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4. Finance and Operations	20 مر
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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

Customers	
Accounts	
A Contacts	
Sales	
🌾 Leads	
Opportunities	
冬 Competitors	
Collateral	
-	

1.1.3. Steps

Click on the menu item New

Leads All Lead	ds - Dynamics 3	65 ×	+				
→ C	Clicklearn	-demo	.crm4.dynamics.co	m/main.aspx3	appid=289a08	34-fc45-e81	1-a94e-000
Apps 🚦 CF	RM ClickLearn	😂 Bu	siness Central	CRM - Der	mo 📕 CRM -	Attain demo	•ଙ୍କି On Pren
Dynamic	:s 365 Sa	ales Hul	b				
		÷	🛱 Show Chart	+ New	🖔 Refresh	🗓 Delete	
Home	Â	A	All Leads 🗸		•		
Recent	\sim						
Pinned	\sim	~	Name 🗸				
			Fine Great				
Nork			Maria Campbell	(sample)			

1.1.3.1. Enter lead topic and name

Lead to Opportunity S Active for less than one	ale mi	Qualify (< 1 Min)
Summary Details	Files	
Contact		
Торіс	*	
Order Type	+	Item based

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		🖈 🔍 者 🥥 🗯 🕑 Paused 🗄
	orce 🍥 Clicklearn Commun	S ClickLearn Learning 🖸 YouTube 🚦 Power Bl 🛛 »
		୦ ଓ ହ + ହ ଛି ? (PH)
		Warm New Peter Højlund Løvskov
	A Propose	Close
Click on the field Lead Source		Р Ø Q + T R @ ? (Рн)
		Warm New Peter Højlund Løvskov Lead Source Rating Status Owner
	A Propose	Lead SourceSelect V
		Status New
		Owner * O A Peter Højlund Løvskov
Click on the item Trade Show in the list		Warm New Peter Højlund Løvskov Lead Source Rating Status Owner
	A Propose	Lead Source
		Rating Advertisement Employee Referral
		Status External Referral Partner
		Owner Seminar Trade Show
		Word of Mouth Other



		<u> </u>
		L Marson L Marson L Parts Halland Landard
		Lead Source Rating Status Owner
	A Propose	Lead Source Trade Show
		Rating Warm ~
		Status New
		Owner * O A Peter Højlund Løvskov
Click on the item Hot in the list		
		Warm New Peter Højlund Løvskov Lead Source Rating Status Owner
	0	Lead Source Trade Show
	Propose	Rating Warm
		Select Status Hot
		Owner Cold
Click on Status		
Click on Status		Lead Source Rating Status Owner
Click on Status	A Propose	Lead Source Trade Show
Click on Status	A Propose	Vertical Source Warm Rating New Status Peter Højlund Løvskov Owner Lead Source Trade Show Rating Hot
Click on Status	A Propose	Warm New Peter Højlund Løvskov Lead Source Status Owner Lead Source Trade Show Rating Hot Status New
Click on Status	A Propose	Warm New Peter Højlund Løvskov Lead Source Status Owner Rating Hot Status New Owner * O & Peter Højlund Løvskov
Click on Status	A Propose	Warm New Peter Højlund Løvskov Lead Source Status Owner Rating Hot Status New Owner * © & Peter Højlund Løvskov
Click on Status	A Propose	Warm New Peter Højlund Løvskov Lead Source Trade Show Lead Source Trade Show Rating Hot Status New Owner * © & Peter Højlund Løvskov
Click on Status	A Propose	Lead Source New Peter Højlund Løvskov Owner
Click on Status	A Propose	Warm New Peter Højlund Løvskov Lead Source Trade Show Rating Hot Status New Owner * O R Peter Højlund Løvskov
Click on Status	A Propose	Warm New Peter Højlund Løvskov Lead Source Trade Show Rating Hot Status New Owner * O Q Peter Højlund Løvskov Lead Source Trade Show Lead Source Trade Show
Click on Status	A Propose	Warm New Peter Højlund Løvskov Lead Source Trade Show Rating Hot Status New Owner * O R Peter Højlund Løvskov
Click on Status	A Propose	Warm New Peter Højlund Løvskov Lead Source Trade Show Rating Hot Status New Owner A Peter Højlund Løvskov Lead Source Trade Show
Click on Status Click on the item Contacted	A Propose	Warm New Peter Højlund Løvskov Lead Source Trade Show Rating Hot Status New Owner * O Q Peter Højlund Løvskov Lead Source Trade Show Rating Hot Status New Owner * O Q Peter Højlund Løvskov Lead Source Trade Show Rating Hot Status New Owner * O Q Contacted
Click on Status	A Propose	Warm New Peter Højlund Løvskov Lead Source Trade Show Rating Hot Status New Owner * O R Peter Højlund Løvskov

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



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

Click on the item **Dashboards**



Summary Details Files



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



My Work	Sales Pipeline
비트 Dashboards	
Activities	
Customers	
🔁 Accounts	
A Contacts	

1. Click on the item **Accounts**



1.2.3. Steps

Click on the menu item **New**

Accounts A	All Accounts - Dyr	namic 🗙	+				
\rightarrow G	Clicklear	n-demo.	.crm4.dynamics.co	m/main.aspx?	appid=289a0834-fc	:45-e811-a94e-0	000c
Apps 🚦	CRM ClickLearn	😂 Bu:	siness Central	CRM - Der	no 🗧 CRM - Attain	demo 📌 On F	Prem
Dynan	nics 365 🕴 s	Sales Hul	b				
		←	🛱 Show Chart	+ New	🗓 Delete 🛛 🗸	🖔 Refresh	Ľč
Home		A	Il Accounts	~			
Recent	\sim						
Pinned	\sim	~	Account Nar	me 🗸			
			Fourth Cof	fee (sample)			
Nork			🖧 Litware, Ind	c. (sample)			

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

Summar	y Project Pr	ice Li:	sts Field Service	Details	Scheduling	Files
ACCO	JNT INFORM	IATIO	N			
Acco	ount Name	*	ClickLearn			•
Pho	ne		+45 88774735			9
Fax						

- 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**.

Phone	+45 88774735	S
Fax		
Website	www.clicklearn.com	
Parent Account		

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

Farcherooane		
Ticker Symbol	MSFT	
Relationship Type	Select	2
	Select	
Product Price List	Competitor	
	Consultant	
	Customer	
	Investor	-
	Partner	
ADDRESS	Influencer	Ų
	Press	
Address 1: Street 1	Prospect	
	Reseller	
Address 1: Street 2	Supplier	
	Vendor	
	Other	
Address 1: Street 3		



- 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

ADDRESS	
Address 1: Street 1	Sjaeleboderne 2
Address 1: Street 2	
Address 1: Street 3	

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

	Address 1: Street 2		
	Address 1: Street 3		
	Address 1: City	Copenhagen K	
62	Active		
ch		o 🛱 🚍 🌄 💽 🧿	

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

Address 1: State/Province	
Address 1: ZIP/Postal Code	1122
Address 1: Country/Region	Denmark

- 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

@ © \$	Home Recent Pinned	~	New Account Account - Account -> Summary Project Price Lists Field Service Details
Му	Work		
<u>। स</u>	Dashboards		
Ż	Activities		
Cus	tomers		Address 1: Street 1 Sjaeleboderne 2
8	Accounts		
0	A		

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

My Work	Sales Pipeline
비트 Dashboards	
Activities	
Customers	
🖪 Accounts	
A Contacts	
Sales	
& Leads	



1.3.3. Steps

Click on the link in cell Fourth Coffee (sample)

Image: Show Chart + New Image: Show
Image: Answer of the second secon
Image: Second secon
Image: Second Handle Control Image: Second Handle Control <td< th=""></td<>
My Work & Litware, Inc. (sample) Image: Dashboards & Adventure Works (sample) Image: Dashboards & Adventure Works (sample) Image: Dashboards Image: Dashboards Image: Dashboards Image: Dashb
Image: Solution of the second seco
Click on the menu item
Customers Customers
Click on the menu item
6/26/2018 11:35 AM ∨ Someone_a@example.com
6/26/2018 11:35 AM V
555-0100 6
CONTACTS
Janis Jopiin
Yvonne McKay (sample)
6/26/2018 11:35 AM
Click on the menu item
someone, @ Evrol Templates
6/26/2018 11:35 AM ✓ A Business Business A Export Contacts >
555-0100 🕫 See associated records
CONTACTS
JJ Janis Joplin
someone_a@example.com
Click on the menu item New Contact
+ Y ↓≣ : Assistant
+ Y ↓≣ : Assistant
+ ↓ ↓≣ : Assistant No n [/] ≡ Select
+ Y i≣ : Assistant Non ⁷ ≣ Select Check back i ↑↓ Sort
+ Y ↓ □ Assistant No n /□ Check back li ↑↓ Sort + New Contact
+ Y I III Assistant Non IIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIII
+ Y ↓ □ Assistant Non /□ Select Check back la ↑↓ Sort + New Contact Primary Contact () Primary Contact () Primary Contact () Refresh () Quick Campaign





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

)elete	Details	
		↑ Scan Business Card
	First Name	+ Anna
	Last Name	* Jensen
	Job Title	
	Account Name	Sourth 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	Sourth Coffee (sample)

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

	Account Name	Sourth Coffee (sample)	
AM	Contact Information		
	Email	someone_x@example.com	
AM	Mobile Phone		
	Business Phone	555-0150	S

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



1	Contact Information		
	Email	someone_x@example.com	5
1	Mobile Phone	123-4567	
l	Business Phone	555-0150	S
1	Description		

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



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



Connected Operations

III Power Apps I to	newation Outlinger		P Ø + P Ø ? 🖲
-	6- 🖬 Save & Cose		
 A Home ③ Recent ∨ 	New Challenge		 Number of ideas
s⊉ Prined ~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	Chullenge Manugement	Tack Select And Exe	Unite Close And Anand
Dashboards	Details Timeframe		
2 Cashboards	Details	Stakeholders	Contributed Ideas
Innovation	Name *	Challenge Sponsor	
6 Challenges	Description		
To Ideas			
A HEAT Projects	Owner R. Peter Hejlund Lavakov		
	Communicate via		

]
*	Event Restaurant	

Click on the text field Name - Enter Name. .



*	Event Restaurant
	Develop a restaurant that can be used on multiple music festivals and art venues.
*	A Peter Højlund Løvskov

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

Click on the field Communicate	via	velop a restaurant that ca stivals and art venues.	in be used on multiple music	
Click on the item Communicate	via	Owner *	Peter Højlund Løvskov Select or search options Select all Email Teams Phone Skype/Lync	 4 items
	peter Users R Peter Højlund Løvsko orgfda1270e	Rece V O Chai	Cor ent records	

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



2.1.2.1.

Click on the item Timeframe

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2.1.2. Set the timeframe for incomming ideas



	← Save & Save & Cose + New Show ✓ ● Power Learning	
D Home D Recent 2 Pinned	New Challenge	Theodes Cost Ad Asard
ashboards	Details Timeframe	
Dashboards	Instre	Laurch date
novation		Accept new ideas til
) Challenges 2 Ideas		Final review of ideas
Team Projects	Almost there	
	Select Save to see your timeline.	

Set Launch date for the challange

Click on Launch date			 Number of i	deas Accept new ideas till Status	Draft Status Reason	\sim
	t And Execu	te		Close And Award	ł	>
		Laur Acco Fina on	nch date ept new ideas till Il review of ideas		1 1 1 1	
Click on a day number. In this example the day 22		-	Accept new ide	December 2020 \uparrow \downarrow	2020	1
			Final review of	Su Mo Tu We Th Fr Sa	Jan Feb	Mar
				6 7 8 9 10 11 12	May Jun	Jul
				13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31 1 2	Sep Oct	Nov



2.1.2.2.

Set the end date for incomming ideas

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Click on Accept new ideas till	t And Execute	2		Close An) d Award		>
		Launch	date	12/22/2020			*
		Accept r	new ideas till				
		Final rev on	view of ideas				
Choose the month and year			Final revie	ew of December 2020	↑ ↓	2020	_
Click on a day number. In this example the day 28			on	Su Mo Tu We Th	Fr Sa	Jan Fe	b Ma
				29 30 1 2 3 6 7 <mark>8</mark> 9 10	4 5 11 12	May Ju	n Ju
				13 14 15 16 17 20 21 22 23 24 27 28 29 30 31	18 19 25 26 1 2	Sep Oo	t No:

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

Click on the field Final review of ideas on





ClickLearn ApS

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Click on the menu item Save & Close

Challenge: Information: New	Chal X L				
Chanenge, mormation, reev					
← → C					
Apps 🗧 CRM ClickLearn	😂 Business Central 🚦 CRM - Demo 🚦 CRM - Attain demo 🔩 C				
E Power Apps Inn	ovation Challenge				
=	← 🖫 Save & Close + New 🏷 Flow ∨				
☆ Home	New Challenge				
🕒 Recent 🗸 🗸					
🖈 Pinned 🗸 🗸	Challenge Management Active for less than one mi Setup (< 1				
Dashboards	Details Timeframe				

2.2. Create an Idea

Objective 2.2.1.

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

Click on the item Ideas





phl

2.2.2. Fill in the information required in the fields below

G	eneral		
	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**.

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

• 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



	Active		
Idea Score	0	0	
Risk Score	[=====	0	

- 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		Smarter manuracturing					
	'rojects	Big data					
		Servitization Renewable energy Holographic computing Event Restaurant					
	Challenges Active Challenges - Pr × +						
	→ C	gfda1270e.crm.dynamics.com/main.aspx?appid=1ce4b4e9-0321-eb11-a813-000d3a3					
	Apps CRM Click	Learn 😜 Business Central 📑 CRM - Demo 📑 CRM - Attain demo 🤹 On Prem					
	Power Apps	Innovation Challenge					
		🔶 🛱 Show Chart 🖉 Edit 📑 Activate 🗋 Deactivate 📋 [
	Home	Active Challenges V					
	Recent	×					
	Pinned	Group By: (no grouping) V					
		✓ Name ✓ Number of idea					
	nboards	Connected Operations					
E Pener Apps Invocation Cushinge							

			2 V T T V U
-	(- Save a Save & Save & Save & Core	🔁 Process 🗠 🙇 Add to Queue 🗇 Queue Item Details 🔍 Assign	🕈 Share - O) Emaila Link - 🖄 How 🗸 - 📢 Word Temptetes 🗸 - (
© Home ⊙ Recent V	Event Restaurant Ener and close the Dialeoge		0 Number of ideas Accept new ideas till Status Status Status Ferson
\$ Pirred V	Challenge Management C Setup (1 Min)	Track Select And Ex	ecute Cose And Award 2
Dashboards	Details Timehame Related		
29 Dashboards	Details	Stakeholders	Contributed ideas
innovation	Name Dent Resourcest	Challenge Sporsor R Peter Highand Lavskov	+ New Idea
95 Challenges © Ideas	Develop-a restaurant that can be used on multiple music feetivals and art venues.	Review Committee	V Name V Originating V Name.
M Team Projects	Owner P. Peter Highund Lavokov	V fullName 1 ∨ Baines Uni ∨	
	Communicate via Ensal	No data available.	No data available.

2.3.2. Go to Contributed Ideas

Click on the menu item

	Number of ideas	Accept new ideas till Status Status Reason	
t And Execute		Close And Award	>
	Contributed Ideas		•
		+ New Idea :	
÷	✓ Name ✓	Originating 🗸 Numb	
		No data available.	



Click on the menu item Add Existing Idea	t And Execute	Close And Award
	Contributed Ideas	
		+ New Idea 🗄
		Add Existing Idea
		Run Report
	4	No de 🕮 Excel Templates >
		Export Ideas
Click on the item Foodtruck		Lookup Records
	sign 🖻 Share 🖾 Email a Link	Select record
	0	Look for Records
	Number o	Recent records All records
	t And Execute	说 Foodtruck
		ن ، Race Finisher Medals
	Contributed Ideas	+ New Record
Click on the button Add		
		Add Cancel
		^ 😨 📾 🬾 ٩३) 11.47 🛃
Click on the menu item Refresh		00/12/2020
	appid=1ce4b4e9-0321-eb11-a813-000d</th <th>3a3780df&pagetype=entityrecord&etn=sample_challenge⁣</th>	3a3780df&pagetype=entityrecord&etn=sample_challenge⁣
	И - Demo 🚦 CRM - Attain demo 🔹 On F	Prem - Business 🗿 Finance and Operat 🚸 Innovation Challer
	Close 🕂 New 📘 Deactivate 🔳	Delete 🔘 Refresh 🗄 Process 🗡 🖺 Add to Que
	 Setup (3 Min) 	O
	elated	



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

Ŭ	← → C				
	III Dynamics 365 Rusiness Central				
	CRONUS Danmark A/S Sales Purchasing Inventory				
	Sales Orders Items Customers Item Journals Sales Journals Ca				
	 This is a sandbox environment (preview) for test, deno, or development purpos 				
	Headline				
	Good afternoon, Peter				
Click on the navigation menu item New					
	CRM Clicklearn CRM Clic				
	CRONUS Danmark A/S Sales Purchasing Inventory Posted				
	Customers: All V 🖉 Search + New 📋 Delete Process V Report V N				
	Keminder: your work date is 4/6/2020 Use today Change to Turn off reminder Percentiation				
	No. † Name Center Location Code Phone No.				
	10000 : Kontorcentralen A/S				
Click on the link in cell Description with the value	Responsibility				
	Center				
Tomt debitorkort	Center Select a template for a new customer P ~				
Tomt debitorkort	Center Select a template for a new customer P ~ htralen A/S X Reminder: your work date is 4/6/2020 Use today Change to				
Tomt debitorkort	Center Select a template for a new customer P ~ htralen A/S X Reminder: your work date is 4/6/2020 Use today Change to Kontormøbler A/S X Reminder: your work date is 4/6/2020 Use today Change to				
Tomt debitorkort	Center Select a template for a new customer P ~ htralen A/S X Reminder: your work date is 4/6/2020 Use today Change to Kontormøbler A/S Description				
Tomt debitorkort	Center Select a template for a new customer > htralen A/S × Reminder: your work date is 4/6/2020 Use today Change to bler × Reminder: your work date is 4/6/2020 Use today Change to nc. Description 1 1 Tomt debitorkor: Kontantbetaling/detailkunde (kontant)				
Tomt debitorkort	Center Select a template for a new customer > ~ htralen A/S × Reminder: your work date is 4/6/2020 Use today Change to kontormøbler A/S > > nc. Description > j Tomt debitorkort Kontantbetaling/detailkunde (kontant) privatkunde (giro) Privatkunde (giro)				
Tomt debitorkort	Center Select a template for a new customer P ~ bler × Reminder: your work date is 4/6/2020 Use today Change to Kontormøbler A/S > Description i → Tomt debitorkort × Kontantbetaling/detailkunde (kontant) Privatkunde (giro) Business-to-business-kunde (bank) EU-kunde (EUR, bank)				
Tomt debitorkort	Center Select a template for a new customer > ~ bler × Reminder: your work date is 4/6/2020 Use today Change to Kontormøbler A/S >				
Tomt debitorkort	Center Select a template for a new customer > ~ bler × Reminder. your work date is 4/6/2020 Use today Change to Kontormøbler A/S > Tomt debitorkort 1 → Tomt debitorkort Business-to-business-kunde (bank) EU-kunde (EUR, bank)				
Tomt debitorkort	Center Select a template for a new customer P ~ bler × Reminder: your work date is 4/6/2020 Use today Change to Kontormøbler A/S Description a Tomt debitorkors Kontartibetaling/detailkunde (kontant) Privatkunde (giro) Business-to-business-kunde (bank) EU-kunde (EUR, bank) Kortartibetaling/detailkunde (kontant) Kontartibetaling/detailkunde (bank)				
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3.2. Create a New Sales Order

Click on the navigation menu item Sales Orders



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Click on the navigation	menu item New	businesscentral.dvnamics.com/acca6652-fa7e-44d2-8c	4b-80eb74d90532/attain-demo?company		
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Click on the navigation menu item CRONUS Danmark ${\rm A/S}$

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4. Finance and Operations

4.1. Validate Vendor Info

Click on the navigation button

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Click on the navigation item link All vendors	$\leftarrow \rightarrow$	C A	Not secure u	isnconeboxax1a	os.cloud.onebox.dynan	nics.com/?t=2019-03-21T10
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🚰 Dashboard -- Finance and Opera 🗙 🕂



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ClickLeann		April 12, 2021	
	Learning Portal Across I	29/43	
Click on the field Vendor account		ALL VENDORS 1002 : Lande Packaging St	upplies
		General	Name Lande Packaging Supplies Search name Lande Packaging Supp Group 40
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Click on the combobox	field ABC code	General UENTIFICATION Vendor account 1002 7ype Organization Organization Name Lande Packaging Supplies Search name Lande Packaging Supplies	Name ORGANI Lande Packaging Supplies Number Search name
Click on the field Addr	ess books	ORGANIZATION DETAILS Number of employees 0 Organization number ABC code None	OTHER INFORMATION MEMO Address books Language en-us



5. SharePoint

5.1. Create a Team in Sharepoint





Click on the input field Group email address	Microsoft 365	
		Site name
	am. Share documents, age project tasks.	Team ClickLearn
	5 C 4 7 (8)	Group email address
	•••	TeamClickLearn 🖉
		Another group with the same alias already exists.
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Click on the input field Site address	am. Share documents, age project tasks.	Team ClickLearn
	s d e ? 🏟	Group email address
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		Another group with the same alias already exists.
		Site address
		TeamClickLearn
	(-)	Site description
		Tell people the purpose of this site
		Z
Click on the button Cancel		Private - only members can access this site
		Select a language
		Select the default site language for your site. You can't change this
		later.
		Next Cancel
Click on the button Yes	100 C	
	and the second second	
		Are you sure you want to \times
		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.

0	ClickLearn	
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	Learning Portal Across M	ultiple	Business S	Systems			32/43
Click on the application	link button Teams Toolbar	🥡 Calls M	icrosoft Teams				
			Microsoft Team	s	C		
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		Chat	You will see me not	entions, replies and other ifications here.			
		Teams				 Favorites 	
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Click on the button Joi This is where you crea existing ones.	n or create a team te your own team, or discover						
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		Help			. 1		
		÷	👪 t Join or create a	i team	ŝ		
Select Create a new te team from scratch or s all-new team or create respectively. Click on team containe	eam, and then select Build a elect Create from to build an from an existing group er Create a team button			Crea	te a tean	1	Join a to Enter code Got a code to j
Click on the text Build	a team from scratch	Bring eve	eryone together and get t	Create your tear	n		
				Build a	team from	scratch	
				Create f An existin	rom g Office 365 g	group or team	



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Learning Portal Across Multiple Business Systems

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.

ate a team	What kir	nd of team will this be?
ogether and get t	î	Private People need permission to join
	0	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, distrib outside your organization a	ution list, or security g is guests by typing the	roup to add to your t ir email addresses.	eam. You can als	o add people
Start typing a name o	r 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	🤹 General	I (MS Teams for Demo) Microsoft Teams						
channel.		Microsoft Teams						
Click on the link MS Teams for Demo	Activity	Teams		V	MT	General	Posts	File
	Chat Teams	Your teams MT MS Teams for Demo General						
	Calendar Calendar Calls							
Click on the button More options	l (MS Teams	for Demo) Microsoft Teams						
next to the team name.	Micro	osoft Teams						
	Team	15	Y	MT	Genera	al Posts	Files V	Viki
		ims	_					
	→ MT I	MS Teams for Demo						
Click on teams menu item Add channel	= Vour te							
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			≘	Add chan	inel			
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			65	Edit team	ceann			
			®	Get link to	o team			
			0	Manage t	ans			

Enter a name and description for your channel.



Click on the input field Letters, numbers, and spaces are allowed	Here are some thing
	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
Create a channel for "MS Teams f Channel name Channel for demo Description (optional)	for Demo" team

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

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

Help others find the right channel by providing a description

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		
Channel name Channel for demo Description (optional) Help others find the right channel by providing a description	Create a channel for "MS Teams for Demo"	team
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Privacy Standard - Accessible to everyone on the team	Help others find the right channel by providing a descri rivacy Standard - Accessible to everyone on the team	ption
Privacy Standard - Accessible to everyone on the team	Help others find the right channel by providing a descri rivacy Standard - Accessible to everyone on the team	ption

Set the privacy setting to Standard or Private

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

Channel for Gemo
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



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	I for demo (MS Teams for Demo) Microsoft Teams		
	Microsoft Teams		
	Teams	Y	Channel for demo Posts
	 Your teams MT MS Teams for Demo 		
Click on the button Manage team	Teams	Y	MT Channel for demo Posts
	MT MS Teams for Demo		
		Ŕ	Hide
		\$	Manage team
		8	Add channel
		€	Add member
		°] ₽	Add member Leave the team
		5) &	Add member Leave the team Edit 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 Team picture

to add a team picture and give your team some personality.

	V	MT MS Teams for	Demo …							
Teams for Demo		Members Channels Settings	Analytics Apps							
		▶ Team picture	Add a team (
		Member permissions	Enable chanr							
		Guest permissions	Enable chanr							

7. Cross Platform

7.1. Cross Platform Recording

Click on the item Accounts	My Work Sales Pipeline				
	# Dashboards				
	Activities				
	Customers				
	Accounts				
	A Contacts				
	Sales				
	& Leads				
Click on the link in cell Account Name	City i ower oc Light (sample)				
	Contoso Pharmaceuticals (sample)	555-0156			
	Alpine Ski House (sample)	555-0157			
	A. Datum Corporation (sample)	555-0158			
	s Coho Winery (sample)	555-0159			
	ClickLearn	+45 8877			
	Acme company				
	All That Wander (sample)				
	Shadowslayer Lighting, LLC	770-315-			
	A. C A. T				
Click on the area.	Account: Account: ClickLearn - D. X Innovation Challenge - Power Ap X 2 Dashboard	Finance			
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Click on the button Create site	Account: Account: ClickLearn - D: × ♦ Ideas Active Ideas - Power Apps × 2 All vendors Finance ← → C
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Click on the button Team site	Create a site Choose the type of site you'd like to create.



Click on the button Cancel	team. Share documents. anage project tasks. Site description Tell people the purpose of this site Next Cancel
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