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:

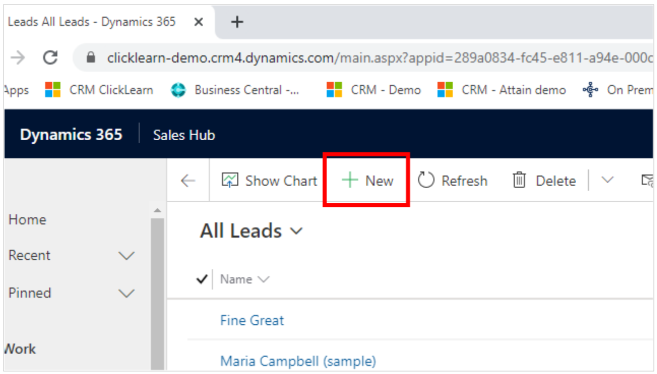
- Full name
- Job title
- Email address
- Mobile phone number

1.1.2. Navigation

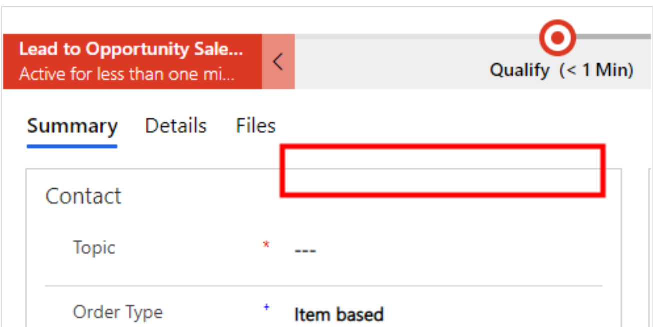
Click on the item **Leads**

1.1.3. Steps

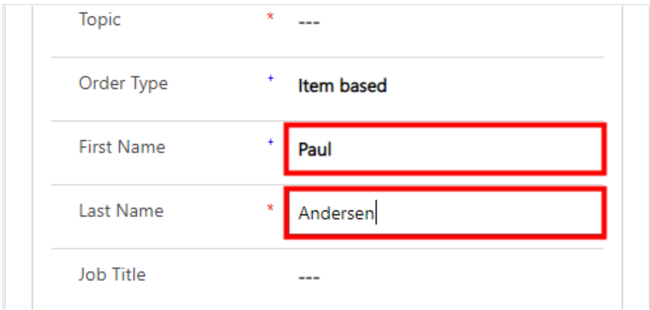
Click on the menu item **New**



1.1.3.1. Enter lead topic and name



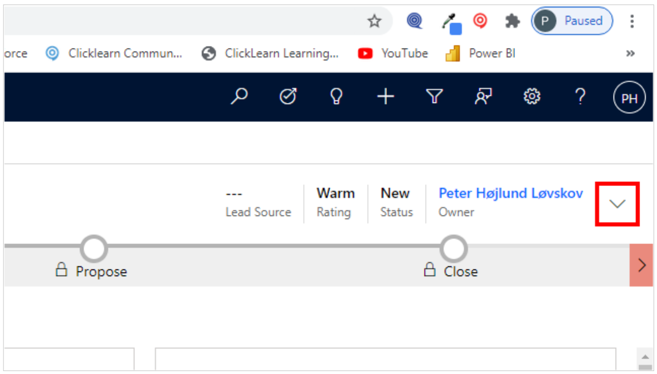
1. Click on the text field **Topic** - Enter **Topic**.



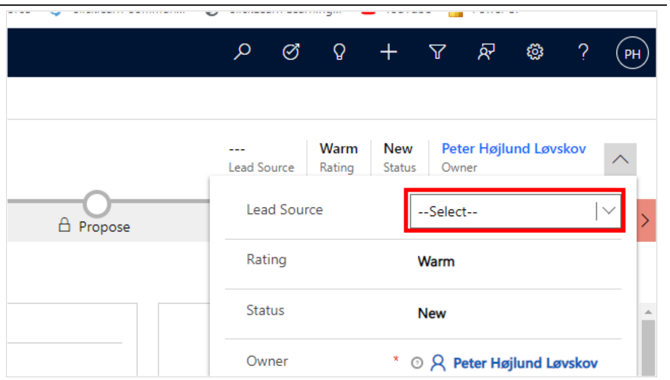
- Click on the text field **First Name** - Enter **First Name**.
- Click on the text field **Last Name** - Enter **Last Name**.

1.1.3.2. Enter lead source and rating

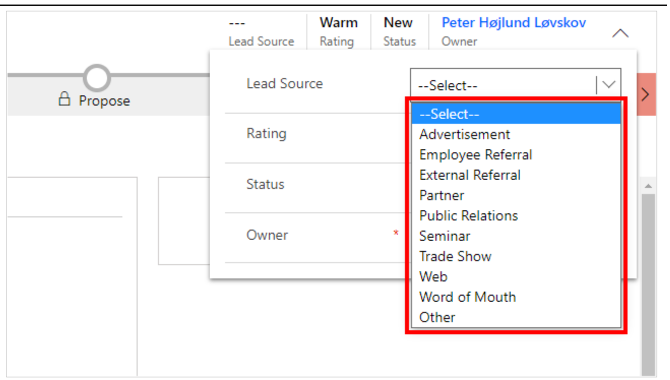
Click on the button **More Header Fields**



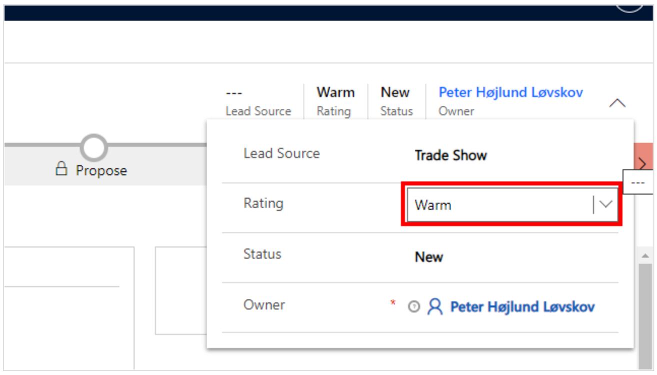
Click on the field **Lead Source**



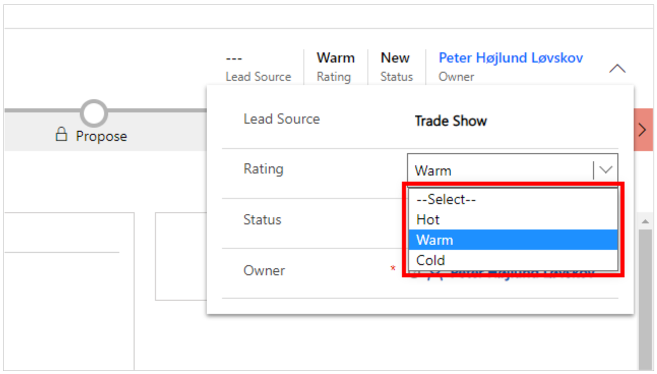
Click on the item **Trade Show** in the list



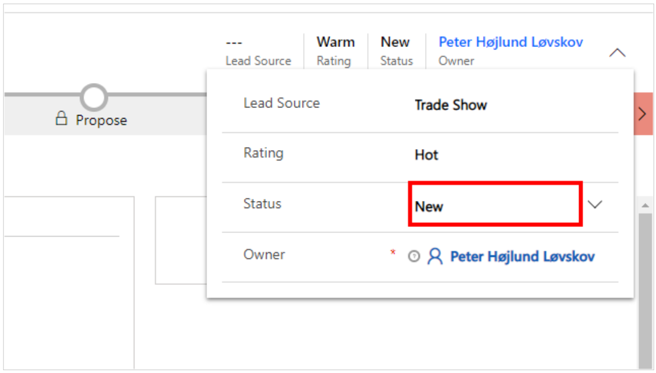
Click on the field **Rating**



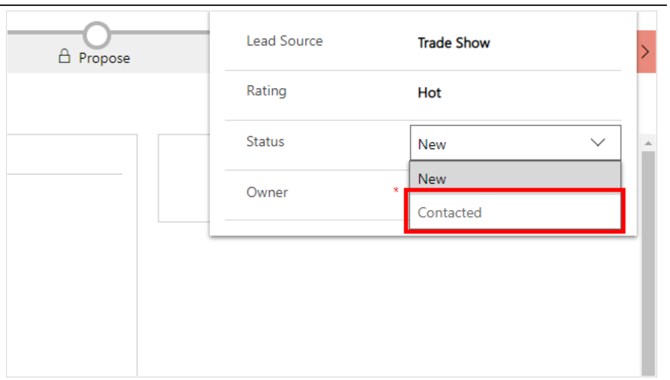
Click on the item **Hot** in the list



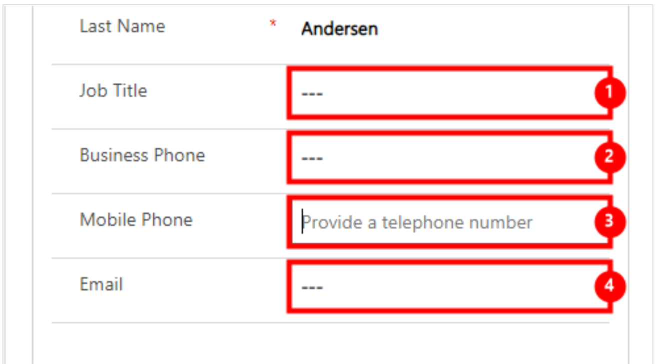
Click on **Status**



Click on the item **Contacted**



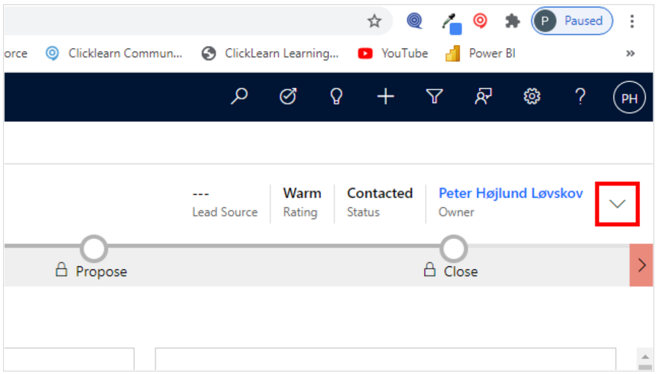
1.1.3.3. Enter additional contact details (when available)



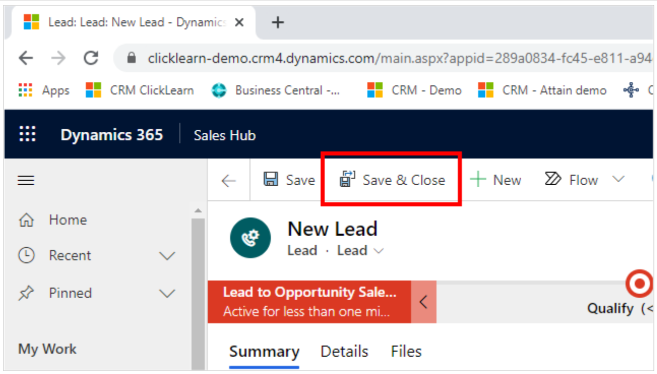
1. Click on the text field **Job Title**
2. Click on the text field **Business Phone**
3. Click on the text field **Mobile Phone**
4. Click on the text field **Email**

1.1.3.4. Verify the correct owner of the lead is set

Click on the button **More Header Fields**

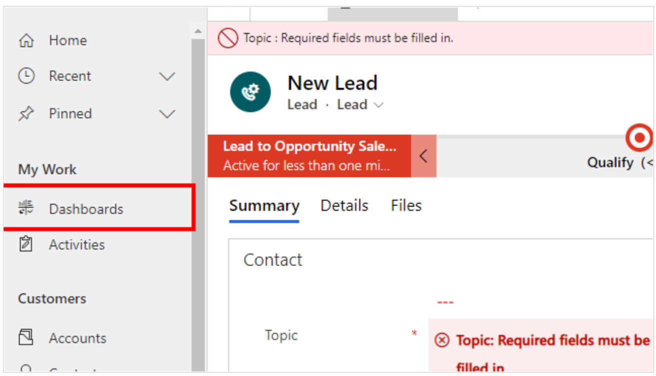


Click on the menu item **Save & Close**



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

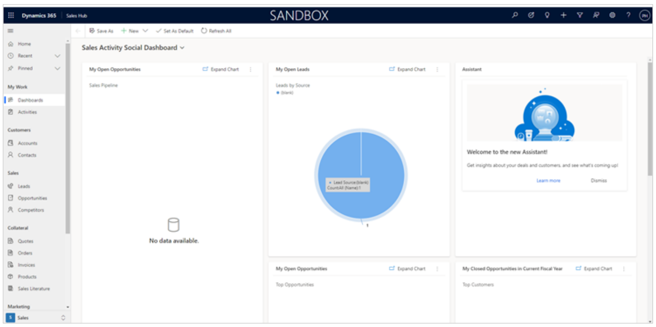
1.2.1. Objective

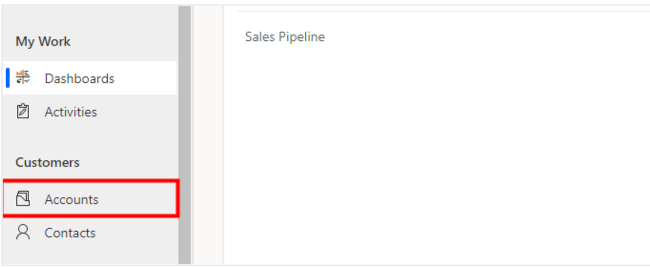
The following describes the process for creating a new account. If you create accounts on behalf of the actual account owner, be sure to assign the correct owner after completing this procedure.

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

- Company name
- Website URL
- Phone number
- Address

1.2.2. Navigation

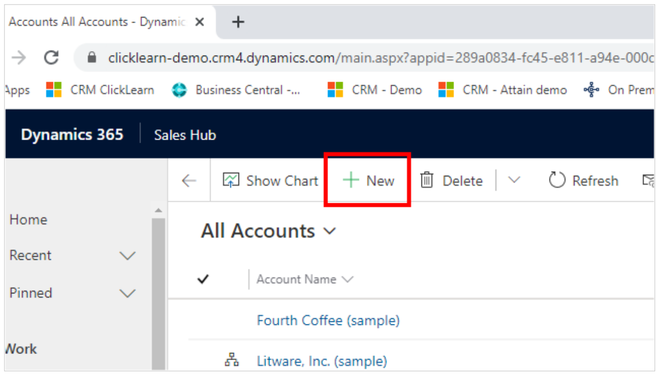




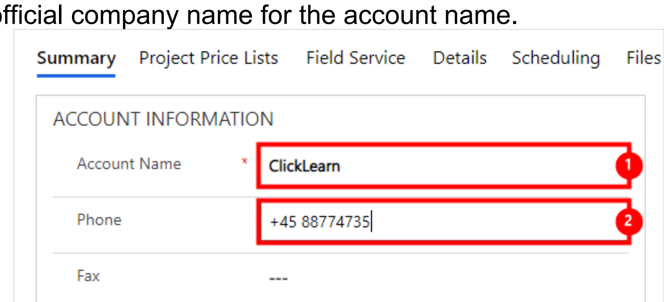
1. Click on the item **Accounts**

1.2.3. Steps

Click on the menu item **New**

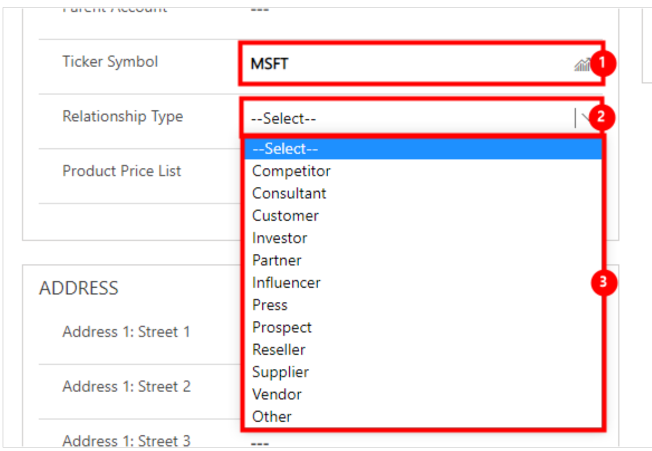


Remember to use the full official company name for the account name.



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**.

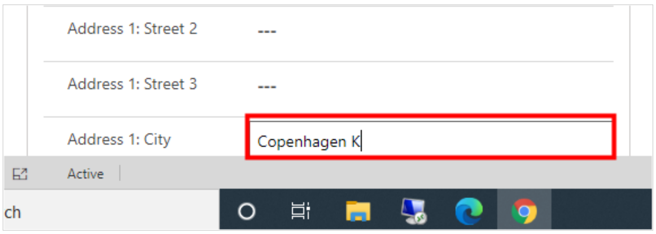
1. Click on the text field **Website** - Enter **the official website address**.



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

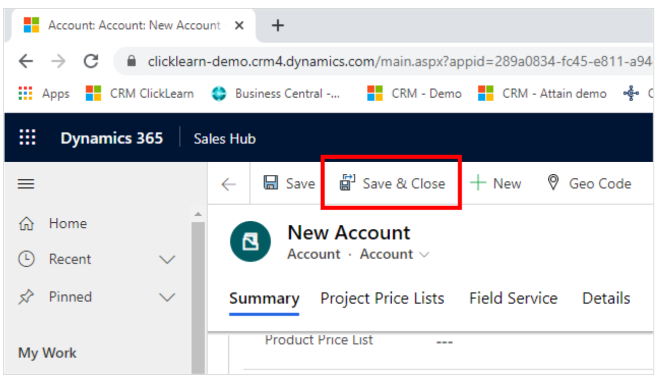
1. Click on the text field **Address 1: Street 1** - Enter **Address 1: Street 1**.



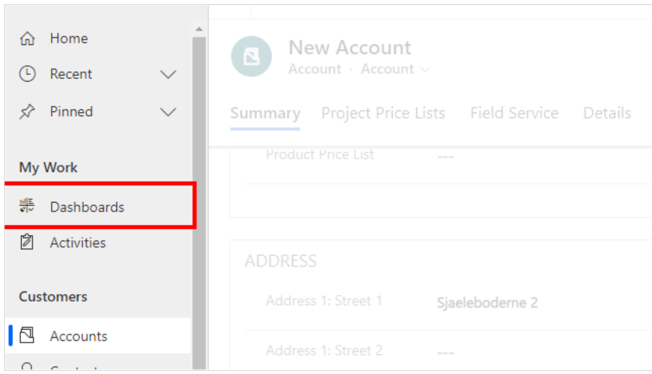
1. Click on the text field **Address 1: City** - Enter **Address 1: City**.

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

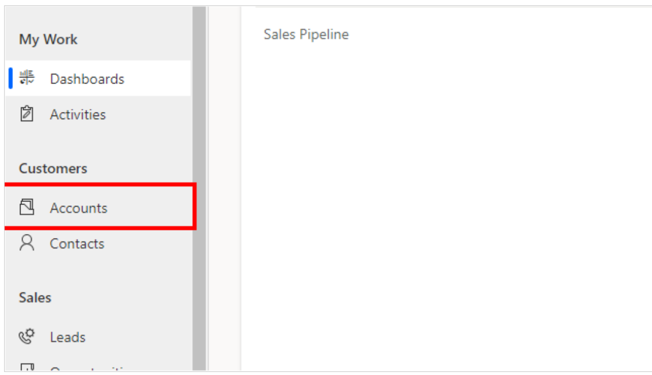
The following describes the process for creating a new contact on an existing account. If you create contacts on behalf of the actual account owner, be sure to assign the correct owner after completing this procedure

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

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

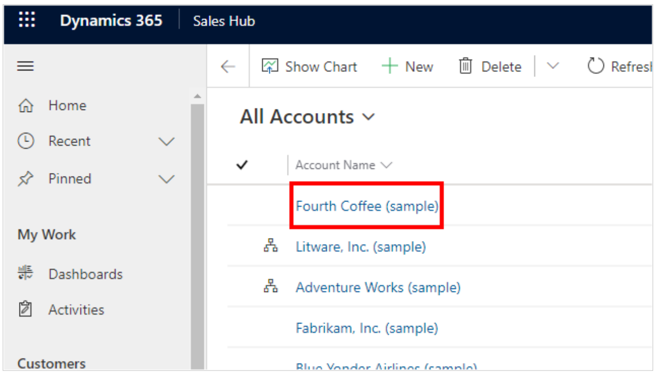
1.3.2. Navigation

Click on the item **Accounts**

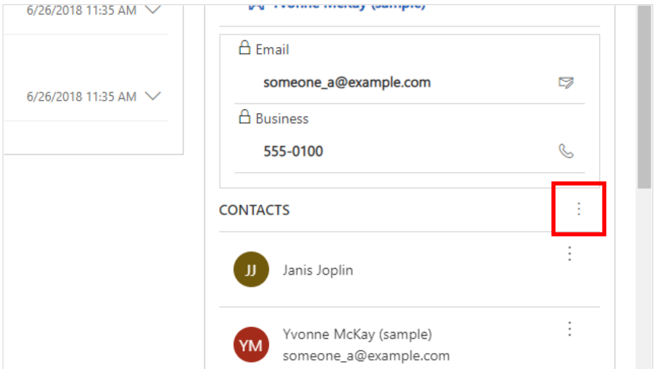


1.3.3. Steps

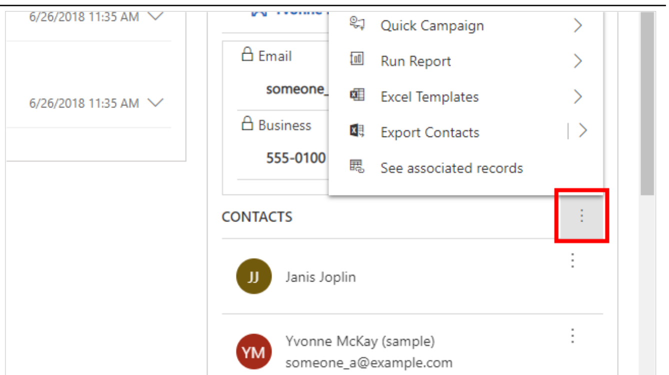
Click on the link in cell **Fourth Coffee (sample)**



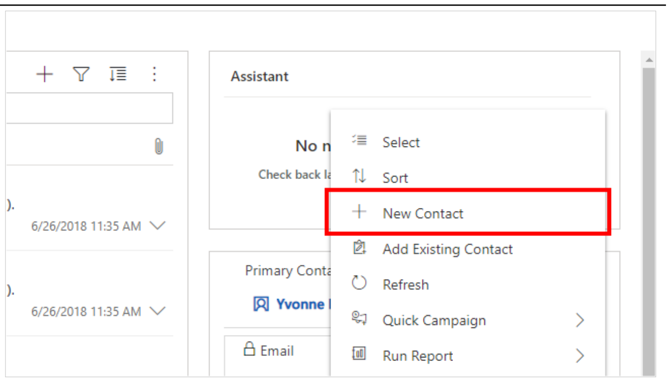
Click on the menu item

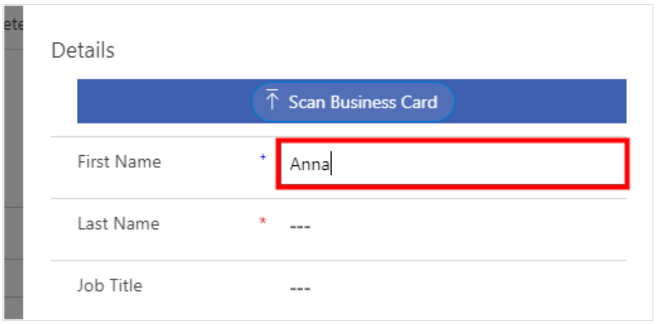


Click on the menu item

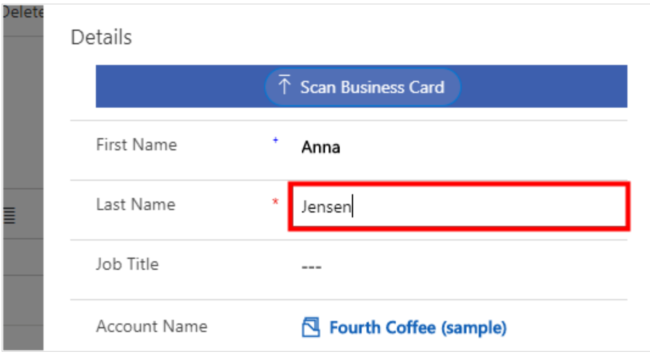


Click on the menu item **New Contact**

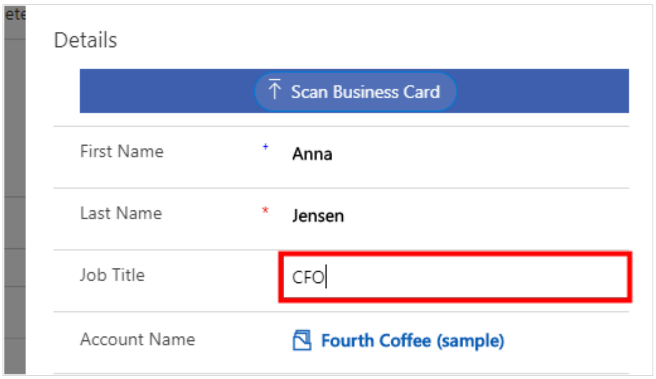




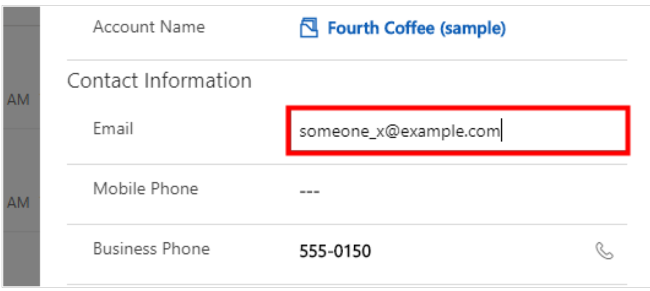
1. Click on the text field **First Name** - Enter **First Name**.



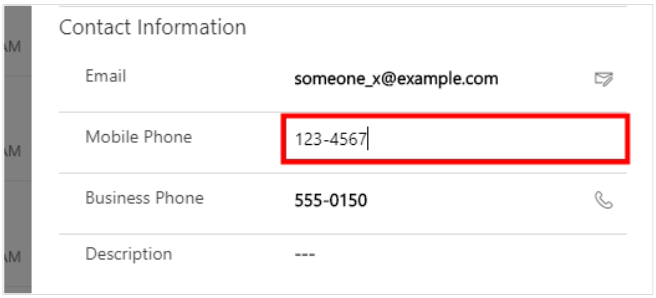
1. Click on the text field **Last Name** - Enter **Last Name**.



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

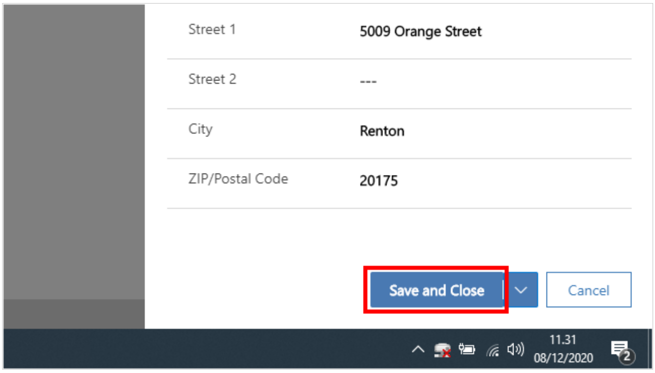


1. Click on the text field **Email** - Enter **Email**.

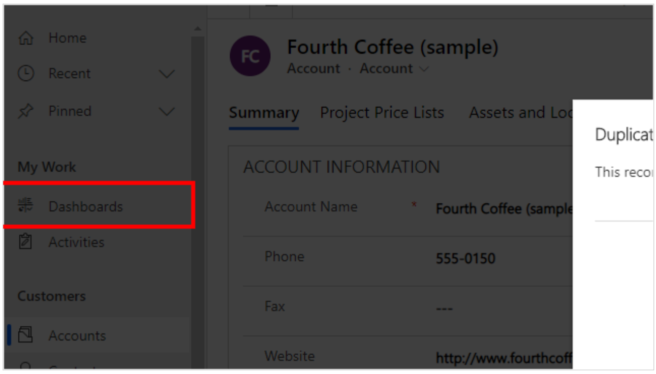


1. Click on the text field **Mobile Phone** - Enter **Mobile Phone**.

Click on the button **Save and Close**



Click on the item **Dashboards**



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

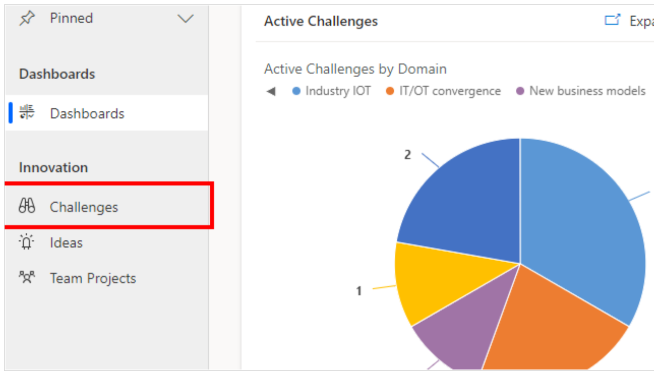
2. Power Platform

2.1. Create a Challenge

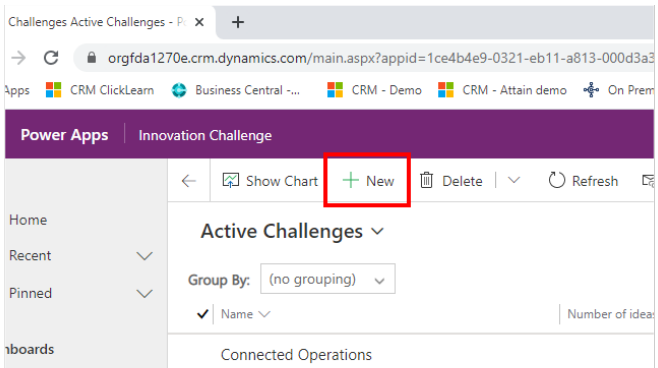
2.1.1. Objective

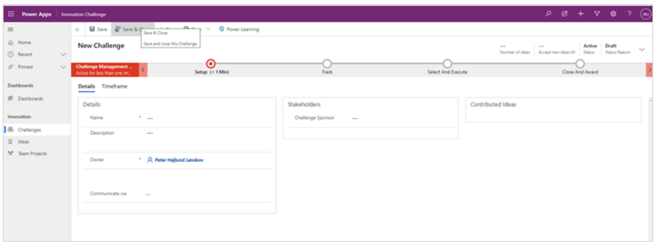
Use this guide to setup a Challange

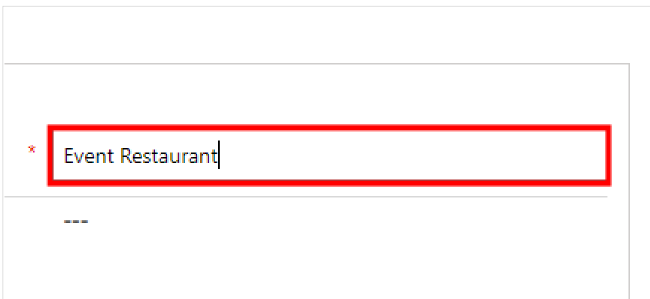
Click on the item **Challenges**



Click on the menu item **New**



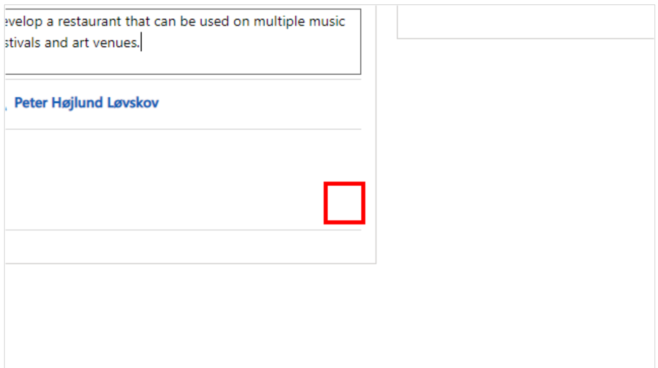




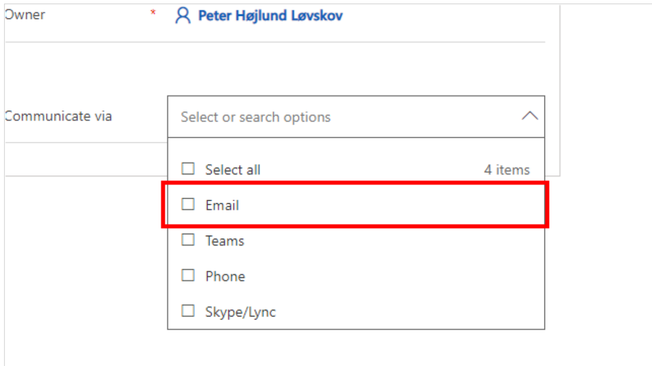
- Click on the text field **Name** - Enter **Name**.

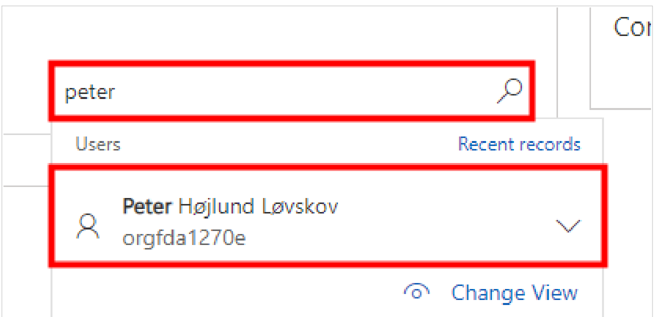
- Click on the text field **Description** - Enter **Description**.

Click on the field **Communicate via**



Click on the item **Communicate via**

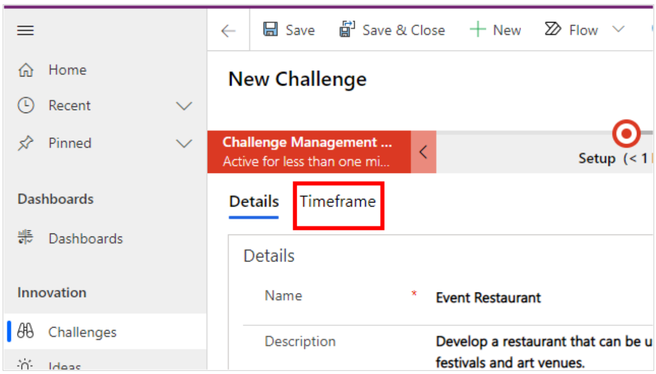


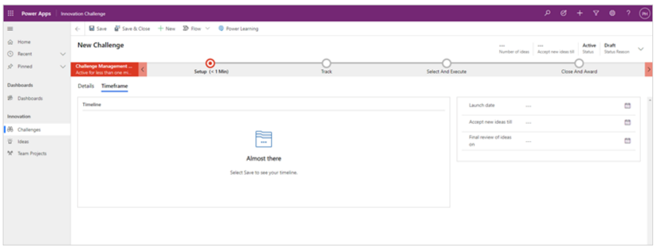


- Click on the lookup field **Challenge Sponsor** - Enter **Challenge Sponsor**.
- Click on the item **Peter Højlund Løvskov orgfda1270e Product Evangelist phl@clicklearn.com**

2.1.2. Set the timeframe for incomming ideas

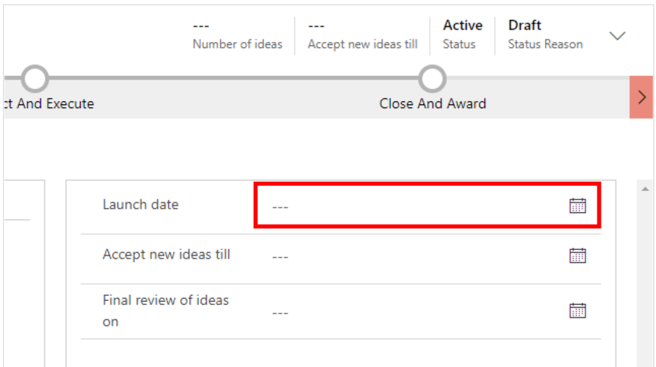
Click on the item **Timeframe**



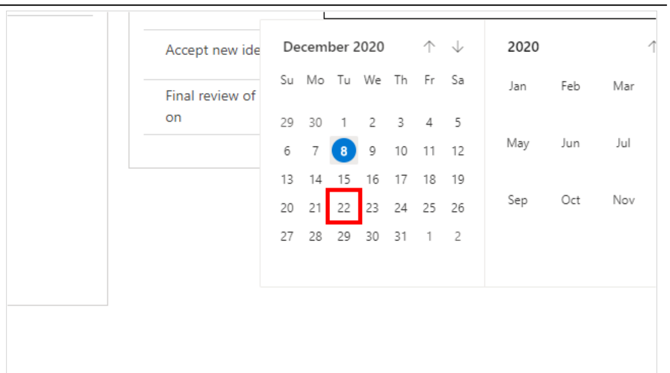


2.1.2.1. Set Launch date for the challange

Click on **Launch date**

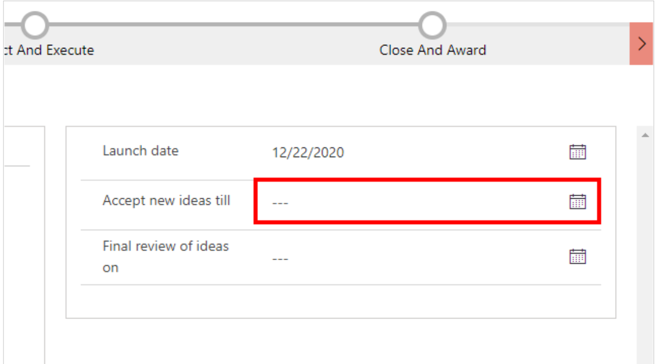


Click on a day number. In this example the day **22**

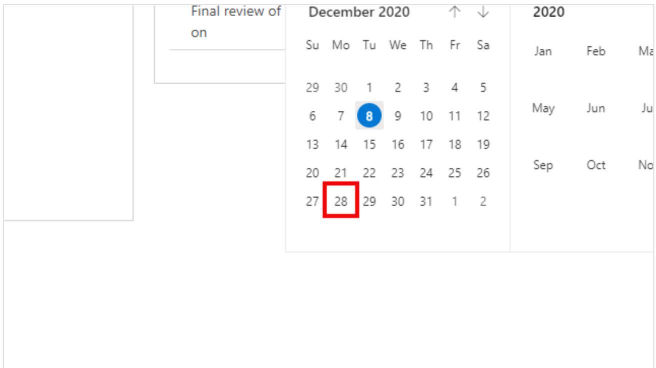


2.1.2.2. Set the end date for incomming ideas

Click on **Accept new ideas till**

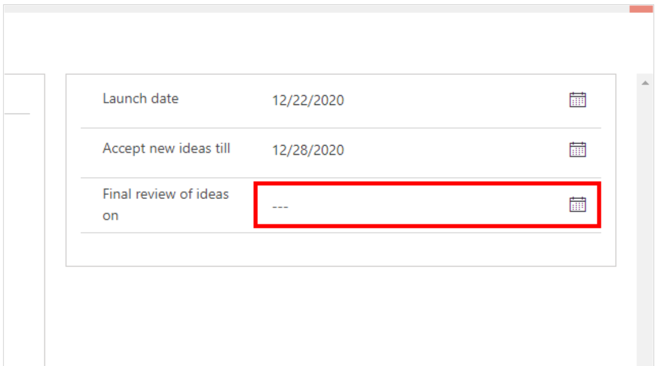


Choose the month and year
Click on a day number. In this example the day **28**

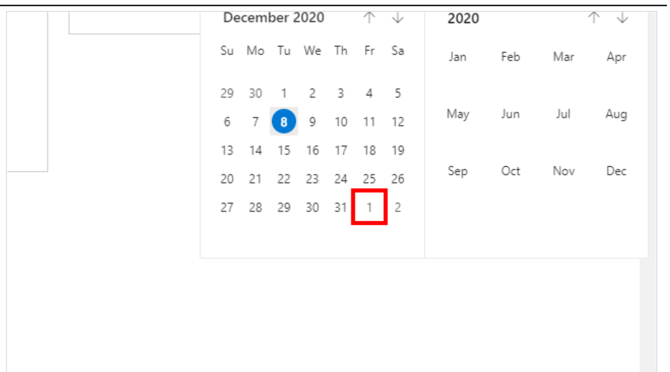


2.1.2.3. Set the date for final decision on ideas for the challange

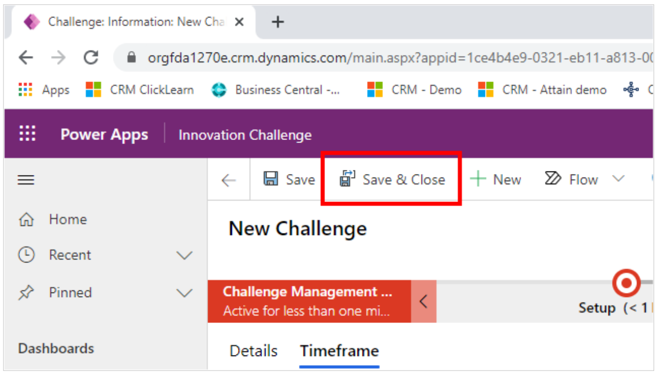
Click on the field **Final review of ideas on**



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



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

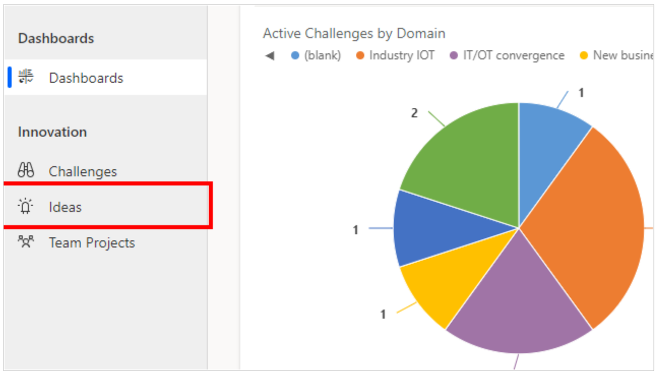


2.2. Create an Idea

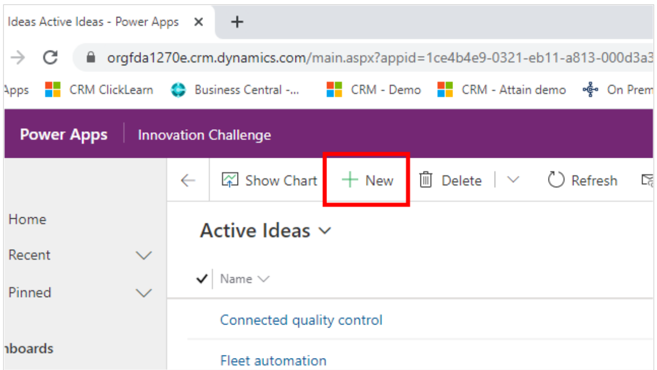
2.2.1. Objective

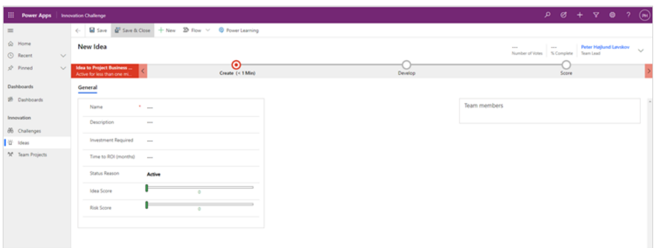
Use this guide to create an idea, that for example can be used in a challange

Click on the item **Ideas**

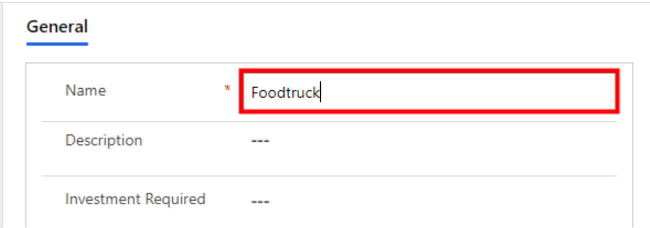


Click on the menu item **New**

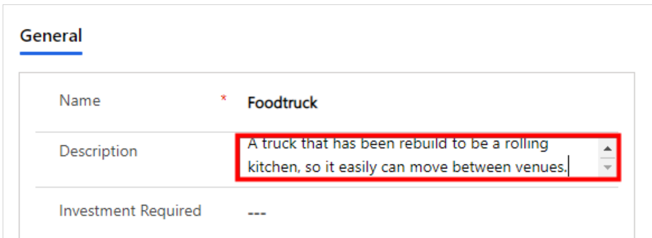




2.2.2. Fill in the information required in the fields below

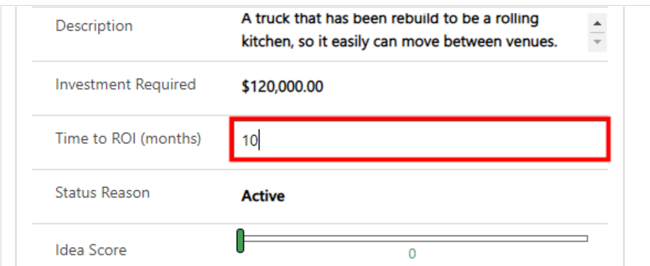


- Click on the text field **Name** - Enter **Name**.



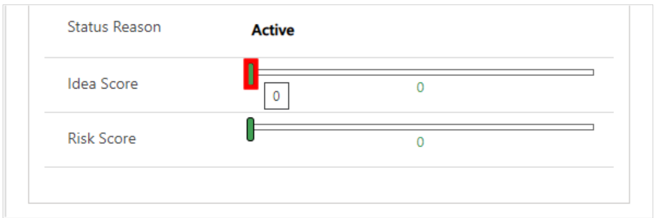
- Click on the text field **Description** - Enter **Description**.

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



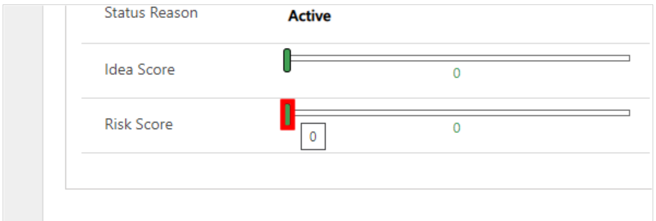
- Click on the text field **Time to ROI (months)** - Enter **Time to ROI (months)**.

2.2.2.1. Set the Idea score



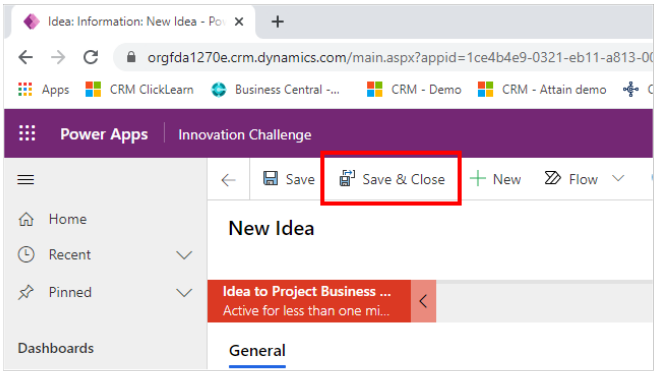
- Click and hold the left mouse button on the link **0**
- Release the left mouse button on the link **0**

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**

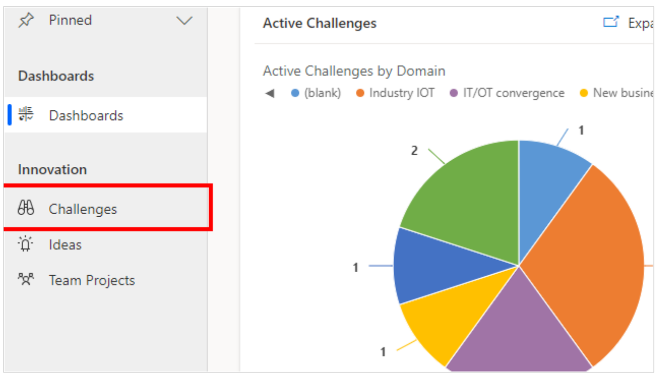
Click on the menu item **Save & Close**



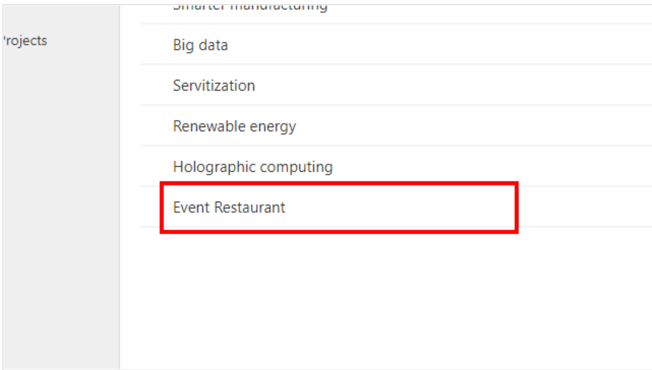
2.3. Add an Idea to a Challenge

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

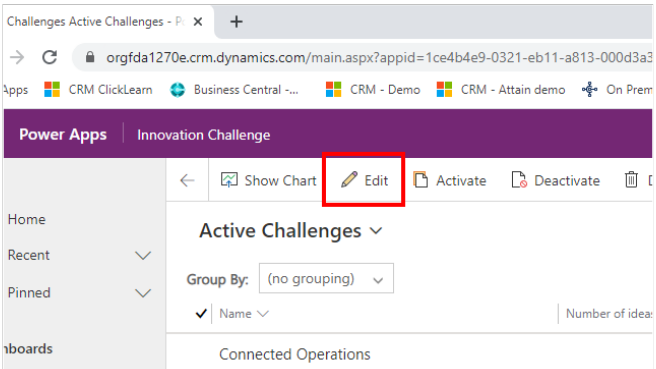
Click on the item **Challenges**

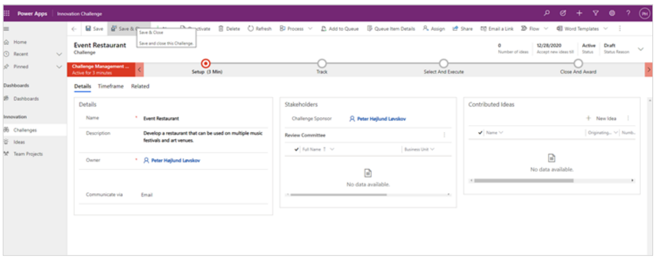


Click on the cell **Name**



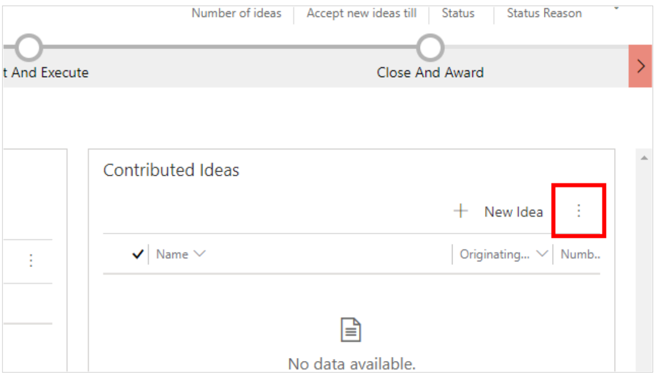
Click on the menu item **Edit**



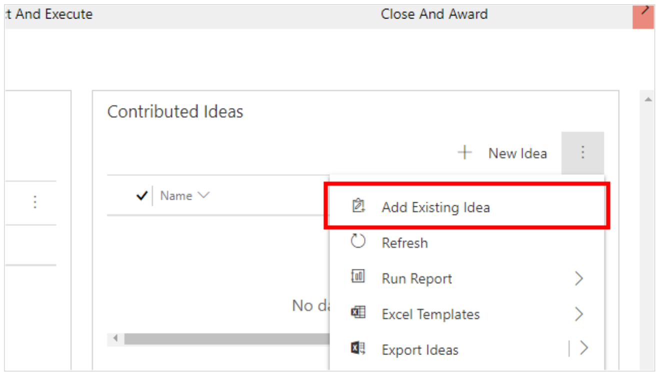


2.3.2. Go to Contributed Ideas

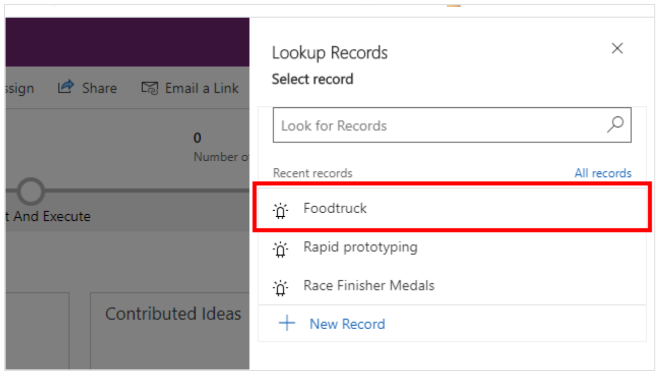
Click on the menu item



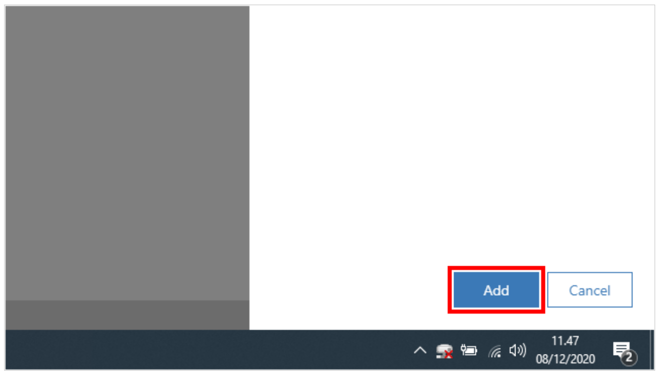
Click on the menu item **Add Existing Idea**



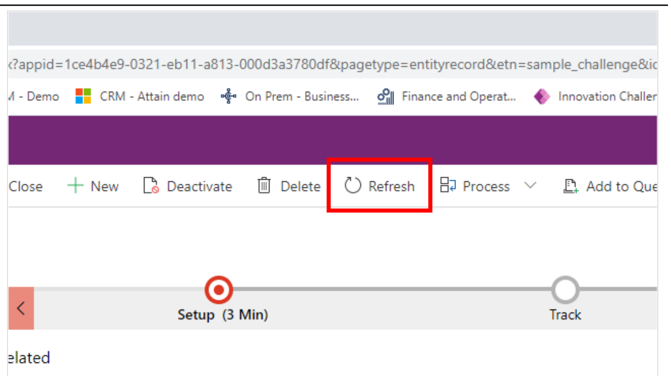
Click on the item **Foodtruck**



Click on the button **Add**



Click on the menu item **Refresh**

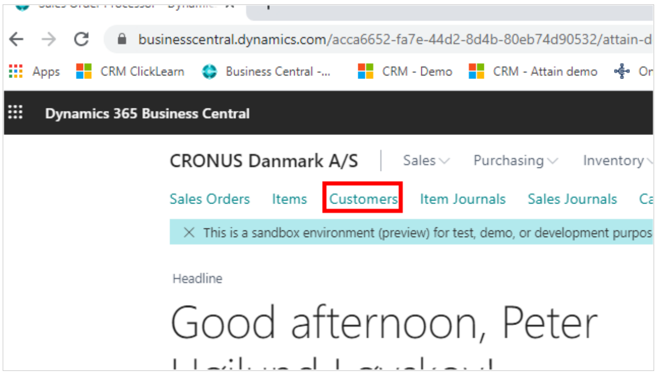


2.3.3. An existing Idea have now been added to the challenge

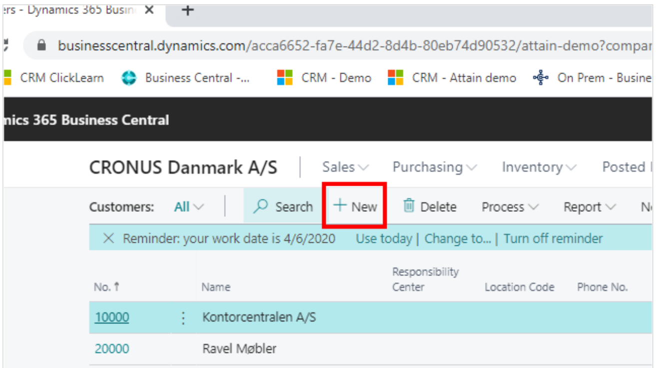
3. Business Central

3.1. Create a new customer

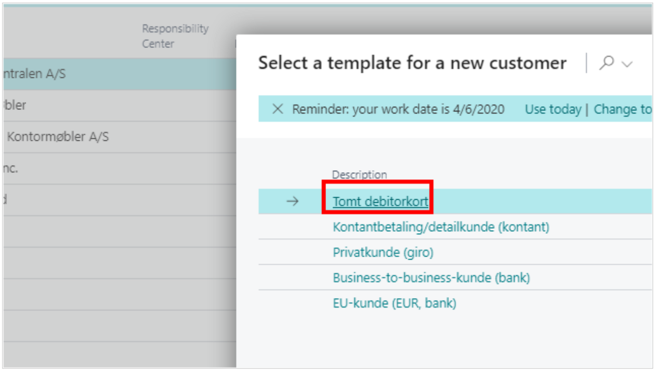
Click on the navigation menu item **Customers**



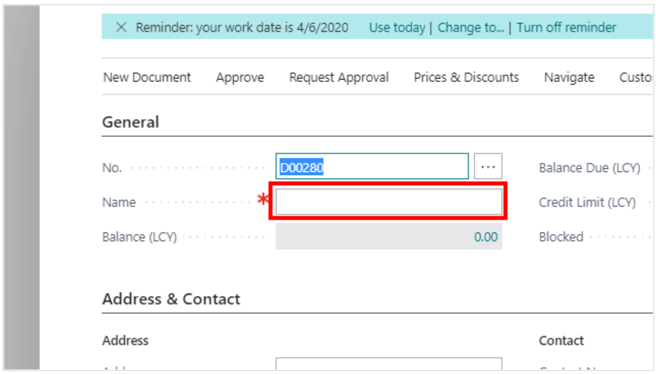
Click on the navigation menu item **New**



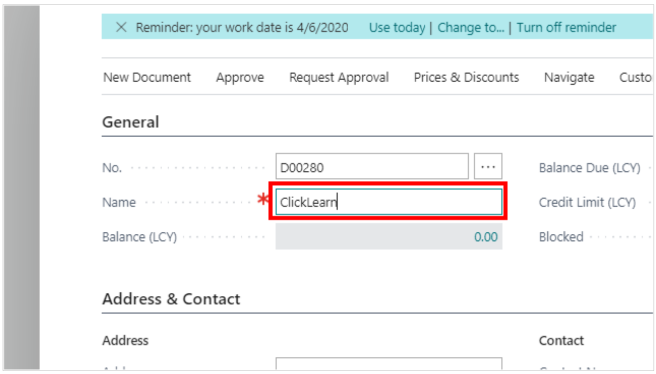
Click on the link in cell **Description** with the value **Tomt debitorkort**



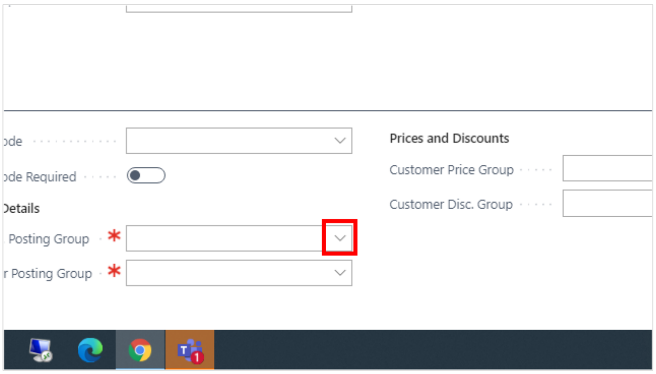
Click on the field **Name**



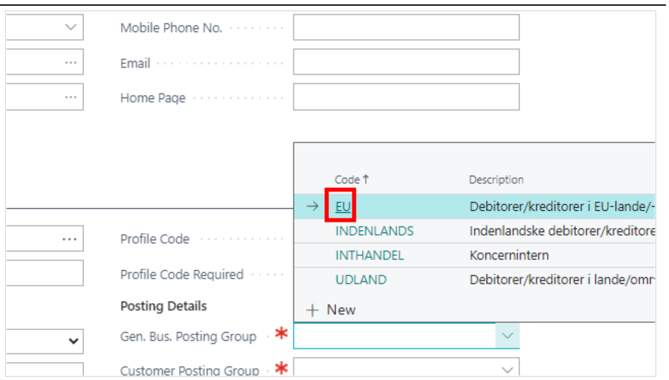
Enter **Name**.



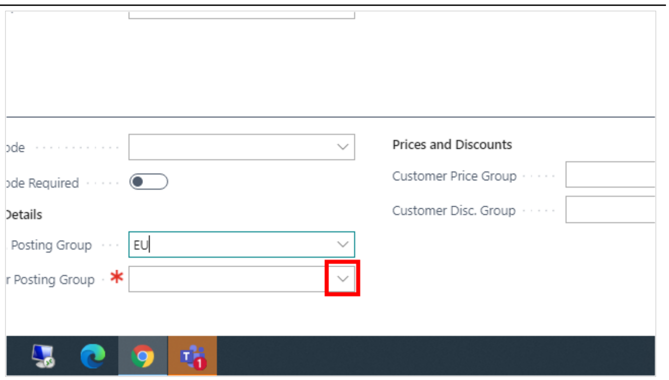
Click on the lookup button **Gen. Bus. Posting Group**



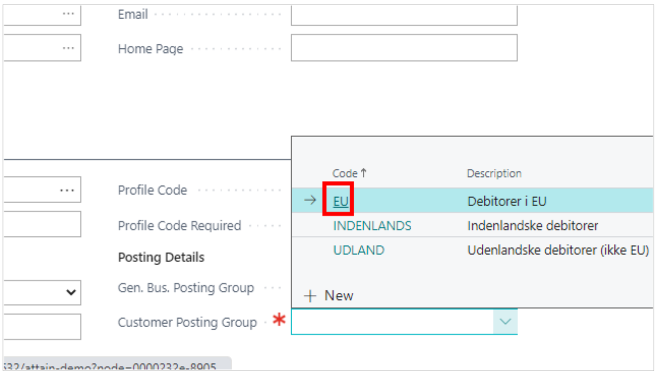
Click on the link in cell **Code** with the value **EU**



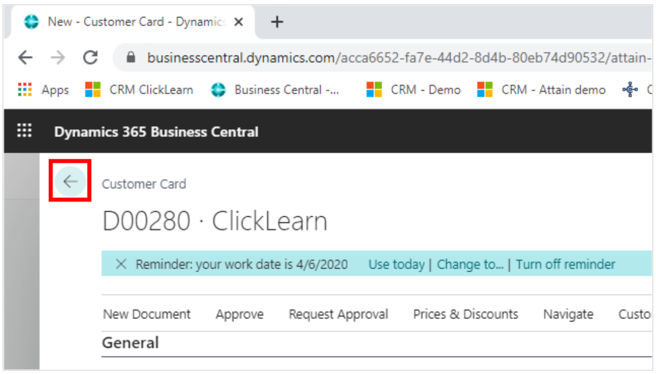
Click on the lookup button **Customer Posting Group**



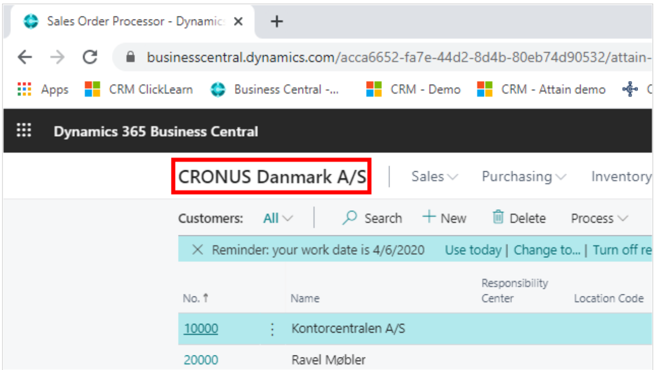
Click on the link in cell **Code** with the value **EU**



Click on the back button

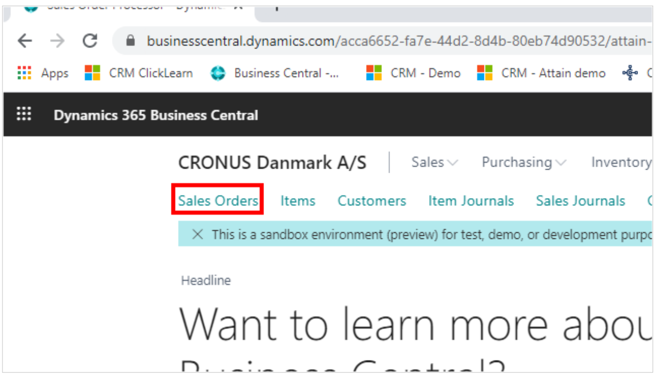


Click on the navigation menu item **CRONUS Danmark A/S**

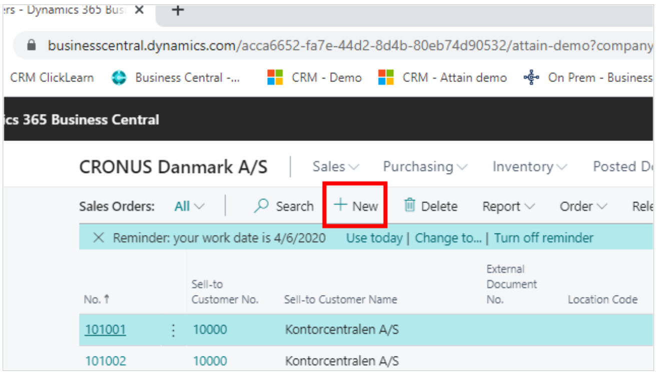


3.2. Create a New Sales Order

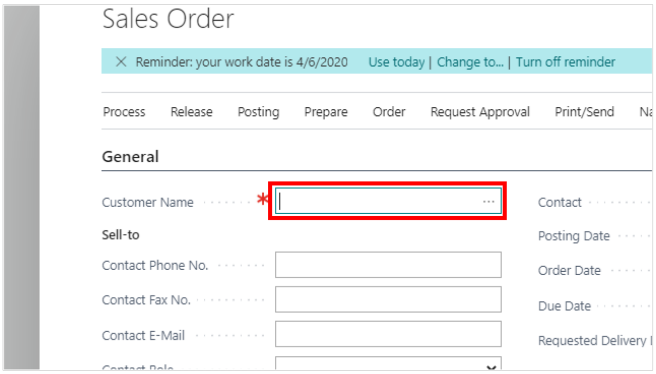
Click on the navigation menu item **Sales Orders**



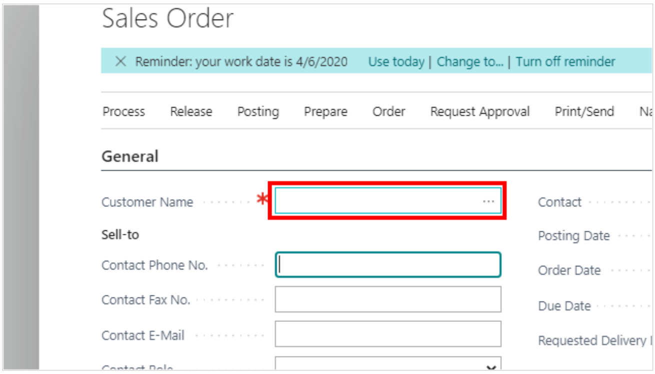
Click on the navigation menu item **New**



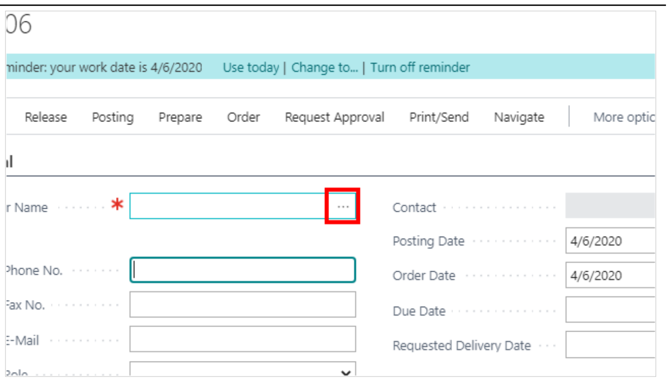
Click on the field **Customer Name**



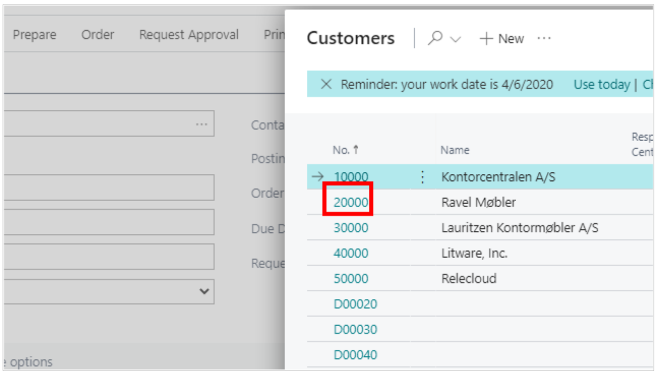
Press the **TAB** key.



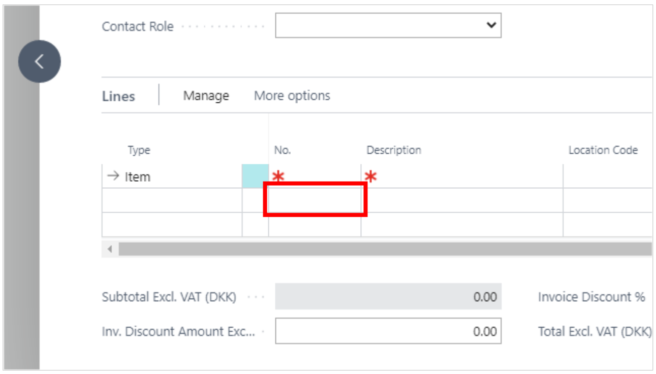
Click on the lookup button **Customer Name**



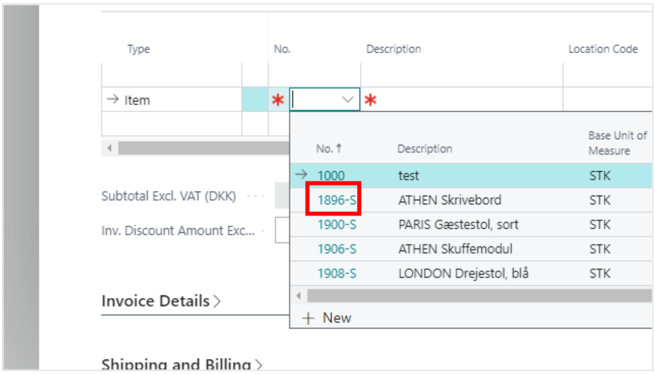
Click on the link in cell **No.** with the value **20000**



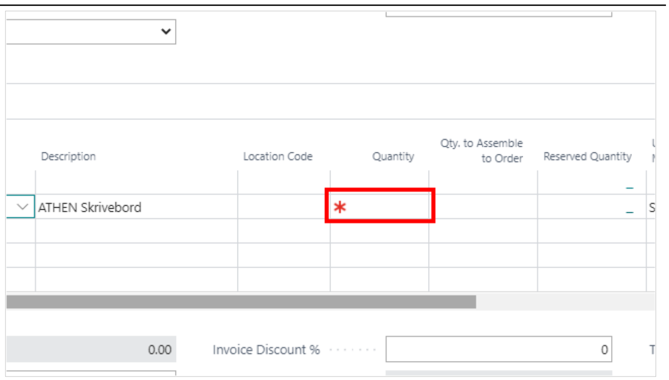
Click on the cell **No.**



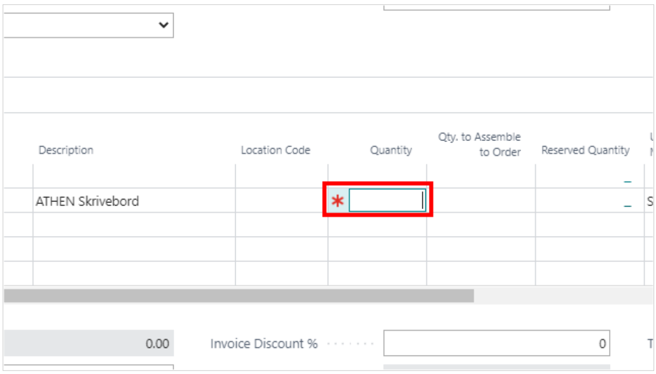
Click on the link in cell **No.** with the value **1896-S**



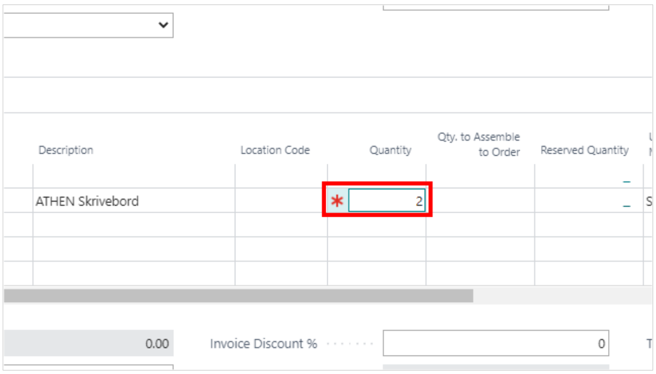
Click on the cell **Quantity**



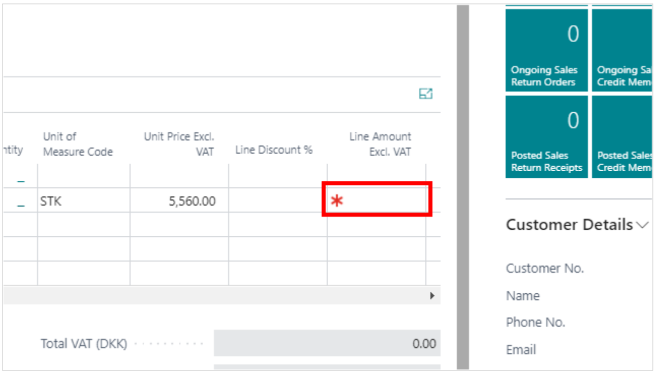
Click on the cell **Quantity**



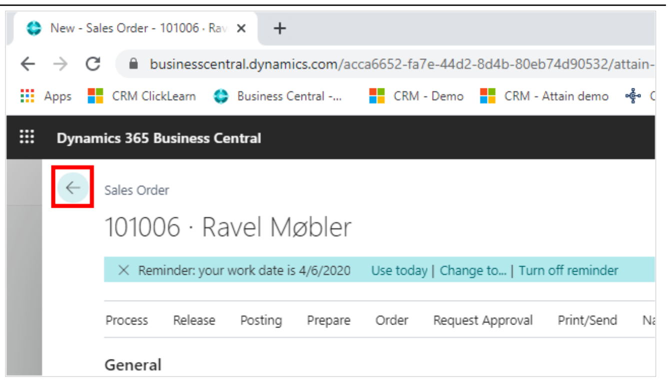
Enter **Quantity**.



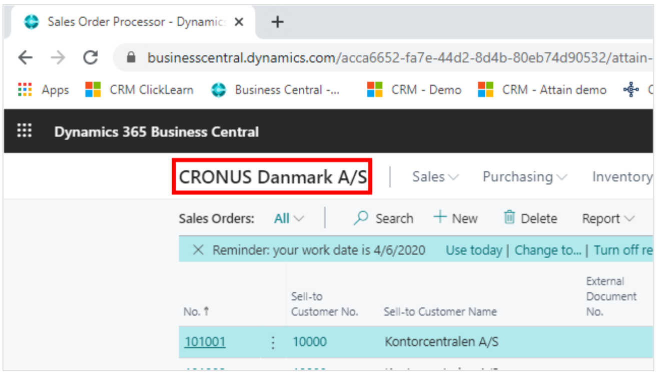
Click on the cell **Line Amount Excl. VAT**



Click on the back button



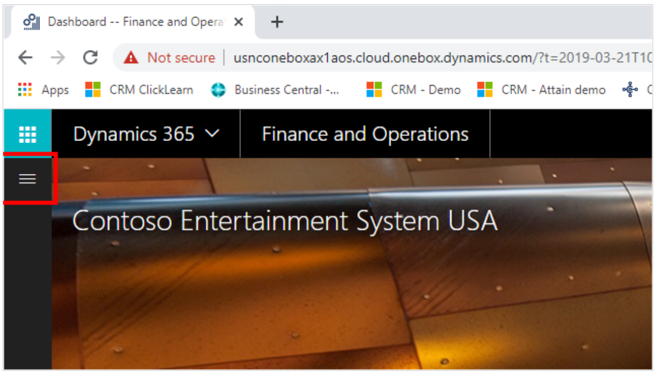
Click on the navigation menu item **CRONUS Danmark A/S**



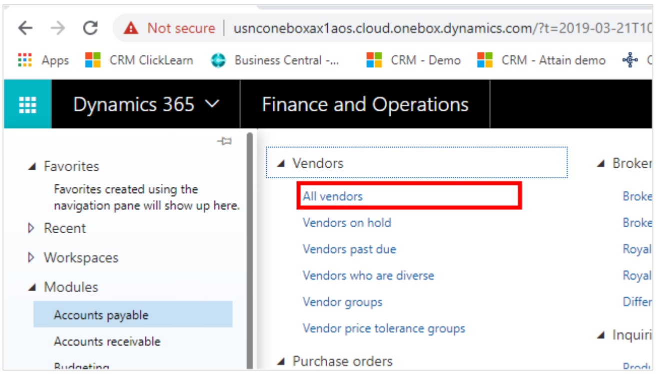
4. Finance and Operations

4.1. Validate Vendor Info

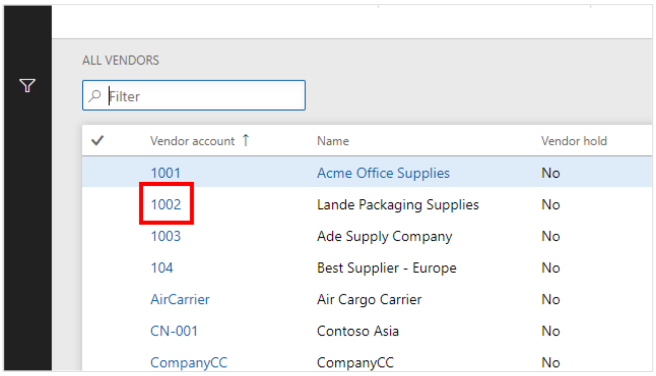
Click on the navigation button



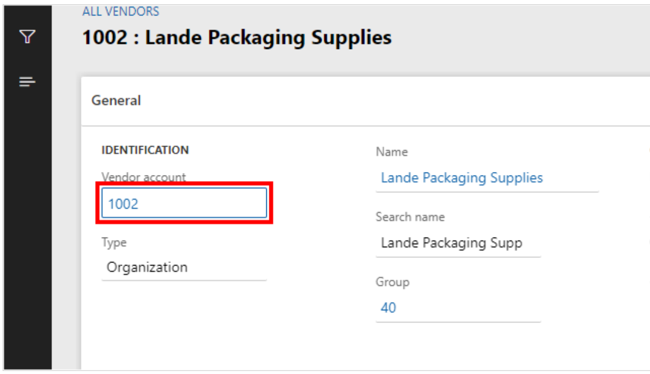
Click on the navigation item link **All vendors**



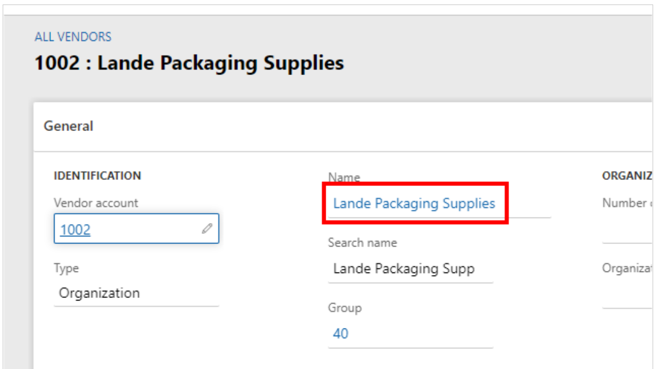
Click on the link in grid cell **Vendor account** with the value **1002**



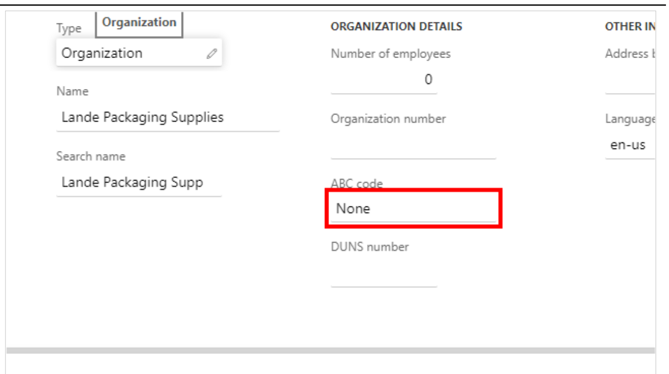
Click on the field **Vendor account**



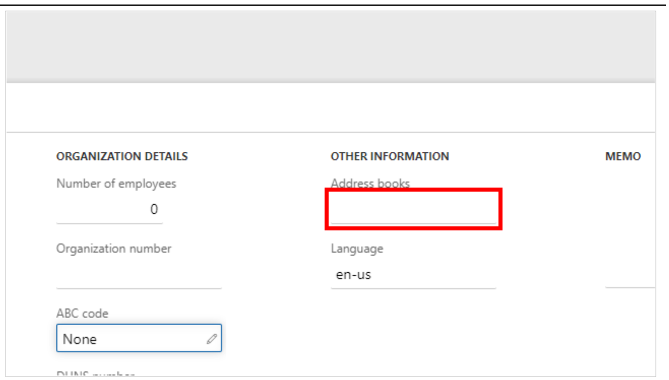
Click on the linke in the field **Name**



Click on the combobox field **ABC code**



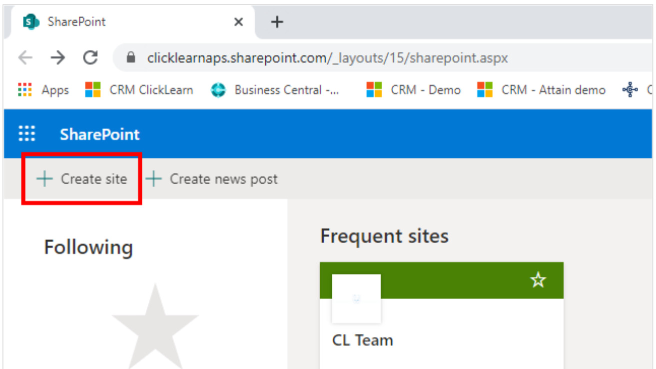
Click on the field **Address books**



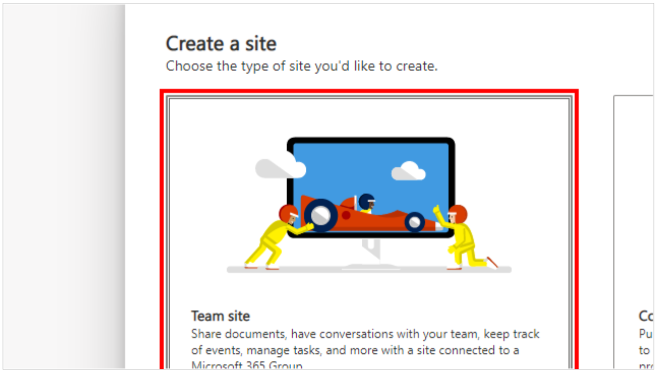
5. SharePoint

5.1. Create a Team in Sharepoint

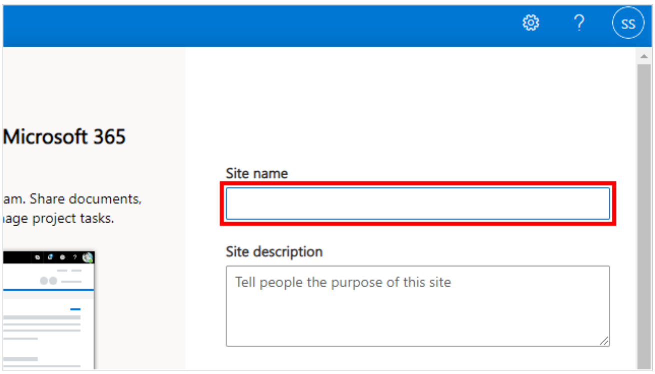
Click on the button □ **Create site**



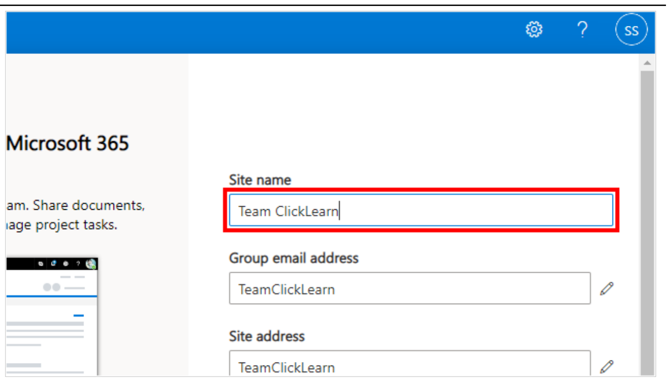
Click on the button **Team site**



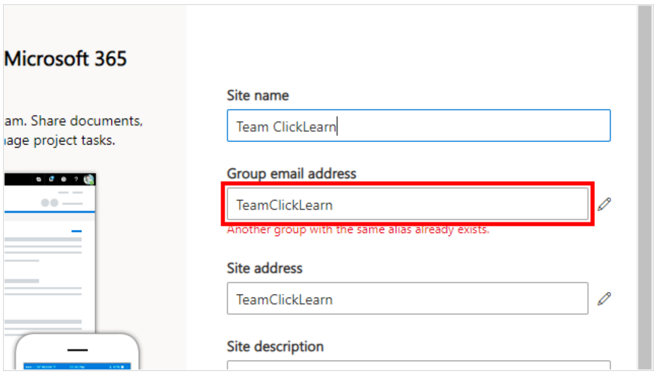
Click on the input field **Site name**



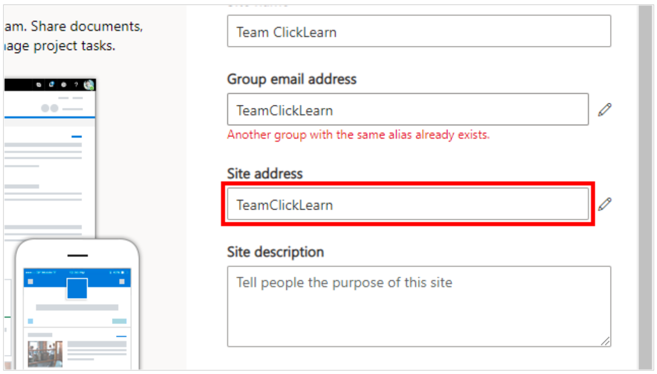
Enter **Site name.**



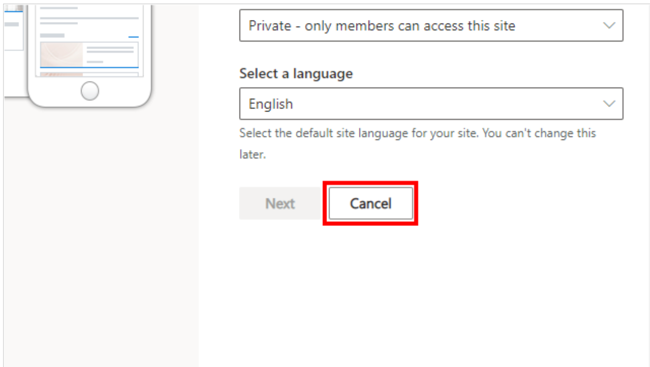
Click on the input field **Group email address**



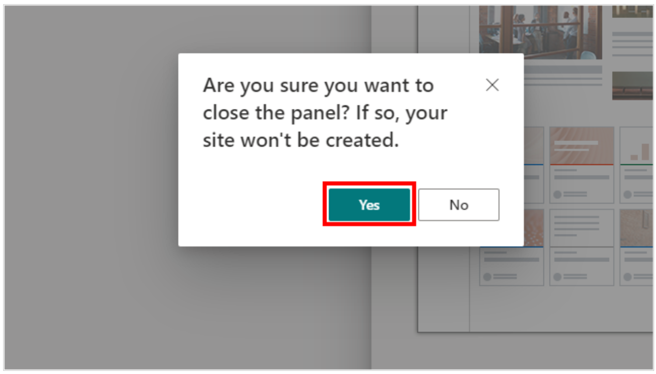
Click on the input field **Site address**



Click on the button **Cancel**



Click on the button **Yes**

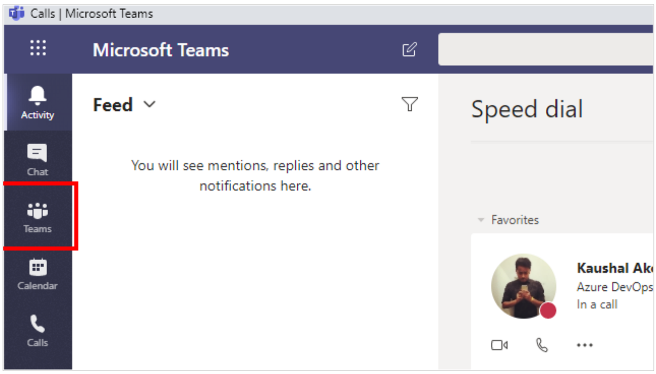


6. Microsoft Teams

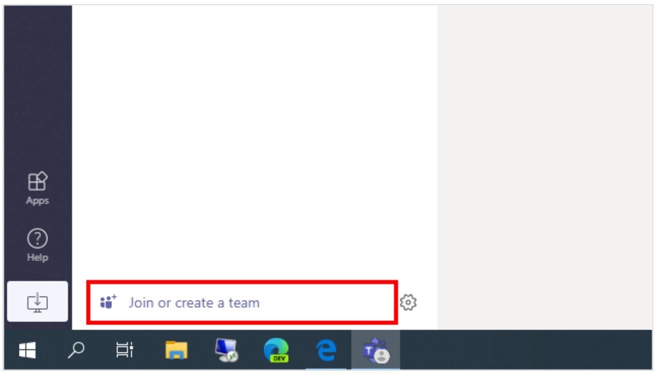
6.1. Create a Team

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

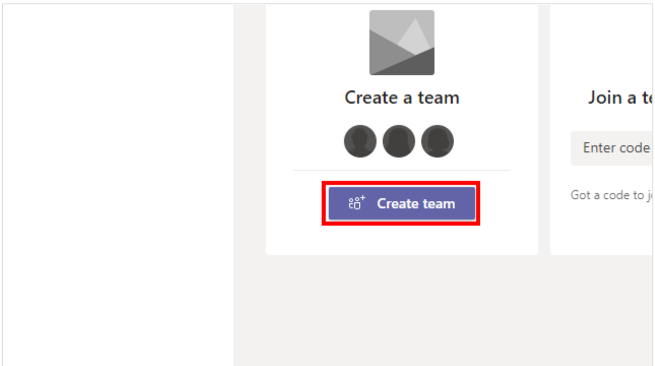
Click on the application link button **Teams Toolbar**



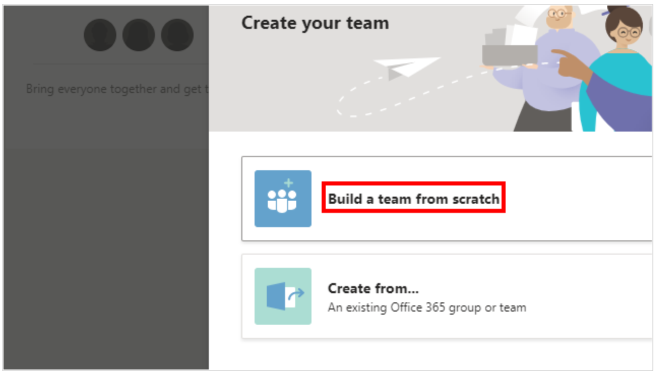
Click on the button **Join or create a team**
This is where you create your own team, or discover existing ones.



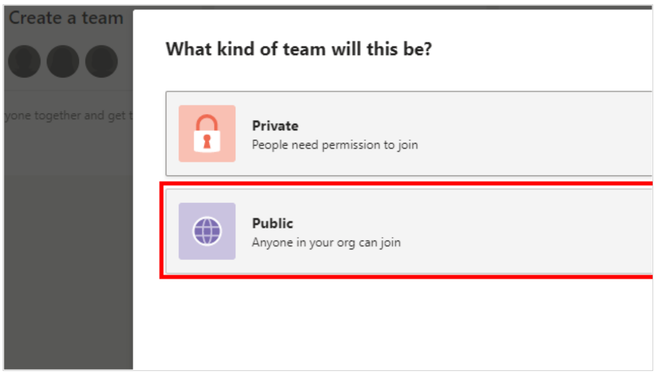
Select Create a new team, and then select Build a team from scratch or select Create from... to build an all-new team or create from an existing group respectively.
Click on team container **Create a team** button



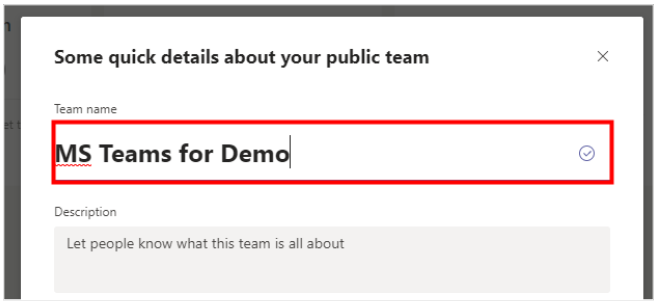
Click on the text **Build a team from scratch**



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.



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

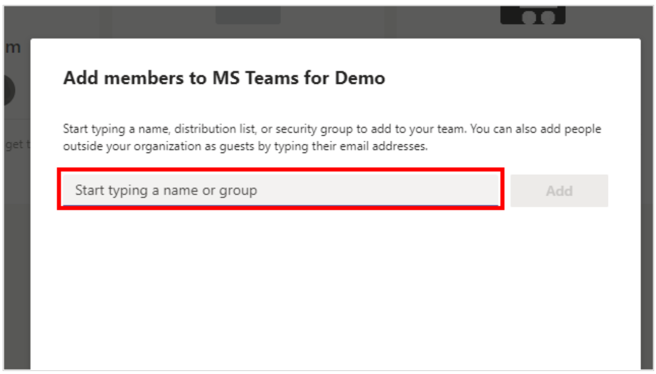


1. Click on the input field **Enter team name** - Enter **Enter team name**.

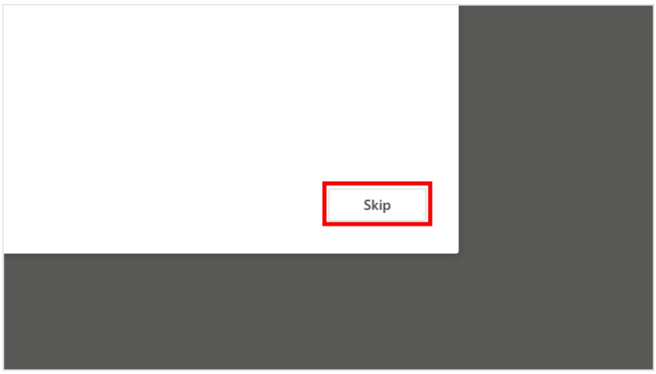
Click on the **Create** button

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**



Click on the **Skip** button

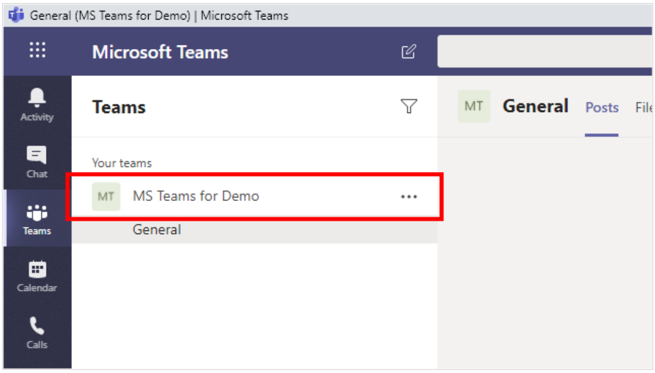


Your Team is now created

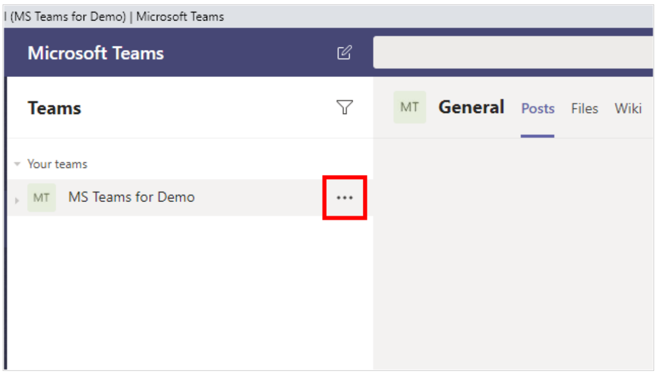
6.2. Create a Channel

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:

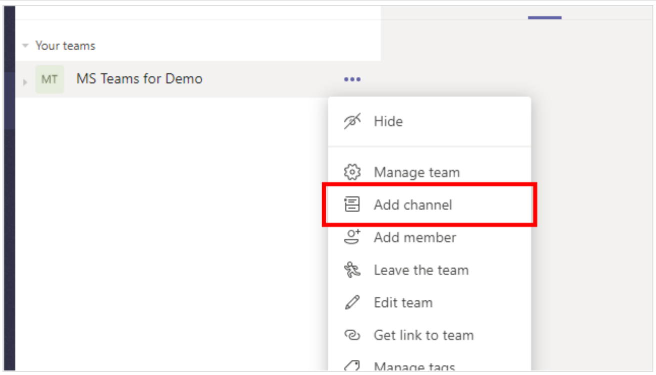
Choose the Team where you want to add an additional channel.
Click on the link **MS Teams for Demo**



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

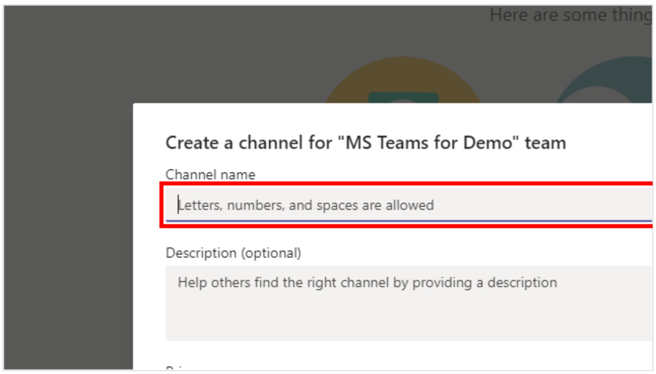


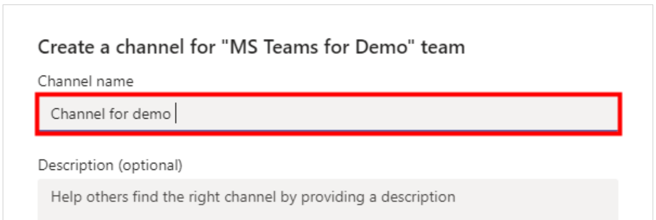
Click on teams menu item **Add channel**



Enter a name and description for your channel.

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

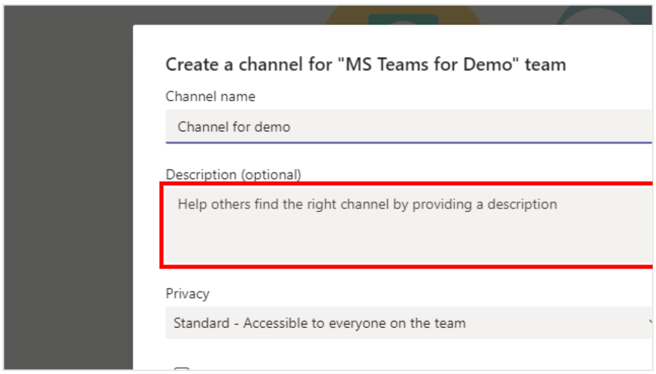




1. Enter **Letters, numbers, and spaces are allowed**.

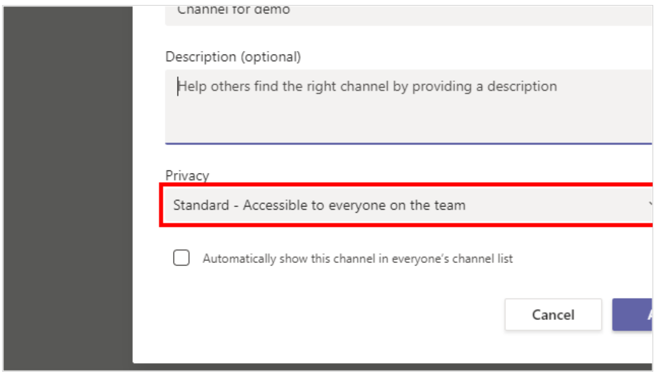
You can build a channel around a topic, project, department name, or whatever you like.

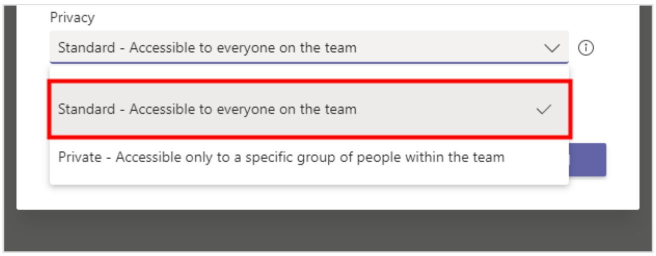
Click on the textarea



Set the privacy setting to Standard or Private

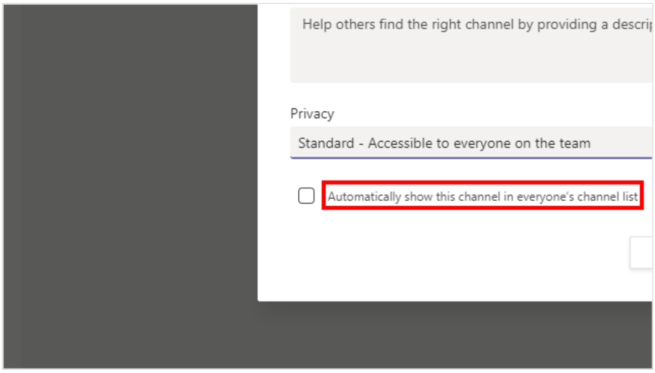
Click on the button **Standard - Accessible to everyone on the team**



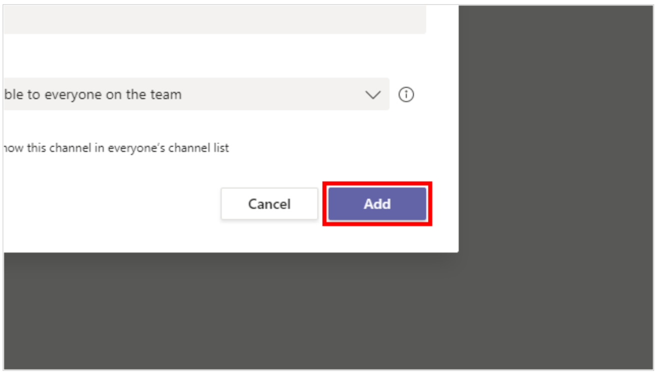


1. Click on the item **Standard - Accessible to everyone on the team**

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.



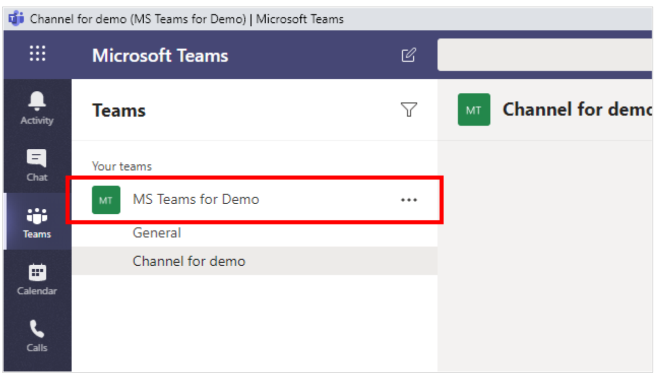
Click on the **Add** button



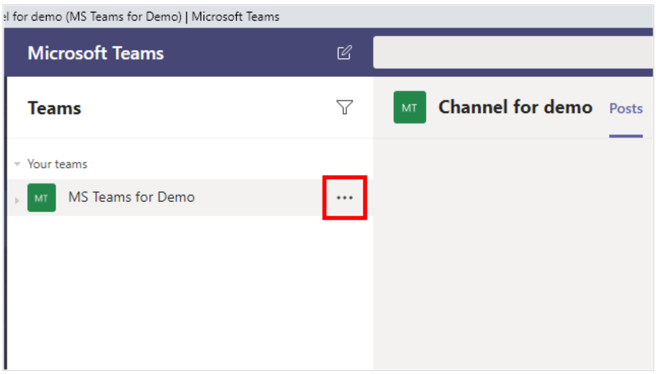
6.3. Customize and manage your team

Click on the Team you wish to Manage or Customize

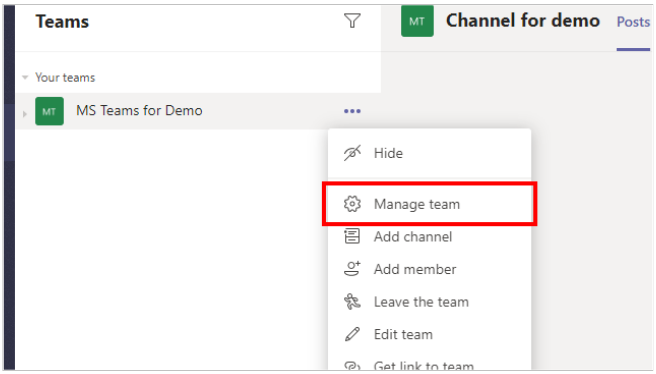
Click on the link **MS Teams for Demo**



Click on the button **More options**

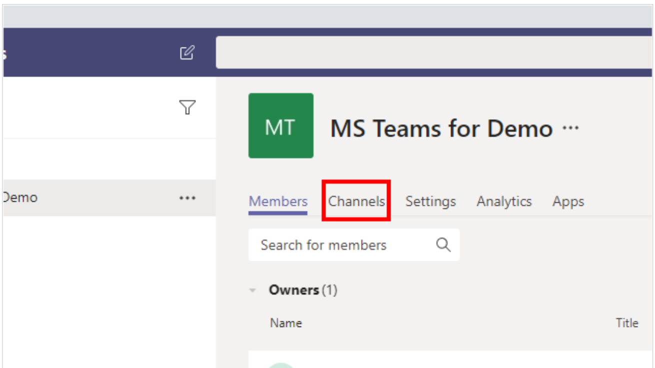


Click on the button **Manage team**

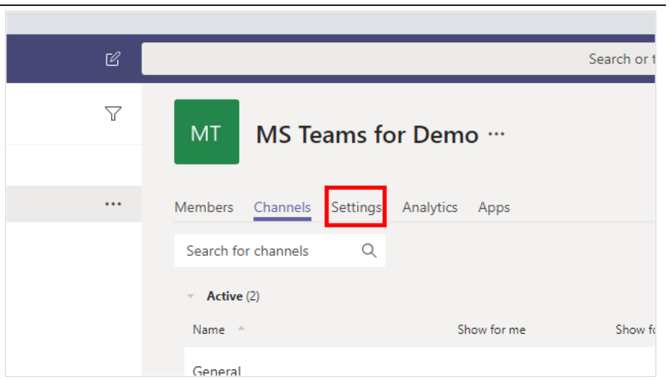


Select Manage team to find Members, Channels, Settings, and Apps for your team all in one place.

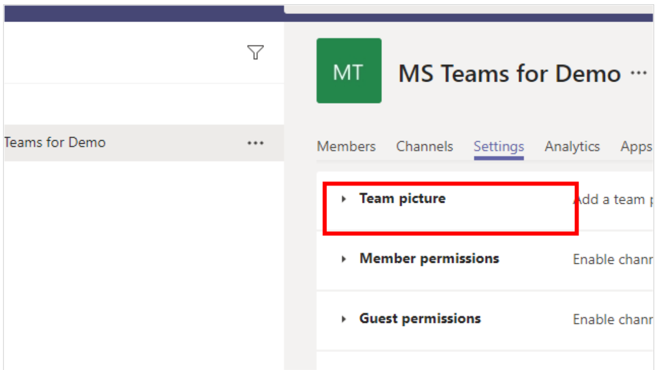
Click on the link **Channels**



Click on the link **Settings**



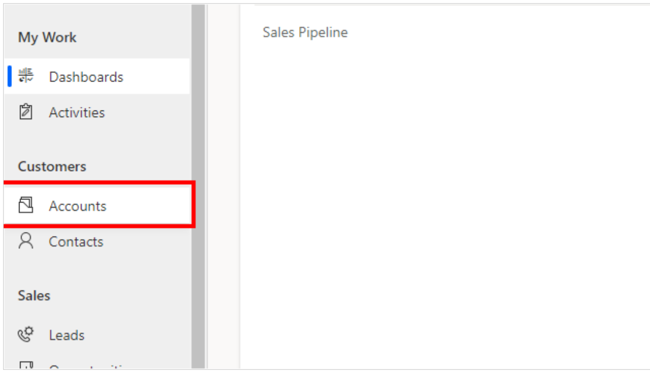
Click on the link **Team picture**
to add a team picture and give your team some personality.



7. Cross Platform

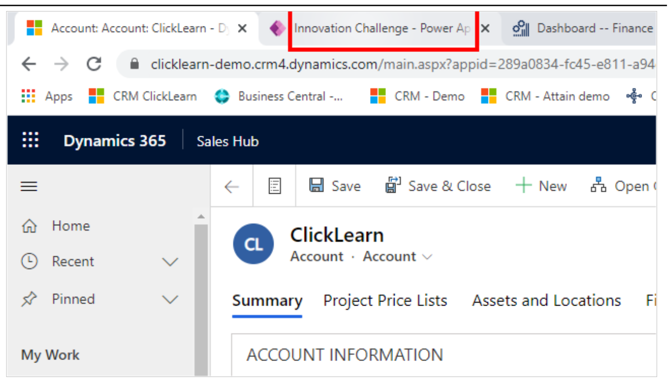
7.1. Cross Platform Recording

Click on the item **Accounts**

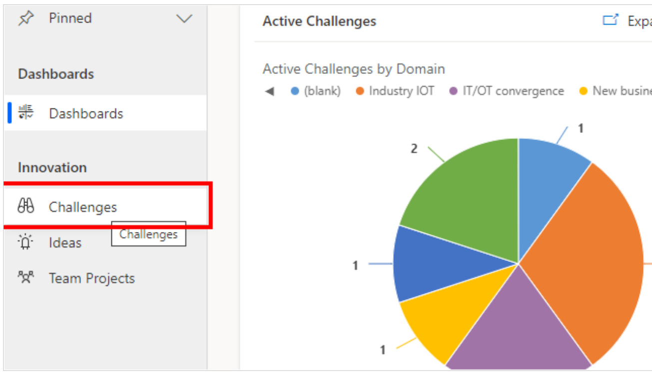


Click on the link in cell **Account Name**

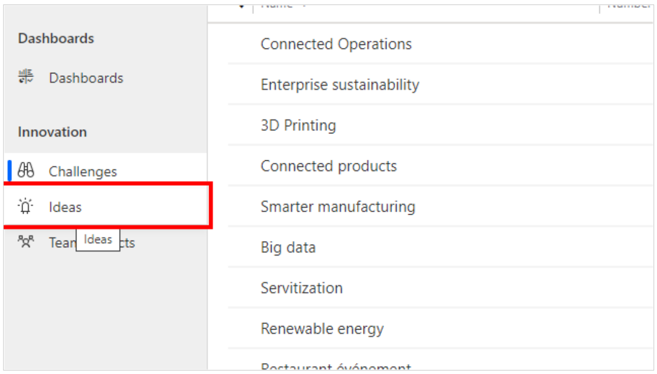
Click on the area.



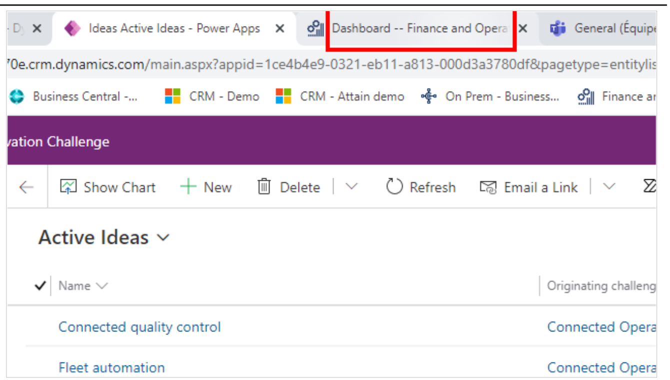
Click on the item **Challenges**



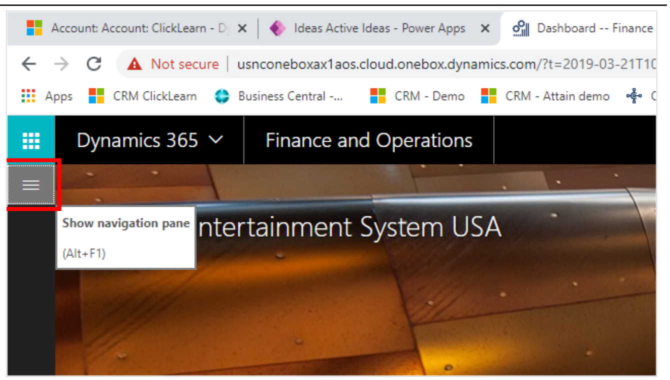
Click on the item **Ideas**



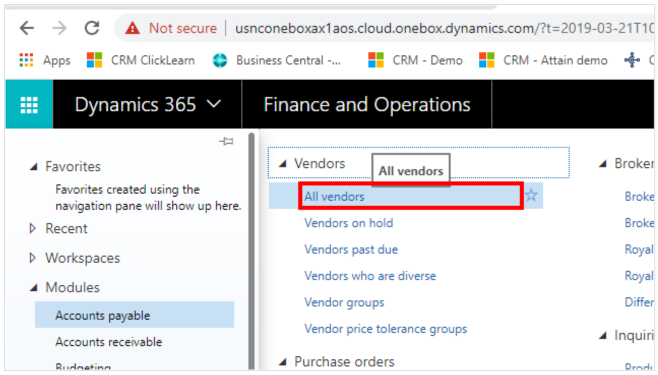
Click on the area.



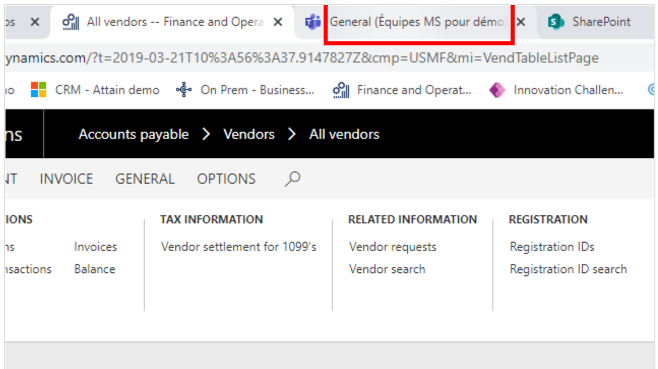
Click on the navigation button



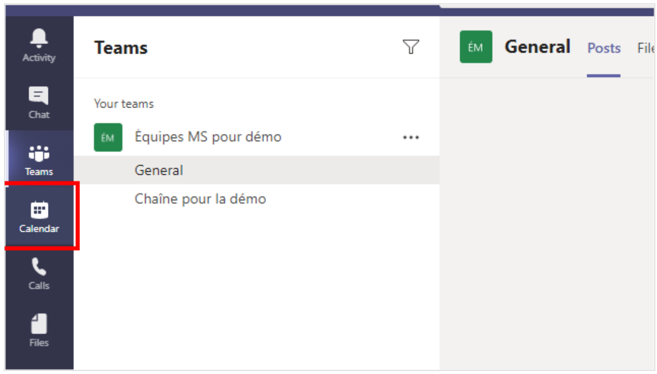
Click on the navigation item link **All vendors**



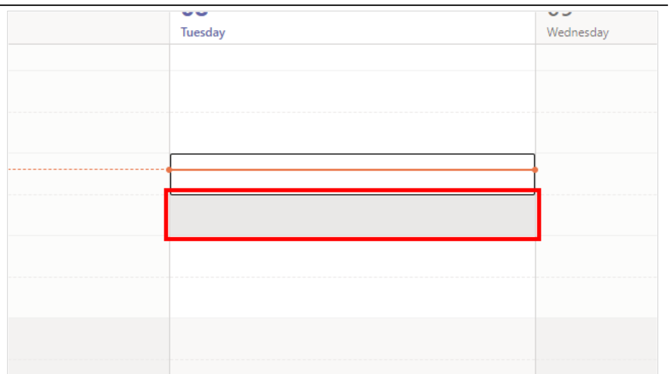
Click on the area.



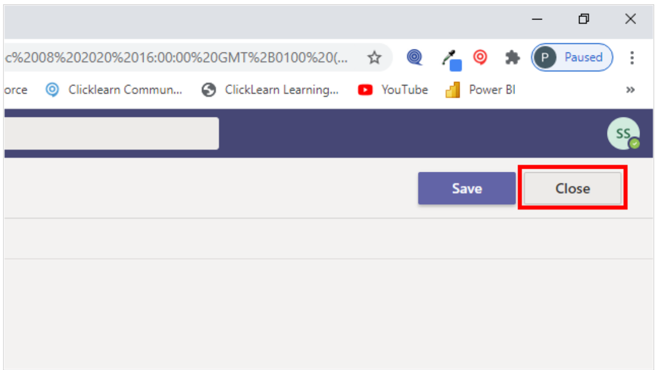
Click on left menu app item **Calendar**



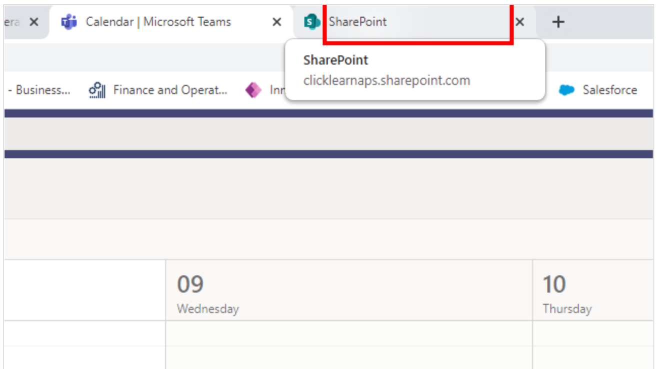
Click on the blank event **December 8 3:30 PM to December 8 4:00 PM. 0 events**



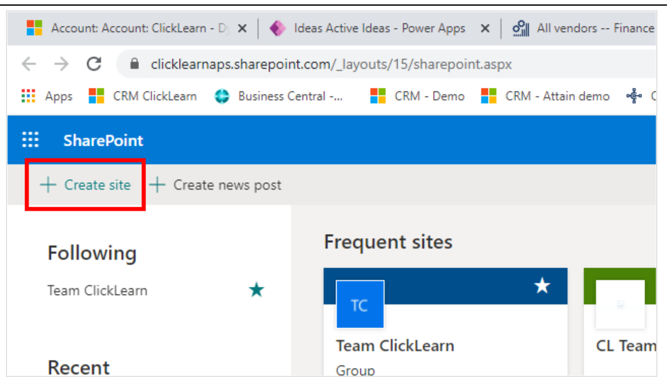
Click on The **Close meeting creation**



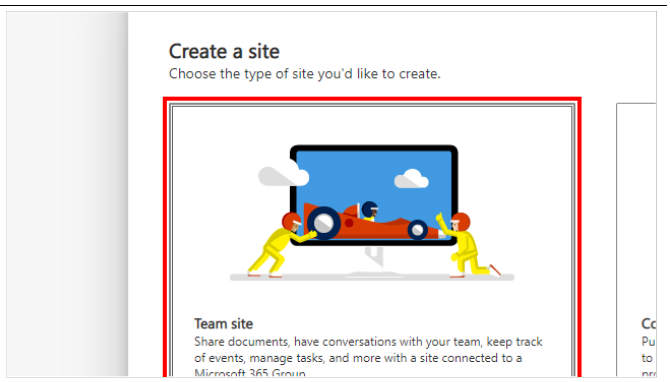
Click on the area.



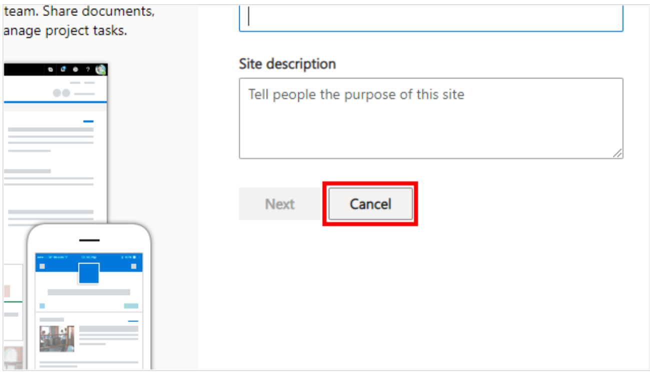
Click on the button **Create site**



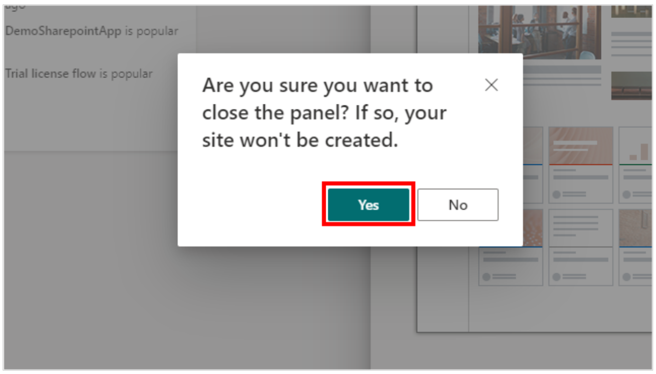
Click on the button **Team site**



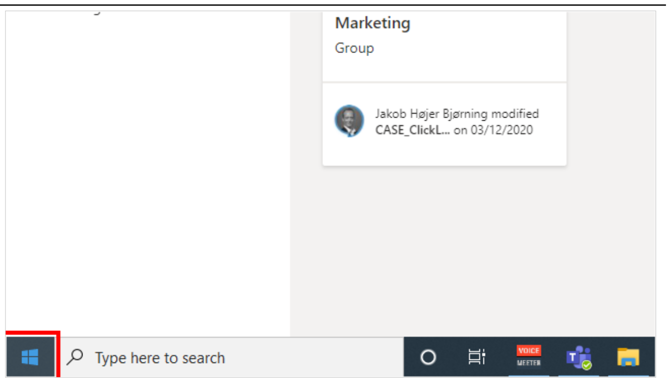
Click on the button **Cancel**



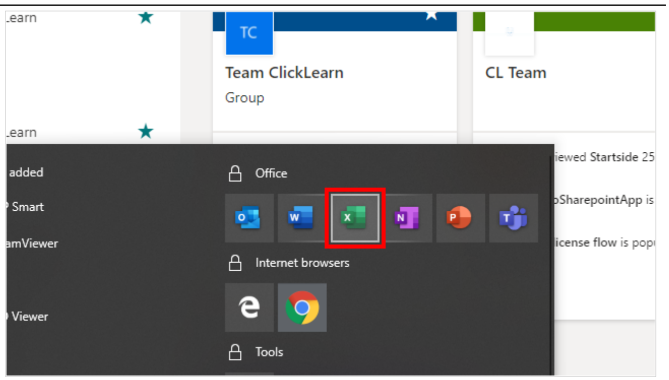
Click on the button **Yes**



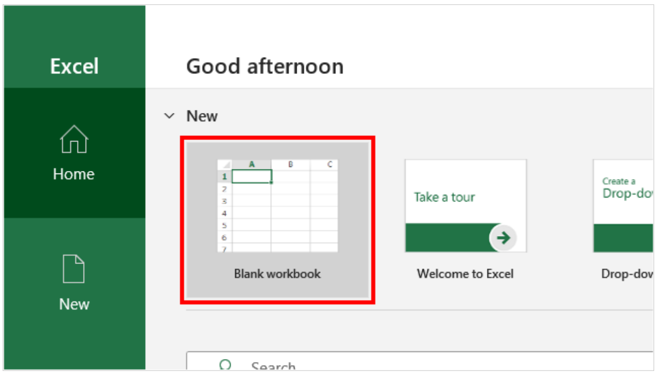
Click on the button **Start**.



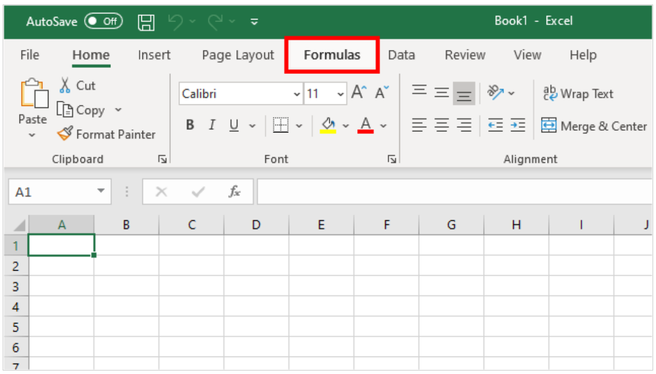
Click on the list element **Excel**.



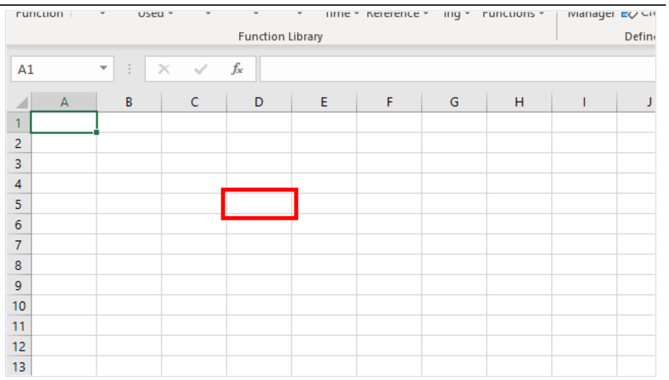
Click on the list element **Blank workbook**.



Click on the tab **Formulas**.



Click on the cell **D5**



Click on the button **Close**.