

Microsoft Dynamics 365 CRM

Course Duration: 40 Hours (5 Days)

Day 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

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

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

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

Day 2

Work with Microsoft Dataverse

Modules:

- What is a relational database?
- Introduction to Microsoft Dataverse
- Manage environments
- Manage customizations with solutions
- Create and manage tables in Microsoft Dataverse
- Create and manage columns in Microsoft Dataverse
- Create relationships between tables in Dataverse
- Create and define calculated and rollup columns

Labs

- Validate lab environment
- Environments
- Publisher and Solution
- Import solution
- Tables
- Columns
- Relationships

Manage Microsoft Dataverse

Modules:

- Define and create business rules in Dataverse
- Load/export data in Microsoft Dataverse
- Manage security in Microsoft Dataverse
- Administration options in Microsoft Dataverse

Labs

- Business rules
- Import data
- Export data
- Security roles
- Users and Teams
- Bulk delete data
- Duplicate detection
- Audit

Create model-driven apps in Power Apps

Modules:

- Introduction to model-driven apps
- Design and create model-driven apps
- Configure forms
- Configure views
- Configure charts
- Configure dashboards

Labs

- Forms
- Views
- Dashboards

Create canvas apps in Power Apps

Modules:

- Introduction to canvas apps
- Customize a canvas app
- Build the UI in a canvas app
- Navigation in a canvas app
- Manage apps
- Build a mobile-optimized app
- Connect to other data

Labs

- Build a canvas app

Day 3

Make portals in Power Pages

Modules:

- Introduction to Power Pages
- Core components and features
- Portals architecture
- Explore design studio

Labs

- Build a Power Pages portal

Build automation with Power Automate

Modules:

- Introduction to automation in Dataverse
- Introduction to Power Automate
- Create Power Automate cloud flows
- Use Dataverse triggers and actions in Power Automate cloud flows
- Introduction to expressions in Power Automate
- Test and troubleshoot Power Automate cloud flows
- Administer Power Automate cloud flows
- Create business process flows

Labs

- Cloud flows
- Business process flows

Build chatbots with Co-Pilot Agents

Modules:

- Identify use cases for Co-Pilot Agents
- Identify components of Co-Pilot Agents

Labs

- Create Power Virtual Agents

Introduction to developing with Power Platform

- Introduction to Microsoft Power Platform developer resources
- Use developer tools to extend Microsoft Power Platform
- Introduction to extending Microsoft Power Platform
- Work with Dataverse API

Labs:

- Power Platform tools
- Power Platform APIs

Day 4

Extending the model-driven apps user experience

- Performing common actions with client script
- Best practices with client script

Labs :

- Client scripting

Create code components with the Power Apps Component Framework

- Get started with Power Apps component framework

Labs:

- Power Apps Component Framework (Optional)

Create Extending Microsoft Dataverse

- Introduction to Dataverse for developers Create plug-ins

Labs:

- Dataverse Plug-ins

Day 5

Integrate with Dataverse and Azure

- Integrate with Azure
- Integrate with Dataverse

Labs

- Azure Functions (Optional)
- Publishing events externally

Learning Path 11: Integrate with Dataverse and Azure

- Custom Connectors

Labs :

- Custom connector (Optional)

Learning Path 12: Application lifecycle management

- Solutions and Application Lifecycle Management