

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

Course Duration: 8 Hours (1 Day)

Overview

This course provides a comprehensive overview of Microsoft Dynamics 365 customer engagement apps, covering essential concepts and functionalities across Customer Insights, Sales, Customer Service, and Field Service. Participants will explore the foundations of these applications, gain insights into customer data management, and learn to leverage tools like Microsoft Power Platform and Dataverse for integrated solutions. Practical lab exercises are included to reinforce key concepts and ensure hands-on experience.

Audience Profile

This course is designed for individuals looking to understand the fundamentals of Microsoft Dynamics 365 customer engagement apps. It is particularly beneficial for:

- IT professionals and administrators who are beginning to work with Dynamics 365.
- Business users interested in understanding how Dynamics 365 can enhance customer engagement.
- Sales and customer service professionals seeking to optimize processes using Dynamics 365.
- Functional consultants are starting their journey with Dynamics 365.

Course Syllabus

Learning Path 1: Explore the core capabilities of Microsoft Dynamics 365 customer engagement apps

Lesson 1: Describe the foundations of Dynamics 365 customer engagement apps

- Understanding customer engagement
- Power Platform and Dynamics 365 integration
- Introduction to Microsoft Dataverse
- Accessing Dynamics 365 customer engagement apps
- Overview of Copilot in Dynamics 365

Lesson 2: Describe shared activities and integration options

- Working with customers and activities
- Using search criteria and filters
- Exploring reporting options
- Understanding integration capabilities

Lab Exercises:

- Working with customer engagement apps
- Managing customers and activities

Learning Path 2: Learn the Fundamentals of Microsoft Dynamics 365 Customer Insights

Lesson 1: Explore Dynamics 365 Customer Insights - Journeys

- Key capabilities of Customer Insights – Journeys
- Segmentation and email marketing
- Customer journey mapping
- Lead generation and qualification
- Use cases for marketing forms
- Event management features

Lesson 2: Describe Dynamics 365 Customer Insights - Data and Dynamics 365 Customer Voice

- Overview of Customer Insights - Data
- Exploring Unified Customer Profiles
- Measures, segments, and predictions
- Consuming Customer Insights in other apps

Lab Exercises:

- Creating a simple customer journey

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

Lesson 1: Explore Dynamics 365 Sales

- Using Dynamics 365 Sales in the sales process
- Working with leads
- Understanding the Product Catalog
- Opportunity management
- Business Process flows in Sales
- Quote, order, and invoice management
- Overview of Sales accelerator
- Copilot in Sales

Lesson 2: Sales capabilities and related apps

- Dynamics 365 sales forecasting
- LinkedIn Sales Navigator integration
- Sales Insights key capabilities
- Microsoft Sales Copilot

Lab Exercises:

- Creating and managing a lead and an opportunity

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

Lesson 1: Explore Dynamics 365 Customer Service

- Case lifecycle management
- Case management in Dynamics 365
- Understanding entitlements and SLAs
- Using queues for workload management
- Knowledge management in Customer Service
- Overview of Copilot in Customer Service

Lesson 2: Describe Dynamics 365 Customer Service capabilities and related apps

- Omnichannel for Customer Service
- Historical Analytics reports
- Dynamics 365 Customer Voice and Customer Service

Lab Exercises:

- Creating and managing cases

Learning Path 5: Learn the Fundamentals of Microsoft Dynamics 365 Field Service

Lesson 1: Explore Dynamics 365 Field Service

- Overview of Dynamics 365 Field Service
- Work order lifecycle
- Inspections
- Dynamics 365 Field Service mobile application

Lesson 2: Describe the scheduling process

- Scheduling capabilities in Field Service
- Defining resources
- Resource Scheduling Optimization
- Customer assets and Connected Field Service