Dynamics 365 - Accounts Quick Guide

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Accounts Quick Guide

1. Check the contact/account doesn’t already exist

2. Navigate to Accounts on the left side of the screen

3. Create ‘New’ in the top tool bar

4. Complete all information within the Summary and Details tab.

5. Save

6. Add any communication with the client in the timeline area. This includes attachments

7. View/Add Contacts, Cases, Open Leads, Open Opportunities and Live Service Contracts on the right side of the screen

8. Navigate to other areas linked to the account through the Related tab.

Dynamics 365 - Accounts Quick Guide.pptx

Important Notes:

Suggested Fields

Dynamics includes a smart feature that suggests options for regularly completed fields. However, these suggestions must be confirmed before saving. Suggested options appear in blue. Review and confirm or discard these suggestions before saving the record.