

KOENIG SOLUTIONS • COURSE OUTLINE

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

Learn to describe core capabilities of Dynamics 365 Customer Insights, Sales, Customer Service and Field Service apps.

1 Day

8 HOURS

5

MODULES

48

TOPICS

5

LAB EXERCISES

COURSE 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.

WHO THIS COURSE IS FOR

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

LEARNING OBJECTIVES

- Describe the foundations of Dynamics 365 customer engagement apps
- Explain integration between Power Platform, Dataverse and Dynamics 365
- Identify key capabilities of Customer Insights - Journeys and Data
- Describe lead, opportunity and quote management in Dynamics 365 Sales
- Explain case lifecycle and knowledge management in Customer Service
- Describe work order lifecycle and inspections in Field Service
- Explain scheduling capabilities and resource management in Field Service
- Identify Copilot features across Dynamics 365 apps

5 Modules, 48 Topics

01

2 Lab Exercises

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

02

Lab Exercise

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

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

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

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

Practise What You Learn

#	MODULE	ACTIVITY
01	Learning Path 1: Explore the Core Capabilities of Microsoft Dynamics 365 Customer Engagement Apps	■ Working with customer engagement apps ■ Managing customers and activities
02	Learning Path 2: Learn the Fundamentals of Microsoft Dynamics 365 Customer Insights	Creating a simple customer journey
03	Learning Path 3: Explore the Fundamentals of Microsoft Dynamics 365 Sales	Creating and managing a lead and an opportunity
04	Learning Path 4: Explore the Fundamentals of Microsoft Dynamics 365 Customer Service	Creating and managing cases

WHAT IS INCLUDED

Everything You Need to Succeed

- Koenig course material for every module
- Delivery by certified instructors and subject matter experts
- Hands-on exercises throughout the course
- Course completion certificate from Koenig

ABOUT KOENIG

Who We Are

Established in 1993, Koenig Solutions is a globally recognised training provider with 35+ technology partnerships, 5,000+ training programmes and a network of certified instructors and subject matter experts, supporting individuals and enterprise teams worldwide.

FLEXIBLE DELIVERY

Learn the Way That Suits You

Classroom Training

Live Online Classes (ILO)

Fly-Me-A-Trainer (FMAT)

Flexi (Self-Paced)

1-on-1 Training

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