KOENIG
step forward

Gold
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Microsoft

MB-910T00: Microsoft Dynamics 365 Fundamentals (CRM)

Course outline

Standard Duration: 8 Hours

Learning Path 1: Explore 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 searching and filtering data and finally, available reporting and integration options.

Lessons

- Describe the foundations of Dynamics 365 customer engagement apps
- Describe shared activities and integration options in Dynamics 365 customer engagement apps

Lab 1.1: Work with customer engagement apps

Lab 1.2: 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

Learning Path 2: Explore the fundamentals of Microsoft Dynamics 365 Customer Insights

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 Customer Insights – Journeys
- Describe Dynamics 365 Customer Insights - Data and Dynamics 365 Customer Voice
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Lab 2.1: Create a Simple Customer Journey

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

Learning Path 3: Explore the fundamentals of Microsoft Dynamics 365 Sales

This module provides an introduction to 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

- Explore Dynamics 365 Sales
- Describe Dynamics 365 Sales capabilities and related apps

Lab 3.1 : Create and manage an Opportunity in Dynamics 365 Sales

After completing this module, students will be able to:

- Describe the typical sales lifecycle
- Describe the process for creating and managing leads, opportunities, andquotes
- 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

Learning Path 4: Explore the fundamentals of Microsoft Dynamics 365 Customer Service

This module provides an introduction to 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 365 Customer Service
- Describe Dynamics 365 Customer Service capabilities and related apps

Lab 4.1: Create and manage Cases in Dynamics 365 Customer Service

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

Learning Path 5: Explore the fundamentals of Microsoft Dynamics 365 Field Service

This module provides an introduction to 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 5.1: Creating Work Orders in Dynamics 365 Field Service

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