process - From Lead to Invoice

Dynamics 365 offers a completely predefined process from initial first contact through to invoice. In this course, participants learn how to carry out this process themselves based on practical exercises.

Training Contents:
- Customer scenarios: Leads and sales opportunities
  - What is a lead? Dealing with leads in CRM
  - Editing sales opportunities
  - Competitor role
- Create and qualify leads
- Create, edit and close sales opportunities, offers, orders and invoices

Requirements for Participants:
- The participants should be familiar with the usage of Dynamics CRM.
- Knowledge of the topics of our basic training is required.

The training takes in total 150 minutes including exercises and questions. Price: 200 €.

Product Management

Dynamics 365 offers many possibilities to classify products and determine prices.

Training Contents:
- Introduction and overview of the product catalogue
- Create unit groups and add new units
- Classify product families
- Create products and add them to the product family
- Create price lists and price list elements
- Excursus about currency and product status

Requirements for Participants:
- Participants should be familiar with CRM and have a good knowledge of the sales process.

The training takes in total 150 minutes including exercises and questions. Price: 200 €.

Dynamics 365 Online Training Courses

Sales Management

In this course you will learn how to define goals with your sales team and to monitor whether they are being achieved.

Training Contents:
- Business processes (business process flow)
- Target management
  - Create targets
  - Definition of superordinate and subordinate targets
- Sales control from the employee's and sales manager's perspective

Requirements for Participants:
- Participants should be familiar with CRM and have good knowledge of sales.

The training takes in total 120 minutes including exercises and questions. Price: 200 €.

Marketing

In this course you will learn how to align sales and marketing activities by using marketing lists to create and execute campaigns.

Training Contents:
- Create and manage marketing lists
- Create and manage campaigns
- Generate and manage campaign reactions
- Create and manage quick campaigns
- Carry out data imports
- Create and manage templates for mail merge and mass mailing

Requirements for Participants:
- The participants should be familiar with the usage of Dynamics CRM.
- Knowledge of the topics of our basic training is required.

The training takes in total 150 minutes including exercises and questions. Price: 200 €.

Dynamics 365 Online Training Courses

Customer Service

Coming soon

Dynamics 365 Online Training Courses

Online Administrator Training

We support you in building and expanding your know-how for Dynamics 365. The goal of these courses is that you can adapt your CRM environment to your individual needs. There are different depths of knowledge you can acquire. This is an overview of the areas required to manage Dynamics 365 and the corresponding course:

Developer	
Plug-ins	Developer Knowledge & Personal Coaching
JavaScript	Developer Knowledge & Personal Coaching
Interfaces	Developer Knowledge & Personal Coaching
Customizer	
Security Roles	System Administration III
System Settings and Business Management	System Administration III
Workflows	System Administration II
Business Rules	System Administration II
Configurator	
Diagrams, Dashboards & Views	System Administration II
Business Processes	System Administration I
Forms	System Administration I
Fields	System Administration I
Excel Imports	System Administration – Basics
User	
Sales	Sales Process, Product Management, Sales Management
Marketing	Marketing
Service	Customer Service

Table: Levels for the development of know-how

Dynamics 365 Online Training Courses

Our online standard trainings are suitable for knowledge building up to "Customizer". "Developers" can only be trained in individual training courses.

If you would like to build up your own Dynamics 365 management skills, these training courses will help you:

Administrator
System Customization Basics: IT Terminologies and their Meaning, Basic Customizing Skills

System Customization I: Configuration of Entities, Fields & Forms	**System Customization II:** Advanced Customizations, Dashboards & Processes

System Customization III: Managing Enterprise and System Areas (coming soon)

The administrator training courses are structured into four different modules (see above). The modules include a presentation and an active exercise part. In a specially provided training environment, participants can practice and implement what they have learned; open questions are discussed at the end of the training.

Finally, you will receive the presentation slides by e-mail.

Tip: Only build up knowledge that you need regularly. Without constant use, this expertise is quickly lost.

Dynamics 365 Online Training Courses

System Customization Basics:
IT Terminologies and their Meaning, Basic Customizing Skills

If you have no customizing experience with Dynamics 365, we recommend this course to learn the basic topics and to get an initial orientation.

Training Contents:

- IT terminology of system customization and its meaning
- Getting started with system customization
- Specific adaptation scenarios
- Introduction to the security concept
- Import and export of data

Requirements for Participants:

- The participants should be familiar with the usage of Dynamics CRM.

The training takes in total 150 minutes including exercises and questions. Price: 200 €.

System Customization I:
Configuration of Entities, Fields & Forms

In this tutorial you will learn what you should consider when customizing your system and how to customize forms.

Training Contents:

- Create and manage solutions
- Create and customize entities
- Create and use fields
- Create and edit forms
- Get familiar with and customize views
- Get familiar with and apply security concepts

Requirements for Participants:

- The participants should be familiar with the usage of Dynamics CRM.
- Basic knowledge of relational databases (entities, attributes, relations)

The training takes in total 180 minutes including exercises and questions. Price: 300 €.

Dynamics 365 Online Training Courses

System Customization II:
Advanced Customizations, Dashboards & Processes

This advanced course introduces you to customization of views and masks. You will also learn about workflows for process automation.

Training Contents:

- Understanding and usage the relationship model
- Advanced customization (fields and forms)
- Working with dashboards & diagrams
- Creation of business process flows and automation

Requirements for Participants:

- The participants should be familiar with the usage of Dynamics CRM.
- Content of the "System Customization I" training course.

The training takes in total 180 minutes including exercises and questions. Price: 300 €.

System Customization III: Managing Enterprise and System Areas

coming soon

More Microsoft Training Courses

In cooperation with other providers, we offer standard training courses on other Microsoft products.

Individual Trainings Courses

We would be happy to make you an individual offer for on-site or online training. Here we can carry out a standard training or train specific processes from your system.

Self-study

This offer is in preparation and currently not available.
For self-study you get access to our portal with documentation and learning videos.

More Sources

Your key users and administrators get free access to our Yammer group "Knowledge-Base4U", in which we announce news about products and dates.

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