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1. Dynamics CE

1.1. Create a Lead

1.1.1. Objective

The following describes the process for creating a new contact on an existing account. If you create contacts on

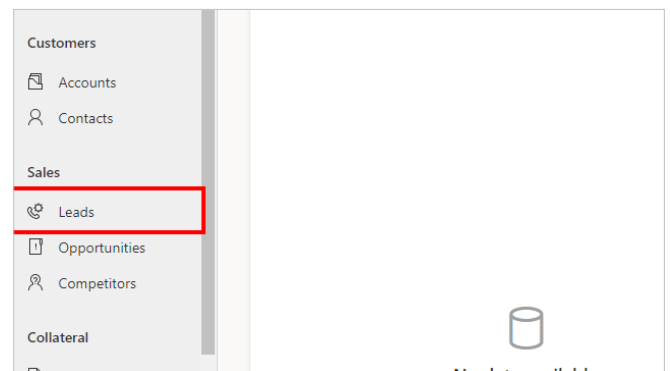
behalf of the actual account owner, be sure to assign the correct owner after completing this procedure.

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

- Full name
- Job title
- Email address
- Mobile phone number

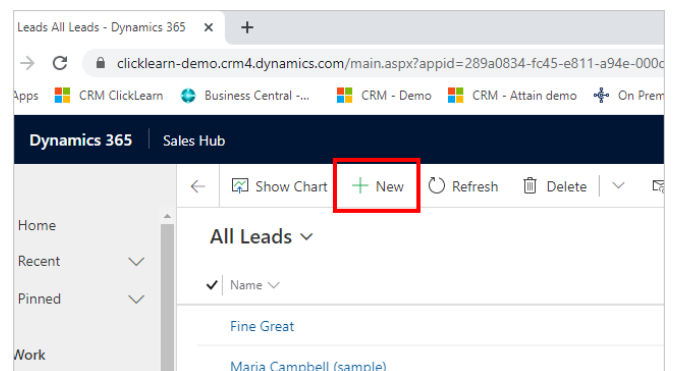
1.1.2. Navigation

Click on the item **Leads**

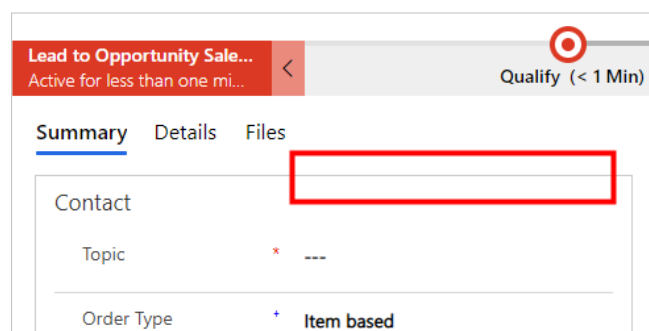


1.1.3. Steps

Click on the menu item **New**



1.1.3.1. Enter lead topic and name



Lead to Opportunity Sale...
Active for less than one mi...

Qualify (< 1 Min)

Summary Details Files

Contact

Topic * ---

Order Type + Item based

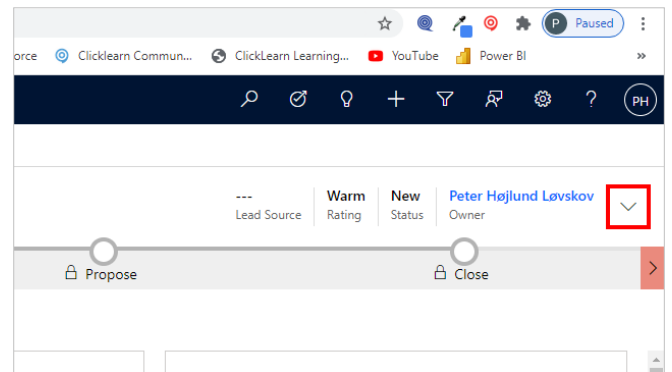
1. Click on the text field **Topic** - Enter **Topic**.

Topic	*	---
Order Type	+	Item based
First Name	+	Paul
Last Name	*	Andersen
Job Title		---

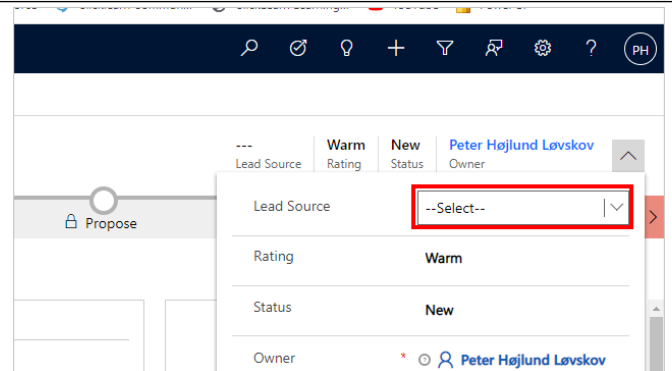
- Click on the text field **First Name** - Enter **First Name**.
- Click on the text field **Last Name** - Enter **Last Name**.

1.1.3.2. Enter lead source and rating

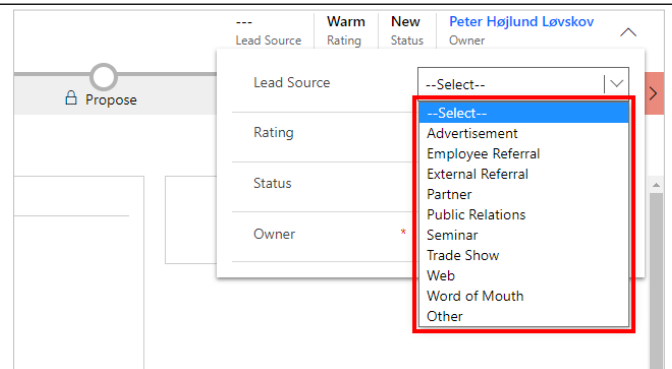
Click on the button **More Header Fields**



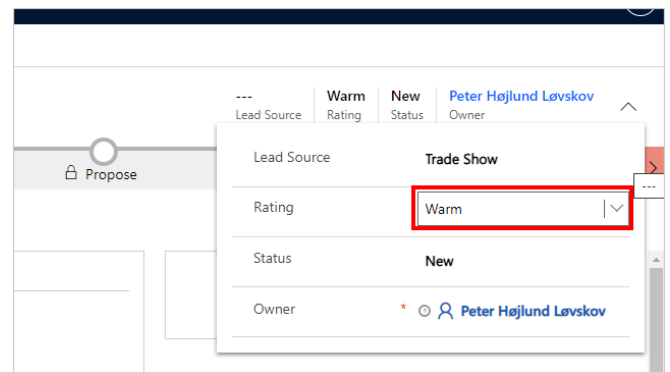
Click on the field **Lead Source**



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

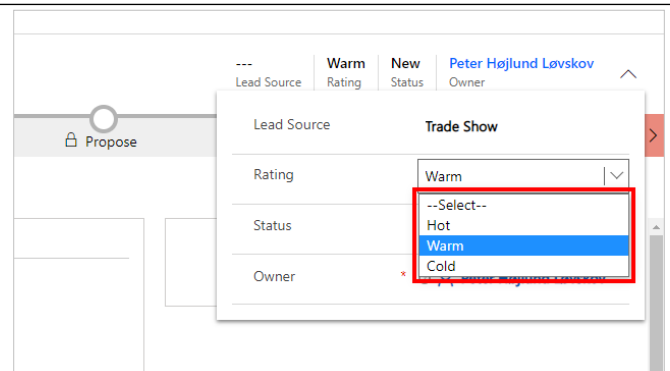


Click on the field **Rating**



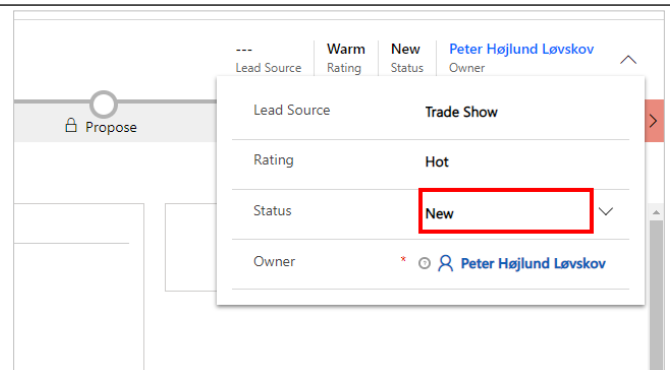
The screenshot shows a 'Propose' form with a dropdown menu for 'Rating'. The menu is open, showing options: 'Warm', 'Hot', and 'Cold'. The 'Warm' option is highlighted with a red box.

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



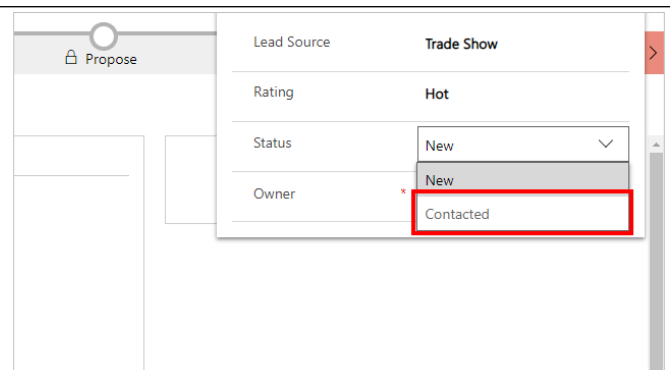
The screenshot shows the 'Propose' form with the 'Rating' dropdown menu open. The 'Hot' option is highlighted with a red box.

Click on **Status**



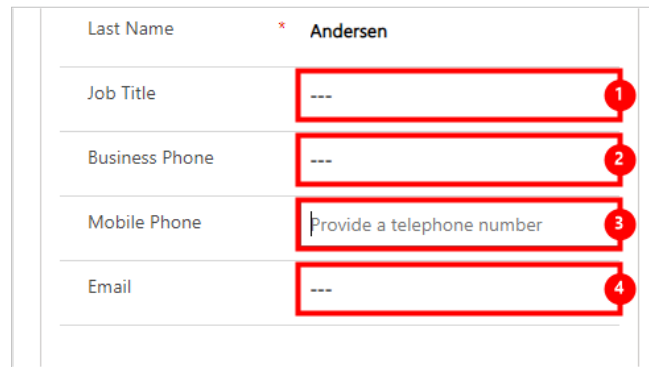
The screenshot shows the 'Propose' form with the 'Status' dropdown menu open. The 'New' option is highlighted with a red box.

Click on the item **Contacted**



The screenshot shows the 'Propose' form with the 'Status' dropdown menu open. The 'Contacted' option is highlighted with a red box.

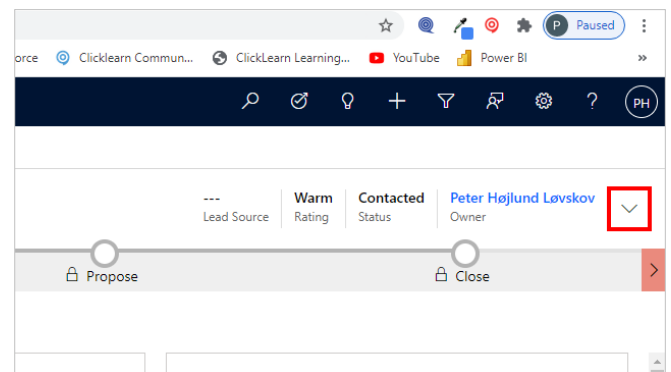
1.1.3.3. Enter additional contact details (when available)



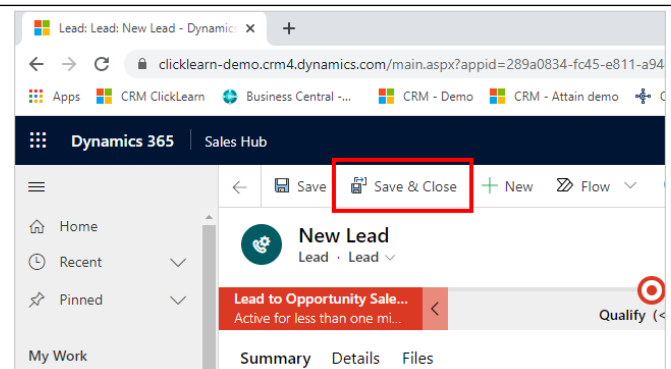
1. Click on the text field **Job Title**
2. Click on the text field **Business Phone**
3. Click on the text field **Mobile Phone**
4. Click on the text field **Email**

1.1.3.4. Verify the correct owner of the lead is set

Click on the button **More Header Fields**

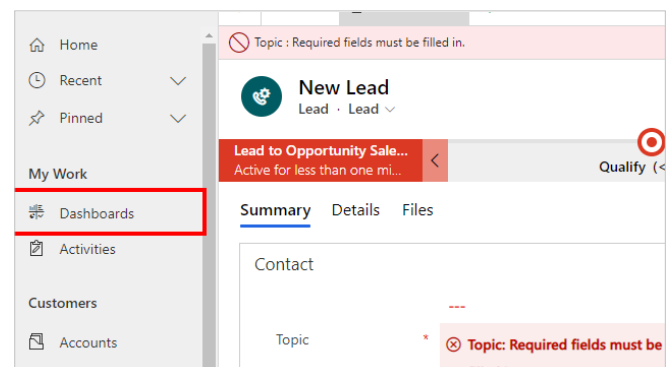


Click on the menu item **Save & Close**



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

Click on the item **Dashboards**



1.2. Create an account

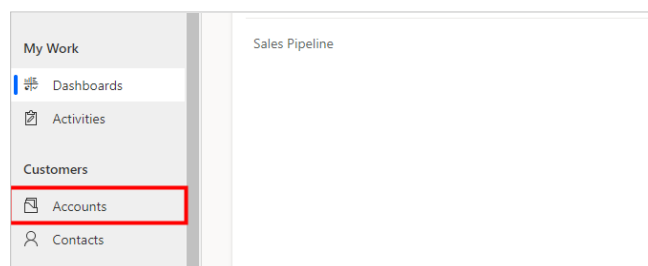
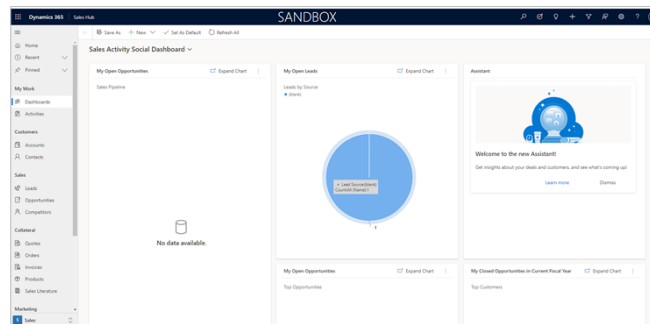
1.2.1. Objective

The following describes the process for creating a new account. If you create accounts on behalf of the actual account owner, be sure to assign the correct owner after completing this procedure.

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

- Company name
- Website URL
- Phone number
- Address

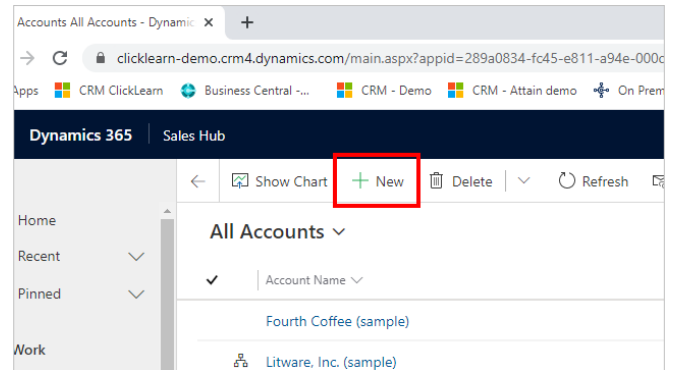
1.2.2. Navigation



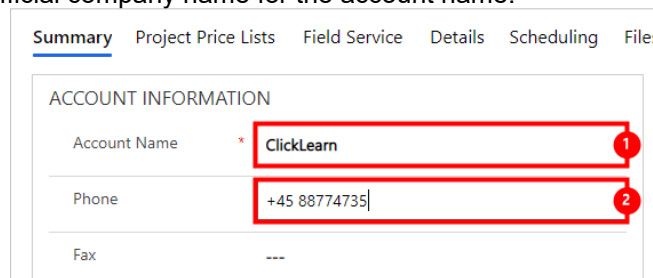
1. Click on the item **Accounts**

1.2.3. Steps

Click on the menu item **New**



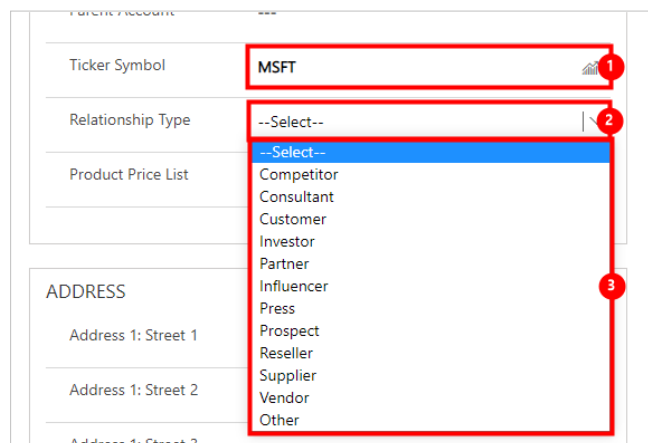
Remember to use the full official company name for the account name.



1. Click on the text field **Account Name** - Enter **Account Name**.
2. Remember to enter the area code
Click on the text field **Phone** - Enter **Phone**.

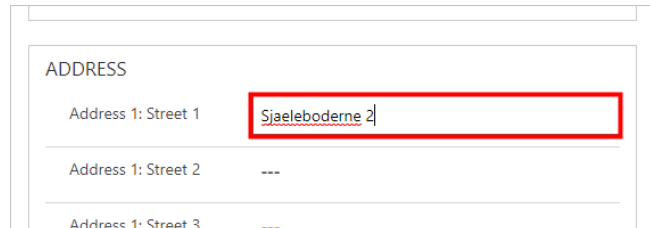


1. Click on the text field **Website** - Enter the official website address.

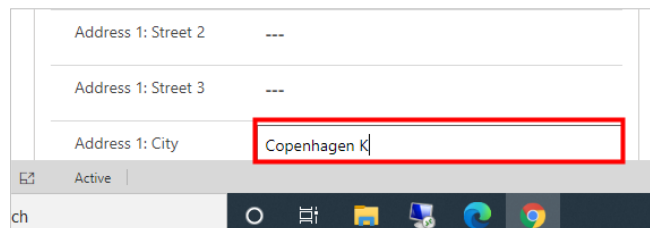


1. Click on the text field **Ticker Symbol** - Enter **Ticker Symbol**. Press the **Enter** key.
2. Click on the field **Relationship Type**
3. Click on the item **Customer** in the list

Enter address information



1. Click on the text field **Address 1: Street 1** - Enter **Address 1: Street 1**.

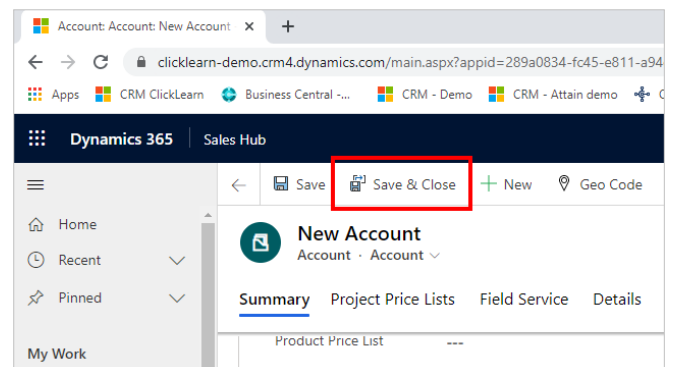


1. Click on the text field **Address 1: City** - Enter **Address 1: City**.

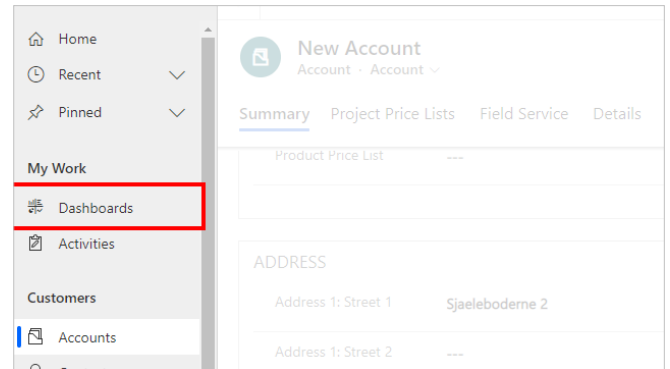


1. Click on the text field **Address 1: ZIP/Postal Code** - Enter **Address 1: ZIP/Postal Code**.
2. Click on the text field **Address 1: Country/Region** - Enter **Address 1: Country/Region**.

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.

1.3. Add a Contact to an Account

1.3.1. Objective

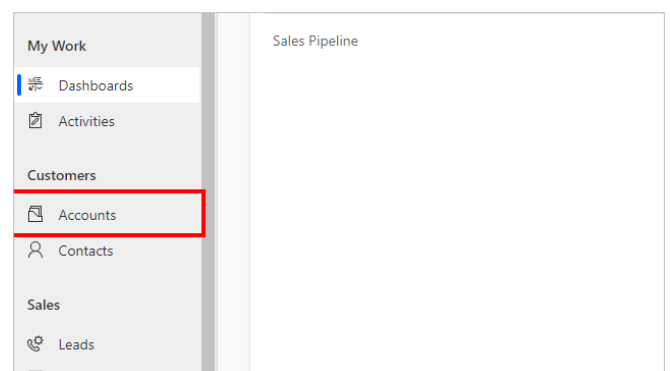
The following describes the process for creating a new contact on an existing account. If you create contacts on behalf of the actual account owner, be sure to assign the correct owner after completing this procedure

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

- Full name
- Job title
- Email address
- Mobile phone number

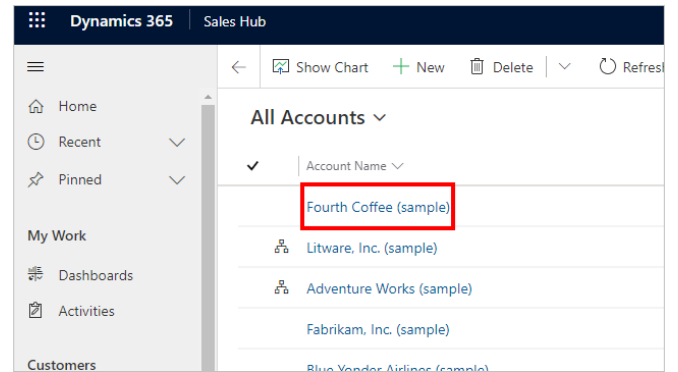
1.3.2. Navigation

Click on the item **Accounts**

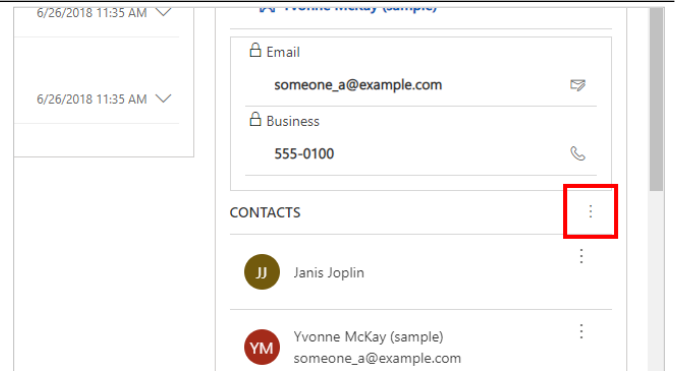


1.3.3. Steps

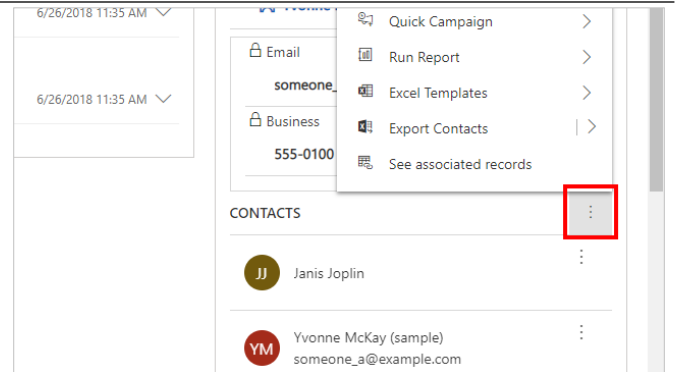
Click on the link in cell **Fourth Coffee (sample)**



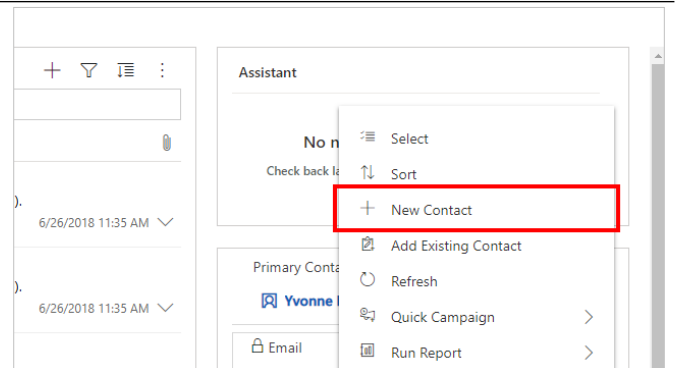
Click on the menu item

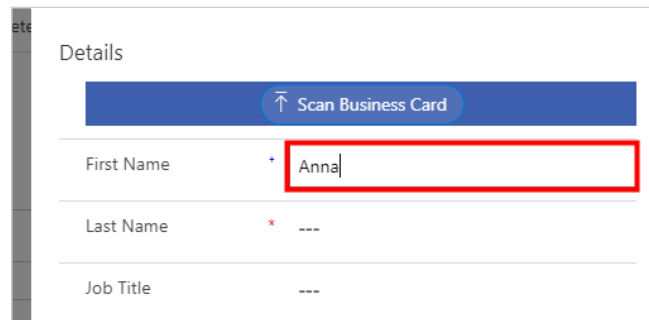


Click on the menu item



Click on the menu item **New Contact**





Details

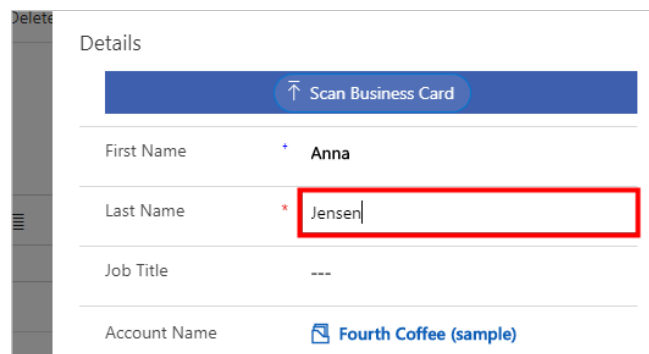
↑ Scan Business Card

First Name + Anna

Last Name * ---

Job Title ---

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



Details

↑ Scan Business Card

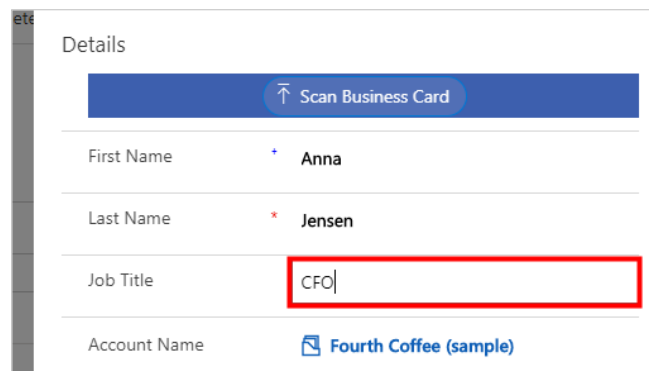
First Name + Anna

Last Name * Jensen

Job Title ---

Account Name  Fourth Coffee (sample)

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



Details

↑ Scan Business Card

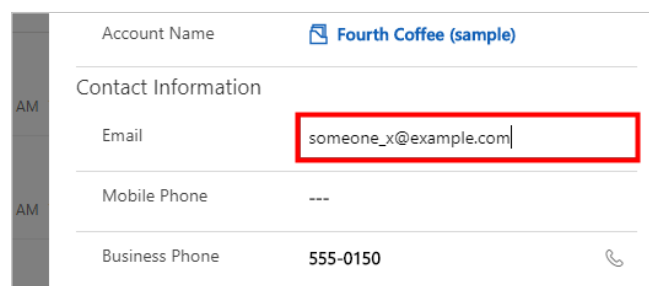
First Name + Anna

Last Name * Jensen

Job Title CFO

Account Name  Fourth Coffee (sample)

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



Account Name  Fourth Coffee (sample)

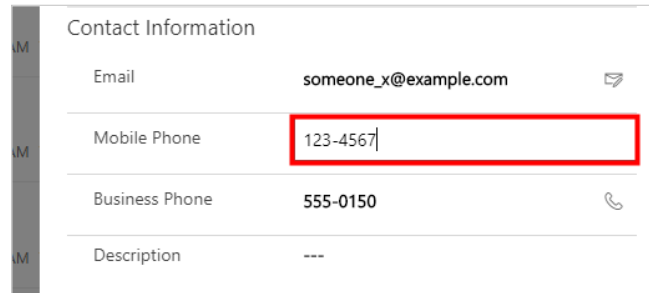
Contact Information

Email someone_x@example.com

Mobile Phone ---

Business Phone 555-0150 

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

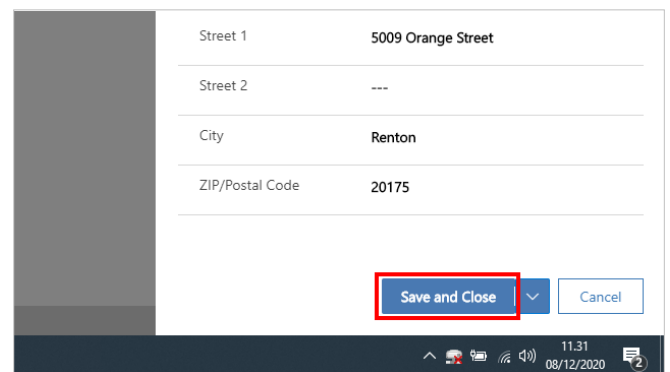


Contact Information

Email	someone_x@example.com	
Mobile Phone	123-4567	
Business Phone	555-0150	
Description	---	

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

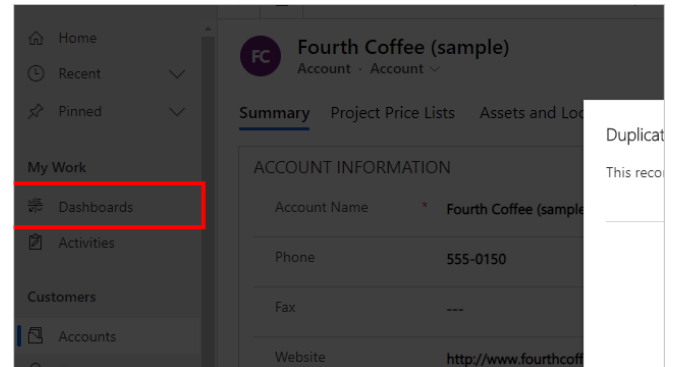
Click on the button **Save and Close**



Street 1	5009 Orange Street
Street 2	---
City	Renton
ZIP/Postal Code	20175

Save and Close  **Cancel**

Click on the item **Dashboards**



Home Recent Pinned My Work **Dashboards** Activities Customers Accounts

Fourth Coffee (sample)
Account · Account

Summary Project Price Lists Assets and Loans

ACCOUNT INFORMATION

Account Name	Fourth Coffee (sample)
Phone	555-0150
Fax	---
Website	http://www.fourthcoffee.com

Duplicate This record

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

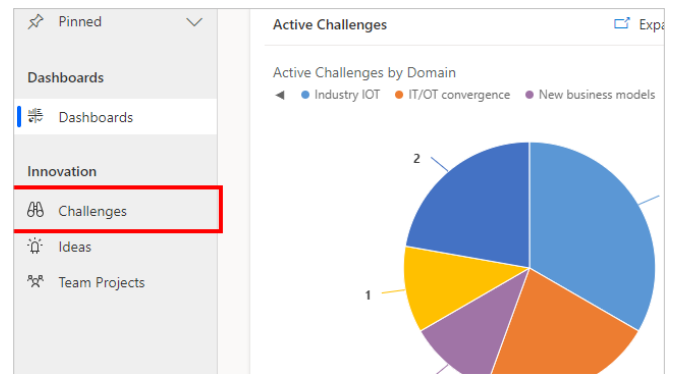
2. Power Platform

2.1. Create a Challenge

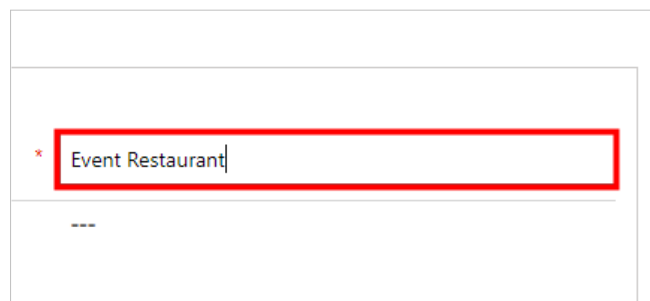
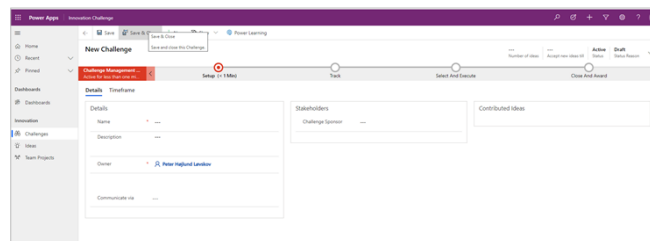
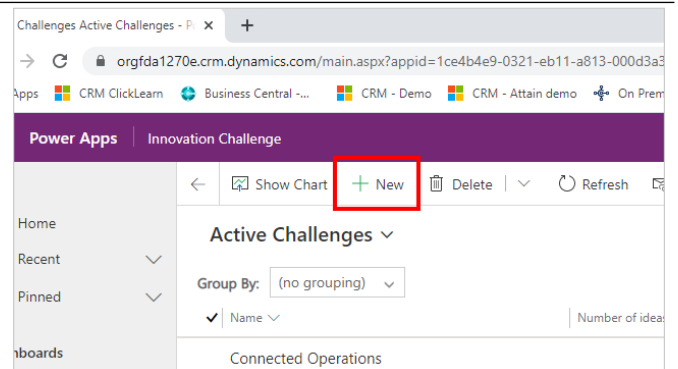
2.1.1. Objective

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

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

*
Peter Højlund Løvskov

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

Click on the field **Communicate via**

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

Peter Højlund Løvskov

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

peter

Users
Recent records

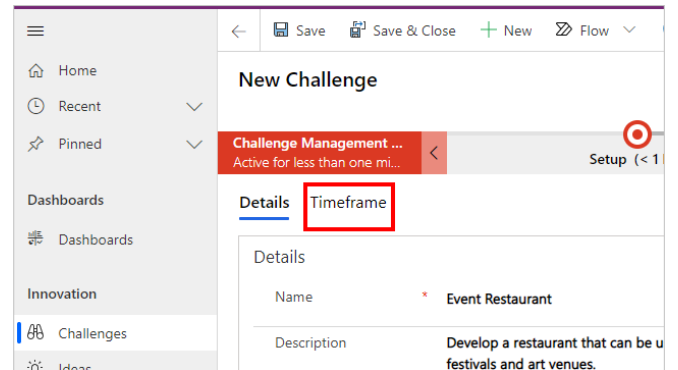
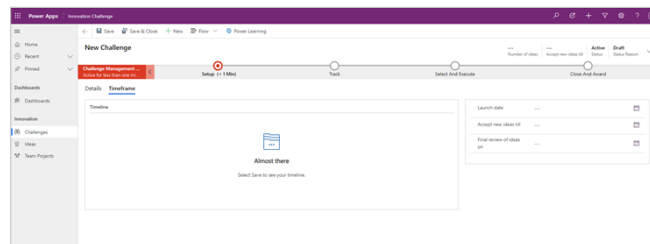
Peter Højlund Løvskov
orgfda1270e

Change View

- Click on the lookup field **Challenge Sponsor** - Enter **Challenge Sponsor**.
- Click on the item **Peter Højlund Løvskov orgfda1270e Product Evangelist phl@clicklearn.com**

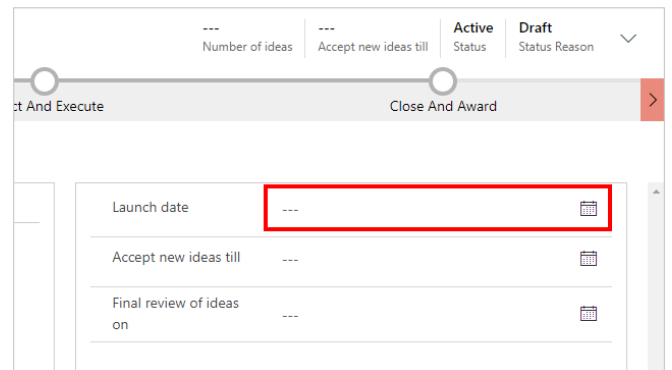
2.1.2. Set the timeframe for incomming ideas

Click on the item **Timeframe**

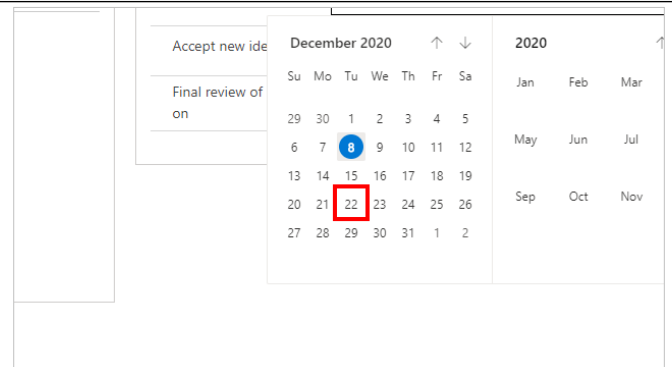



2.1.2.1. Set Launch date for the challenge

Click on **Launch date**



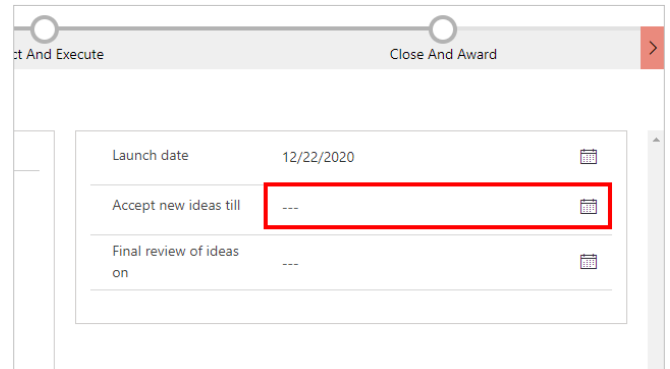
Click on a day number. In this example the day **22**



2.1.2.2.

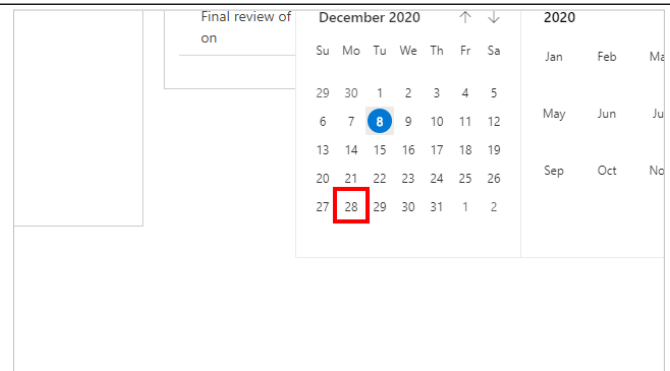
Set the end date for incoming ideas

Click on **Accept new ideas till**



Choose the month and year

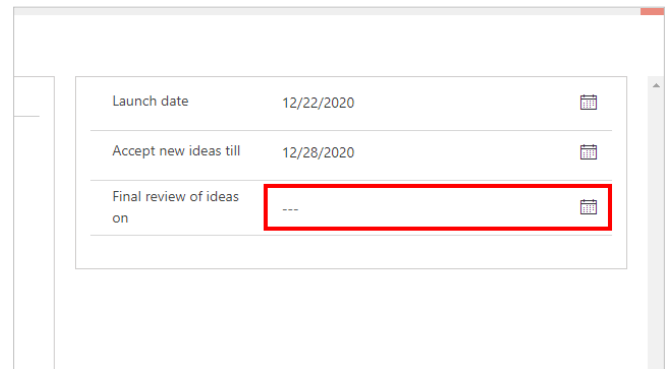
Click on a day number. In this example the day **28**



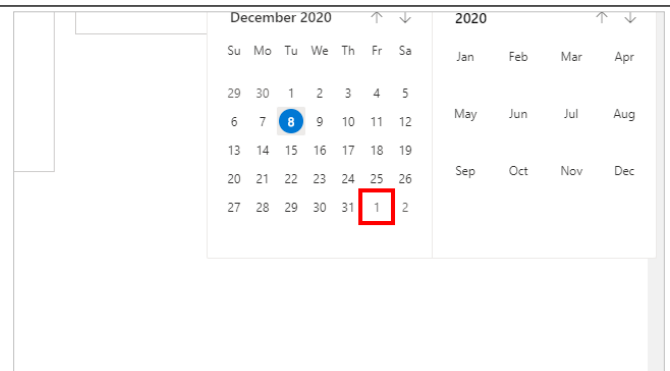
2.1.2.3.

Set the date for final decision on ideas for the challenge

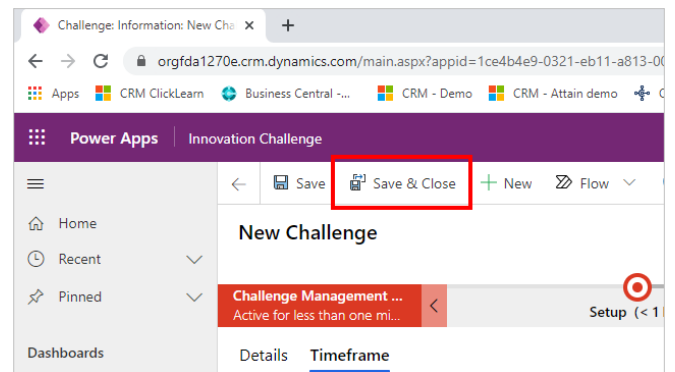
Click on the field **Final review of ideas on**



Click on a day number. In this example the day **1**



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

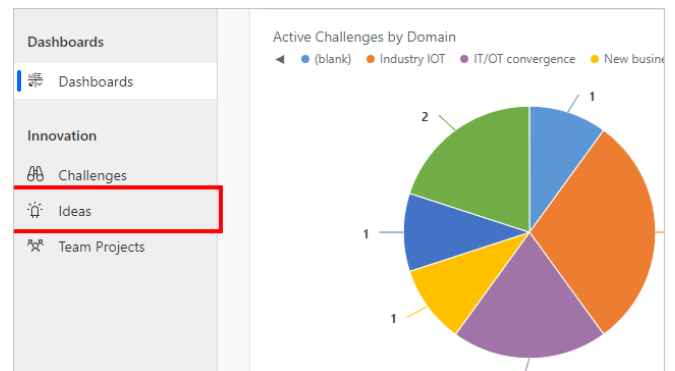


2.2. Create an Idea

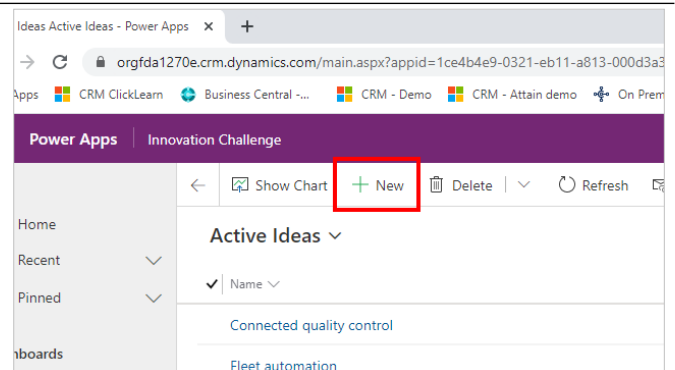
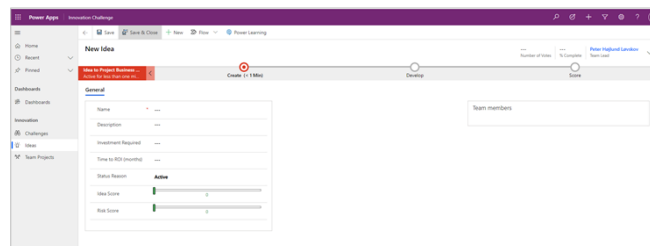
2.2.1. Objective

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

General

Name	*	Foodtruck
Description		---
Investment Required		---

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

General

Name	*	Foodtruck
Description		A truck that has been rebuild to be a rolling kitchen, so it easily can move between venues.
Investment Required		---

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

General

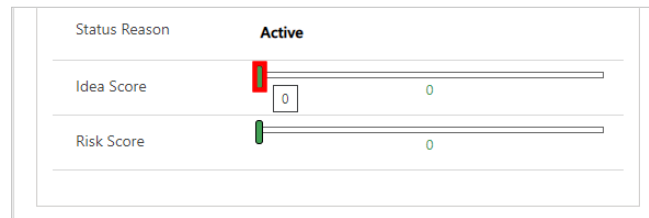
Name	*	Foodtruck
Description		A truck that has been rebuild to be a rolling kitchen, so it easily can move between venues.
Investment Required		120000
Time to ROI (months)		---

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

Description	A truck that has been rebuild to be a rolling kitchen, so it easily can move between venues.
Investment Required	\$120,000.00
Time to ROI (months)	10
Status Reason	Active
Idea Score	0

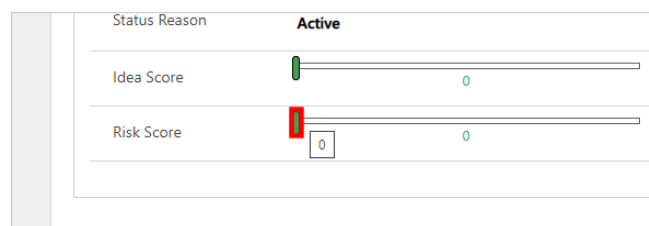
- Click on the text field **Time to ROI (months)** - Enter **Time to ROI (months)**.

2.2.2.1. Set the Idea score



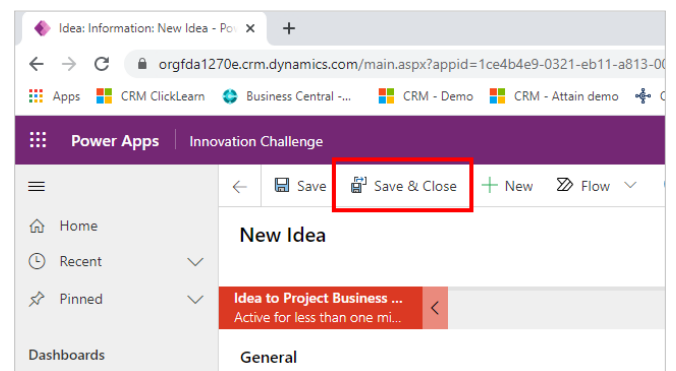
- Click and hold the left mouse button on the link 0
- Release the left mouse button on the link 0

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

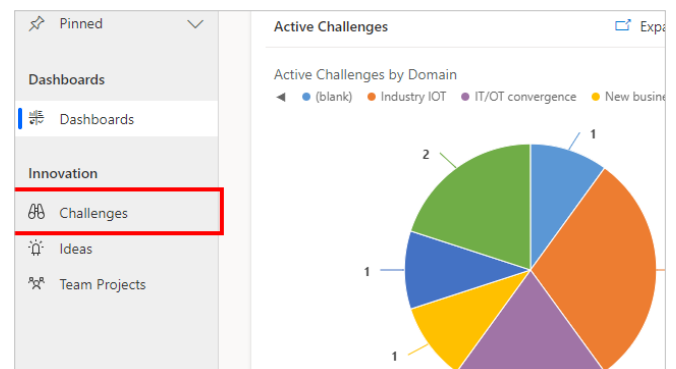
Click on the menu item **Save & Close**



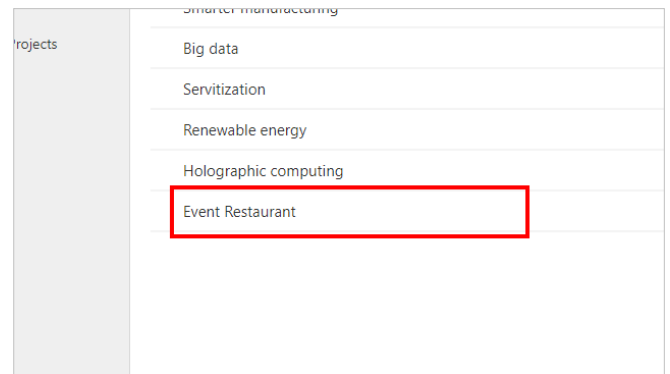
2.3. Add an Idea to a Challenge

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

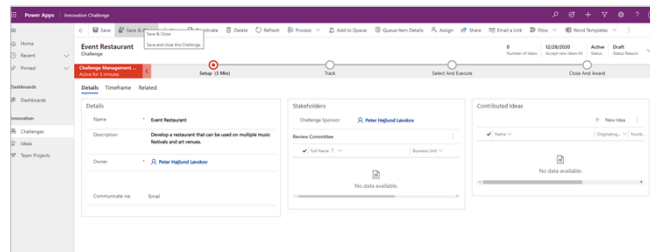
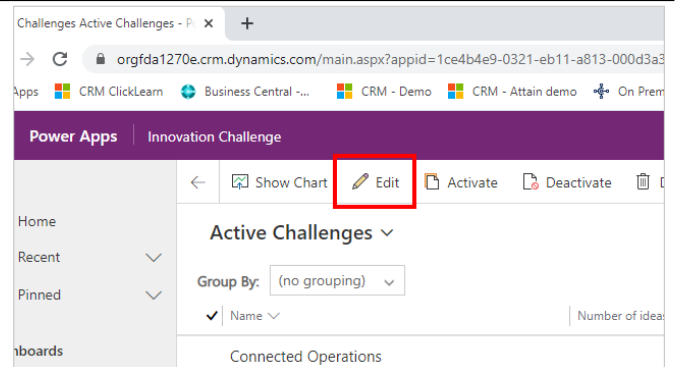
Click on the item **Challenges**



Click on the cell **Name**

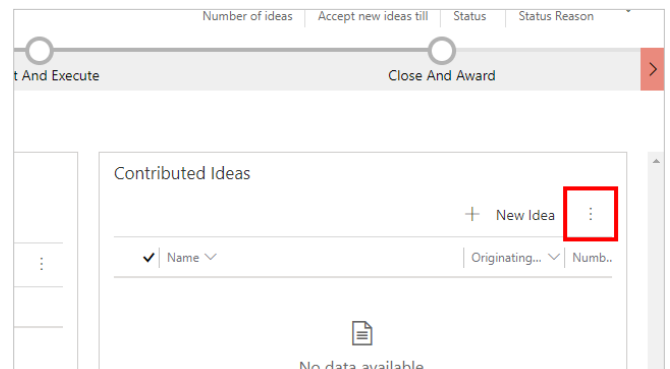


Click on the menu item **Edit**

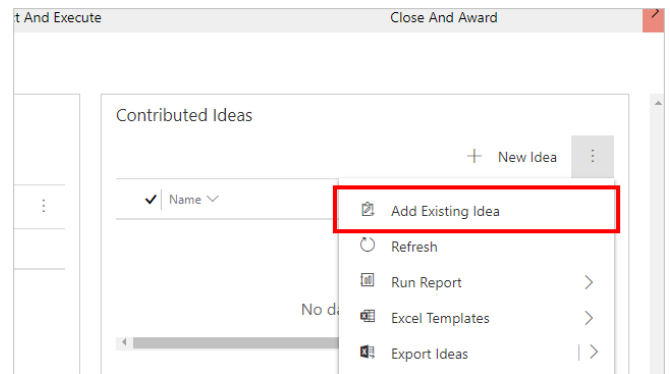


2.3.2. Go to Contributed Ideas

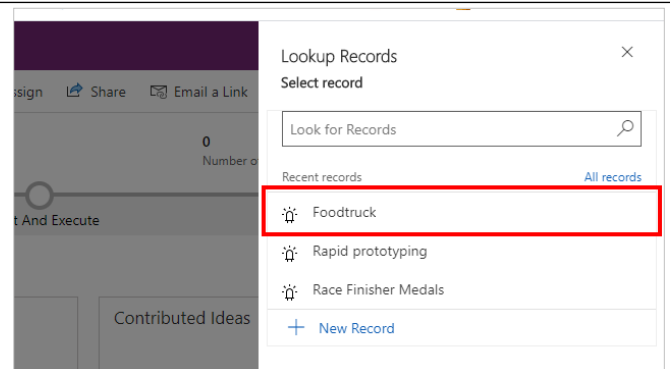
Click on the menu item



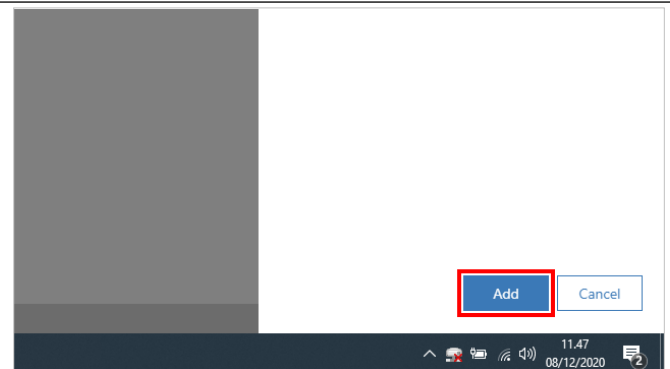
Click on the menu item **Add Existing Idea**



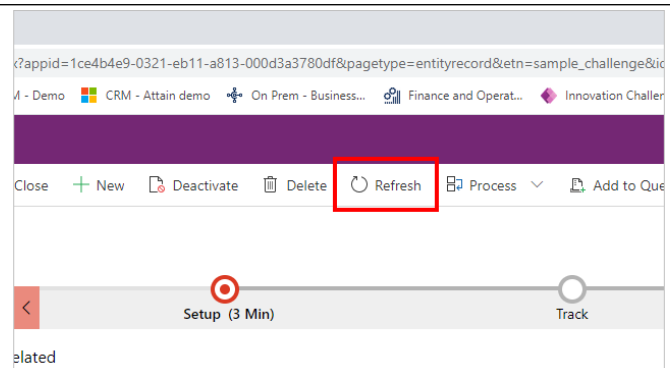
Click on the item **Foodtruck**



Click on the button **Add**



Click on the menu item **Refresh**

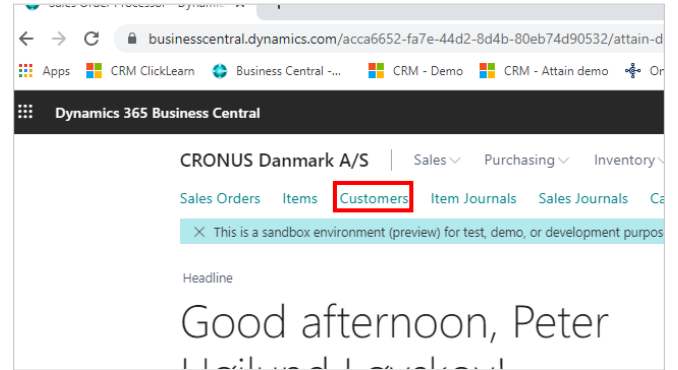


2.3.3. An existing Idea have now been added to the challenge

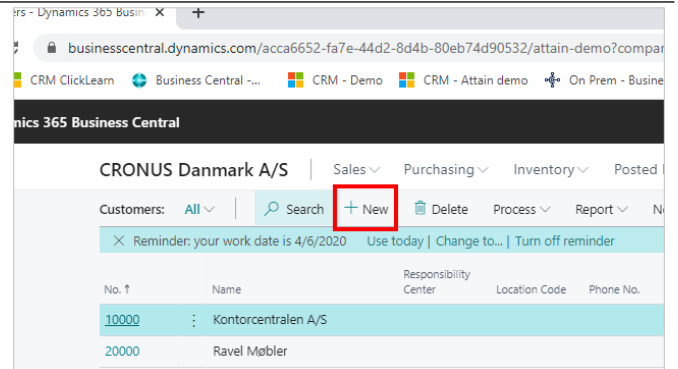
3. Business Central

3.1. Create a new customer

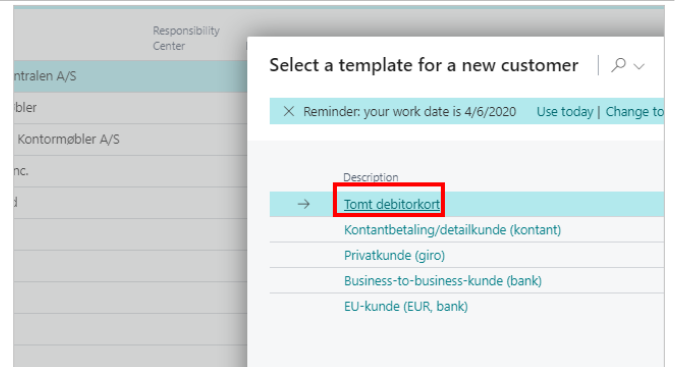
Click on the navigation menu item **Customers**



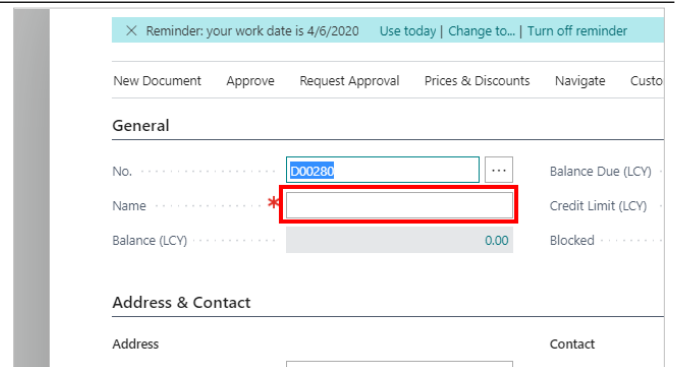
Click on the navigation menu item **New**



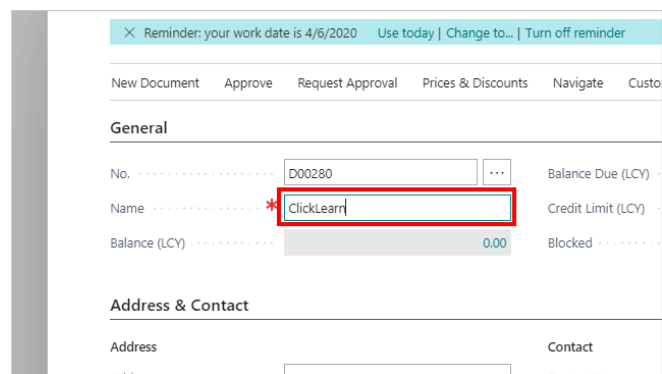
Click on the link in cell **Description** with the value **Tomt debitorkort**



Click on the field **Name**



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. D00280 ... Balance Due (LCY) ..

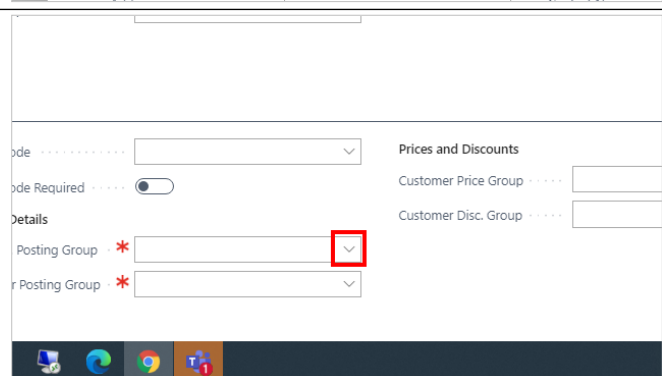
Name * ClickLearn Credit Limit (LCY) ..

Balance (LCY) 0.00 Blocked

Address & Contact

Address Contact

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



Code Prices and Discounts

Code Required Customer Price Group

Details

Posting Group * Customer Disc. Group

or Posting Group *

Mobile Phone No.

Email

Home Page

Code ↑ Description

→ EU Debitorer/kreditorer i EU-lande/-

INDENLANDS Indenlandske debitorer/kreditorer

INTHANDEL Konkernintern

UDLAND Debitorer/kreditorer i lande/omr

+ New

Profile Code

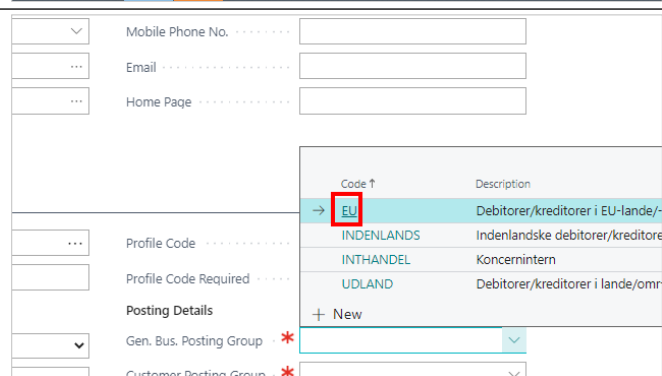
Profile Code Required

Posting Details

Gen. Bus. Posting Group *

Customer Posting Group *

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



Mobile Phone No.

Email

Home Page

Code ↑ Description

→ EU Debitorer/kreditorer i EU-lande/-

INDENLANDS Indenlandske debitorer/kreditorer

INTHANDEL Konkernintern

UDLAND Debitorer/kreditorer i lande/omr

+ New

Profile Code

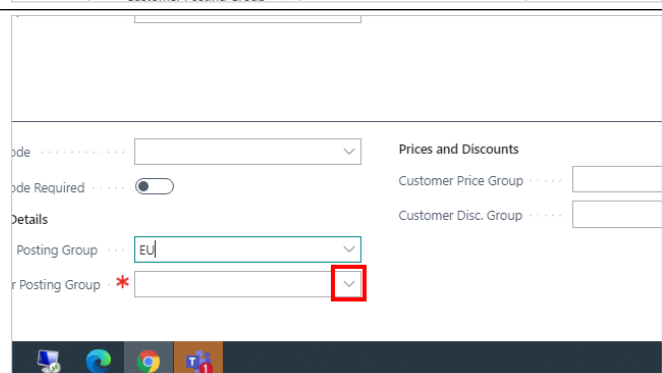
Profile Code Required

Posting Details

Gen. Bus. Posting Group *

Customer Posting Group *

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



Code Prices and Discounts

Code Required Customer Price Group

Details

Posting Group EU Customer Disc. Group

or Posting Group *

Mobile Phone No.

Email

Home Page

Code ↑ Description

→ EU Debitorer/kreditorer i EU-lande/-

INDENLANDS Indenlandske debitorer/kreditorer

INTHANDEL Konkernintern

UDLAND Debitorer/kreditorer i lande/omr

+ New

Profile Code

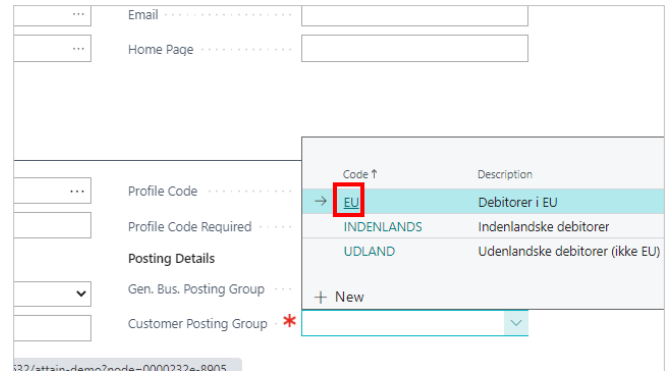
Profile Code Required

Posting Details

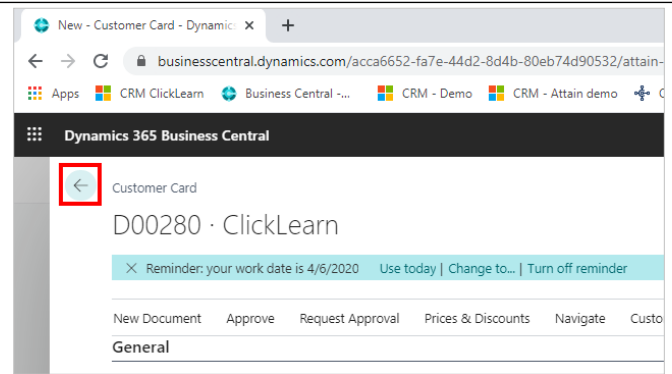
Gen. Bus. Posting Group *

Customer Posting Group *

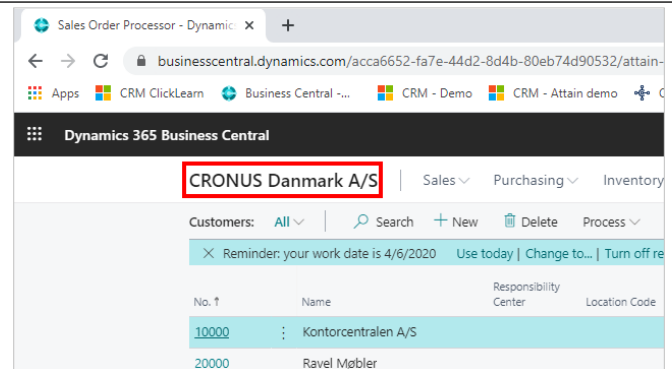
Click on the link in cell **Code** with the value **EU**



Click on the back button

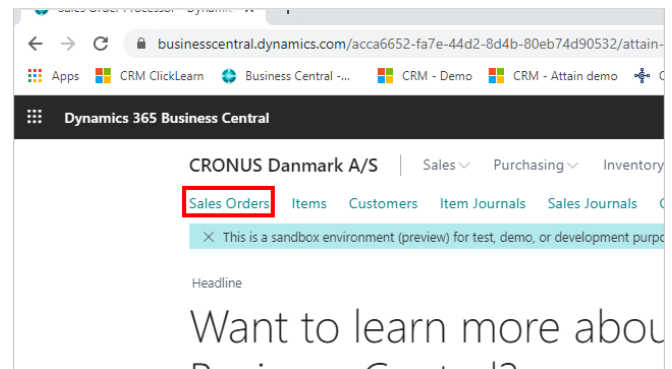


Click on the navigation menu item **CRONUS Danmark A/S**

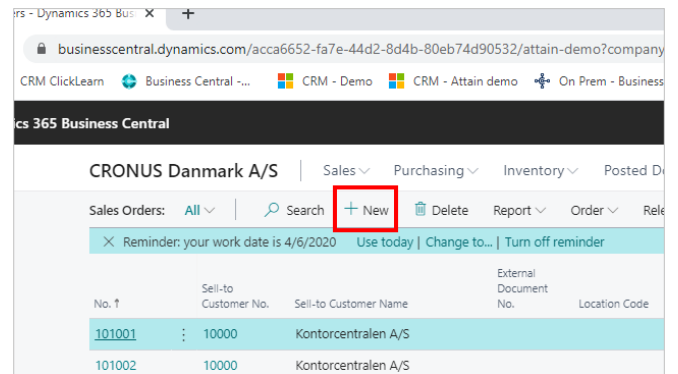


3.2. Create a New Sales Order

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

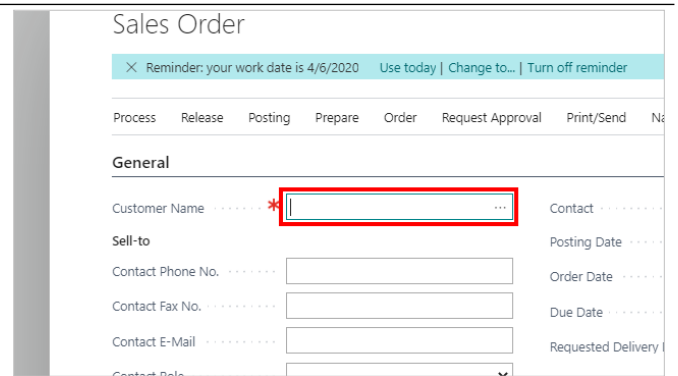


Click on the navigation menu item **New**



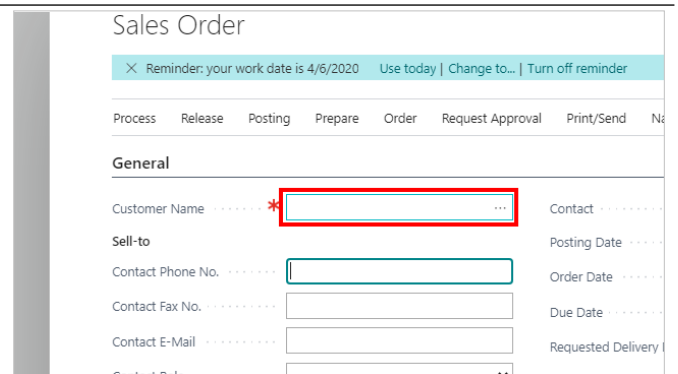
The screenshot shows the Dynamics 365 Business Central interface for 'CRONUS Denmark A/S'. The 'Sales' menu is expanded, and the 'New' button is highlighted with a red box. Below the menu, there is a table with columns: No., Sell-to Customer No., Sell-to Customer Name, External Document No., and Location Code. The table contains two rows of data.

Click on the field **Customer Name**



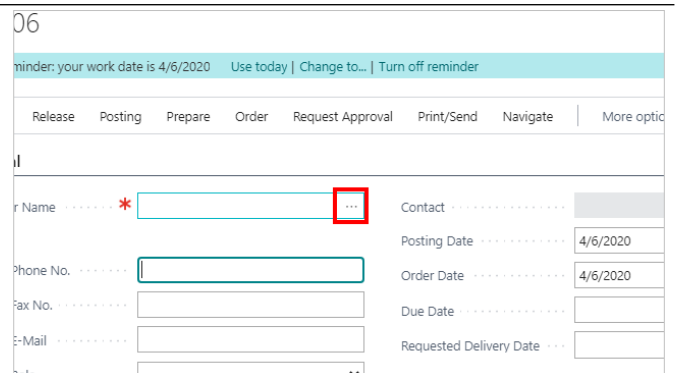
The screenshot shows the 'Sales Order' form. The 'Customer Name' field is highlighted with a red box. The form includes various fields for contact information, such as 'Contact Phone No.', 'Contact Fax No.', and 'Contact E-Mail'. The 'Customer Name' field is marked with an asterisk, indicating it is a required field.

Press the **TAB** key.



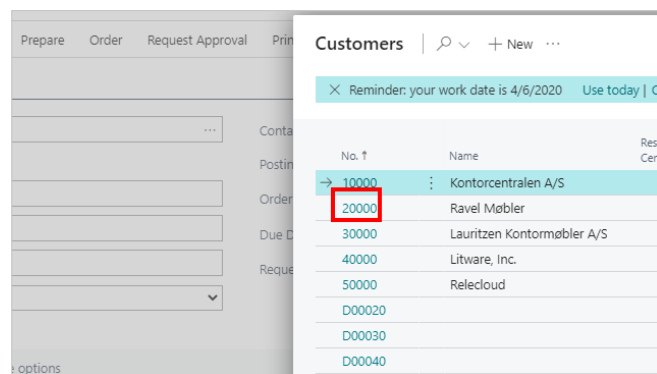
This screenshot is identical to the previous one, showing the 'Sales Order' form with the 'Customer Name' field highlighted in a red box. The form includes various fields for contact information, such as 'Contact Phone No.', 'Contact Fax No.', and 'Contact E-Mail'. The 'Customer Name' field is marked with an asterisk, indicating it is a required field.

Click on the lookup button **Customer Name**



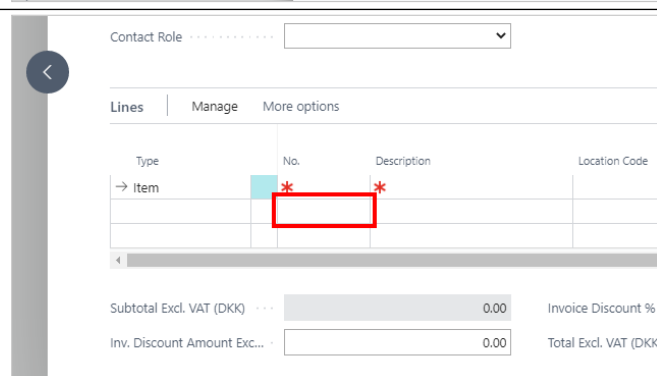
This screenshot is identical to the previous ones, showing the 'Sales Order' form with the 'Customer Name' field highlighted in a red box. The form includes various fields for contact information, such as 'Contact Phone No.', 'Contact Fax No.', and 'Contact E-Mail'. The 'Customer Name' field is marked with an asterisk, indicating it is a required field.

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



No. #	Name	Resp. Cent.
10000	Kontorcentralen A/S	
20000	Ravel Møbler	
30000	Lauritzen Kontormøbler A/S	
40000	Litware, Inc.	
50000	Relecloud	
D00020		
D00030		
D00040		

Click on the cell **No.**

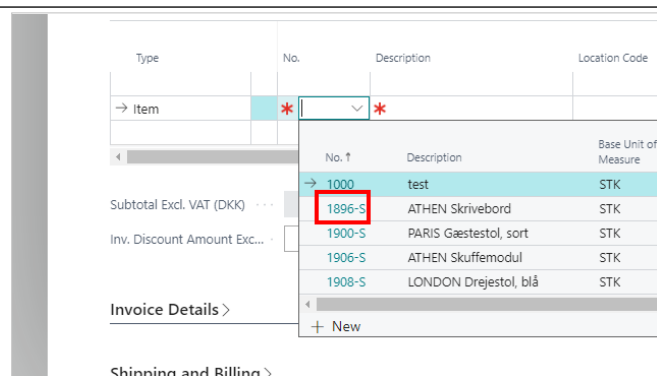


Type	No.	Description	Location Code
→ Item	*	*	

Subtotal Excl. VAT (DKK) 0.00 Invoice Discount %

Inv. Discount Amount Exc... 0.00 Total Excl. VAT (DKK)

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



Type	No.	Description	Location Code
→ Item	*	*	

No. #	Description	Base Unit of Measure
1000	test	STK
1896-S	ATHEN Skrivebord	STK
1900-S	PARIS Gæstestol, sort	STK
1906-S	ATHEN Skuffemodul	STK
1908-S	LONDON Drejestol, blå	STK

Subtotal Excl. VAT (DKK) 0.00 Invoice Discount %

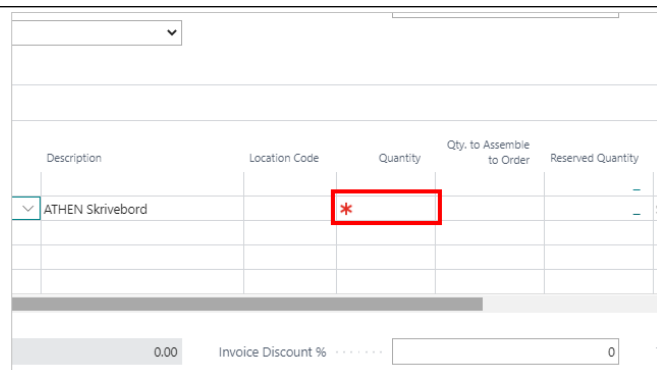
Inv. Discount Amount Exc... 0.00 Total Excl. VAT (DKK)

Invoice Details >

+ New

Shipping and Billing >

Click on the cell **Quantity**



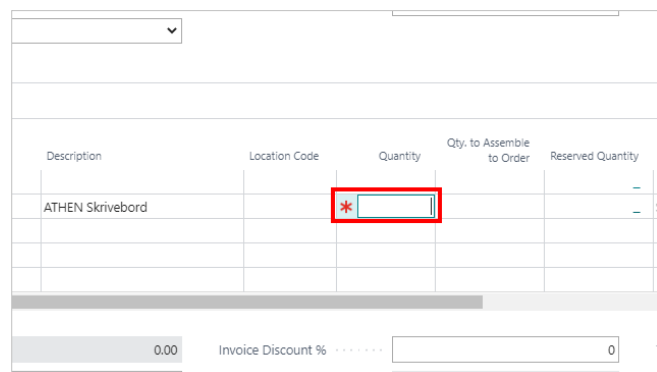
Description	Location Code	Quantity	Qty. to Assemble to Order	Reserved Quantity
ATHEN Skrivebord		*		

Subtotal Excl. VAT (DKK) 0.00 Invoice Discount % 0

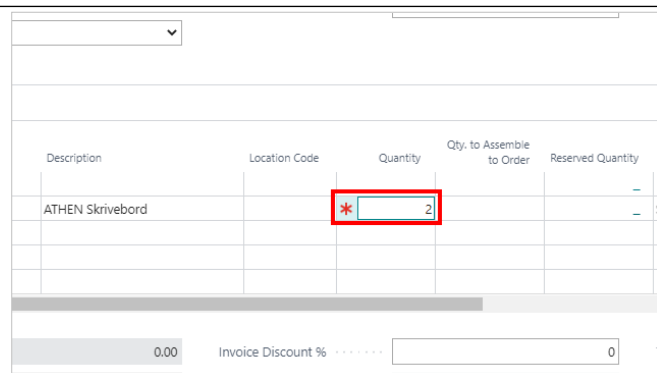
Inv. Discount Amount Exc... 0.00 Total Excl. VAT (DKK)

ClickLearn ApS	phl
	July 2, 2021
Learning Portal Across Multiple Business Systems	27/43

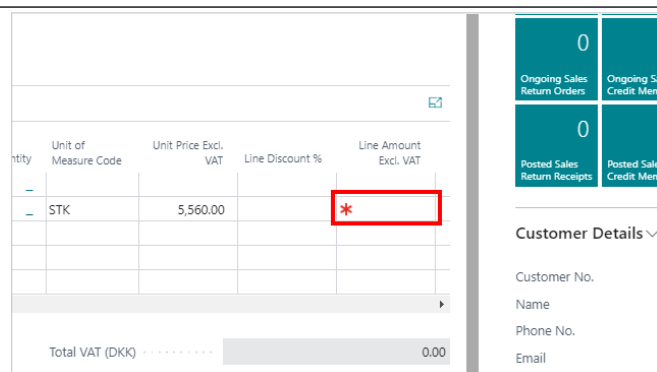
Click on the cell **Quantity**



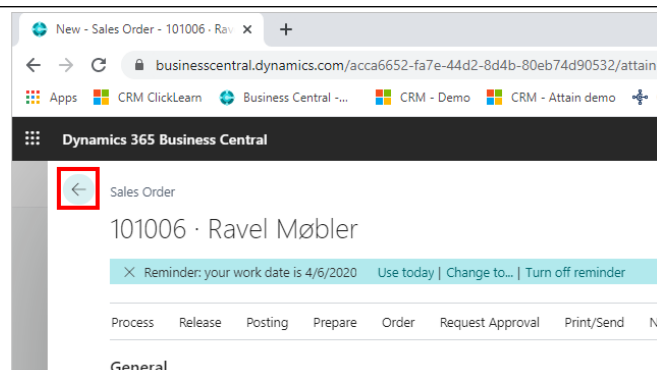
Enter **Quantity**.



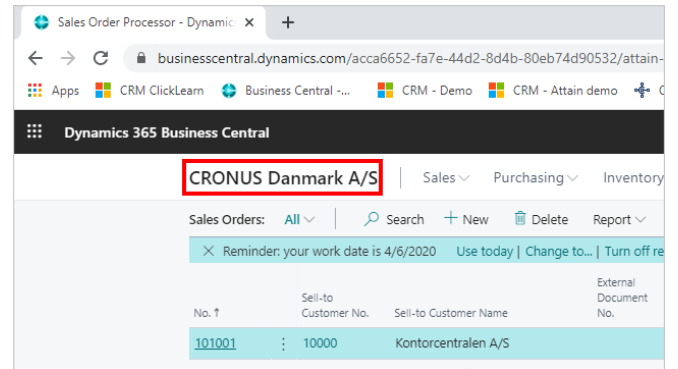
Click on the cell **Line Amount Excl. VAT**



Click on the back button



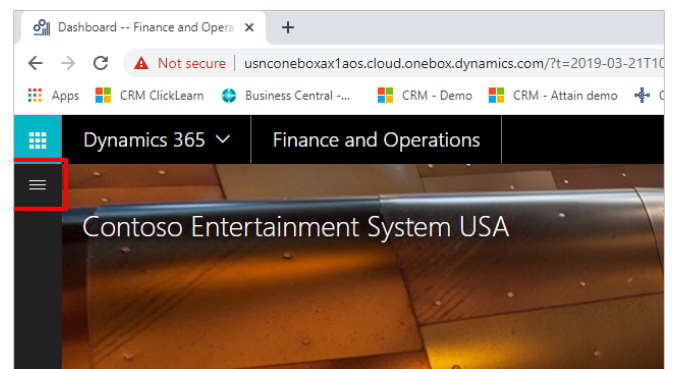
Click on the navigation menu item **CRONUS Danmark A/S**



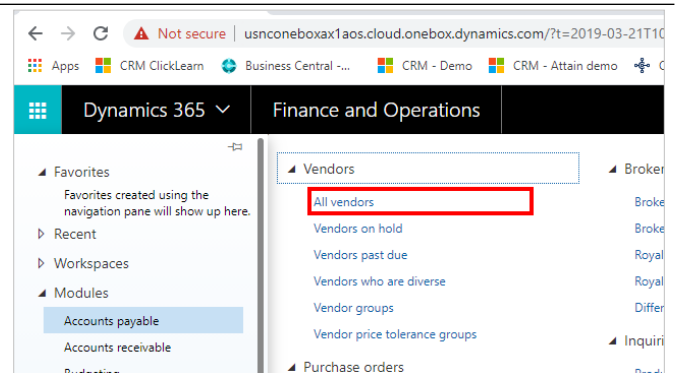
4. Finance and Operations

4.1. Validate Vendor Info

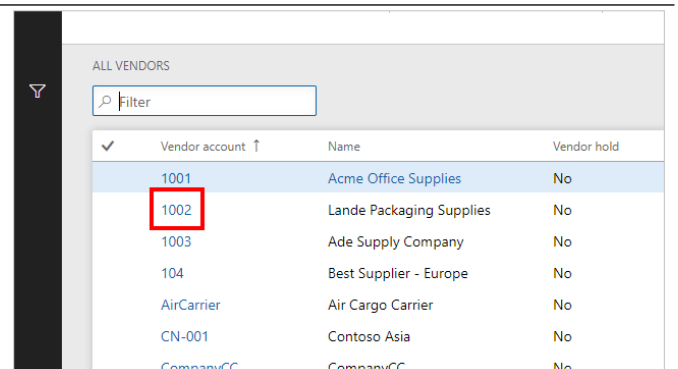
Click on the navigation button



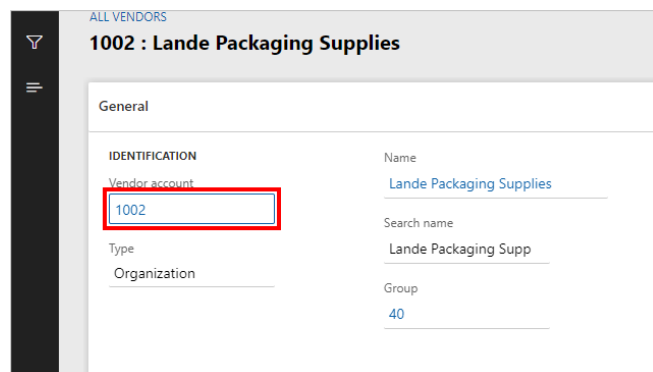
Click on the navigation item link **All vendors**



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



Click on the field **Vendor account**



ALL VENDORS
1002 : Lande Packaging Supplies

General

IDENTIFICATION

Vendor account
1002

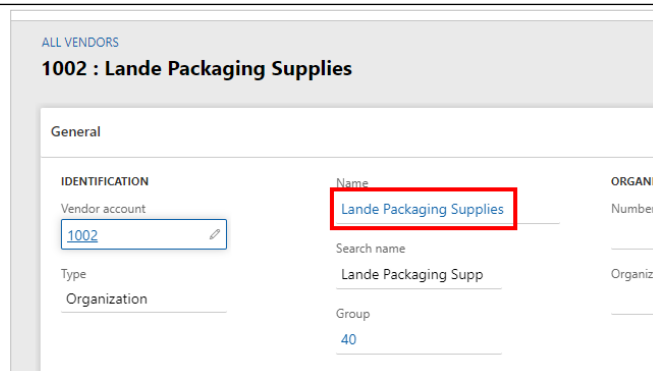
Type
Organization

Name
Lande Packaging Supplies

Search name
Lande Packaging Supp

Group
40

Click on the linke in the field **Name**



ALL VENDORS
1002 : Lande Packaging Supplies

General

IDENTIFICATION

Vendor account
1002

Type
Organization

Name
Lande Packaging Supplies

Search name
Lande Packaging Supp

Group
40

ORGANIZATION DETAILS

Number of employees
0

Organization number

ABC code
None

DUNS number

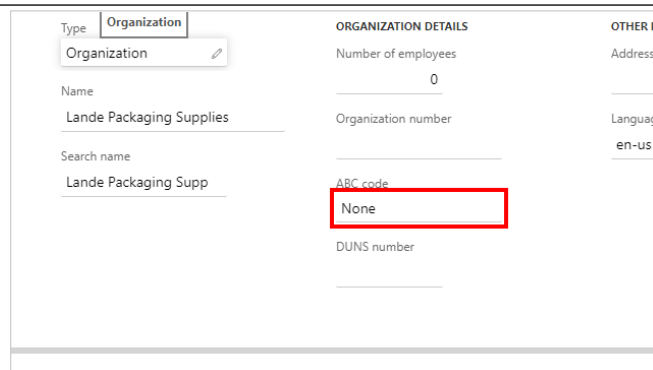
OTHER INFORMATION

Address books

Language
en-us

MEMO

Click on the combobox field **ABC code**



Organization

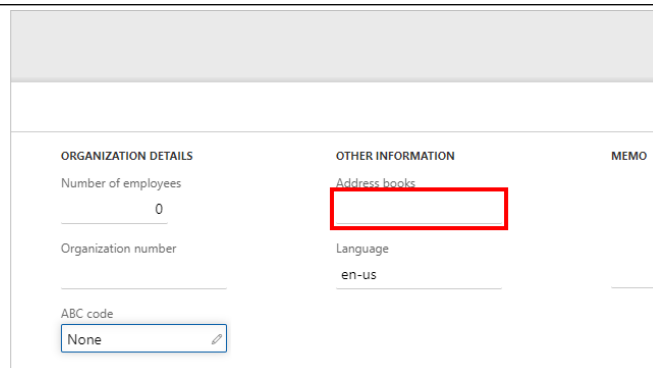
Name
Lande Packaging Supplies

Search name
Lande Packaging Supp

ABC code
None

DUNS number

Click on the field **Address books**



ORGANIZATION DETAILS

Number of employees
0

Organization number

ABC code
None

DUNS number

OTHER INFORMATION

Address books

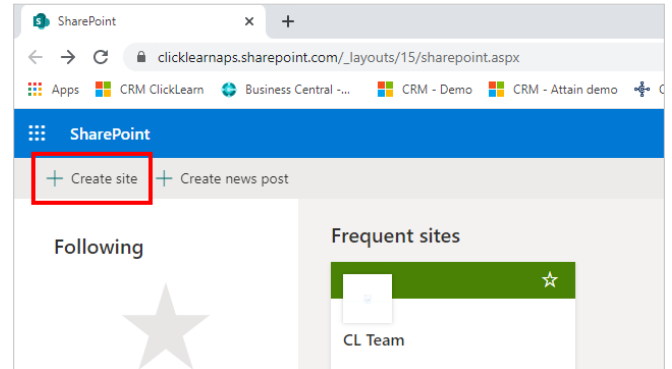
Language
en-us

MEMO

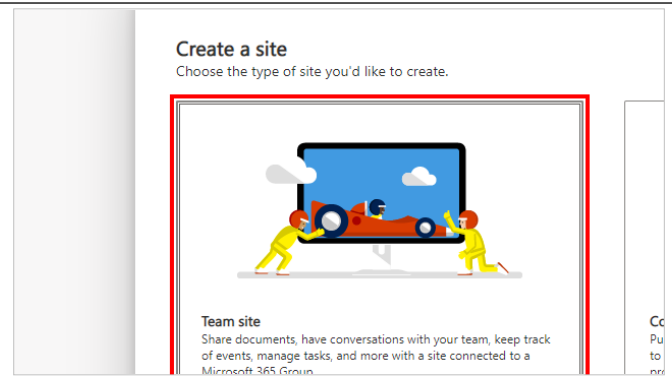
5. SharePoint

5.1. Create a Team in Sharepoint

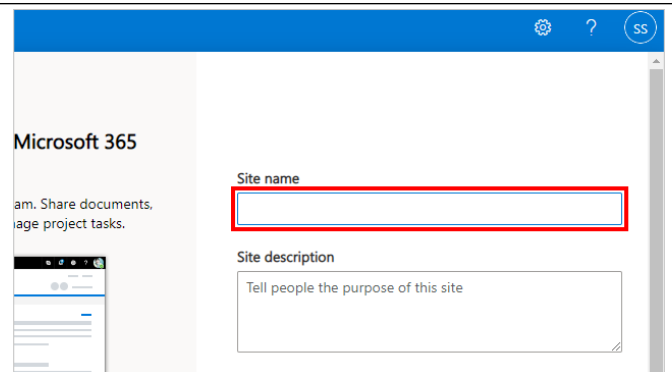
Click on the button ☐ **Create site**



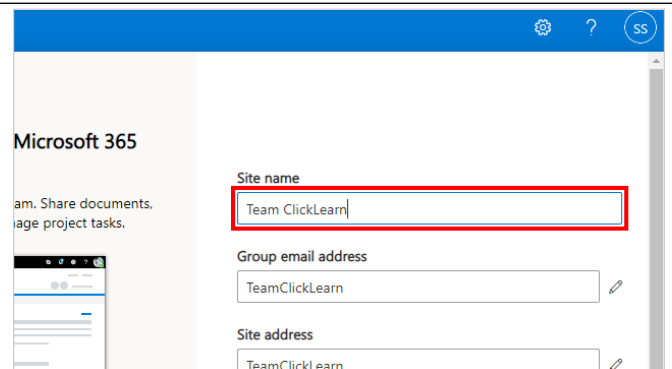
Click on the button **Team site**



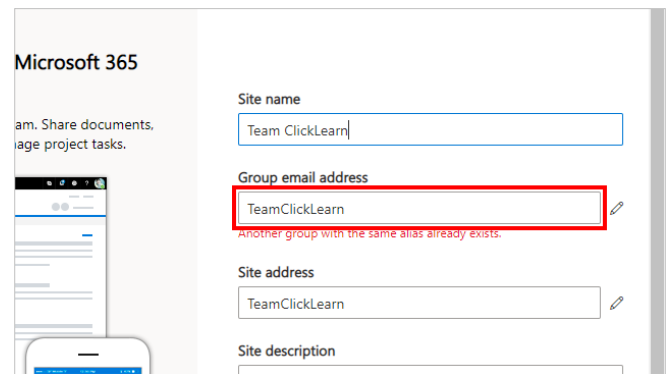
Click on the input field **Site name**



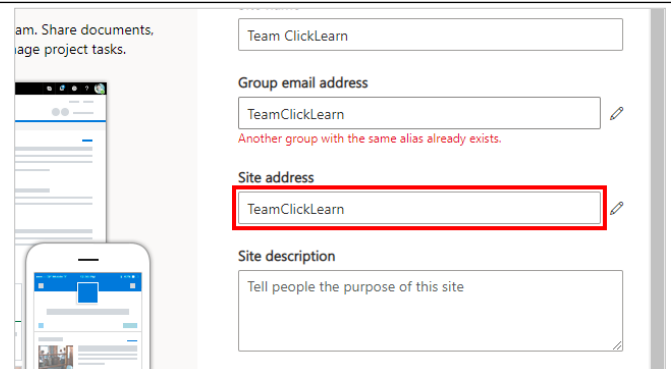
Enter **Site name**.



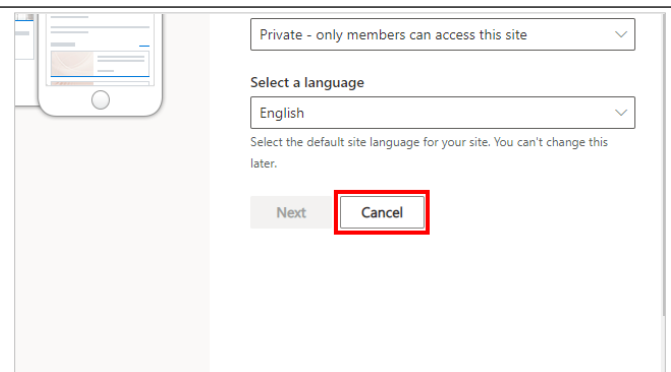
Click on the input field **Group email address**



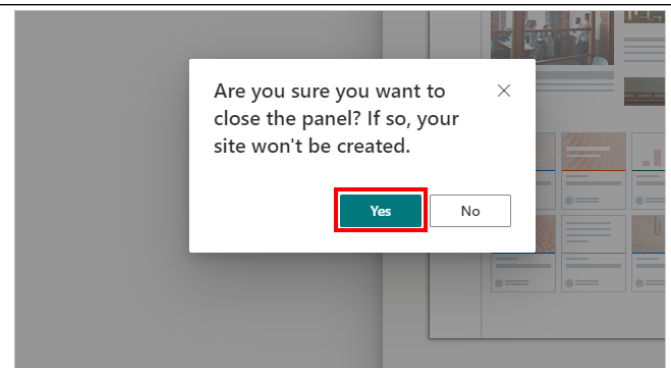
Click on the input field **Site address**



Click on the button **Cancel**



Click on the button **Yes**

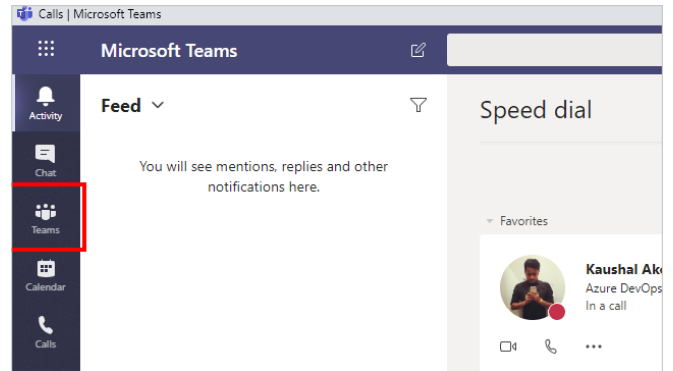


6. Microsoft Teams

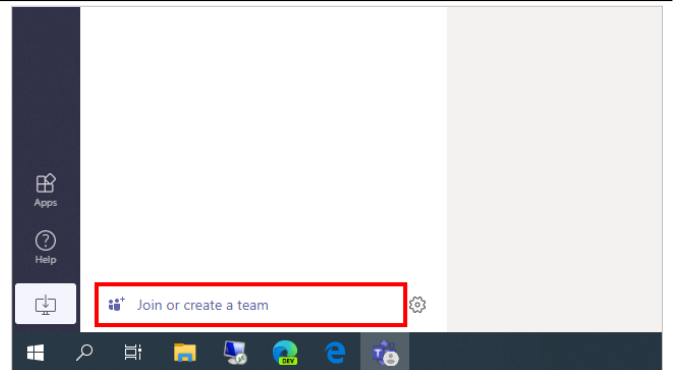
6.1. Create a Team

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

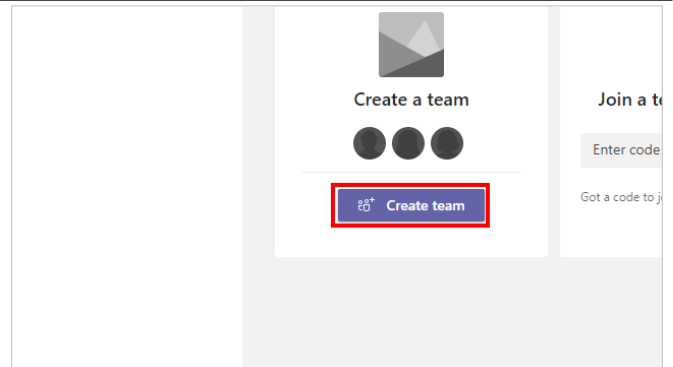
Click on the application link button **Teams Toolbar**



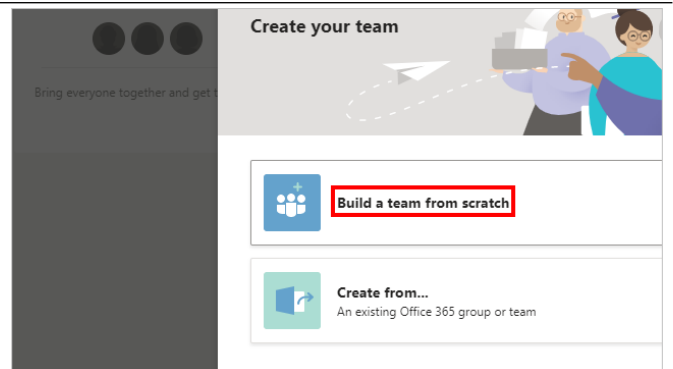
Click on the button **Join or create a team**
This is where you create your own team, or discover existing ones.



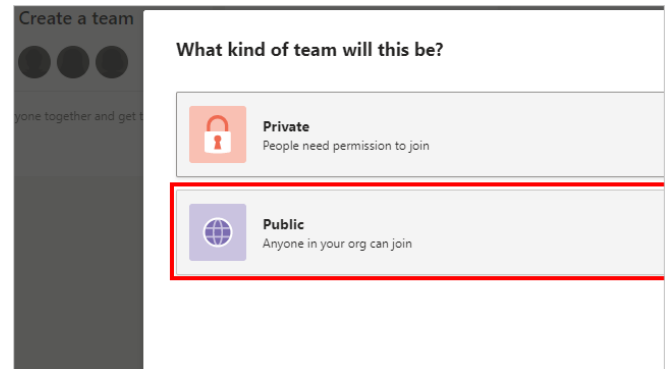
Select Create a new team, and then select Build a team from scratch or select Create from... to build an all-new team or create from an existing group respectively.
Click on team container **Create a team** button



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



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.



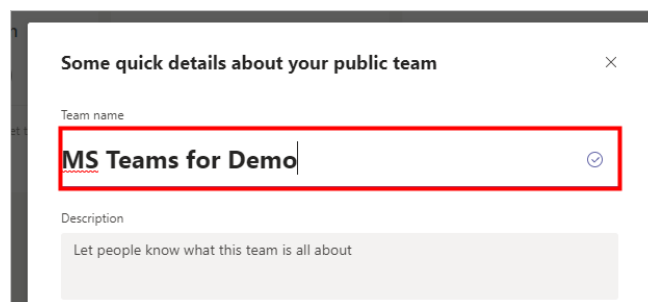
Create a team

What kind of team will this be?

Private
People need permission to join

Public
Anyone in your org can join

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



Some quick details about your public team

Team name

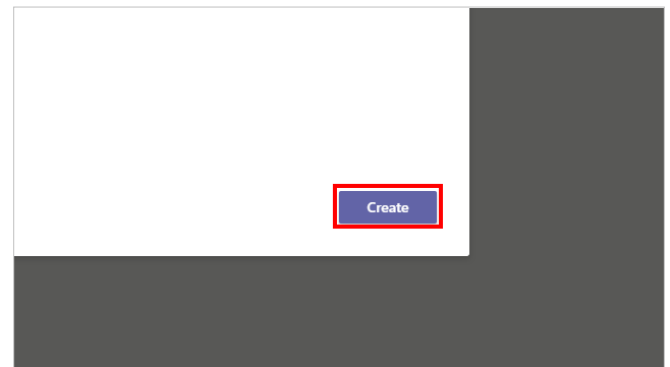
MS Teams for Demo

Description

Let people know what this team is all about

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

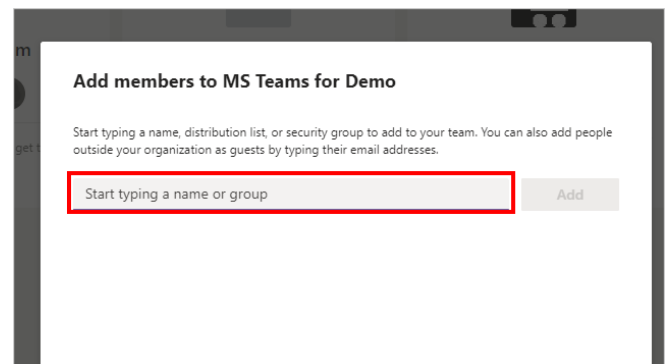
Click on the **Create** button



Create

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**



Add members to MS Teams for Demo

Start typing a name, distribution list, or security group to add to your team. You can also add people outside your organization as guests by typing their email addresses.

Start typing a name or group

Add

Click on the **Skip** button



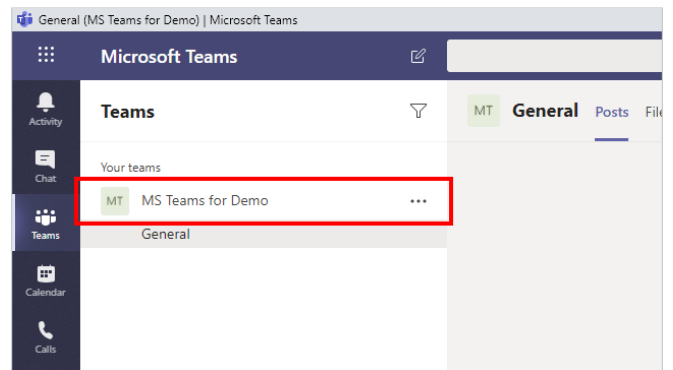
Your Team is now created

6.2. Create a Channel

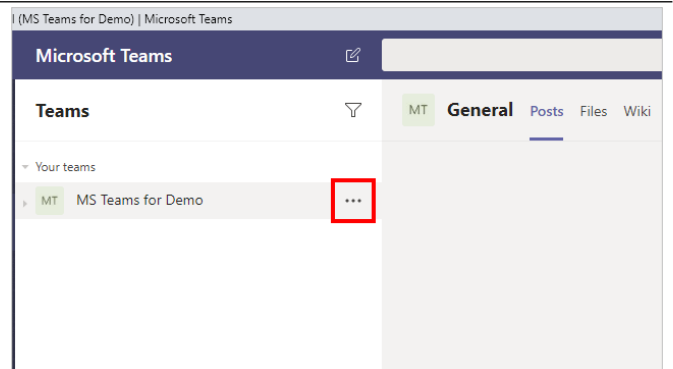
By default, every team gets a General channel, which is a good channel to use for announcements and information the whole team needs. To add more channels:

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

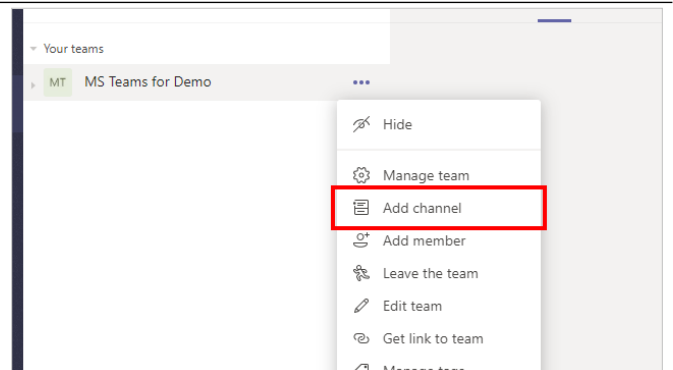
Click on the link **MS Teams for Demo**



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

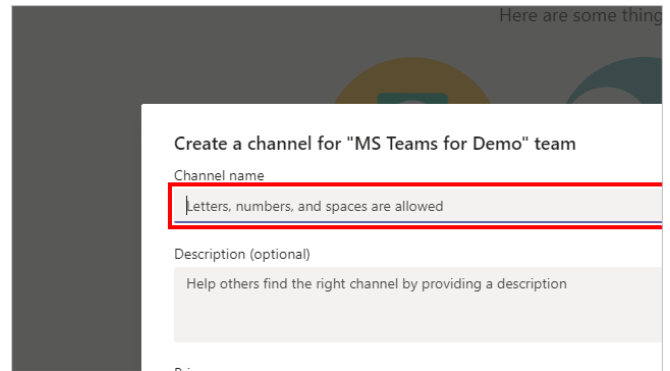
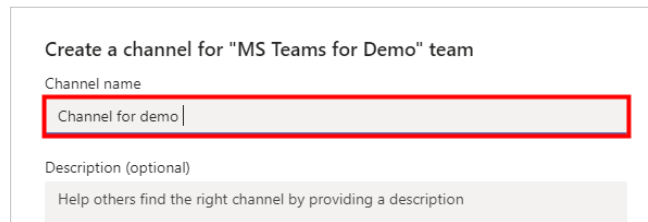


Click on teams menu item **Add channel**



Enter a name and description for your channel.

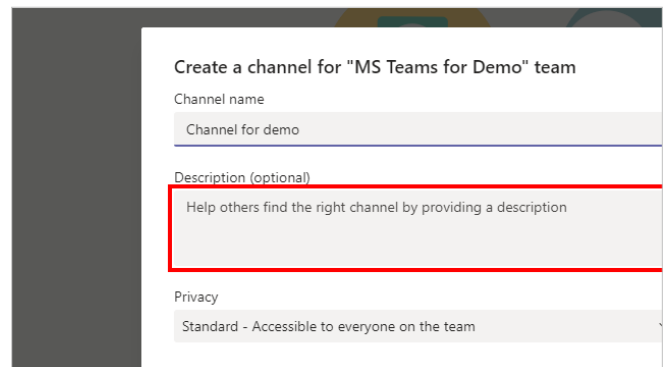
Click on the input field **Letters, numbers, and spaces are allowed**

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

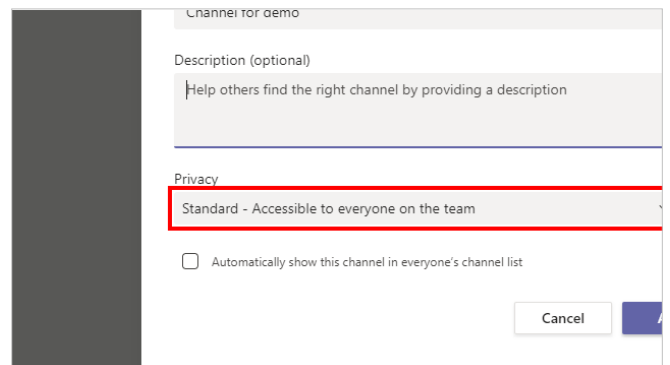
You can build a channel around a topic, project, department name, or whatever you like.

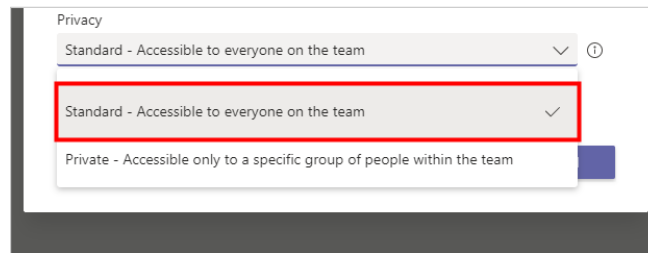
Click on the textarea



Set the privacy setting to Standard or Private

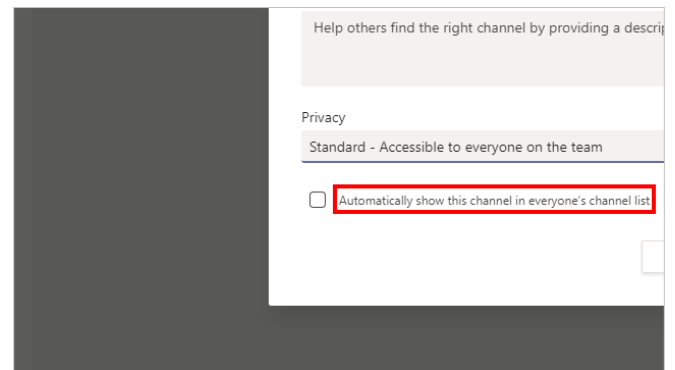
Click on the button **Standard - Accessible to everyone on the team**



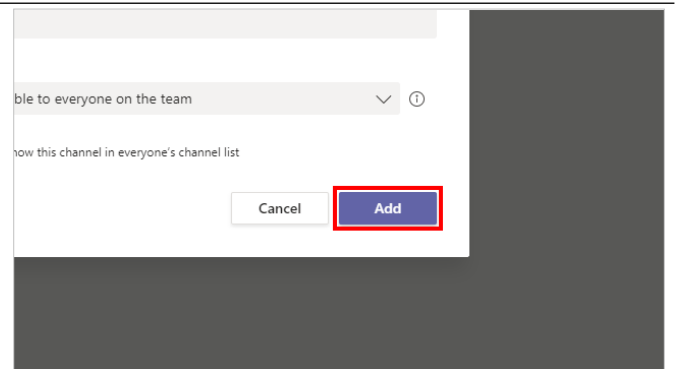


1. Click on the item **Standard - Accessible to everyone on the team**

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.



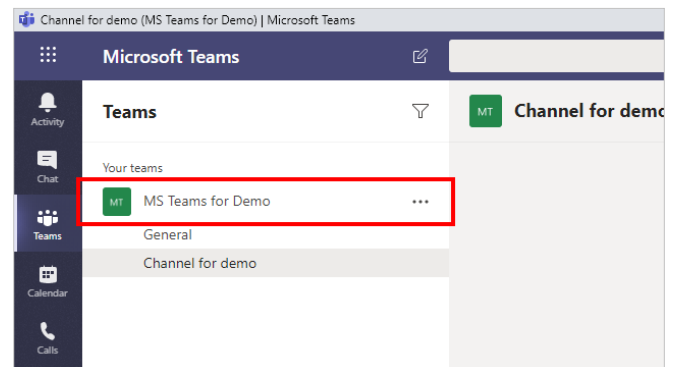
Click on the **Add** button



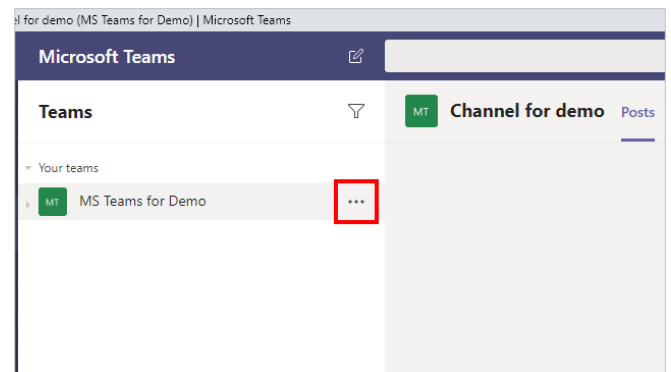
6.3. Customize and manage your team

Click on the Team you wish to Manage or Customize

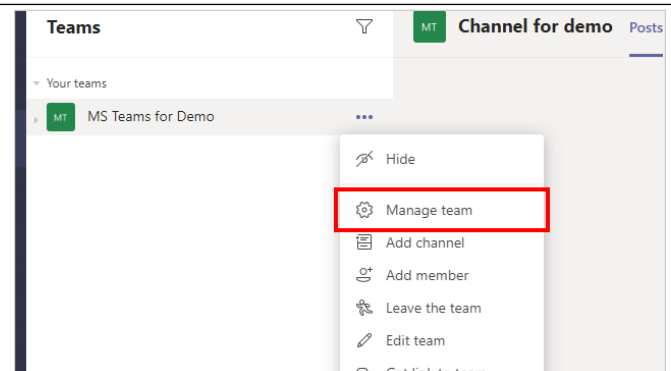
Click on the link **MS Teams for Demo**



Click on the button **More options**

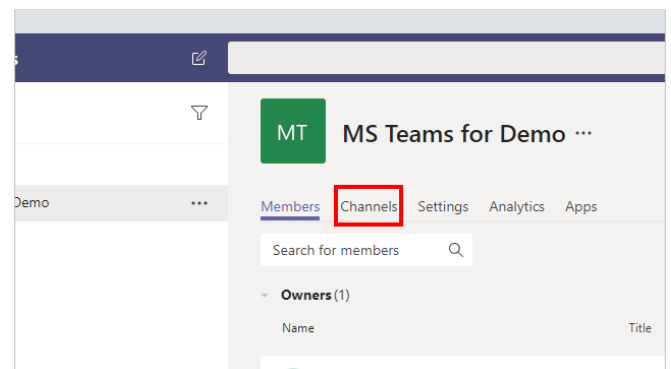


Click on the button **Manage team**

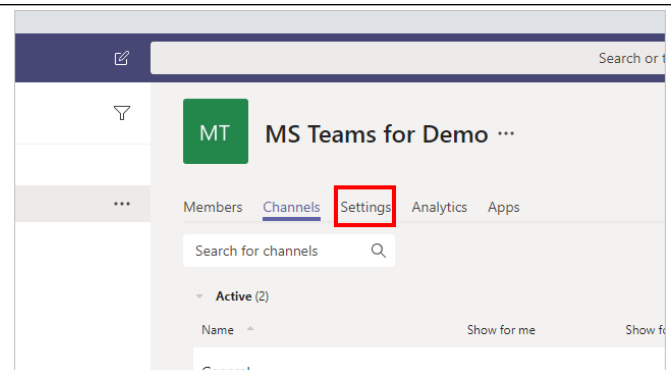


Select Manage team to find Members, Channels, Settings, and Apps for your team all in one place.

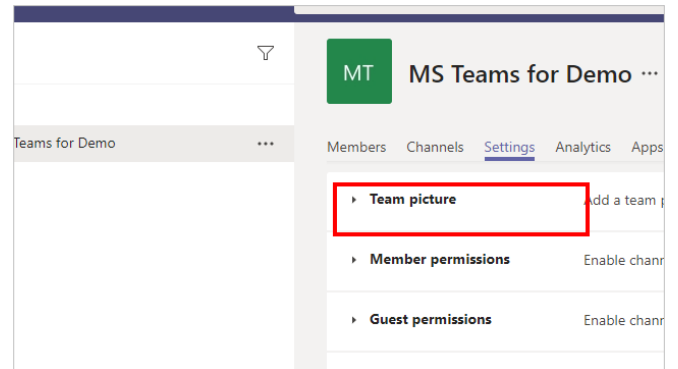
Click on the link **Channels**



Click on the link **Settings**



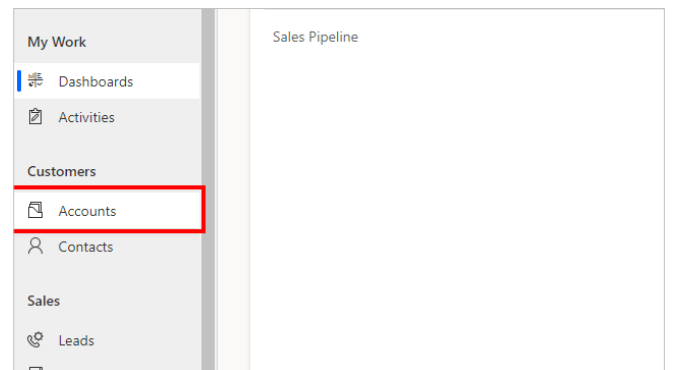
Click on the link **Team picture** to add a team picture and give your team some personality.



7. Cross Platform

7.1. Cross Platform Recording

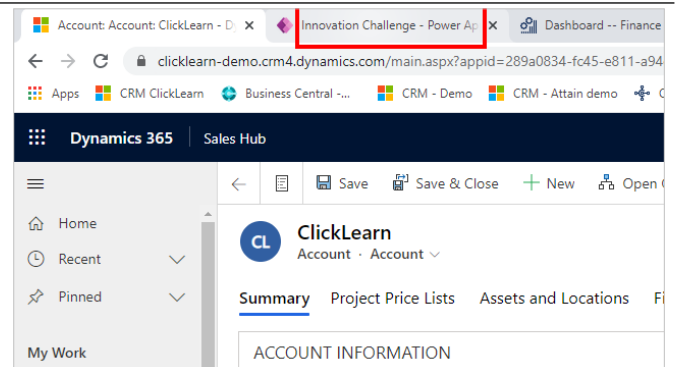
Click on the item **Accounts**



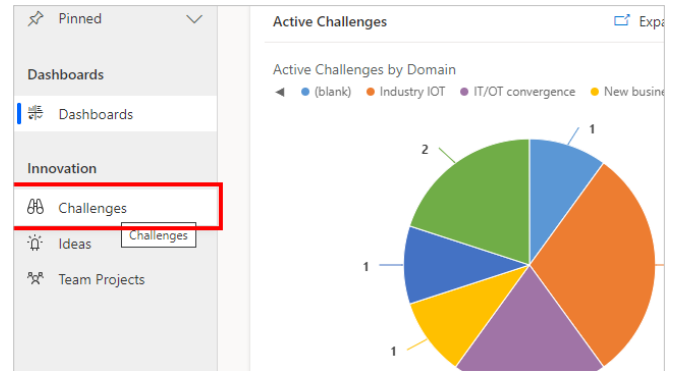
Click on the link in cell **Account Name**



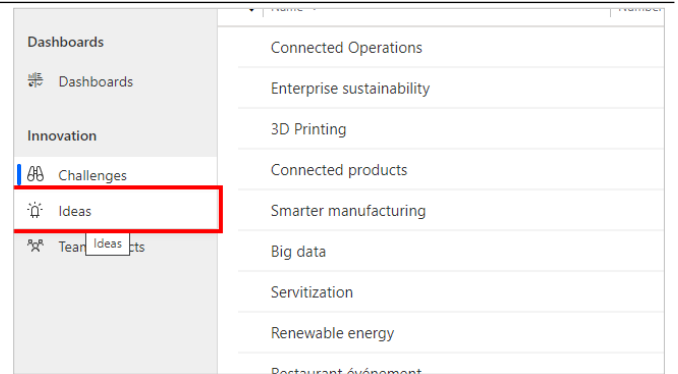
Click on the area.



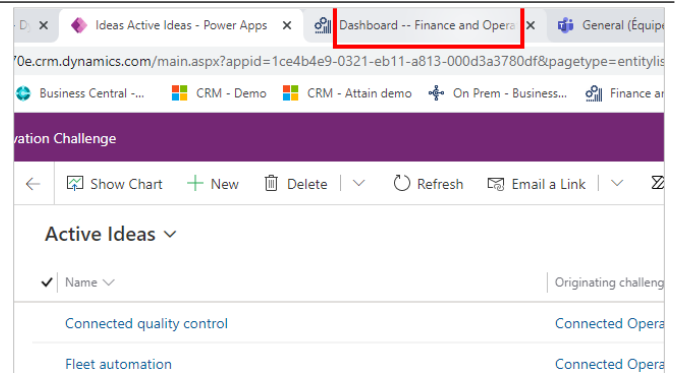
Click on the item **Challenges**



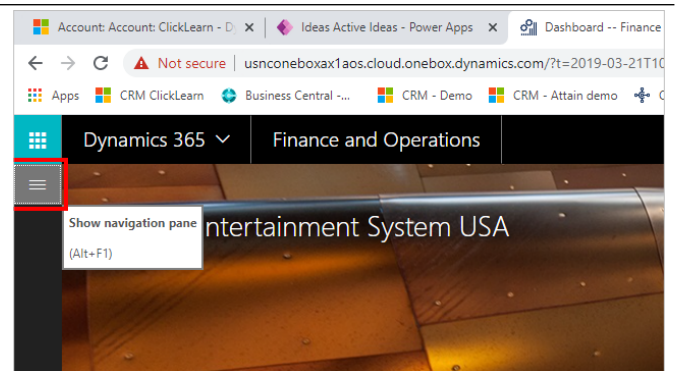
Click on the item **Ideas**



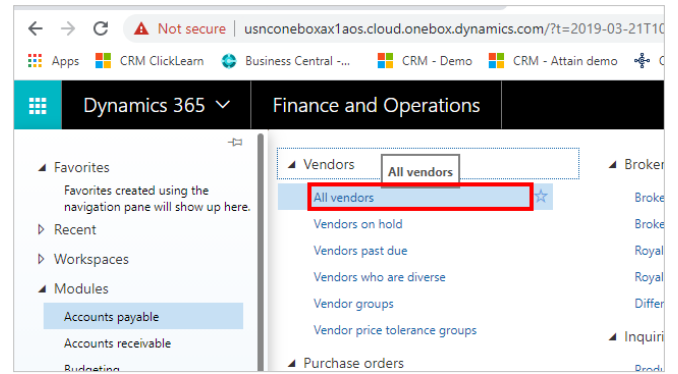
Click on the area.



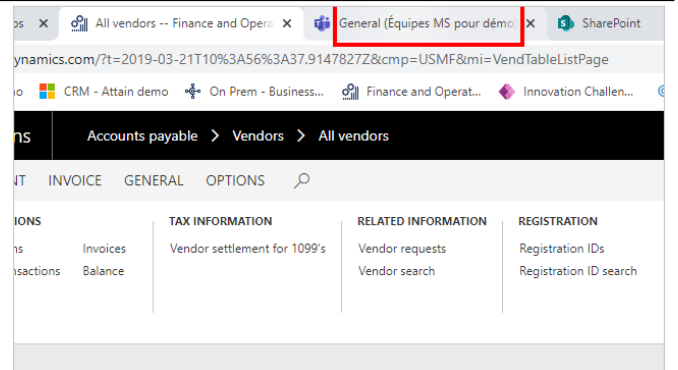
Click on the navigation button



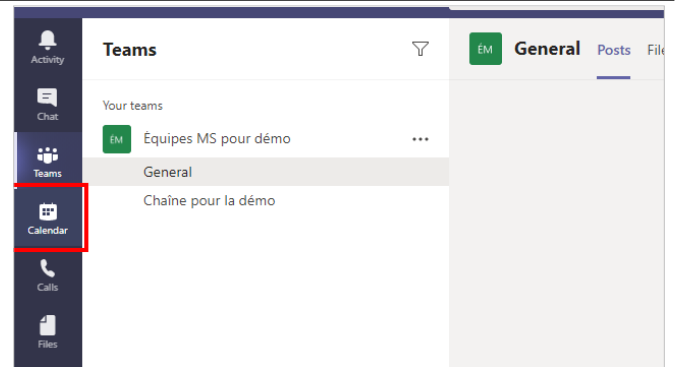
Click on the navigation item link **All vendors**



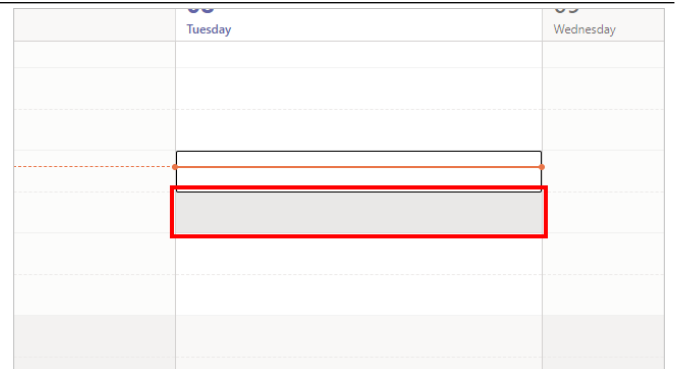
Click on the area.



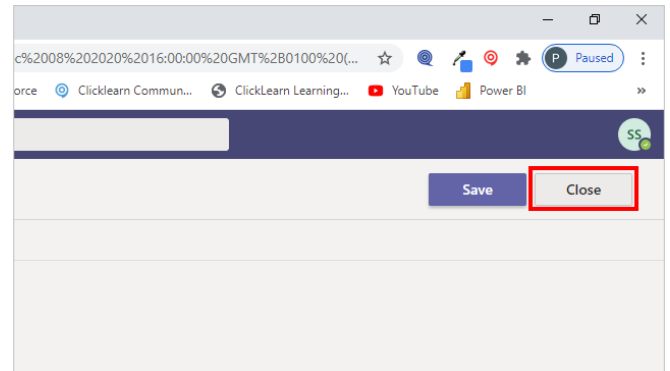
Click on left menu app item **Calendar**



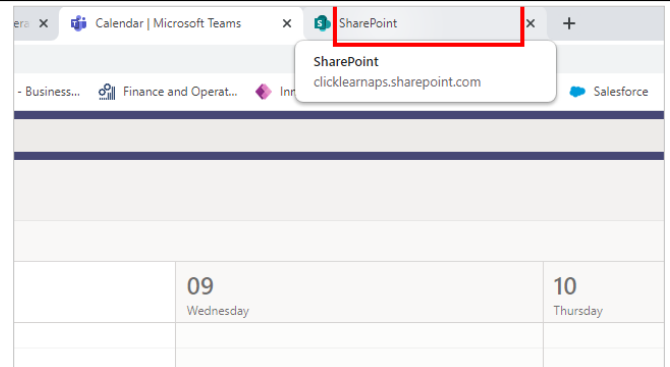
Click on the blank event **December 8 3:30 PM to December 8 4:00 PM. 0 events**



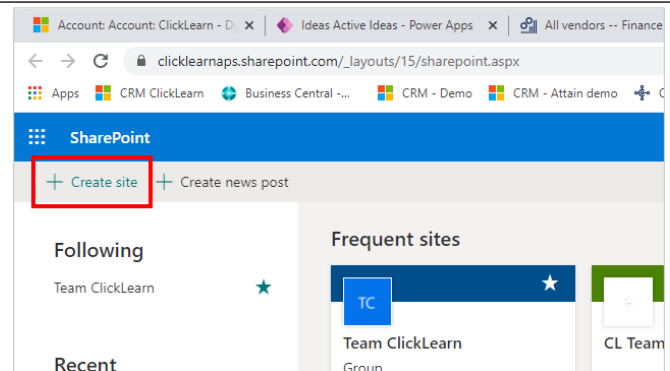
Click on The **Close** meeting creation



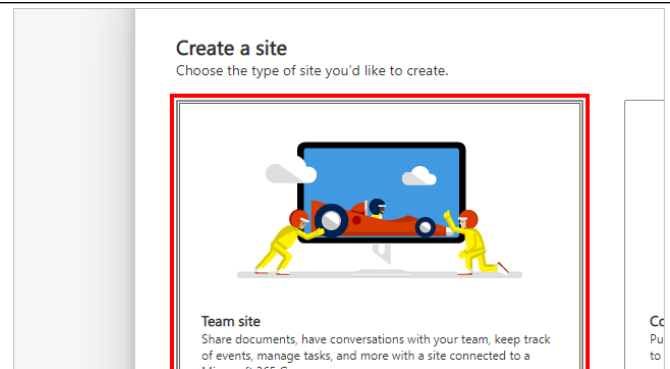
Click on the area.



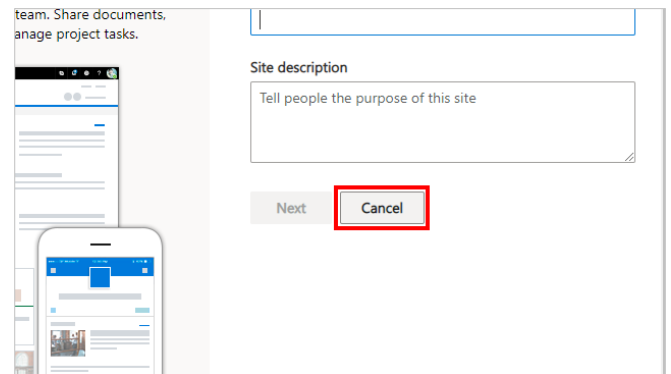
Click on the button ☐ **Create site**



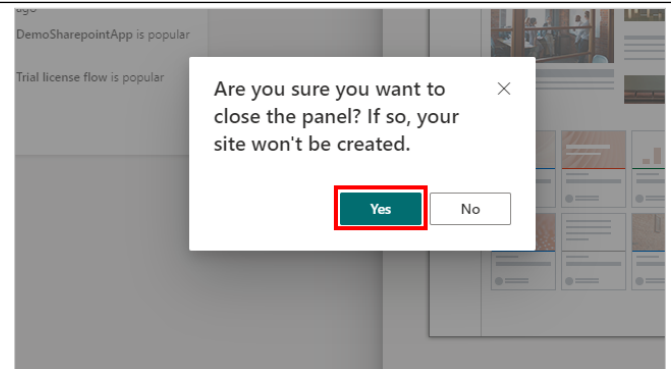
Click on the button **Team site**



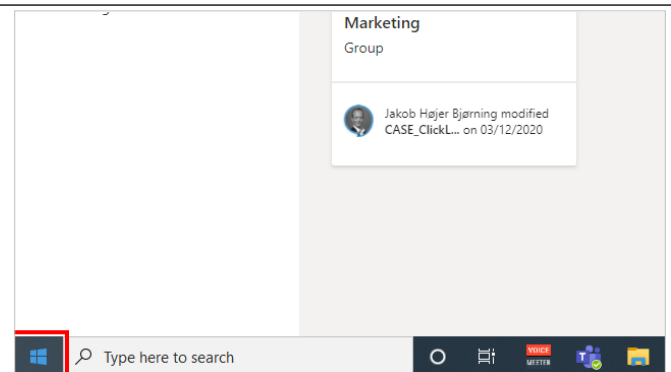
Click on the button **Cancel**



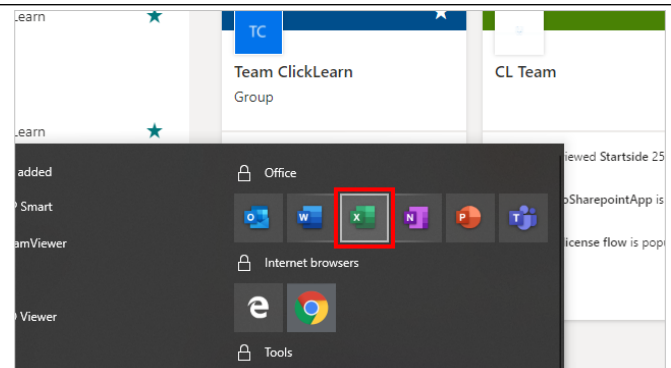
Click on the button **Yes**



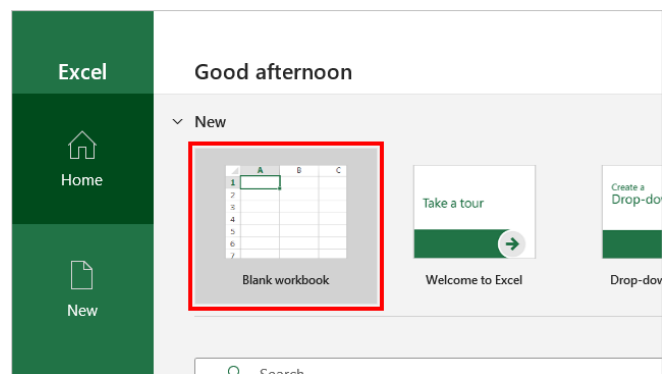
Click on the button **Start**.



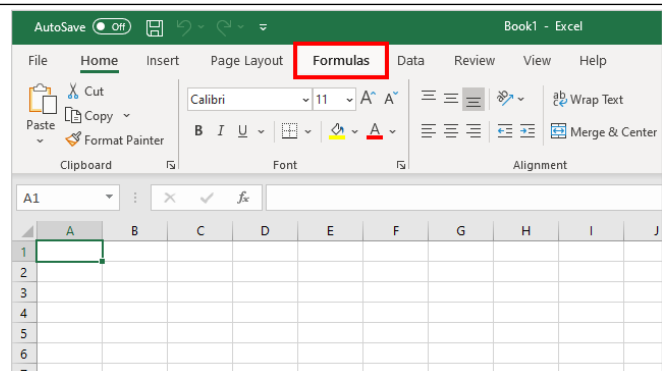
Click on the list element **Excel**.



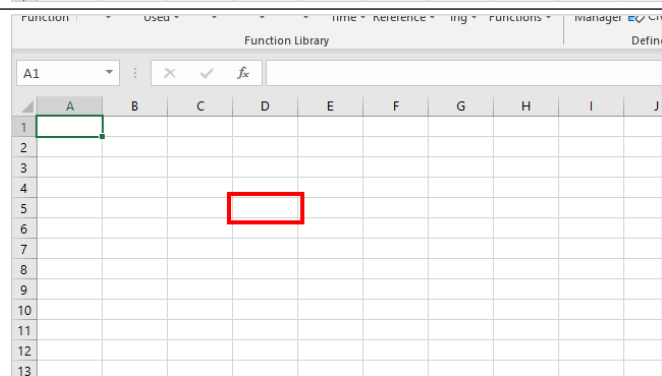
Click on the list element **Blank workbook**.



Click on the tab **Formulas**.



Click on the cell **D5**



Click on the button **Close**.

