Course name	Dynamics 365 Customer Engagements App with Extensibility
Course Level	Advanced
Possible Technology	Dynamics 365 CRM
Vendor Name	Microsoft
Course available from which date	ASAP
Exam linked or without exam	NA
Standard or Custom	Custom
If a custom course,	NA
Extra effort by the trainer (Yes/No)	No
Have we charged extra (Yes/No)	No
Customization approved by Delivery Manager (Yes/No)	
TOC approved by Delivery Manager	Yes (Mohan Sindhu)
Duration (in hours)	48 hours
Base course name	MB-910 and PL-400

TOC for Dynamics 365 Customer Engagements App with Extensibility

Section - A
Microsoft Dynamics 365 Fundamentals (CRM)

Module 1: Examine the core capabilities of Microsoft Dynamics 365 customer engagement apps.
This module serves as an introduction to the shared features for customer engagement apps. Learners are introduced to Microsoft Dataverse, and how data is made accessible and managed in the customer engagement apps, from shared entities to search and filtering data and finally, available reporting and integration options.

Lessons
- Navigate the Dynamics 365 customer engagement apps.
- Explore common Dynamics 365 activities and integration options.
- Lab: Validate lab environment and work with the customer engagement apps
- Lab: Manage Customers and Activities

After completing this module, students will be able to:
- Describe the different Dynamics 365 customer engagement applications.
- Describe Microsoft Dataverse and how it is used.
- Describe how to search and filter data.
- Describe the process for working with customers and activities.
- Describe available reporting options.
- Describe available integration options.

Module 2: Learn the fundamentals of Dynamics 365 Marketing
This module introduces learners to the core capabilities of Dynamics 365 Marketing.

In the first lesson, you will learn about the core product capabilities to support key marketing tasks, from email marketing to segments and customer journeys. The next lesson covers event management, as well as Dynamics 365 Customer Voice for customer surveys and Dynamics 365 Customer Insights for AI-based analytics.

Lessons
- Explore Dynamics 365 Marketing
- Explore other marketing capabilities and apps.
- Lab: Create a Customer Journey
- Lab: Create a Segment

After completing this module, students will be able to:
- Describe the use cases for Dynamics 365 Marketing
- Describe segments and how they are used.
- Describe customer journeys.
- Describe how to generate and qualify leads.
- Describe event management.
- Describe how to capture customer feedback with Dynamics 365 Customer Voice
- Describe how to use Dynamics 365 Customer Insights

Module 3: Learn the fundamentals of Dynamics 365 Sales

This module introduces Dynamics 365 Sales, focusing on managing leads, lead qualification, opportunities, and sales orders as part of the standard sales lifecycle. Then we shift our attention to sales forecasting and the use of LinkedIn Sales Navigator and Dynamics 365 Sales Insights for improved relationship selling.

Lessons
- Examine Dynamics 365 Sales
- Use sales capabilities.
- Lab: Create and manage a Lead
- Lab: Create and manage an Opportunity

After completing this module, students will be able to:
- Describe the typical sales lifecycle.
- Describe the process for creating and managing leads, opportunities, and quotes.
- Describe the use of business process flows in Dynamics 365 Sales
- Describe sales forecasting.
- Describe additional sales apps such as Sales Insights and Sales Navigator

Module 4: Learn the Fundamentals of Dynamics 365 Customer Service

This module introduces Dynamics 365 Customer Service. We begin with the standard case management business processes and how Customer Service addresses those. Then we examine the product capabilities, including business process flows, entitlements and SLAs, and knowledge management. Finally, we cover Omnichannel for Customer Service and historical analytics.

Lessons
- Explore Dynamics Field Service
- Examine knowledge management in Dynamics 365 Customer Service and related apps.
- Lab: Create and manage Cases

- Lab: Create and publish a Knowledge Base article

After completing this module, students will be able to:
- Describe use cases for Dynamics 365 Customer Service
- Describe the case lifecycle.
- Describe queues, entitlements, and SLAs.
- Describe Knowledge Management options.
- Describe Omnichannel for Dynamics 365 Customer Service
- Describe Customer Service Historical Analytic reports.

Module 5: Learn the Fundamentals of Dynamics 365 Field Service

This module introduces Dynamics 365 Field Service. We begin with a discussion of the work order lifecycle. Then we examine the product capabilities, including work order generation, inspections, scheduling, asset management, and Connected Field Service.

Lessons
- Explore Dynamics 365 Field Service
- Describe the scheduling process.
- Lab: Create work orders in Dynamics 365 Field Service
- Lab: Create an Inspection

After completing this module, students will be able to:
- Describe Dynamics 365 Field Service use cases.
- Describe the field service business process.
- Describe the work order lifecycle.
- Describe inspections.
- Describe the scheduling capabilities of Dynamics 365 Field Service.
- Describe asset management.
- Describe Connected Field Service.

Section - B
Microsoft Dynamics 365 CE Apps – Extensibility

Module 1: Create a model-driven application in Power Apps

This module introduces you to creating a model-driven Power Apps app that uses Microsoft Dataverse.

Lessons
- Introduction to model-driven apps and Microsoft Dataverse
- Get started with model-driven apps in Power Apps
- Create and manage tables in Microsoft Dataverse
- Create and manage fields within a table in Microsoft Dataverse
- Working with choices in Microsoft Dataverse
- Create a relationship between tables in Microsoft Dataverse
- Define and create business rules in Microsoft Dataverse
- Create and define calculated or rollup fields in Microsoft Dataverse
- Get started with security roles in Microsoft Dataverse
- Lab 0: Validate lab environment
- Lab 1: Data Modelling

- Lab 2: Model-driven app

Module 2: Create a canvas app in Power Apps

This module introduces you to Power Apps, helps you create and customize an app, and then manages and distributes it. It will also show you how to provide the best app navigation and build the best UI using themes, icons, images, personalization, different form factors, and controls.

Lessons
- Get started with Power Apps
- Customize a canvas app in Power Apps
- Manage apps in Power Apps
- Navigation in a canvas app in Power Apps
- How to build the UI in a canvas app in Power Apps
- Use and understand Controls in a canvas app in Power Apps
- Document and test your Power Apps application.
- Lab 3: Canvas App

Module 3: Master advanced techniques and data options in canvas apps

This module will help you use advanced formulas, and perform custom updates, performance checks, and testing. It will also help you to improve user experience, use custom connectors and focus on working with data source limits.

Lessons
- Use imperative development techniques for canvas apps in Power Apps
- Author an advanced formula that uses tables, records, and collections in a canvas app in Power Apps
- Perform custom updates in a Power Apps canvas app.
- Complete testing and performance checks in a Power Apps canvas app
- Work with relational data in a Power Apps canvas app
- Work with data source limits (delegation limits) in a Power Apps canvas app
- Connecting to other data in a Power Apps canvas app.
- Use custom connectors in a Power Apps canvas app.
- Lab 4: Advanced canvas app techniques

Module 4: Automate a business process using Power Automate

This module introduces you to Power Automate and teaches you how to build workflows and administer flows.

Lessons
- Get started with Power Automate
- Build more complex flows with Power Automate
- Introduction to business process flows in Power Automate
- Create an immersive business process flow in Power Automate
- Understand the advanced business process flow concepts in Power Automate
- Introduction to expressions in Power Automate
- Lab 5: Power Automate

Module 5: Introduction to developing with Power Platform
This module is the first step in learning about platforms, tools, and the ecosystem of the Power Platform

Lessons
- Introduction to Power Platform developer resources
- Use developer tools to extend the Power Platform
- Introduction to extending the Microsoft Power Platform
- Lab 6: Power Platform tools
- Lab 7: Power Platform APIs

Module 6: Extending the Power Platform Microsoft Dataverse
This module looks at the tools and resources needed for extending the Power Platform. We'll start by looking at the SDKs, the extensibility model, and the event framework. This learning path also covers when to use plug-ins. Configuration of plug-ins as well as registering and deploying plug-ins.

Lessons
- Introduction to Microsoft Dataverse for developers
- Extend Plug-ins

Module 7: Extending the Power Platform user experience Model-Driven Apps
This module describes how to create client scripting, perform common actions with client script, and automate business process flow with client script. Learn about what client scripts can do, rules, and maintaining scripts. Discover when to use client script as well as when not to use client script.

Lessons
- Introduction to web resources
- Performing common actions with the client script
- Automate business process flows with client script.
- Lab 8: Client scripting

Module 8: Create components with Power Apps Component Framework
This module describes how to get started with Power Apps Component Framework with an introductory module on the core concepts and components. Then it shows you how to build a component and work with advanced Power Apps Component Framework features.

Lessons
- Get started with the Power Apps component framework.
- Build a Power Apps component.
- Use advanced features with the Power Apps component framework.
- Lab 9: Power Apps Component Framework

Module 9: Extend Power Apps portals
This module describes how to transform a content portal into a full web app interacting with Microsoft Dataverse. We will also cover the options available to customizers and developers to extend the portal functionality and integrate with Office 365, Power Platform, and Azure components.

Lessons

- Introduction to Power Apps portals
- Access Microsoft Dataverse in Power Apps portals
- Extend Power Apps portals.
- Build custom Power Apps portals web templates.

Module 10: Integrate with Power Platform and Microsoft Dataverse

This module describes how to integrate with Microsoft Dataverse using code by learning about Microsoft Dataverse API. Get an in-depth overview of options available with Microsoft Dataverse to integrate data and events to Azure.

Lessons

- Work with Microsoft Dataverse Web API
- Integrate Microsoft Dataverse Azure solutions.
- Lab 10: Dataverse Plug-ins
- Lab 11: Azure Functions
- Lab 12: Publishing events externally
- Lab 13: Custom connector