

Dynamics 365 Sales and Service

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Module 1: Configure Dynamics 365 Sales

In this module, we will learn about configuring the sales application to fit an organization's unique requirements.

Lessons

- Configure organization and management settings
- Lab: Lab 1.1: Validate lab environment

After completing this module, you will be able to:

- Install and configure the sales application.
- Identify common sales scenarios.

Module 2: Manage leads and opportunities with Dynamics 365 Sales

In this module, you will learn how to manage customer data records, use built-in sales tools and take a lead through the lead lifecycle.

Lessons

- Manage leads with Dynamics 365 Sales
- Manage opportunities with Dynamics 365 Sales
- Lab: Lab 2.1: Manage customers

After completing this module, you will be able to:

- Create customer records.
- Use sales tooling.
- Create leads and opportunities.

Module 3: Manage orders and the product catalog with Dynamics 365 Sales

In this module, we will learn how to use quotes and orders to further use Dynamics 365 Sales to manage your sales opportunities and turn them into closed deals.

Lessons

- Manage and organize your product catalog with Dynamics 365 Sales
- Process sales orders with Dynamics 365 Sales

After completing this module, you will be able to:

- Create and use the product catalog.

- Add quotes to opportunities.
- Complete a sale with an order.

Module 4: Manage goals with Dynamics 365 Sales

In this module, we will learn how to manage goals to track the success of your sales organization and gather key metrics about sales performance.

Lessons

- Define and track individual goals with Dynamics 365 Sales
- Use goal metrics in Dynamics 365 Sales

After completing this module, you will be able to:

- Use rollup columns to define sales metrics.
- Track individual goals for sales and teams.

Module 5: Create surveys with Dynamics 365 Customer Voice

In this module, students will learn about Dynamics 365 Customer Voice, a powerful tool for gathering and analysing customer sentiment.

Lessons

- Create a survey project with Dynamics 365 Customer Voice
- Create surveys with Dynamics 365 Customer Voice
- Send Dynamics 365 Customer Voice surveys

After completing this module, students will be able to:

- Set up survey projects to organize and create surveys
- Create a survey with variables and entities
- Send Dynamics 365 Customer Voice surveys using multiple modalities

Module 6: Work with Cases

In this module, you will learn about working with Cases in Dynamics 365 Customer Service.

Lessons

- Get started with Cases
- Managing Cases
- Use queues to manage case workloads
- Create or update records automatically
- Unified routing

After completing this module, students will be able to:

- Create and manage Cases
- Work with queues and unified routing
- Create or update records automatically

Module 7: Work with entitlements and service-level agreements

In this module, you will learn how to create and manage entitlements and service level agreements

Lessons

- Create and manage entitlements
- Create and manage service-level agreements

After completing this module, you will be able to:

- Create and manage entitlements
- Create and manage service-level agreements

Module 8: Work with knowledge management

In this module, you will learn how to create knowledge management solutions, and use knowledge articles to resolve cases

Lessons

- Create knowledge management solutions
- Use knowledge articles to resolve cases
- Create and manage SLAs

After completing this module, you will be able to:

- Create and use knowledge management solutions
- Use knowledge articles to resolve cases

Module 9: Create surveys with Customer Voice

In this module, you will learn how to engage with customers using Dynamics 365 Customer Voice

Lessons

- Create a survey project
- Create surveys
- Send surveys
- Automate surveys

After completing this module, you will be able to:

- Work with Dynamics 365 Customer Voice to send surveys to customers and collect feedback

Module 10: Schedule services

In this module, you will learn how to schedule services and resources using Customer Service Scheduling

Lessons

- Configure Customer Service Scheduling
- Schedule services

After completing this module, you will be able to:

- Schedule services and resources using Dynamics 365 Customer Service Scheduling

Module 11: Omnichannel for Dynamics 365 Customer Service

In this module, you will learn how to use Omnichannel for Dynamics 365 Customer Service

Lessons

- Getting started
- Routing and work distribution
- Deploy an SMS channel
- Deploy chat widgets
- Create smart assist solutions

After completing this module, you will be able to:

- Work with Omnichannel for Dynamics 365 Customer Service

Module 12: Connected Customer Service

In this module, you will learn how to use Connected Customer Service to proactively handle customer service scenarios

Lessons

- Getting started
- Registering and managing devices

After completing this module, you will be able to:

- Work with Connected Customer Service
- Register and manage devices

Module 13: Implement Microsoft Power Platform

In this module, you will learn how to work with the Microsoft Power Platform to enhance your Dynamics 365 Customer Service solution

Lessons

- Create custom apps
- Integrate a Power Virtual Agents bot

After completing this module, you will be able to:

- Create custom apps in Microsoft Power Platform for your Customer Service solution
- Integrate a Power Virtual Agents bot

Module 14: Configure Field Service

In this introductory module, we will introduce key concepts of Dynamics 365 Field Service, including bookable resources

Lessons

- Configure Microsoft Dynamics 365 Field Service
- Configure bookable resources
- Schedule crews, facilities, and resource pools

After completing this module, students will be able to:

- Configure Field Service
- Configure bookable resources
- Configure and schedule crews, facilities, and resource pools

Module 15: Manage work orders

In this module, we will explore work orders, incident types, and inspections.

Lessons

- Work order management, agreements, inventory, and purchasing
- Manage incident types
- Inspections

After completing this module, students will be able to:

- Handle work orders, agreements, inventory, and purchasing
- Manage incident types
- Create and manage inspections

Module 16: Schedule and dispatch work orders

In this module, we will learn how to work with the schedule board to schedule and dispatch work orders

Lessons

- Manage scheduling options
- Customize the schedule board
- Deploy Resource Scheduling Optimization (RSO)

After completing this module, students will be able to:

- Schedule and dispatch work orders
- Customize the schedule board
- Deploy RSO

Module 17: Field Service Mobile App

In this module, we will learn how to customize and configure the Field Service mobile app.

Lessons

- Get started with the Field Service mobile app
- Customize and configure the mobile app
- Integrate Remote Assist

After completing this module, students will be able to:

- Customize and configure the Field Service mobile app
- Integrate Remote Assist

Module 18: Manage inventory and purchasing

In this module, we will learn how to manage inventory and purchasing in work orders

Lessons

- Configure Field Service work orders

After completing this module, students will be able to:

- Configure work orders
- Manage inventory using inventory management and warehouse management
- Make inventory adjustments and transfers

Module 19: Implement assets and connected devices

In this module, we will introduce Connected Field Service, customer assets, and creating work orders from IoT data

Lessons

- Customer assets
- Create work orders from IoT data

After completing this module, students will be able to:

- Create and associate customer assets
- Create work orders from IoT data using Connected Field Service

Module 20:

- Stages of scheduling (manual, semi-automated, fully automated) along with
- Configuring Agreements for preventive maintenance
- Basics of connected Field service
- High-level overview of AR/VR for Field service (FS guides and HoloLens app)