Microsoft Dynamics 365 CRM Mastery -
Sales, Customer Service and Field Service

Course Description:

This comprehensive course is designed to provide an in-depth understanding of Microsoft Dynamics 365, focusing on customer relationship management (CRM) and field service capabilities. Spanning across multiple learning paths, this course covers the core functionalities of Dynamics 365, including Sales, Customer Service, Customer Insights, Field Service, and more. Participants will gain practical skills through a series of lab exercises and demos, enabling them to effectively manage and optimize customer interactions, sales processes, and service operations. By the end of this course, you will be well-equipped to leverage Dynamics 365 to drive business success and customer satisfaction.

Audience Profile:

This course is ideal for:

- Business professionals seeking to enhance their understanding of Microsoft Dynamics 365 CRM and Field Service applications.

- IT professionals and system administrators responsible for managing and configuring Dynamics 365 environments.

- Sales and customer service managers aiming to optimize their team's performance using Dynamics 365.

- Functional consultants and solution architects interested in deepening their knowledge of Dynamics 365 features and integrations.

- Anyone pursuing Microsoft Dynamics 365 certifications.

Prerequisites:

Participants should have:

- A basic understanding of CRM concepts.

- Familiarity with Microsoft Office and general IT systems.

- No prior experience with Dynamics 365 is required, although basic knowledge is beneficial.

Course Objectives:

By the end of this course, participants will be able to:

- Understand the core functionalities of Microsoft Dynamics 365 customer engagement apps.

- Utilize Dynamics 365 Customer Insights for managing customer journeys and data.

- Manage sales processes, including leads, opportunities, orders, and forecasting with Dynamics 365 Sales.

- Implement and optimize case management and customer service processes using Dynamics 365 Customer Service.

- Configure and manage Dynamics 365 Field Service applications, including work orders, scheduling, and mobile app functionalities.

- Leverage Microsoft Power Platform to extend and enhance Dynamics 365 capabilities.

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Learning Path A – Microsoft Dynamics 365 Fundamentals (CRM)

1. **Core Capabilities of Dynamics 365 Customer Engagement Apps**

   o Foundations of Dynamics 365 Customer Engagement

   o Shared Activities and Integration Options

   o Lab: Working with Customer Engagement Apps

   o Lab: Managing Customers and Activities

2. **Fundamentals of Microsoft Dynamics 365 Customer Insights**

   o Explore Dynamics 365 Customer Insights - Journeys

   o Describe Dynamics 365 Customer Insights - Data and Dynamics 365 Customer Voice

   o Lab: Creating a Simple Customer Journey

3. **Fundamentals of Microsoft Dynamics 365 Sales**

   o Explore Dynamics 365 Sales

   o Sales Capabilities and Related Apps

   o Lab: Creating and Managing a Lead and an Opportunity

4. **Fundamentals of Microsoft Dynamics 365 Customer Service**

   o Explore Dynamics 365 Customer Service

   o Describe Dynamics 365 Customer Service Capabilities and Related Apps

   o Lab: Creating and Managing Cases

5. **Fundamentals of Microsoft Dynamics 365 Field Service**

   o Explore Dynamics 365 Field Service

   o Describe the Scheduling Process

   o Customer Assets and Connected Field Service

Learning Path B – Microsoft Dynamics 365 Sales

1. **Get Started with Dynamics 365 Sales**

   o Introduction to Dynamics 365 Sales

   o Configure Organization and Management Settings

   o Lab: Validate Lab Environment

2. **Manage Leads and Opportunities in Dynamics 365 Sales**

   o Manage Leads with Dynamics 365 Sales

   o Manage Opportunities with Dynamics 365 Sales

   o Track Customer Interactions with Activities

   o Lab: Manage Customers

   o Demo: Customize the Sales Process

3. **Manage Orders and the Product Catalog with Dynamics 365 Sales**

   o Manage and Organize Your Product Catalog with Dynamics 365 Sales

   o Process Sales Orders with Dynamics 365 Sales

   o Lab: Manage Product Catalog

   o Lab: Build Quotes

   o Lab: Orders and Invoices

4. **Manage Goals and Forecasts with Dynamics 365 Sales**

   o Define and Track Goals in Dynamics 365 Sales

   o Manage Forecasting in Dynamics 365 Sales

5. **Analyze Dynamics 365 Sales Data**

   o Analyze Data with Dynamics 365 Sales

   o Analyze Data with Power BI

   o Lab: Configure a Dashboard

6. **Work with Dynamics 365 Sales Insights and the Sales Accelerator**

   o Get Started with Dynamics 365 Sales Insights

   o Get Started with the Sales Accelerator

   o Demo: Sales Insights

   o Lab: Create a Sequence

7. **Create Surveys with Dynamics 365 Customer Voice**

- o   Create a Survey Project
- o   Create Surveys with Dynamics 365 Customer Voice
- o   Send Dynamics 365 Customer Voice Surveys

8. **Enhance Seller Productivity by Extending Dynamics 365 Sales**

- o   Boost Sales Performance with Microsoft Copilot for Sales
- o   Get Started with the Dynamics 365 Sales Mobile App
- o   Use Microsoft 365 Services with Dynamics 365 Sales

Learning Path C – Microsoft Dynamics 365 Customer Service

1. **Case Management**

- o   Get Started with Dynamics 365 Customer Service
- o   Managing Cases with Dynamics 365 Customer Service
- o   Use Microsoft Dynamics 365 Customer Service Queues to Manage Case Workloads
- o   Create or Update Records Automatically in Customer Service Hub
- o   Lab: Validate Lab Environment
- o   Demo: Set up Customer Service Environment
- o   Lab: Creating Cases, Queues, Resolving Cases, and Routing Cases

2. **Entitlements and Service Level Agreements**

- o   Create and Manage Entitlements in Microsoft Dynamics 365 Customer Service
- o   Manage Service Level Agreements
- o   Lab: Entitlements and Templates

3. **Knowledge Management**

- o   Create Knowledge Management Solutions in Dynamics 365 Customer Service
- o   Use Knowledge Articles to Resolve Dynamics 365 Customer Service Cases
- o   Lab: Create Knowledge Articles

4. **Multi-session Experiences**

- o   Enhance Agent Productivity with Customer Service Workspace
- o   Create Custom Experiences with Agent Experience Profiles
- o   Lab: Customer Service Workspace and Agent Experience Profiles

5. **Routing**

- o Examine Routing Options Available
- o Basic Record Routing
- o Get Started with Unified Routing

6. **Omnichannel for Dynamics 365 Customer Service**
   - o Getting Started with Omnichannel for Customer Service
   - o Configure Channels in Omnichannel for Customer Service
   - o Deploy Chat Widgets with Omnichannel for Customer Service

7. **Customer Voice**
   - o Create a Survey Project with Dynamics 365 Customer Voice
   - o Create Surveys with Dynamics 365 Customer Voice
   - o Send Dynamics 365 Customer Voice Surveys
   - o Automate Dynamics 365 Customer Voice Surveys with Power Automate
   - o Lab: Create Survey

8. **Service Scheduling**
   - o Configure Customer Service Scheduling
   - o Schedule Services with Customer Service Scheduling
   - o Lab: Configure Customer Service Scheduling and Define Services

9. **Analytics and Insights**
   - o Get Started with Customer Service Insights
   - o Create Visualizations for Customer Service
   - o Omnichannel Insights
   - o Demo: Configure Insights in Customer Service

10. **Connected Customer Service**
    - o Get Started with Connected Customer Service for Dynamics 365 and Azure IoT
    - o Register and Manage Devices with Connected Customer Service for Dynamics 365 and Azure IoT

11. **Power Platform for Customer Service**
    - o Create Custom Apps for Dynamics 365 Customer Service
    - o Integrate a Power Virtual Agents Bot with Omnichannel for Customer Service

Learning Path D – Microsoft Dynamics 365 Field Service

1. **Configure Field Service Applications**

   o   Configure Microsoft Dynamics 365 Field Service

   o   Lab: Validate Lab Environment

   o   Lab: Configure Field Service

   o   Configure Bookable Resources

   o   Schedule Crews, Facilities, and Resource Pooling

   o   Lab: Skills and Characteristics

   o   Lab: Creating Resources

2. **Manage Work Orders**

   o   Work Order Management

   o   Manage Incident Types

   o   Lab: Incident Types, Work Order Management, and Agreements

   o   Create and Perform Inspections

   o   Lab: Inspections

3. **Schedule and Dispatch Work Orders**

   o   Manage Scheduling Options

   o   Lab: Scheduling

   o   Configure Schedule Boards

   o   Lab: Configure the Schedule Board

   o   Resource Scheduling Optimization

4. **Manage the Field Service Mobile App**

   o   Get Started with the Dynamics 365 Field Service Mobile Application

   o   Lab: Field Service Mobile App

   o   Customize and Configure the Dynamics 365 Field Service Mobile App

   o   Integrate Dynamics 365 Remote Assist with Dynamics 365 Field Service

5. **Manage Inventory and Purchasing**

   o   Manage Inventory and Warehouses

   o   Manage Purchasing and Returns

   o Lab: Inventory

6. **Implement Assets and Connected Devices**

   o Customer Assets

   o Lab: Customer Assets

   o Connected Field Service

7. **Power Platform for Field Service**