

1.	Dynamics CE	2
1.1.	Marketing	2
1.1.1.	Add Leads to a Marketing List	2
1.1.1.1.	Objective	2
1.1.1.2.	Navigation	2
1.1.1.3.	Steps	2
1.1.2.	Create a Marketing list	4
1.1.2.1.	Objective	4
1.1.2.2.	Navigation	4
1.1.2.3.	Steps	5
1.2.	Sales	7
1.2.1.	Create an account	7
1.2.1.1.	Objective	7
1.2.1.2.	Navigation	7
1.2.1.3.	Steps	7
1.2.2.	Add a Contact to an Account	11
1.2.2.1.	Objective	11
1.2.2.2.	Navigation	11
1.2.2.3.	Steps	11
1.2.3.	Create a Lead	14
1.2.3.1.	Objective	14
1.2.3.2.	Navigation	14
1.2.3.3.	Steps	14
1.2.3.3.1.	Enter lead topic and name	14
1.2.3.3.2.	Enter lead source and rating	15
1.2.3.3.3.	Enter additional contact details (when available)	16
1.2.3.3.4.	Verify the correct owner of the lead is set	16
1.2.4.	Edit an account	17
1.3.	Services	18
1.3.1.	Create a Case	18
1.3.1.1.	Objectives	18
1.3.1.2.	Navigation	19
1.3.1.3.	Steps	19
2.	Power Platform	20
2.1.	Create a Challenge	20
2.1.1.	Objective	20
2.1.2.	Set the timeframe for incoming ideas	22
2.1.2.1.	Set Launch date for the challenge	23
2.1.2.2.	Set the end date for incoming ideas	23
2.1.2.3.	Set the date for final decision on ideas for the challenge	24
2.2.	Create an Idea	24
2.2.1.	Objective	24
2.2.2.	Fill in the information required in the fields below	25
2.2.2.1.	Set the Idea score	26
2.2.2.2.	Set the Risk score	26
2.3.	Add an Idea to a Challenge	26
2.3.1.	Navigate to the challenge to wish to add an idea to	26
2.3.2.	Go to Contributed Ideas	27
2.3.3.	An existing Idea have now been added to the challenge	29
3.	Business Central	29
3.1.	Create a new customer	29

3.2.	Create a New Sales Order	31
4.	Finance and Operations	35
4.1.	Validate Vendor Info	35
5.	SharePoint	37
5.1.	Create a Team in Sharepoint.....	37
6.	Microsoft Teams	38
6.1.	Create a Team	38
6.2.	Create a Channel.....	41
6.3.	Customize and manage your team	43
7.	Cross Platform	45
7.1.	Cross Platform Recording.....	45

1. Dynamics CE

1.1. Marketing

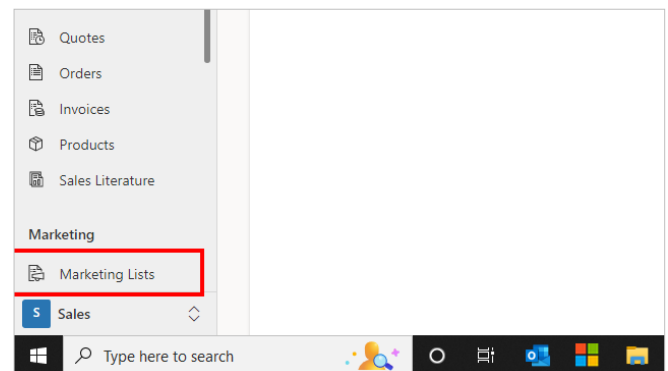
1.1.1. Add Leads to a Marketing List

1.1.1.1. Objective

The following describes the process for creating a new lead.

1.1.1.2. Navigation

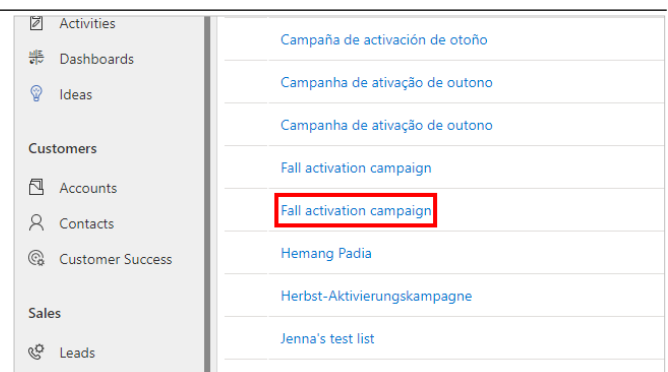
Click on the item **Marketing Lists**



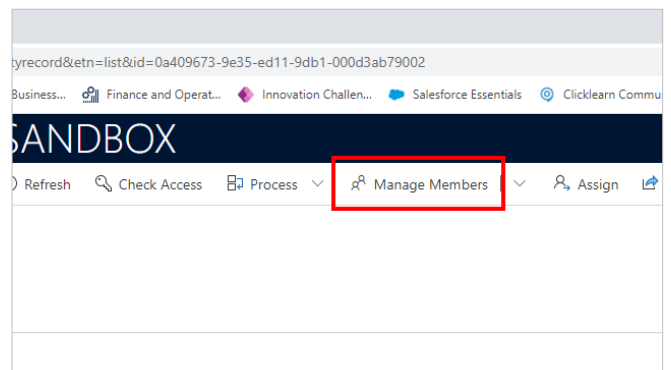
1.1.1.3. Steps

Select the dynamic marketing list

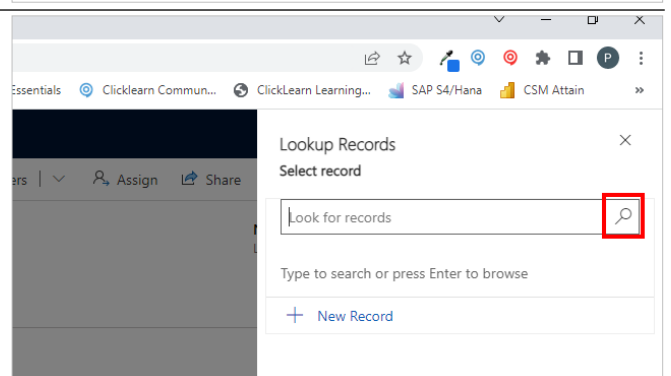
Click on the link in cell **Fall activation campaign**



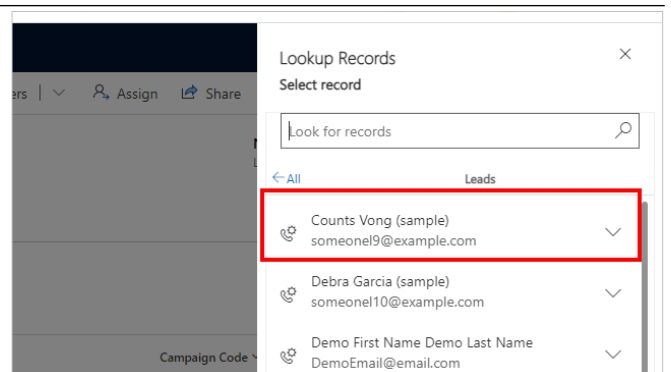
Click on the menu item **Manage Members**



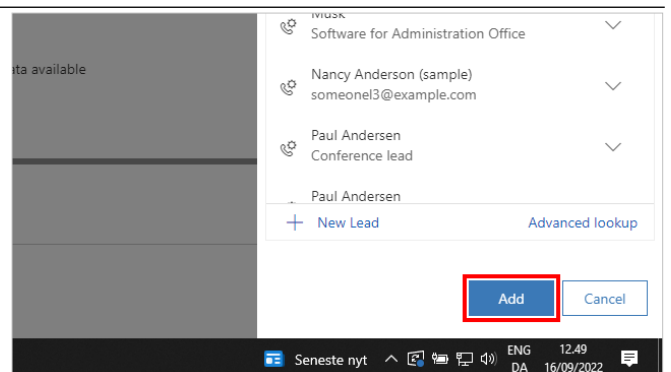
Click on the button **Search records for Select record, Multiple Selection Lookup field**
 Create a query to search and find the leads to be added



Click on the item **Counts Vong (sample) someone19@example.com 555-0135 Follow-up with information regarding our promotions (sample) Margie's Travel New**

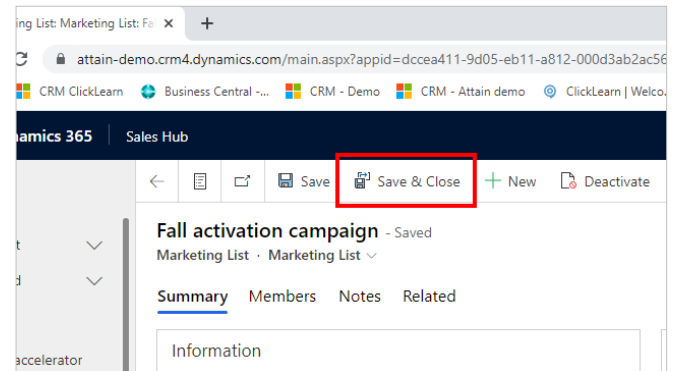


Click on the button **Add**

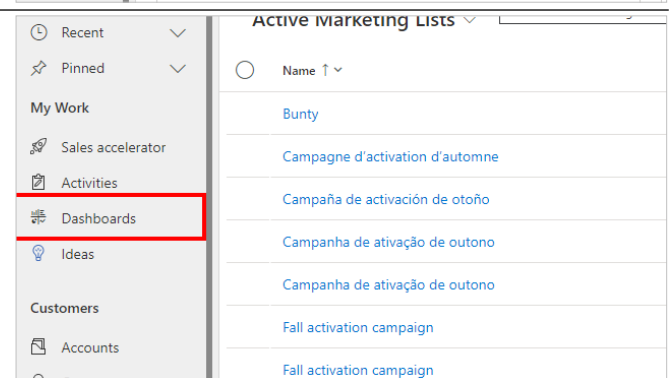


The leads have now been added to the marketing list, which is ready for further processing.

Click on the menu item **Save & Close**



Click on the item **Dashboards**



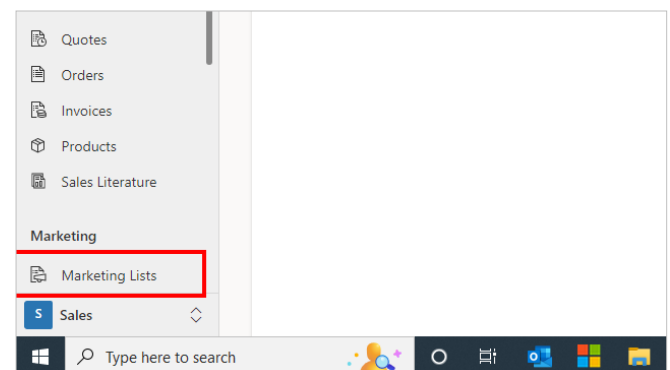
1.1.2. Create a Marketing list

1.1.2.1. Objective

The following describes the process for creating a new lead.

1.1.2.2. Navigation

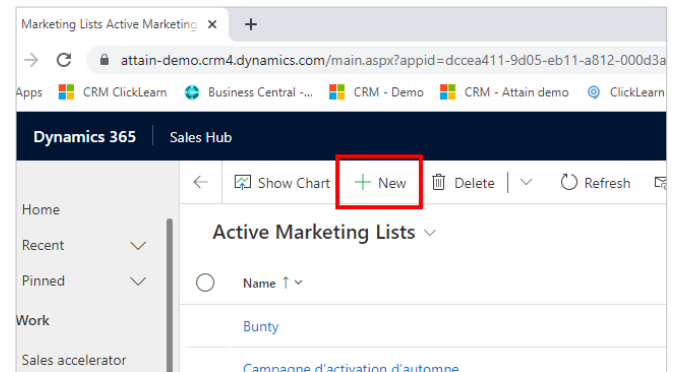
Click on the item **Marketing Lists**



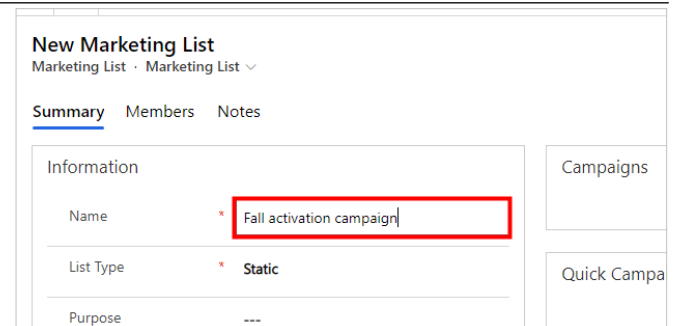
1.1.2.3.

Steps

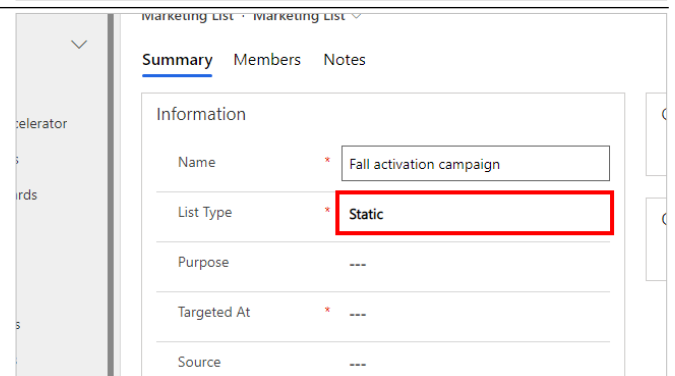
Click on the menu item **New**



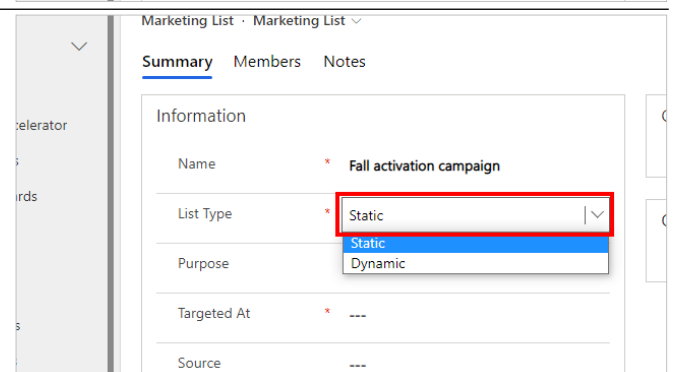
1. Click on the text field **Name** - Enter **Name**. Use a logical name that corresponds with the purpose of the list.



Click on the field **List Type**



Click on the item **Dynamic** in the list



Directions North America

1. Click on the text field **Purpose** - Enter **Purpose**.

Summary Members Notes

Information

Name * Fall activation campaign

List Type * Dynamic

Purpose Leads to all touch points in last quarter

Targeted At * ---

Source ---

Campaigns

Quick Campaigns

1. Click on the field **Targeted At**.
2. Click on the item **Lead** in the list. Select the target audience: Leads, Contacts or Accounts.

Information

Name * Fall activation campaign

List Type * Dynamic

Purpose Drive Leads to all touch points in last ...

Targeted At * --Select-- 1+2

Source ---

Currency US Dollar

Campaigns

Quick Campaigns

- Click on the text field **Description**
If needed, add more information about the use of the marketing list here.

Cost ---

Last Used On ---

Locked No

Owner * Peter Højlund Løvskov

Description ---

- Click on the menu item **Save & Close**

Marketing List: Marketing List: N...

attain-demo.crm4.dynamics.com/main.aspx?appid=dccea411-9d05-eb11-a812-000d3a...

Apps CRM ClickLearn Business Central ... CRM - Demo CRM - Attain demo ClickLearn

Dynamics 365 Sales Hub

Home Recent Pinned Work Sales accelerator

Save Save & Close New Manage Men

New Marketing List - Unsaved

Marketing List - Marketing List

Summary Members Notes

Information

- Click on the **application** button in the navigation top bar

Marketing Lists Active Marketing x

attain-demo.crm4.dynamics.com/main.aspx?appid=dccea411-9d05-eb11-a812-0...

Apps CRM ClickLearn Business Central ... CRM - Demo CRM - Attain demo ClickLearn

Dynamics 365 Sales Hub

Home Recent Pinned My Work Sales accelerator

Show Chart + New

Active Marketing Lists Create a new Marketing List record.

Name ↑

Bunt

Campagne d'activation d'automne

The account has now been created with you as the owner. Remember to assign the account, if another person is the account manager.

1.2. Sales

1.2.1. Create an account

1.2.1.1. Objective

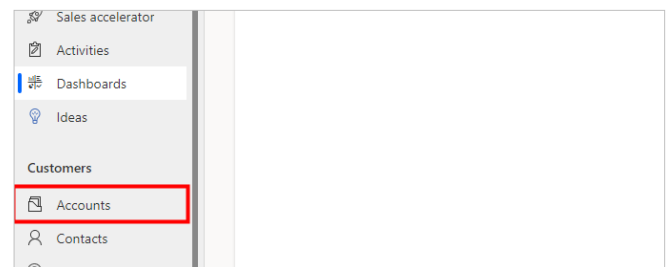
The following describes the process for creating a new lead.

To complete the process, you must have the following information available:

- Company name
- Website URL
- Phone number
- Address

1.2.1.2. Navigation

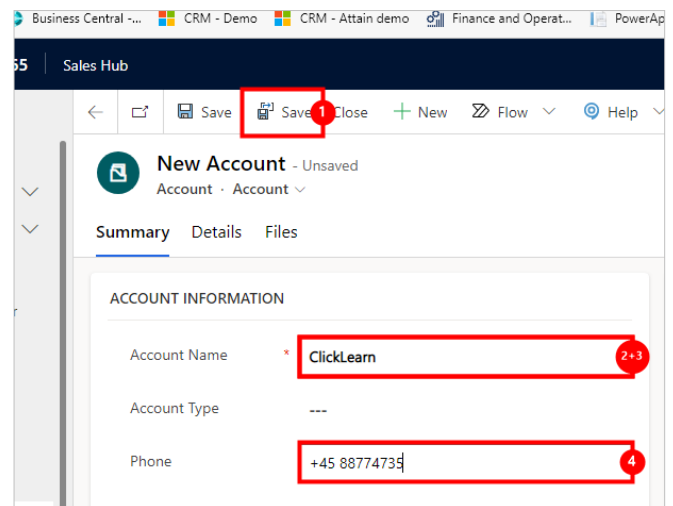
1. Click on the item **Accounts**.



1.2.1.3. Steps

Remember to use the full official company name for the account name.

1. Click on the menu item **New**.
2. Click on the text field **Account Name** - Enter **Account Name**.
3. Click on the item --- in the list.
4. Remember to enter the area code
Click on the text field **Phone** - Enter **Phone**.



1. Click on the text field **Website** - Enter the **official website address**.





Directions North America

Click on the text field **Ticker Symbol**

Phone	+45 88774735	
Fax	---	
Website	<input type="text" value="www.clicklearn.com"/>	
Parent Account	---	
Ticker Symbol	<input type="text" value=""/>	

ADDRESS

Enter **Ticker Symbol**. Press the **Enter** key.


Phone	+45 88774735	
Fax	---	
Website	https://www.clicklearn.com	
Parent Account	---	
Ticker Symbol	<input type="text" value="MSFT"/>	

ADDRESS

Address 1: Street 1

Click on the text field **Address 1: Street 1**

Communities
 Directors
 s


Parent Account	---
Ticker Symbol	<input type="text" value="MSFT"/> 

ADDRESS

Address 1: Street 1	<input type="text"/>
Address 1: Street 2	---
Address 1: Street 3	---
Address 1: City	---

Click on the text field **Address 1: Street 1**

Communities
 Directors
 s

Parent Account	---
Ticker Symbol	<input type="text" value="MSFT"/> 

ADDRESS

Address 1: Street 1	<input type="text"/>
Address 1: Street 2	---
Address 1: Street 3	---
Address 1: City	---

Directions North America

Enter **Address 1: Street 1**.

Parent Account	---
Ticker Symbol	MSFT
ADDRESS	
Address 1: Street 1	Sjæleboerne 2
Address 1: Street 2	---
Address 1: Street 3	---
Address 1: City	---

Click on the text field **Address 1: City**

Address 1: Street 1	Sjæleboerne 2
Address 1: Street 2	---
Address 1: Street 3	---
Address 1: City	---
Address 1: State/Province	---
Address 1: ZIP/Postal Code	---

Enter **Address 1: City**.

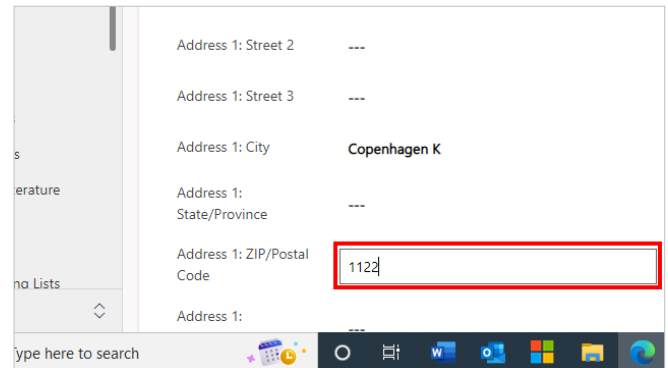
Address 1: Street 1	Sjæleboerne 2
Address 1: Street 2	---
Address 1: Street 3	---
Address 1: City	Copenhagen K
Address 1: State/Province	---
Address 1: ZIP/Postal Code	---

Click on the text field **Address 1: ZIP/Postal Code**

Address 1: Street 2	---
Address 1: Street 3	---
Address 1: City	Copenhagen K
Address 1: State/Province	---
Address 1: ZIP/Postal Code	---
Address 1:	---

Directions North America

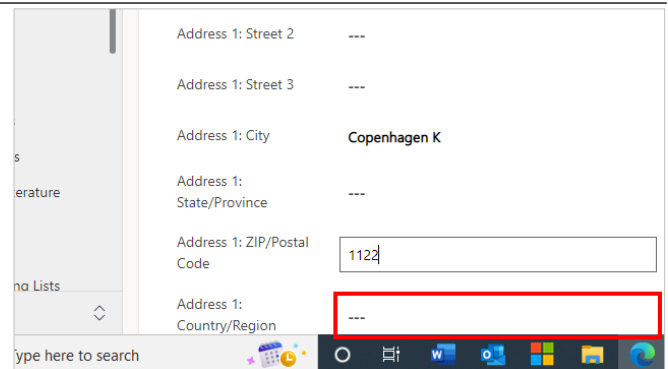
Enter **Address 1: ZIP/Postal Code.**



Address 1: Street 2 ---
 Address 1: Street 3 ---
 Address 1: City Copenhagen K
 Address 1: State/Province ---
 Address 1: ZIP/Postal Code 1122
 Address 1: ---

type here to search

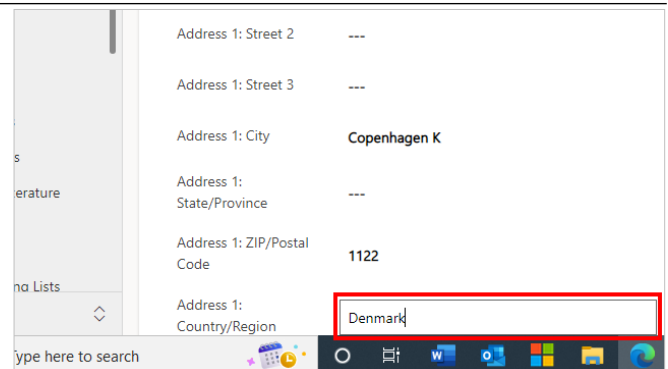
Click on the text field **Address 1: Country/Region**



Address 1: Street 2 ---
 Address 1: Street 3 ---
 Address 1: City Copenhagen K
 Address 1: State/Province ---
 Address 1: ZIP/Postal Code 1122
 Address 1: Country/Region ---

type here to search

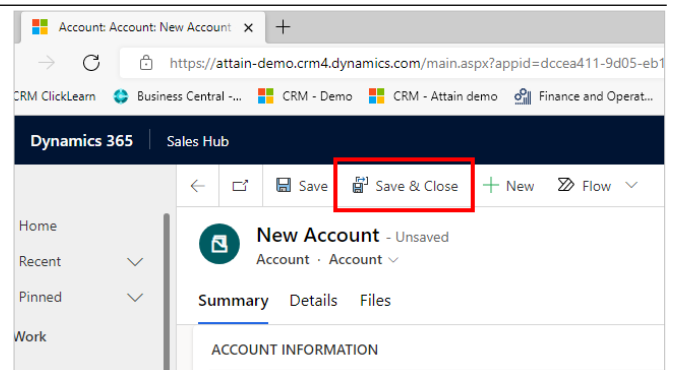
Enter **Address 1: Country/Region.**



Address 1: Street 2 ---
 Address 1: Street 3 ---
 Address 1: City Copenhagen K
 Address 1: State/Province ---
 Address 1: ZIP/Postal Code 1122
 Address 1: Country/Region Denmark

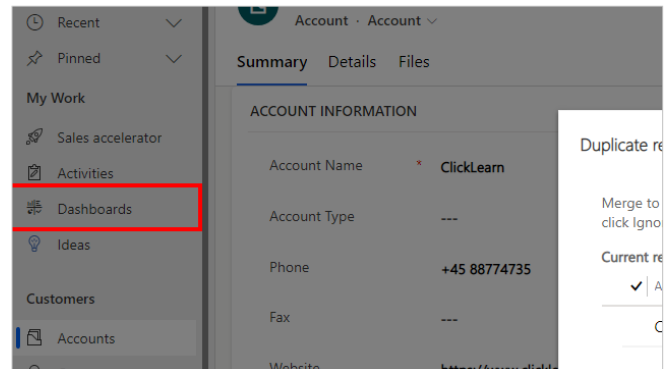
type here to search

Click on the menu item **Save & Close**



Account: Account: New Account x +
 https://attain-demo.crm4.dynamics.com/main.aspx?appid=dcea411-9d05-eb1
 CRM ClickLearn Business Central CRM - Demo CRM - Attain demo Finance and Operat...
 Dynamics 365 Sales Hub
 Home Recent Pinned Work
 Save Save & Close New Flow
 New Account - Unsaved
 Account - Account
 Summary Details Files
 ACCOUNT INFORMATION

Click on the item **Dashboards**



The account has now been created with you as the owner. Remember to assign the account, if another person is the account manager.

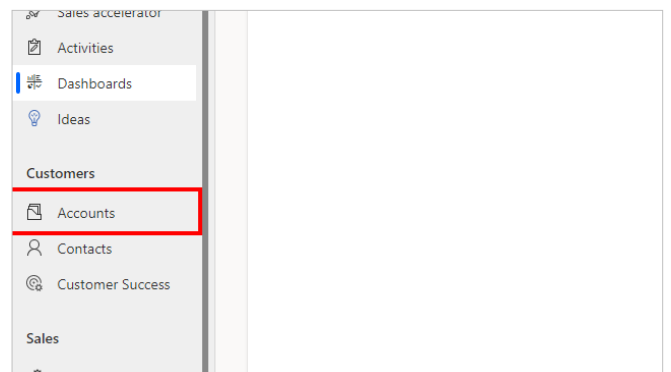
1.2.2. Add a Contact to an Account

1.2.2.1. Objective

The following describes the process for creating a new lead.

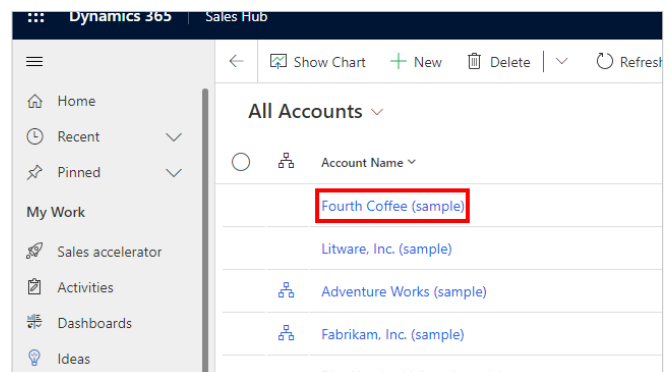
1.2.2.2. Navigation

Click on the item **Accounts**



1.2.2.3. Steps

Click on the link in cell **Fourth Coffee (sample)**



Directions North America

Click on the menu item **More commands for Contact**

A screenshot of the Contacts app interface. On the left, a list of messages is visible with timestamps like '7/27/2021 9:15 AM' and '10/5/2020 1:16 PM'. The main area shows a contact card for 'someone_a@example.com' with a phone number '555-0100'. A red rectangular box highlights the three-dot menu icon in the top right corner of the contact card. Below the contact card, the 'CONTACTS' section is visible, showing a list of contacts including '12 Great abc@xyz.com' and 'Yvonne McKay (sample) someone_a@example.com'.

Click on the menu item **More commands for Contact**

[illegible]

Click on the menu item **New Contact**

The screenshot shows the 'New Contact' dialog in the 'Contacts' app. The dialog is a white box with a red border, containing a list of options: '+ New Contact', 'Add Existing Contact', 'Refresh', 'Quick Campaign', and 'Flow'. The 'New Contact' option is highlighted with a red circle. The background shows a list of contacts and a sidebar with navigation options.

1. Click on the text field **First Name** - Enter **First Name**.

Details

Scan Business Card

First Name

Anna

Last Name

Job Title

1. Click on the text field **Last Name** - Enter **Last Name**.

Details

↑ Scan Business Card

First Name

+

Anna


Last Name

*

Jensen

Job Title

Account Name

 Fourth Coffee (sample)

Directions North America

1. Click on the text field **Job Title** - Enter **Job Title**.

Details

Scan Business Card

First Name + Anna

Last Name * Jensen

Job Title CFO

Account Name Fourth Coffee (sample)

1. Click on the text field **Email** - Enter **Email**.

Account Name Fourth Coffee (sample)

Contact Information

Email someone_x@example.com

Mobile Phone ---

Business Phone 555-0150-100

1. Click on the text field **Mobile Phone** - Enter **Mobile Phone**.

Contact Information

Email someone_x@example.com

Mobile Phone 123-4567

Business Phone 555-0150-100

Description ---

- Click on the button **Save and Close**

10/5/2020 1:16 PM

City Renton

ZIP/Postal Code 20175

sample).

10/5/2020 1:16 PM

10/5/2020 1:16 PM

Save and Close

Cancel

15°C Skyet

ENG 15.37

DA 15/09/2022

- Click on the item **Dashboards**

Recent

Pinned

My Work

Sales accelerator

Activities

Dashboards

Ideas

Customers

Accounts

Account · Account

Summary Details Assets and Locations Files Relat

ACCOUNT INFORMATION

Account Name * Fourth Coffee (sample)

Account Type ---

Phone 555-0150-100

Fax ---

Website http://www.fourthcoffee.com/

The account has now been created with you as the owner. Remember to assign the account, if another person is the account manager.

1.2.3. Create a Lead

1.2.3.1. Objective

The following describes the process for creating a new lead.

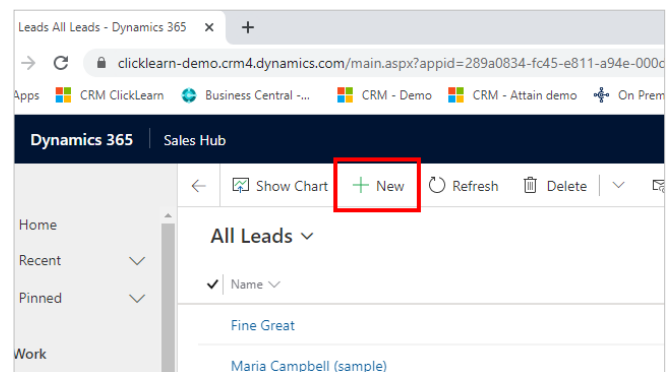
1.2.3.2. Navigation

Click on the item **Leads**



1.2.3.3. Steps

Click on the menu item **New**



1.2.3.3.1. Enter lead topic and name

1. Click on the text field **Topic** - Enter **Topic**.

- Click on the text field **First Name** - Enter **First Name**.
- Click on the text field **Last Name** - Enter **Last Name**.

1.2.3.3.2.

Enter lead source and rating

Click on the button **More Header Fields**

The screenshot shows the top navigation bar of the ClickLearn application. The 'More Header Fields' button, represented by a downward arrow icon, is highlighted with a red box. The interface includes a search bar, a filter icon, and a user profile icon labeled 'PH'.

Click on the field **Lead Source**

The screenshot shows the 'Lead Source' dropdown menu open. The dropdown is highlighted with a red box. The menu lists various lead sources: Advertisement, Employee Referral, External Referral, Partner, Public Relations, Seminar, Trade Show, Web, Word of Mouth, and Other. The 'Lead Source' field is currently set to '--Select--'.

Click on the item **Trade Show** in the list

The screenshot shows the 'Lead Source' dropdown menu with 'Trade Show' selected. The 'Trade Show' item is highlighted with a red box. The dropdown menu is open, showing the list of lead sources.

Click on the field **Rating**

The screenshot shows the 'Rating' dropdown menu open. The dropdown is highlighted with a red box. The menu lists various ratings: Warm, New, and Other. The 'Rating' field is currently set to 'Warm'.

Directions North America

Click on the item **Hot** in the list

Click on **Status**

Click on the item **Contacted**

1.2.3.3.3.

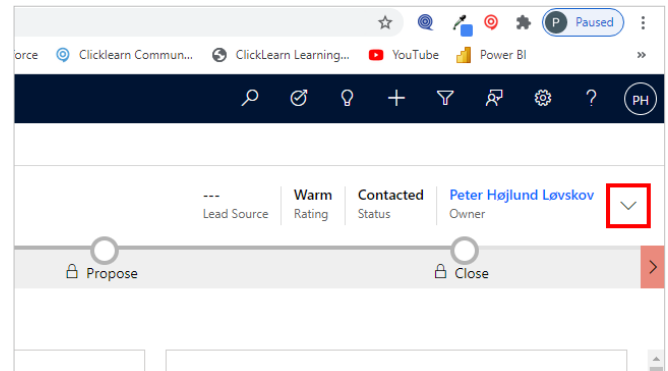
Enter additional contact details (when available)

1. Click on the text field **Job Title**.
2. Click on the text field **Business Phone**.
3. Click on the text field **Mobile Phone**.
4. Click on the text field **Email**.

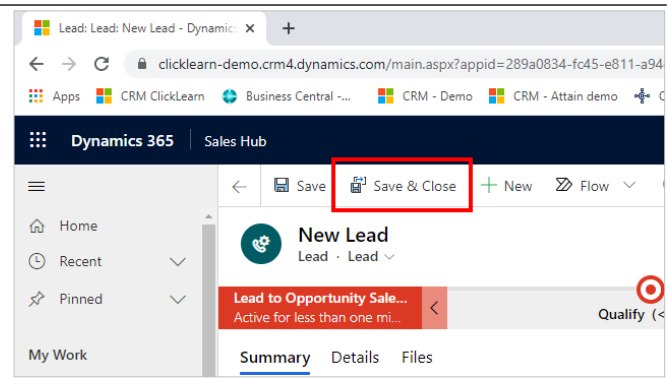
1.2.3.3.4.

Verify the correct owner of the lead is set

Click on the button **More Header Fields**

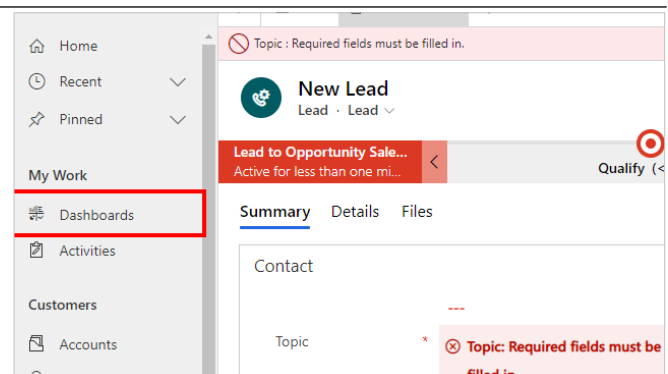


Click on the menu item **Save & Close**



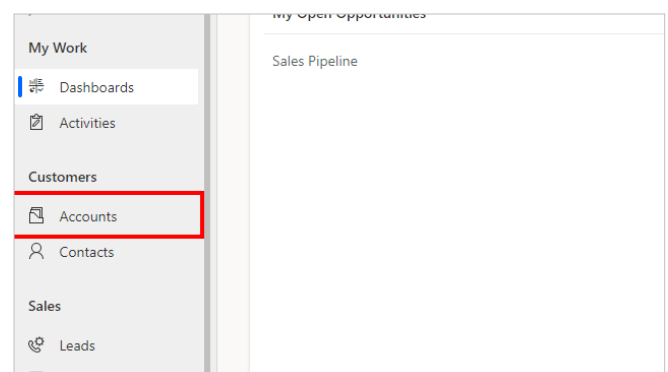
The lead has now been created. You may now add it to a marketing list.

Click on the item **Dashboards**



1.2.4. Edit an account

Click on the item **Accounts**



Directions North America

Click on the button **Adventure Works (sample)**

The screenshot shows a sidebar menu on the left with options like Home, Recent, Pinned, My Work, Dashboards, Activities, Customers, Accounts, and Contacts. The main area is titled 'All Accounts' and lists several accounts: Fourth Coffee (sample), Litware, Inc. (sample), Adventure Works (sample) (highlighted with a red box), Fabrikam, Inc. (sample), Blue Yonder Airlines (sample), and City Power & Light (sample). There is also a partially visible 'Contoso Pharmaceuticals (sample)' at the bottom.

Click on the text field **Account Name**

The screenshot shows the details page for the 'Adventure Works (sample)' account. The page has tabs for 'mary', 'Details', 'Assets and Locations', 'Files', and 'Related'. Under the 'COUNT INFORMATION' section, the 'Account Name' field is highlighted with a red box and contains the text 'Adventure Works (sample)'. Other fields include 'Account Type' (---), 'Phone' (555-0152), and 'Fax' (this is not a fax number). A 'Timeline' panel is visible on the right.

Click on the field **Account Type**

This screenshot is similar to the previous one, showing the 'Adventure Works (sample)' account details. The 'Account Type' field, which currently shows '---', is highlighted with a red box. The 'Account Name' field also contains 'Adventure Works (sample)'. The 'Phone' and 'Fax' fields are the same as in the previous screenshot.

Click on the text field **Ticker Symbol**

The screenshot shows the 'Adventure Works (sample)' account details page with the 'Ticker Symbol' field highlighted by a red box. A dropdown menu is open for the 'Parent Account' field, showing options: 'Federal', 'Commercial', 'Mechanical', and 'Technical'. The 'Website' field contains 'http://www.adventure-works.com/'. The 'Parent Account' field is set to '---'. The 'Ticker Symbol' field is also set to '---'. Below this, the 'DRESS' section shows 'Address 1: Street 1' as '4405 Balboa Court'. The 'Timeline' panel on the right shows various activity icons.

1.3. Services

1.3.1. Create a Case

1.3.1.1. Objectives

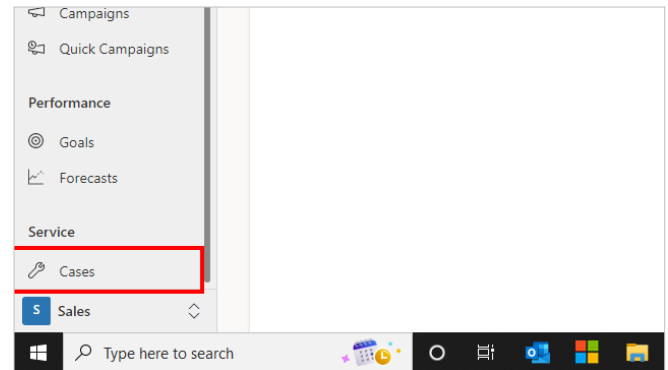
The following describes the process for creating a new lead.

Directions North America

1.3.1.2.

Navigation

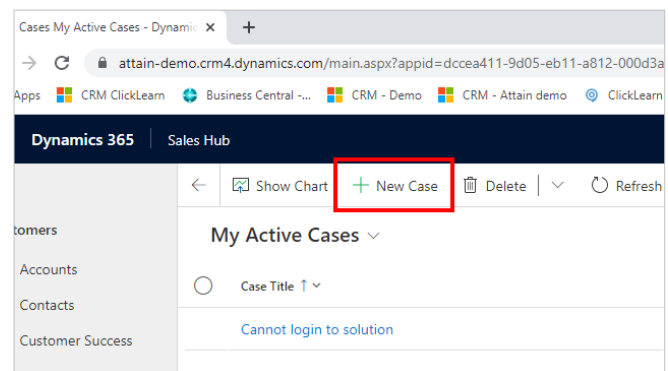
Click on the item **Cases**



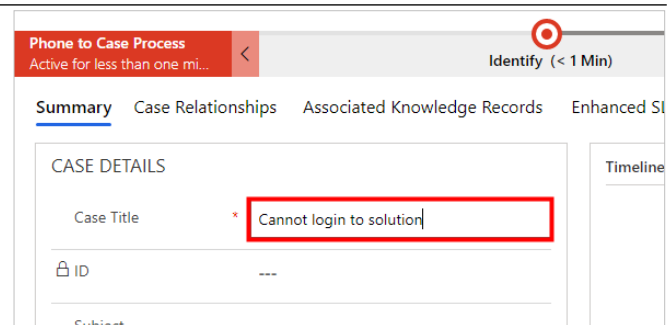
1.3.1.3.

Steps

Click on the menu item **New Case**

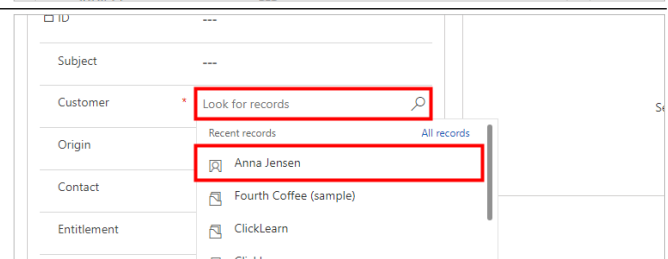


1. Click on the text field **Case Title** - Enter **Case Title**. Press the **Enter** key. Set a short name for the case.



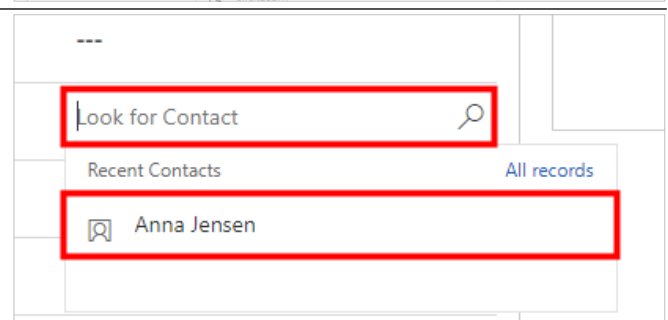
Select the account this case is coming from:

- Click on the lookup field **Customer**.
- Click on the item **Anna Jensen**.

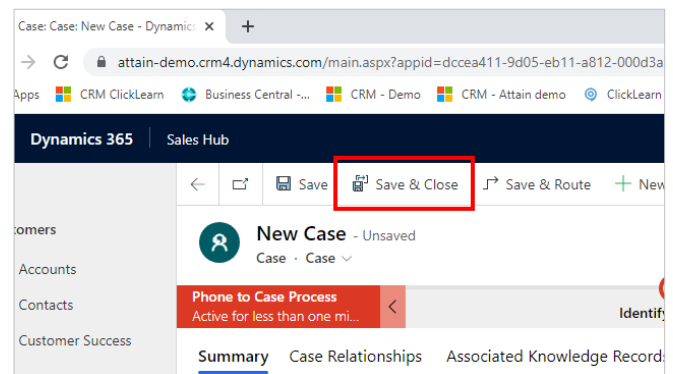


Select the contact for this case:

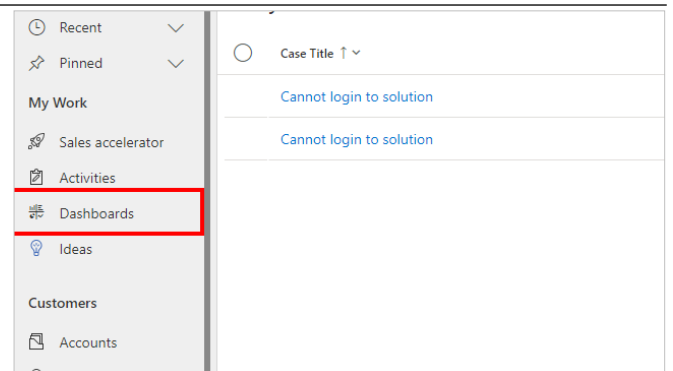
- Click on the input field **Contact**.
- Click on the item **Anna Jensen**.



Click on the menu item **Save & Close**



Click on the item **Dashboards**



The account has now been created with you as the owner. Remember to assign the account, if another person is the account manager.

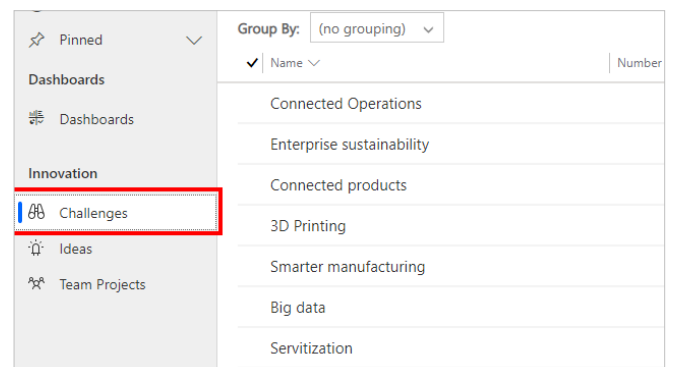
2. Power Platform

2.1. Create a Challenge

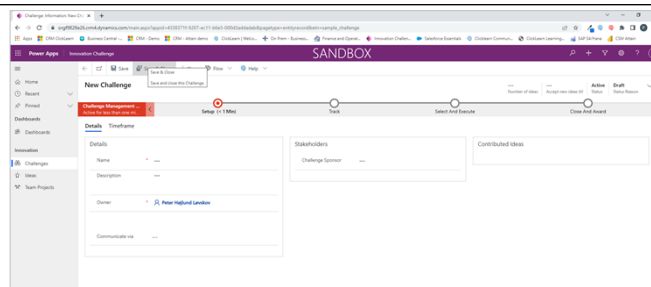
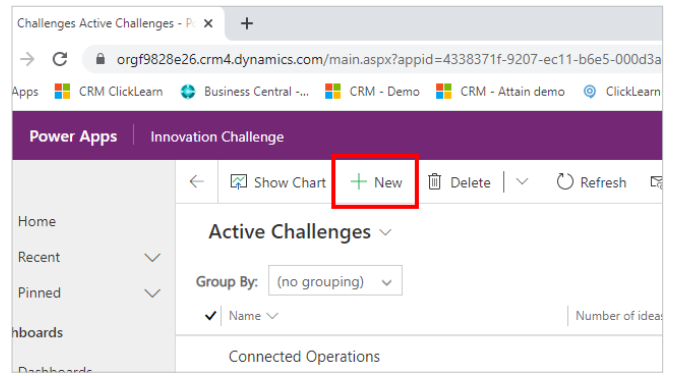
2.1.1. Objective

Use this guide to setup a Challenge

Click on the item **Challenges**



Click on the menu item **New**



- Click on the text field **Name** - Enter **Name**.

* Event Restaurant

- Click on the text field **Description** - Enter **Description**.

* Event Restaurant

Develop a restaurant that can be used on multiple music festivals and art venues.

* Peter Højlund Løvskov

Click on the button **Communicate via**

Develop a restaurant that can be used on multiple music festivals and art venues.

Peter Højlund Løvskov

Communicate via

Directions North America

Click on the item **Communicate via**

Owner: Peter Højlund Løvskov

Communicate via: Select or search options

- ☐ Select all (4 items)
- ☒ Email
- ☐ Teams
- ☐ Phone
- ☐ Skype/Lync

- Click on the lookup field **Challenge Sponsor** - Enter **Challenge Sponsor**.
- Click on the item **Peter Højlund Løvskov**.

Search: peter

Users: Peter Højlund Løvskov (orgf9828e26)

Recent records

Advanced lookup

2.1.2. Set the timeframe for incoming ideas

Click on the item **Timeframe**

Home, Recent, Pinned, Dashboards, Innovation, Challenges, Ideas

New Challenge - Unsaved

Challenge Management ... Active for less than one mi... Setup (< 1)

Details, **Timeframe**

Details

Name: Event Restaurant

Description: Develop a restaurant that can be u... festivals and activities

Almost there

Select Save to see your timeline

Launch date, Accept new ideas till, End date of ideas

2.1.2.1.

Set Launch date for the challenge

Click on **Launch date**

The screenshot shows a challenge setup form with a progress bar at the top. The progress bar has two stages: 'Start And Execute' and 'Close And Award'. Below the progress bar, there are three input fields: 'Launch date', 'Accept new ideas till', and 'Final review of ideas on'. The 'Launch date' field is highlighted with a red box. To the right of the form, there are tabs for 'Active' and 'Draft'.

Click on a day number. In this example the day **Mo**

The screenshot shows a date picker for August 2022. The calendar grid shows days from 1 to 31. The 22nd is highlighted with a red box. To the right of the calendar, there are tabs for '2022' and '2023'.

2.1.2.2.

Set the end date for incoming ideas

Click on **Accept new ideas till**

The screenshot shows the same challenge setup form as before. The 'Accept new ideas till' field is now highlighted with a red box. The 'Launch date' field now contains the date '8/22/2022'.

Choose the month and year

Click on a day number. In this example the day **Fr**

The screenshot shows a date picker for August 2022. The calendar grid shows days from 1 to 31. The 26th is highlighted with a red box. To the right of the calendar, there are tabs for '2022' and '2023'.

2.1.2.3. Set the date for final decision on ideas for the challenge

Click on the field **Final review of ideas on**

Launch date 8/22/2022

Accept new ideas till 8/26/2022

Final review of ideas on ---

Click on a day number. In this example the day **We**

August 2022

Su Mo Tu We Th Fr Sa

31 1 2 3 4 5 6

7 8 9 10 11 12 13

14 15 16 17 18 19 20

21 22 23 24 25 26 27

28 29 30 31 1 2 3

Click on the menu item **Save & Close**

Challenge: Information: New Cha x +

orgf9828e26.crm4.dynamics.com/main.aspx?appid=4338371f-9207-ec11-b6e5-000d3a

Apps CRM ClickLearn Business Central CRM - Demo CRM - Attain demo ClickLearn

Power Apps Innovation Challenge

Save Save & Close New Flow

New Challenge - Unsaved

Challenge Management ... Active for less than one mi... Setup (< 1 Min)

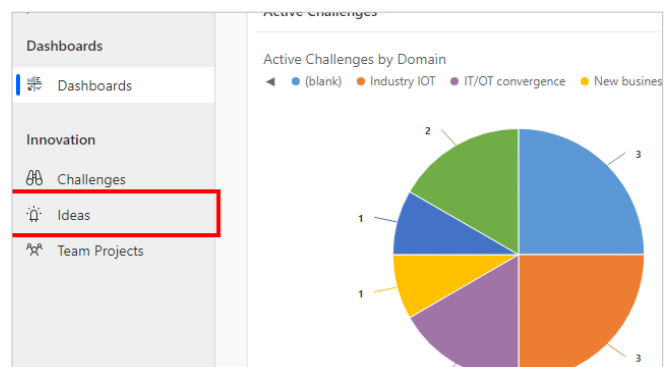
Details Timeframe

2.2. Create an Idea

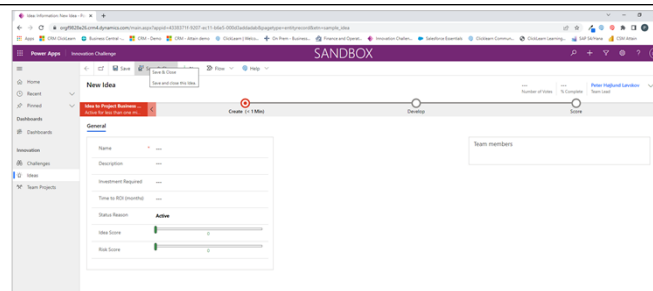
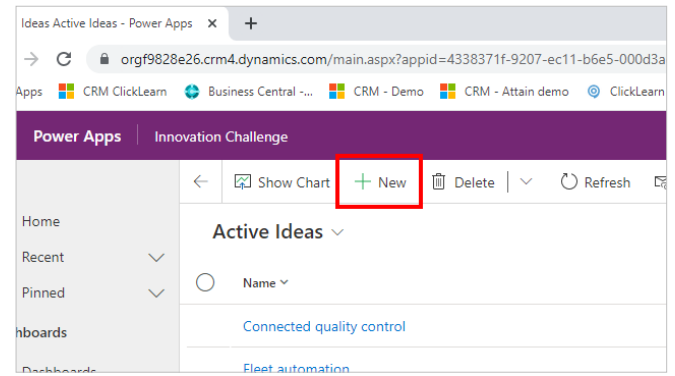
2.2.1. Objective

Use this guide to create an idea, that for example can be used in a challenge

Click on the item **Ideas**



Click on the menu item **New**



2.2.2. Fill in the information required in the fields below

- Click on the text field **Name** - Enter **Name**.

General

Name * Foodtruck

Description ---

Investment Required ---

- Click on the text field **Description** - Enter **Description**.

General

Name * Foodtruck

Description so it easily can move between venues.

Investment Required ---

- Click on the text field **Investment Required** - Enter **Investment Required**. Press the **Enter** key.

General

Name * Foodtruck

Description so it easily can move between venues.

Investment Required \$120,000.00

Time to ROI (months) ---

- Click on the text field **Time to ROI (months)** - Enter **Time to ROI (months)**.

Description	so it easily can move between venues.
Investment Required	\$120,000.00
Time to ROI (months)	10
Status Reason	Active
Idea Score	

2.2.2.1. Set the Idea score

- Click and hold the left mouse button on the link **0**.
- Release the left mouse button on the link **0**.

Status Reason	Active
Idea Score	
Risk Score	

2.2.2.2. Set the Risk score

- Click and hold the left mouse button on the link **0**.
- Release the left mouse button on the link **0**.

Status Reason	Active
Idea Score	
Risk Score	

Click on the menu item **Save & Close**

Idea: Information: New Idea - Po

orgf9828e26.crm4.dynamics.com/main.aspx?appid=4338371f-9207-ec11-b6e5-000d3a

CRM ClickLearn Business Central CRM - Demo CRM - Attain demo ClickLearn

Power Apps Innovation Challenge

Save Save & Close New Flow

New Idea - Unsaved

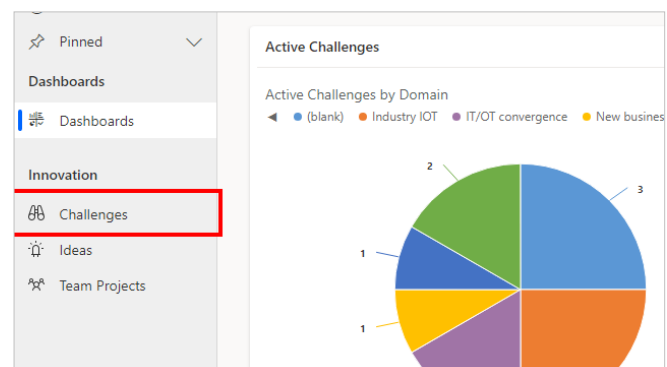
Idea to Project Business ... Active for less than one mi...

General

2.3. Add an Idea to a Challenge

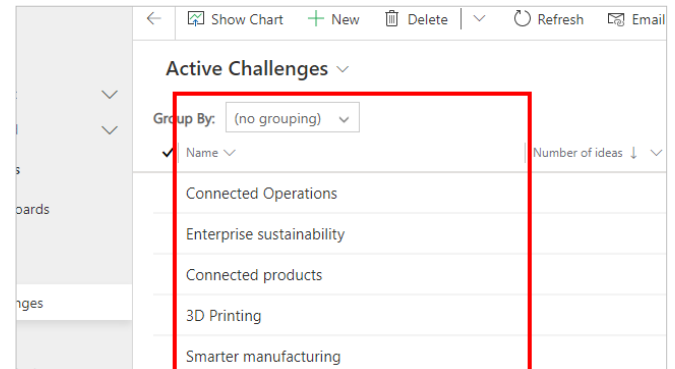
2.3.1. Navigate to the challenge to wish to add an idea to

Click on the item **Challenges**

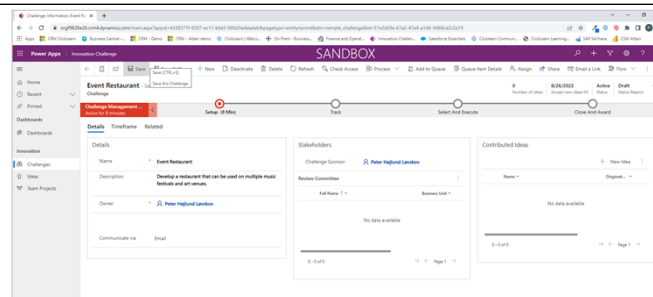
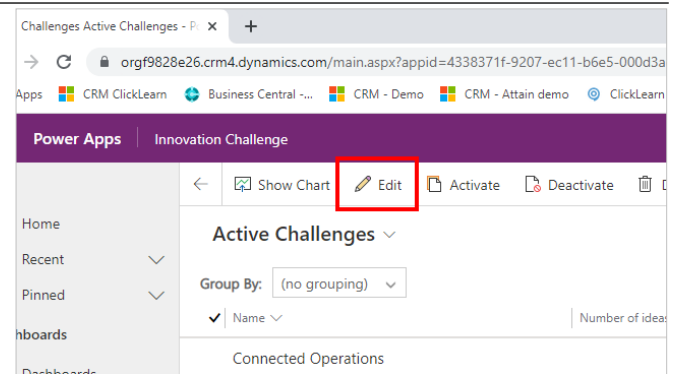


Directions North America

Click on the row selector on any row

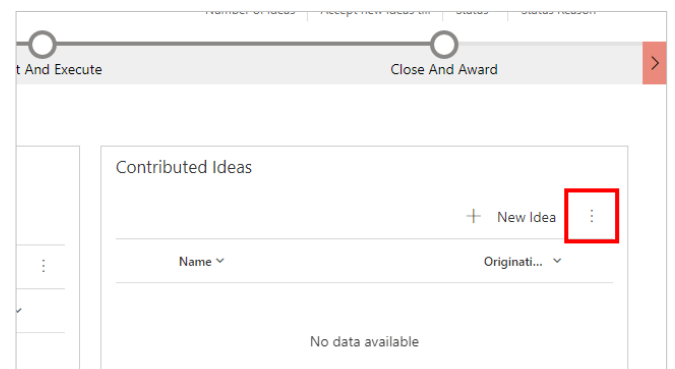


Click on the menu item **Edit**



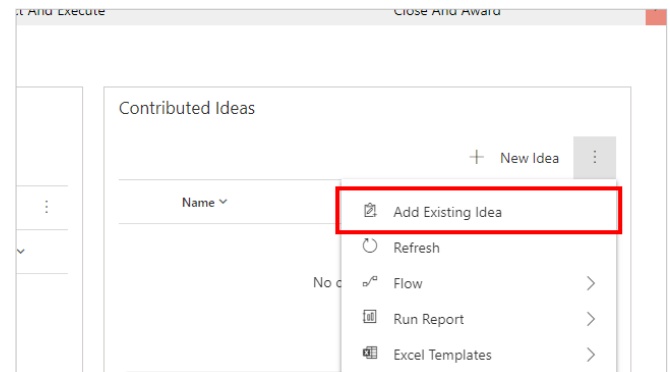
2.3.2. Go to Contributed Ideas

Click on the menu item **More commands for Idea**

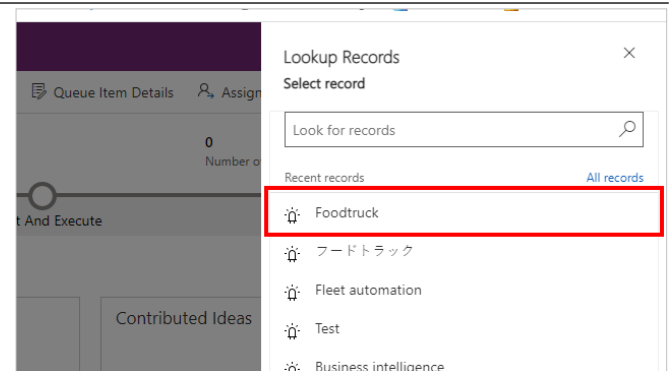


Directions North America

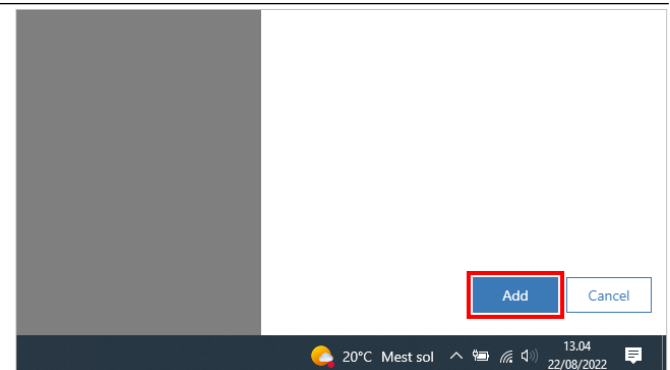
Click on the menu item **Add Existing Idea**



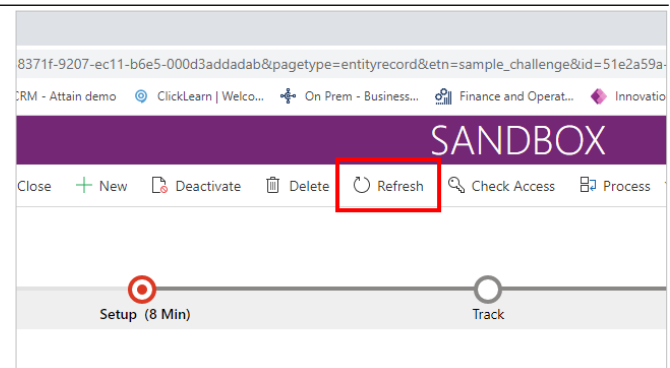
Click on the item **Foodtruck**



Click on the button **Add**



Click on the menu item **Refresh**

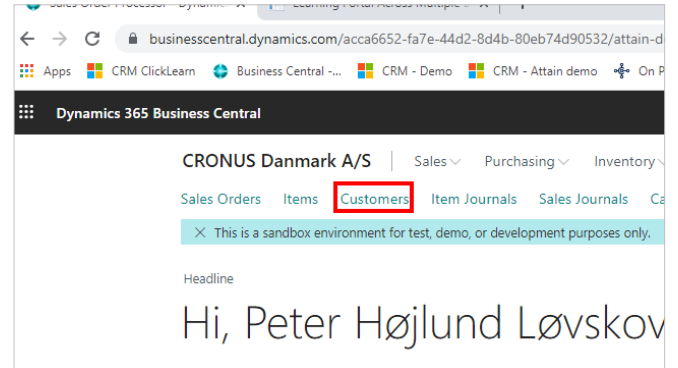


2.3.3. An existing Idea have now been added to the challenge

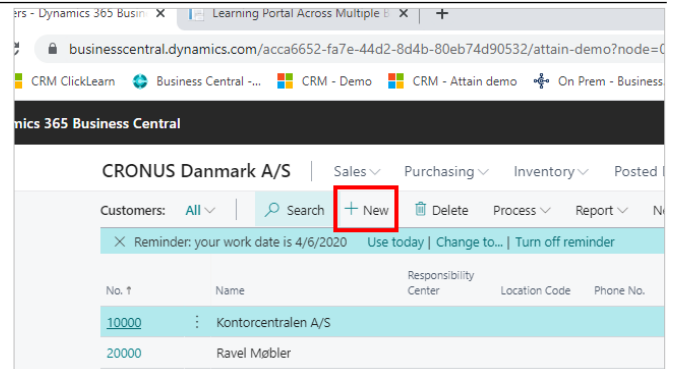
3. Business Central

3.1. Create a new customer

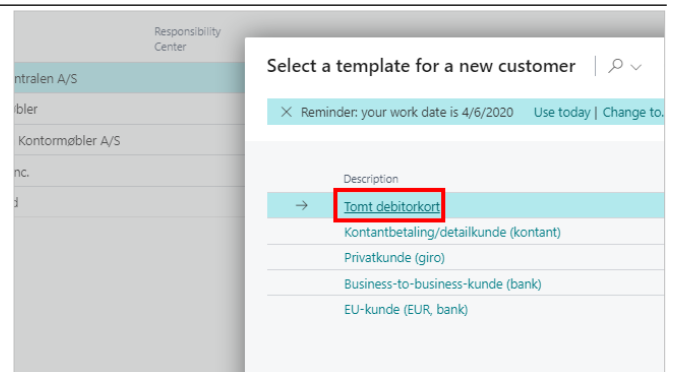
Click on the navigation menu item **Customers**



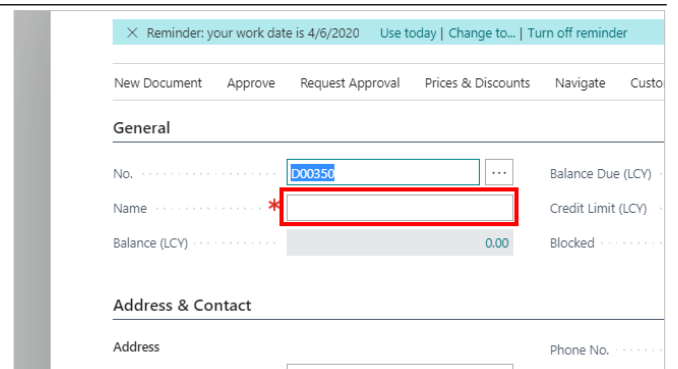
Click on the navigation menu item **New**



Click on the link in cell **Tomt debitorkort** with the value **Tomt debitorkort**



Click on the field **Name**



Directions North America

Enter **Name**.

× Reminder: your work date is 4/6/2020 Use today | Change to... | Turn off reminder

New Document Approve Request Approval Prices & Discounts Navigate Custo

General

No. D00350 ... Balance Due (LCY) ..

Name * ClickLearn Credit Limit (LCY) ..

Balance (LCY) 0.00 Blocked

Address & Contact

Address Phone No.

Click on the lookup button **Gen. Bus. Posting Group**

Code Prices and Discounts

Code Required Customer Price Group

Details

Posting Group * Customer Disc. Group

r Posting Group *

Click on the link in cell **EU** with the value **EU**

Home Page Contact

Contact Name *

Profile Code *

Profile Code Required *

Posting Details

Gen. Bus. Posting Group *

Customer Posting Group *

Code	Description
→ EU	Debitorer/kreditorer i EU-lande/-
INDENLANDS	Indenlandske debitorer/kreditorer
INTHANDEL	Koncernintern
UDLAND	Debitorer/kreditorer i lande/omr

+ New

Click on the lookup button **Customer Posting Group**

Code Prices and Discounts

Code Required Customer Price Group

Details

Posting Group * EU

r Posting Group *

Directions North America

Click on the link in cell **EU** with the value **EU**

Code	Description
EU	Debitorer i EU
INDENLANDS	Indenlandske debitorer
UDLAND	Udenlandske debitorer (ikke EU)

Click on the back button

Click on the navigation menu item **CRONUS Danmark A/S**

3.2. Create a New Sales Order

Click on the navigation menu item **Sales Orders**

Directions North America

Click on the navigation menu item **New**

The screenshot shows the Dynamics 365 Business Central interface. At the top, there's a navigation bar with 'Sales', 'Purchasing', 'Inventory', and 'Posted Documents'. Below this, there's a 'Sales Orders' section with a '+ New' button highlighted in a red box. Other buttons like 'Delete', 'Report', and 'Order' are also visible. A reminder banner at the top indicates 'Reminder: your work date is 4/6/2020'. Below the banner, there's a table with columns for 'No.', 'Sell-to Customer No.', 'Sell-to Customer Name', 'External Document No.', and 'Location Code'. The table contains two rows of data for 'Kontorcentralen A/S'.

Click on the field **Customer Name**

The screenshot shows the 'Sales Order' form. The 'General' section is active. The 'Customer Name' field is highlighted in a red box. Other fields like 'Sell-to', 'Contact Phone No.', 'Contact Fax No.', and 'Contact E-Mail' are also visible. A reminder banner at the top indicates 'Reminder: your work date is 4/6/2020'. The form has tabs for 'Process', 'Release', 'Posting', 'Prepare', 'Order', 'Request Approval', 'Print/Send', and 'Navigate'.

Press the **TAB** key.

This screenshot is identical to the previous one, showing the 'Sales Order' form with the 'Customer Name' field highlighted in a red box. It shows the same reminder banner and navigation tabs.

Click on the lookup button **Customer Name**

This screenshot is identical to the previous ones, showing the 'Sales Order' form with the 'Customer Name' field highlighted in a red box. It shows the same reminder banner and navigation tabs.

Directions North America

Click on the link in cell **No.** with the value **20000**

Click on the cell **No.**

Click on the link in cell **No.** with the value **1896-S**

Click on the cell **Quantity**

Directions North America

Click on the cell **Quantity**

Description	Location Code	Quantity	Qty. to Assemble to Order	Reserved Quantity
ATHEN Skrivebord		*		

0.00 Invoice Discount % 0

Enter **Quantity**.

Description	Location Code	Quantity	Qty. to Assemble to Order	Reserved Quantity
ATHEN Skrivebord		* 2		

0.00 Invoice Discount % 0

Click on the cell **Line Amount Excl. VAT**

Unit of Measure Code	Unit Price Excl. VAT	Line Discount %	Line Amount Excl. VAT
STK	5,560.00		*

Total VAT (DKK) 0.00

Ongoing Sales Return Orders 0

Ongoing Sales Credit Mem 0

Posted Sales Return Receipts 0

Posted Sales Credit Mem 0

Customer Details

Customer No.

Name

Phone No.

Email

Click on the back button

New - Sales Order - 101006 - Ravel Møbler

businesscentral.dynamics.com/acca6652-fa7e-44d2-8d4b-80eb74d90532/attain-

Apps CRM ClickLearn Business Central CRM - Demo CRM - Attain demo

Dynamics 365 Business Central

Sales Order

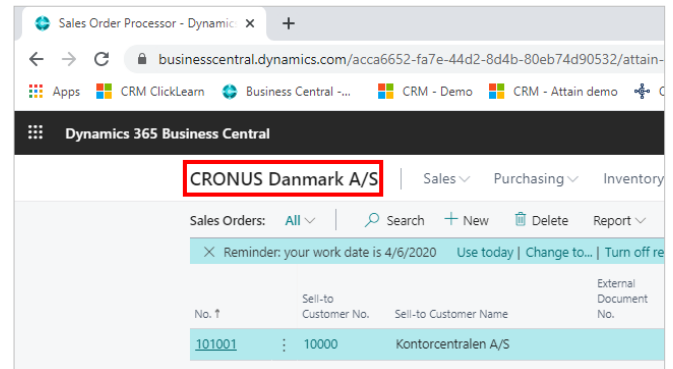
101006 · Ravel Møbler

Reminder: your work date is 4/6/2020 Use today | Change to... | Turn off reminder

Process Release Posting Prepare Order Request Approval Print/Send Na

General

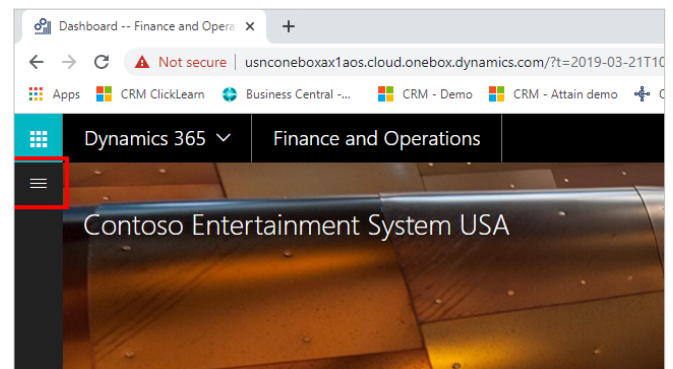
Click on the navigation menu item **CRONUS**
Danmark A/S



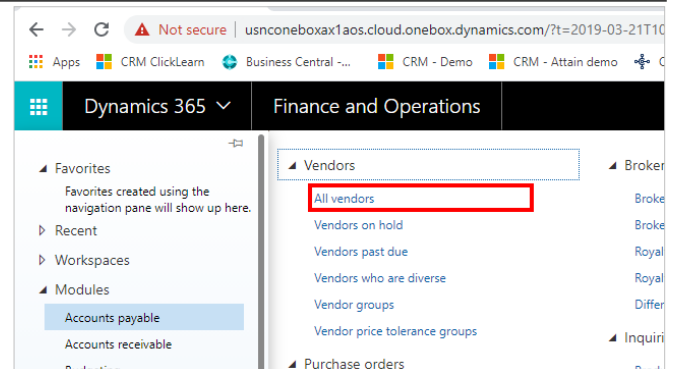
4. Finance and Operations

4.1. Validate Vendor Info

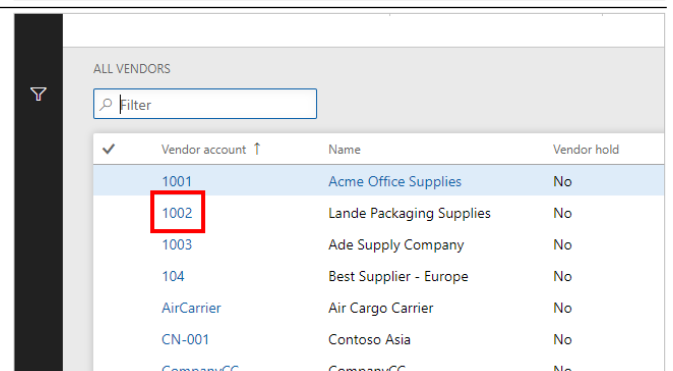
Click on the navigation button



Click on the navigation item link **All vendors**



Click on the link in grid cell **Vendor account** with the value **1002**



Directions North America

Click on the field **Vendor account**

ALL VENDORS

1002 : Lande Packaging Supplies

General

IDENTIFICATION

Vendor account

1002

Name

[Lande Packaging Supplies](#)

Search name

Lande Packaging Supp

Type

Organization

Group

40

Click on the link in the field **Name**

ALL VENDORS

1002 : Lande Packaging Supplies

General

IDENTIFICATION

Vendor account

1002

Name

[Lande Packaging Supplies](#)

Search name

Lande Packaging Supp

Type

Organization

Group

40

ORGANIZATION

Number of employees

0

Organization number

en-us

Click on the combobox field **ABC code**

Type

Organization

Organization

Name

Lande Packaging Supplies

Search name

Lande Packaging Supp

ABC code

None

DUNS number

0

Organization number

en-us

Click on the field **Address books**

ORGANIZATION DETAILS

Number of employees

0

Organization number

en-us

ABC code

None

OTHER INFORMATION

Address books

Language

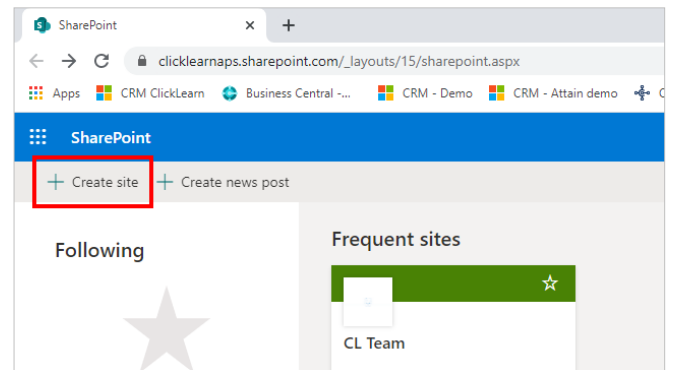
en-us

MEMO

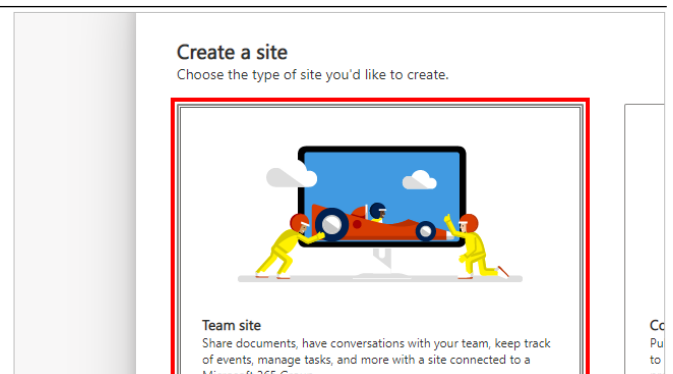
5. SharePoint

5.1. Create a Team in Sharepoint

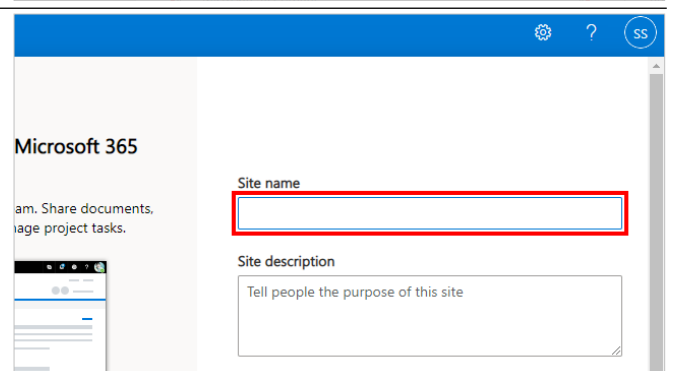
Click on the button ☐ **Create site**



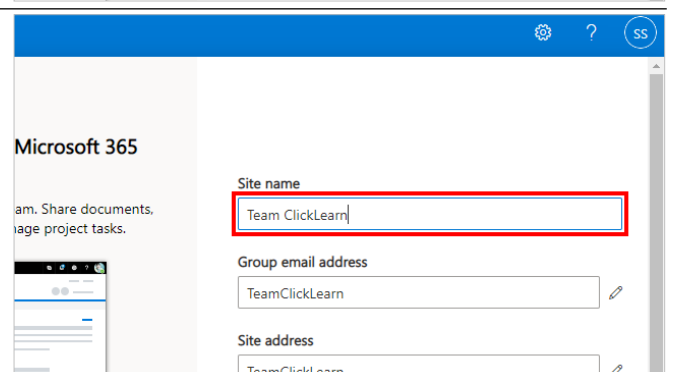
Click on the button **Team site**



Click on the input field **Site name**



Enter **Site name**.



Click on the input field **Group email address**

Microsoft 365

am. Share documents,
age project tasks.

Site name
Team ClickLearn

Group email address
TeamClickLearn
Another group with the same alias already exists.

Site address
TeamClickLearn

Site description

Click on the input field **Site address**

am. Share documents,
age project tasks.

Site name
Team ClickLearn

Group email address
TeamClickLearn
Another group with the same alias already exists.

Site address
TeamClickLearn

Site description
Tell people the purpose of this site

Click on the button **Cancel**

Private - only members can access this site

Select a language
English

Select the default site language for your site. You can't change this later.

Next Cancel

Click on the button **Yes**

Are you sure you want to close the panel? If so, your site won't be created.

Yes No

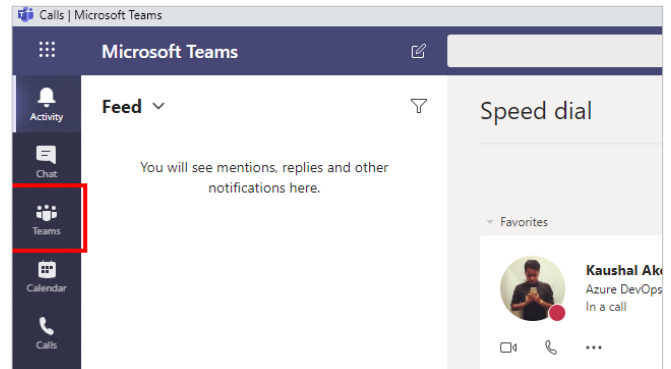
6. Microsoft Teams

6.1. Create a Team

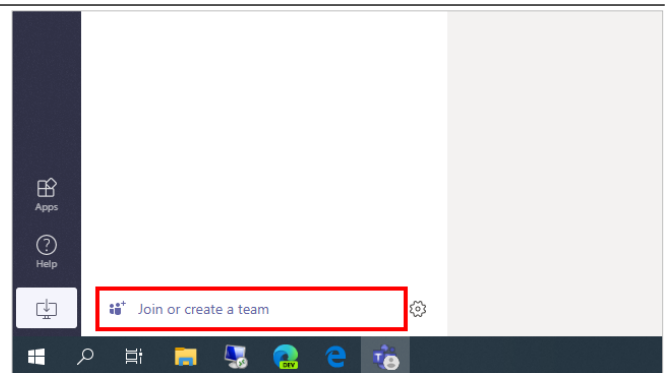
To get your team up and running in Microsoft Teams, create a team, add people, and add channels.

Directions North America

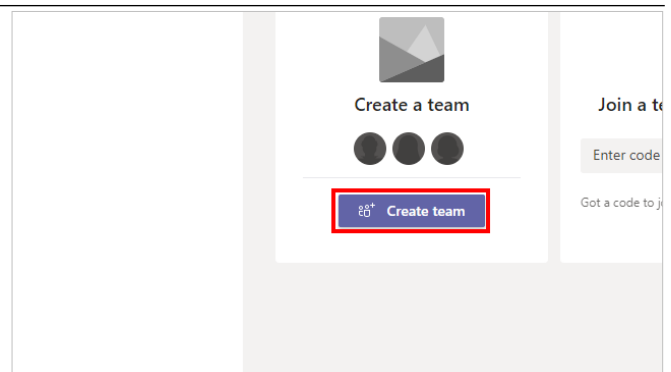
Click on the application link button **Teams Toolbar**



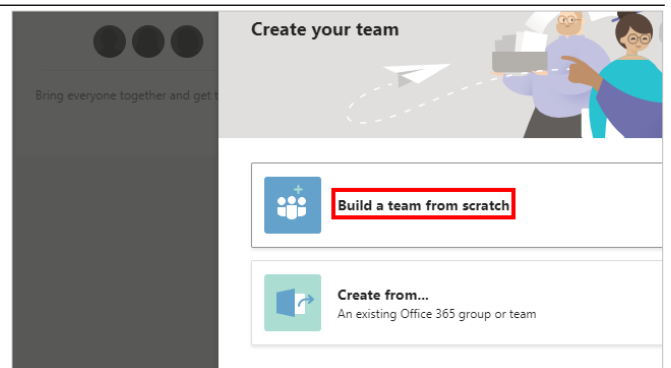
Click on the button **Join or create a team**
 This is where you create your own team, or discover existing ones.



Select Create a new team, and then select Build a team from scratch or select Create from... to build an all-new team or create from an existing group respectively.
 Click on team container **Create a team** button

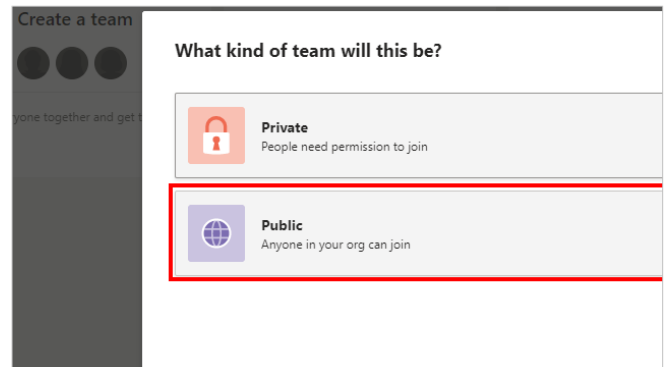


Click on the text **Build a team from scratch**



Directions North America

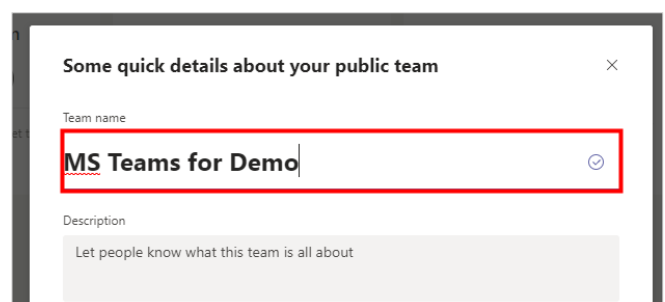
Click on the **Public Anyone in your org can join** button
 Select Private if you'd like people to request permission to join, or select Public if anyone in your org can join.



The screenshot shows a 'Create a team' dialog box. It asks 'What kind of team will this be?'. There are two options: 'Private' (People need permission to join) and 'Public' (Anyone in your org can join). The 'Public' option is highlighted with a red rectangular box.

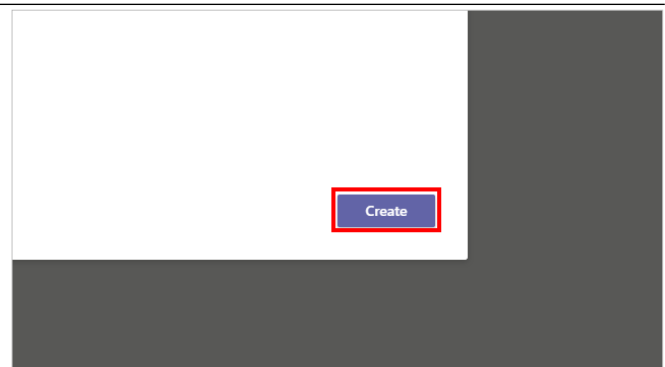
Give the team a name and add a short description if you'd like.

1. Click on the input field **Enter team name** - Enter **Enter team name**.



The screenshot shows a dialog box titled 'Some quick details about your public team'. It has two input fields: 'Team name' and 'Description'. The 'Team name' field is highlighted with a red rectangular box and contains the text 'MS Teams for Demo'.

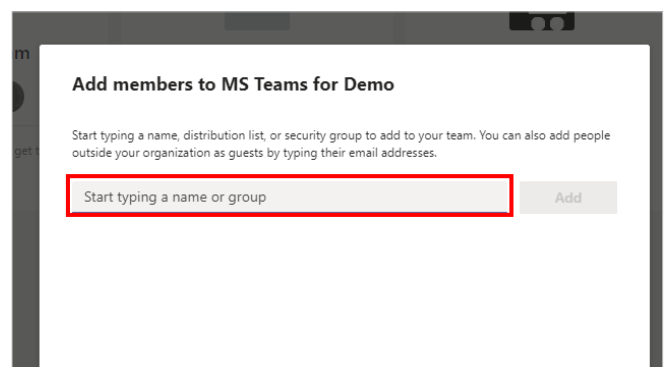
Click on the **Create** button



The screenshot shows the bottom part of the team creation dialog box. A blue 'Create' button is highlighted with a red rectangular box.

You can add members to you new team by typing a name or a group.

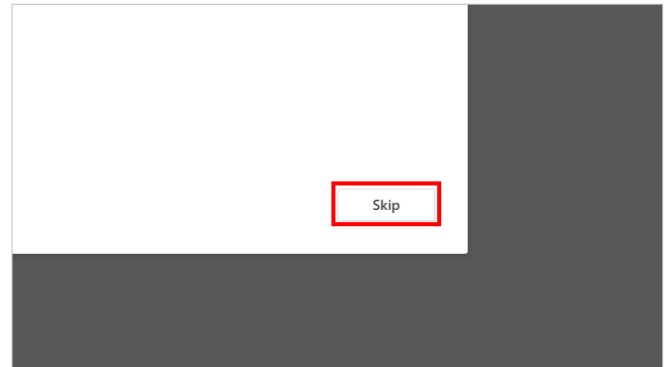
Click on the input field **Start typing a name or group**



The screenshot shows a dialog box titled 'Add members to MS Teams for Demo'. It contains a text input field with the placeholder 'Start typing a name or group' and an 'Add' button. The input field is highlighted with a red rectangular box.

Directions North America

Click on the **Skip** button



Your Team is now created

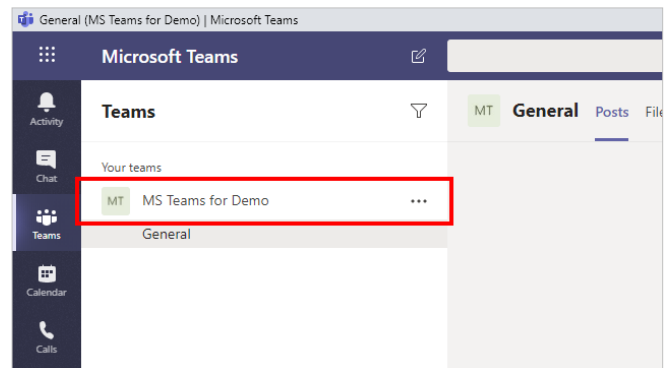
6.2. Create a Channel

By default, every team gets a General channel, which is a good channel to use for announcements and information the whole team needs.

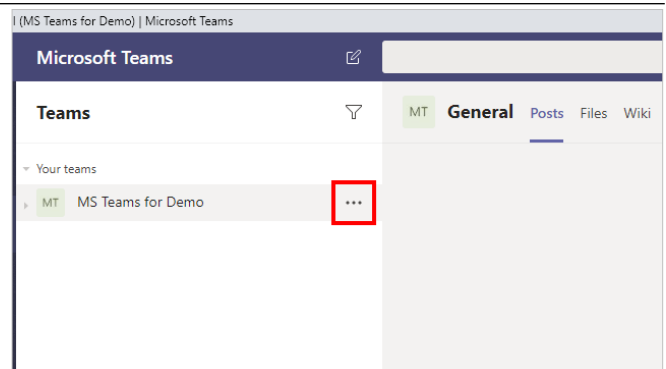
To add more channels:

Choose the Team where you want to add an additional channel.

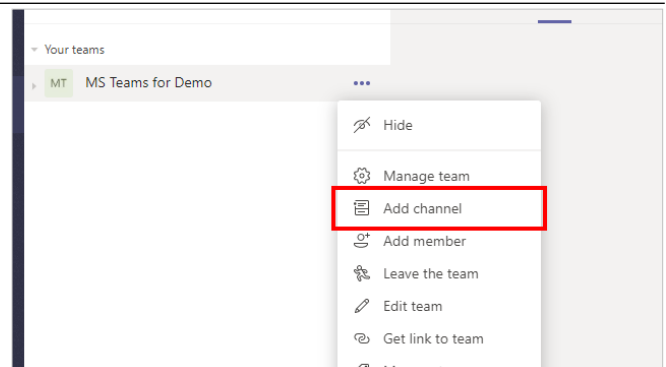
Click on the link **MS Teams for Demo**



Click on the button **More options** next to the team name.



Click on teams menu item **Add channel**



Enter a name and description for your channel.

Click on the input field **Letters, numbers, and spaces are allowed**

Here are some things...

Create a channel for "MS Teams for Demo" team

Channel name

Letters, numbers, and spaces are allowed

Description (optional)

Help others find the right channel by providing a description

1. Enter **Letters, numbers, and spaces are allowed**.

Create a channel for "MS Teams for Demo" team

Channel name

Channel for demo

Description (optional)

Help others find the right channel by providing a description

You can build a channel around a topic, project, department name, or whatever you like.

Click on the textarea

Create a channel for "MS Teams for Demo" team

Channel name

Channel for demo

Description (optional)

Help others find the right channel by providing a description

Privacy

Standard - Accessible to everyone on the team

Set the privacy setting to Standard or Private

Click on the button **Standard - Accessible to everyone on the team**

Channel for demo

Description (optional)

Help others find the right channel by providing a description

Privacy

Standard - Accessible to everyone on the team

☐ Automatically show this channel in everyone's channel list

Cancel

1. Click on the item **Standard - Accessible to everyone on the team**.

Privacy

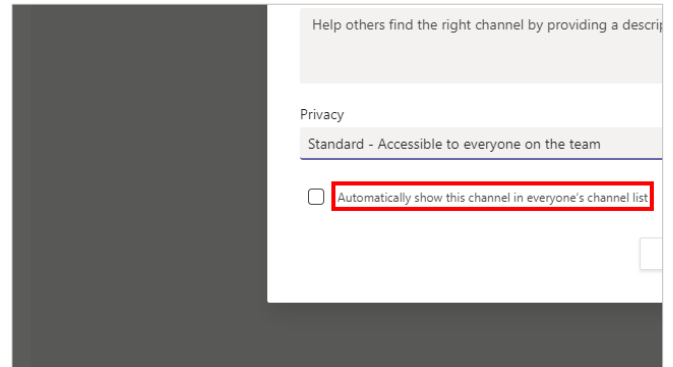
Standard - Accessible to everyone on the team

Standard - Accessible to everyone on the team

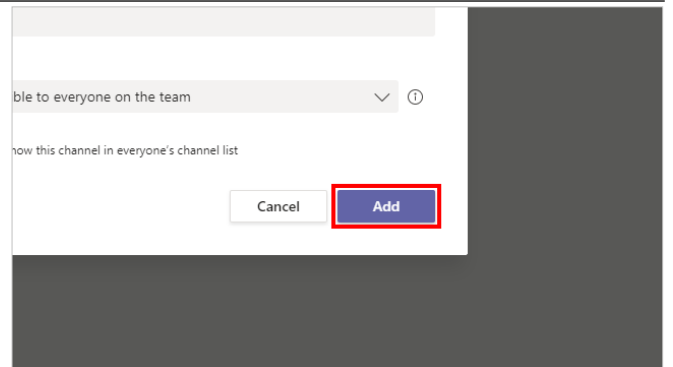
Private - Accessible only to a specific group of people within the team

Directions North America

Click on the label **Automatically show this channel in everyone's channel list** if you want this channel to be automatically visible in everyone's channel list.



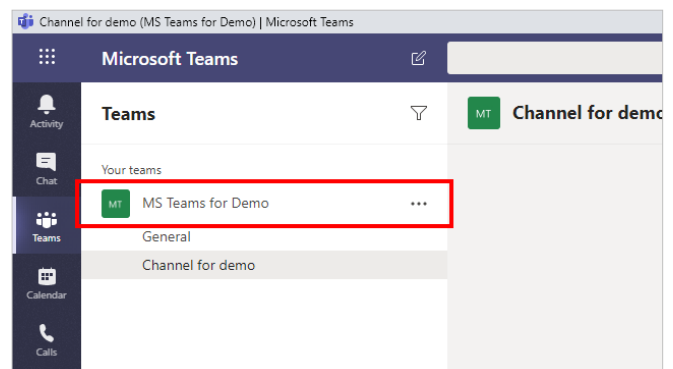
Click on the **Add** button



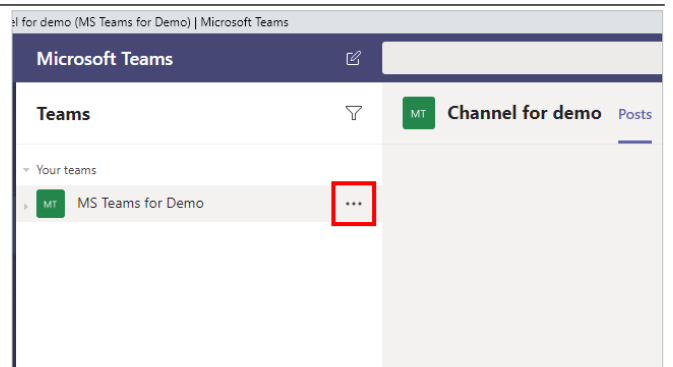
6.3. Customize and manage your team

Click on the Team you wish to Manage or Customize

Click on the link **MS Teams for Demo**

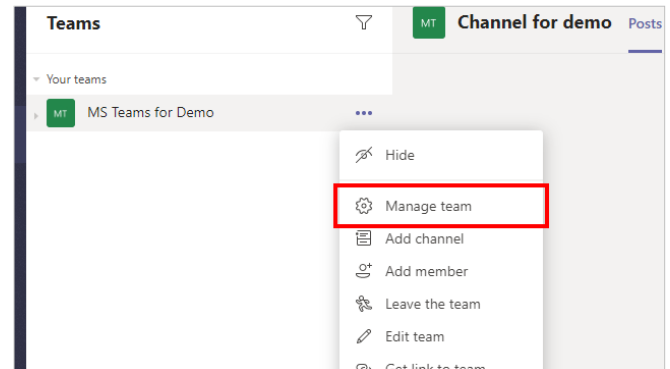


Click on the button **More options**



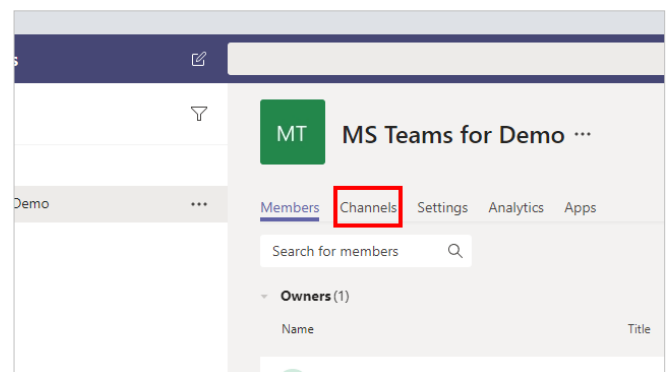
Directions North America

Click on the button **Manage team**

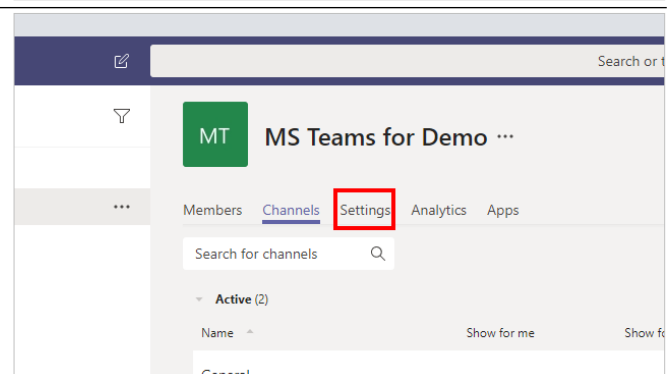


Select Manage team to find Members, Channels, Settings, and Apps for your team all in one place.

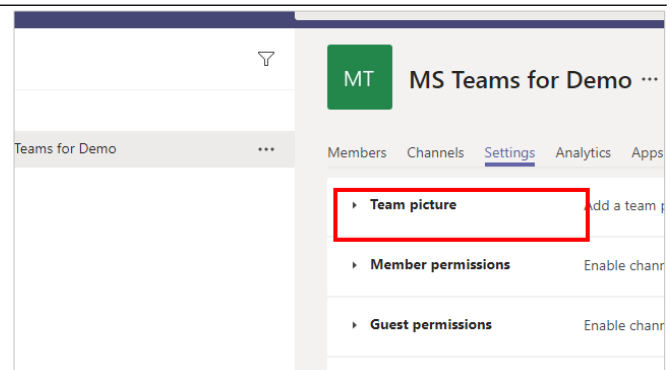
Click on the link **Channels**



Click on the link **Settings**



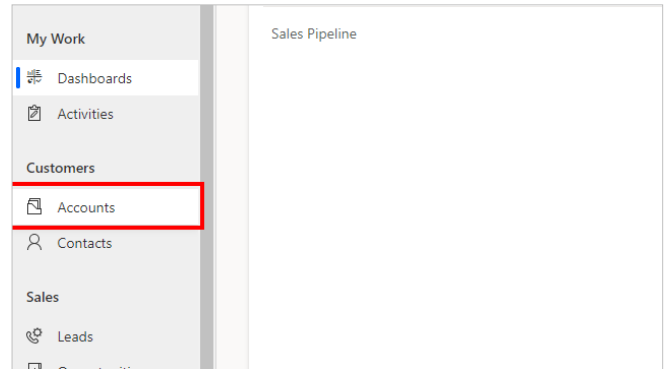
Click on the link **Team picture** to add a team picture and give your team some personality.



7. Cross Platform

7.1. Cross Platform Recording

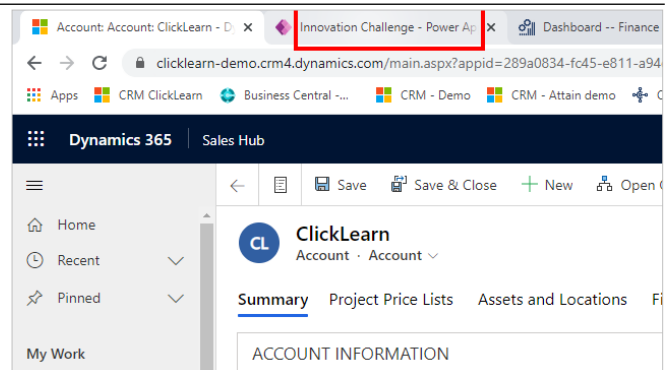
Click on the item **Accounts**



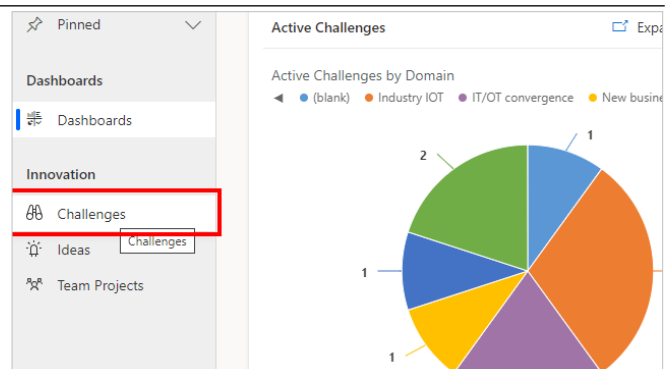
Click on the link in cell **Account Name**

City Power & Light (sample)	
Contoso Pharmaceuticals (sample)	555-0156
Alpine Ski House (sample)	555-0157
A. Datum Corporation (sample)	555-0158
Coho Winery (sample)	555-0159
ClickLearn	+45 8877
Acme company	---
All That Wander (sample)	---
Shadowlayer Lighting, LLC	770-315-
A Great Test	555-5556

Click on the area.

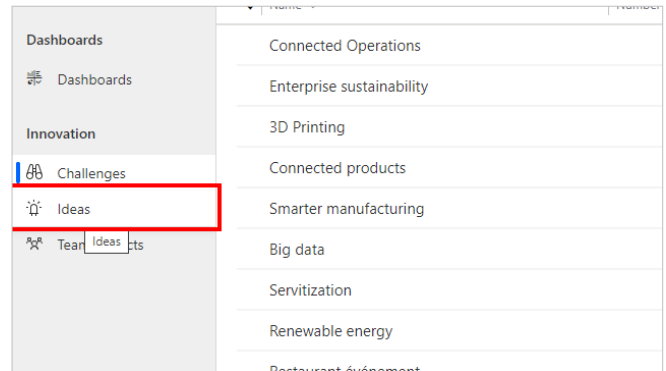


Click on the item **Challenges**

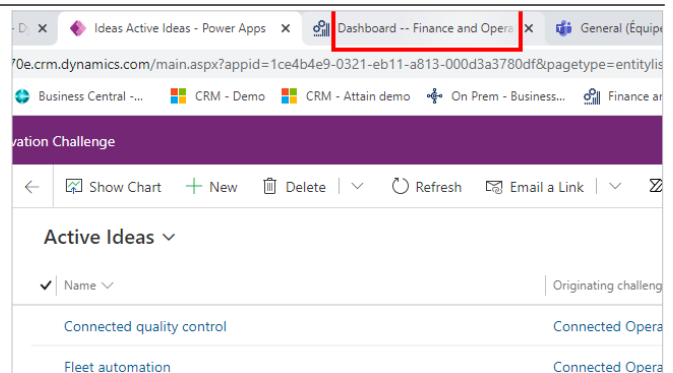


Directions North America

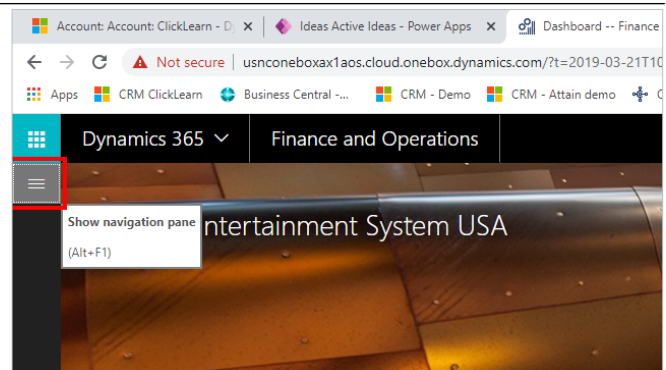
Click on the item **Ideas**



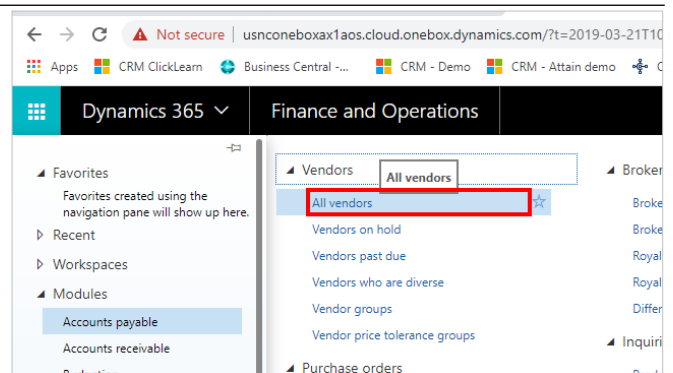
Click on the area.



Click on the navigation button

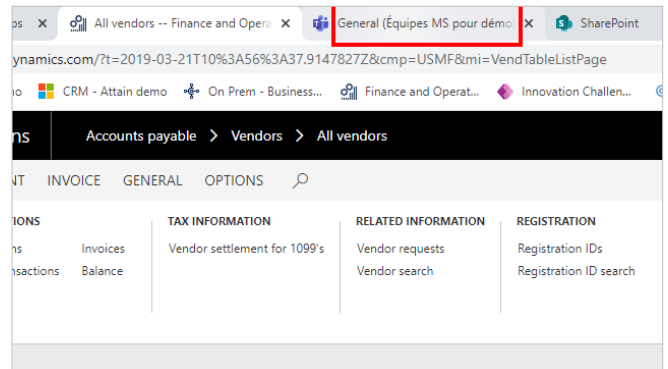


Click on the navigation item link **All vendors**

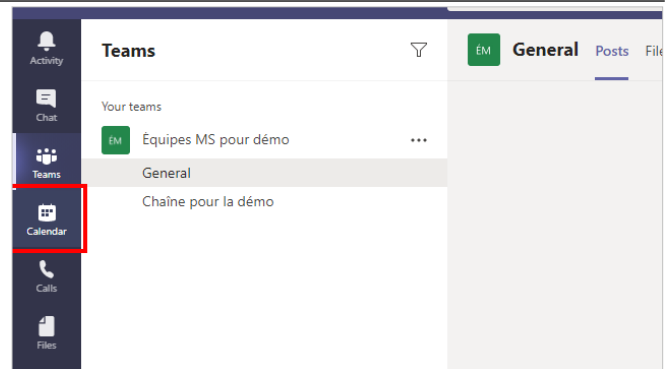


Directions North America

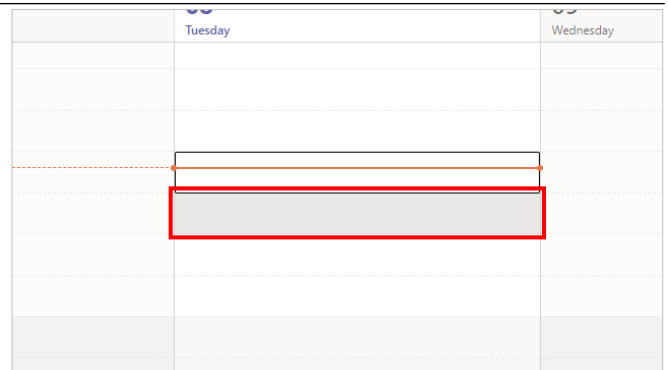
Click on the area.



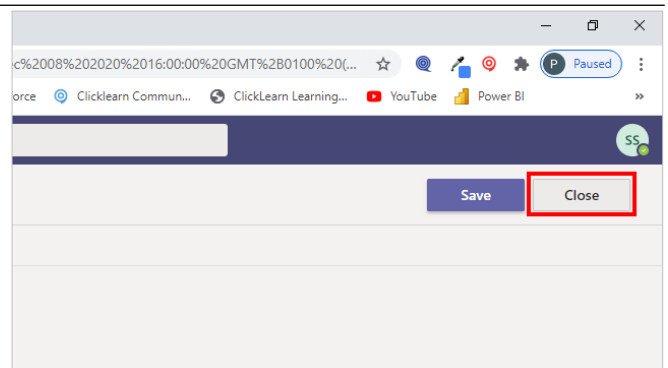
Click on left menu app item **Calendar**



Click on the blank event **December 8 3:30 PM to December 8 4:00 PM. 0 events**

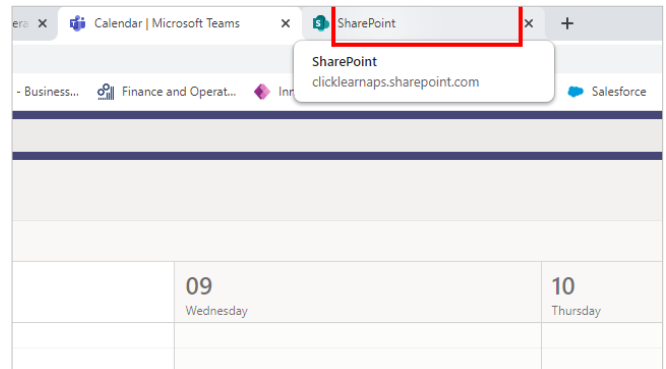


Click on the button **Close meeting creation**

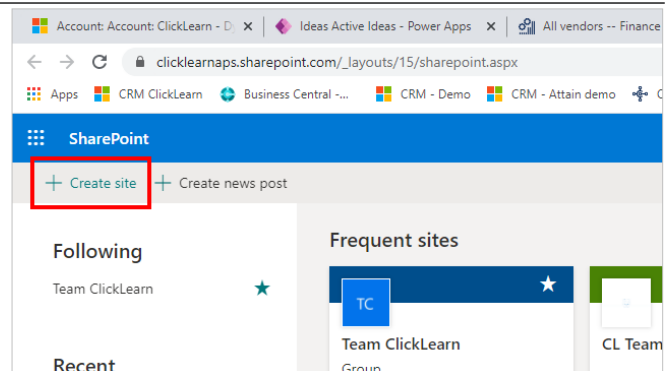


Directions North America

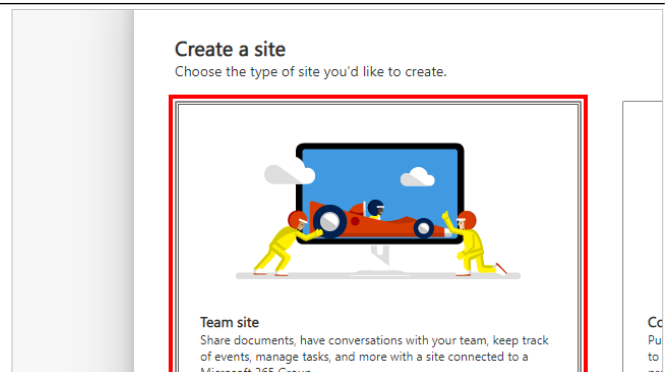
Click on the area.



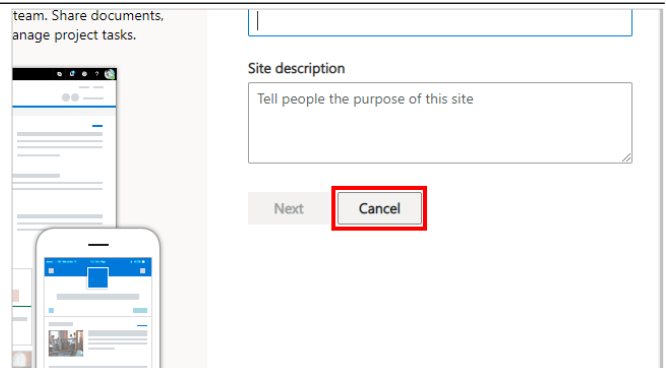
Click on the button ☐ **Create site**



Click on the button **Team site**

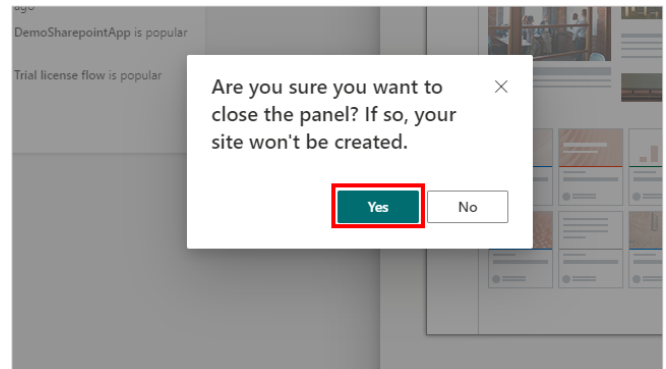


Click on the button **Cancel**

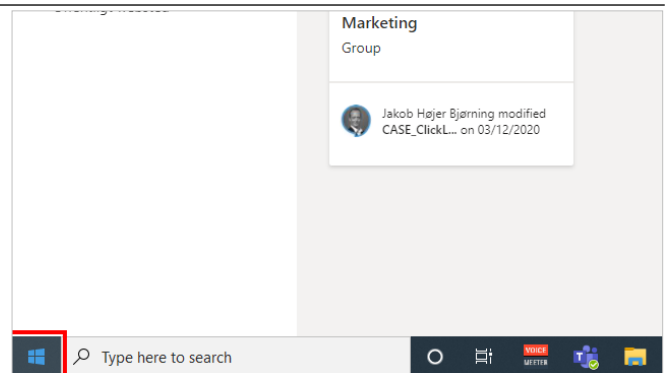


Directions North America

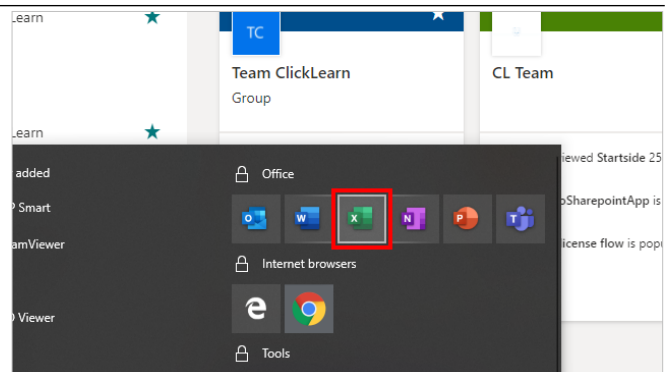
Click on the button **Yes**



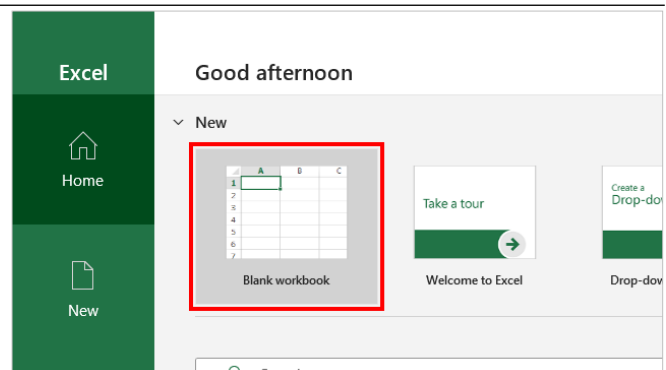
Click on the button **Start**.



Click on the list element **Excel**.

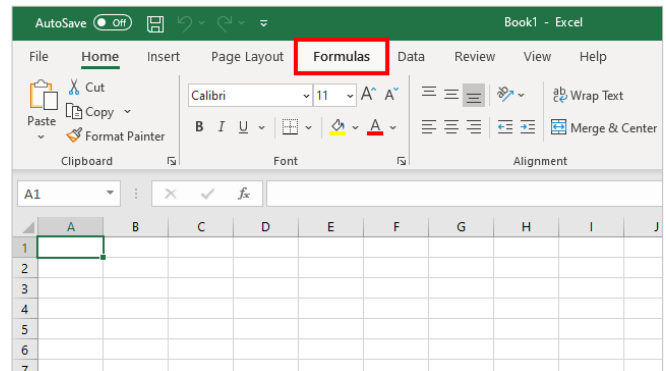


Click on the list element **Blank workbook**.

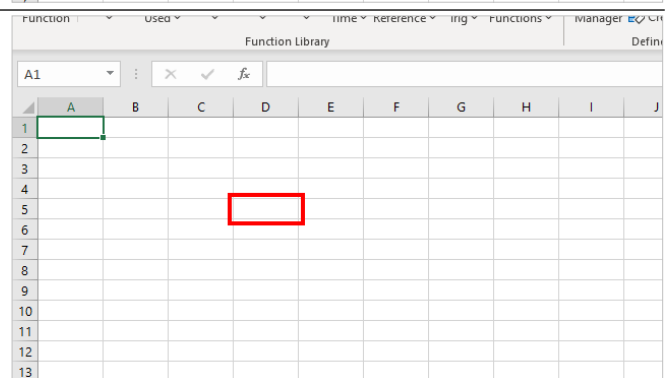


Directions North America

Click on the tab **Formulas**.



Click on the cell **D5**



Click on the button **Close**.

