

D365FS Call Logging

Trainer – Steve Morgan



Logging into D365FS

<https://ABC-training.crm11.dynamics.com>

Housekeeping

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Objectives

The objectives of this course are:

- Access and navigate key entities for their role
- Create and manage Cases, Assets, Accounts and Contacts
- View and edit Case details, and Contact details
- View Contracts
- View Work Orders
- View Product Inventory
- Understand SLA, Priorities, and BPF
- View RMA (Warranty)

Agenda

- Introduction to D365FS
- Getting Started with D365FS
- Working with Accounts, Contracts and Assets
- Working with Cases
- Working with Work Orders
- Working with BPF, SLA's and Priorities
- Viewing Inventory
- Working with Resource Information

ASSET Numbers

- SN104625
- SN104633
- SN104507
- SN104508
- SN104510
- SN104511
- SN104512
- SN104513

ADD TEMPORARY SITE

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ADD CONTACT

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Objectives review

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QUESTIONS



Course feedback

Please use the following link to provide feedback on the session you attended: