

KOENIG SOLUTIONS • COURSE OUTLINE

Microsoft Dynamics 365 CRM & Power Platform Practitioner Bootcamp (Intermediate)

Learn to implement, customise and extend Dynamics 365 CRM apps and Power Platform, from Dataverse to automation, portals and integrations.

5 Days

40 HOURS

19

MODULES

99

TOPICS

36

HANDS-ON ACTIVITIES

LEARNING OBJECTIVES

- Describe the core capabilities of Dynamics 365 customer engagement apps
- Explain Sales, Customer Service and Field Service features
- Create and manage tables, columns and relationships in Dataverse
- Apply business rules and security roles in Dataverse
- Build model-driven and canvas apps using Power Apps
- Configure Power Pages portals and design studio components
- Implement cloud flows and business process flows with Power Automate
- Develop plug-ins, custom connectors and Azure integrations

19 Modules, 99 Topics

DAY 1

Explore the Core Capabilities of Microsoft Dynamics 365 Customer Engagement Apps

2 Lab Exercises**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

Learn the Fundamentals of Microsoft Dynamics 365 Customer Insights

Lab Exercise**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

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

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

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

Work with Microsoft Dataverse

7 Labs

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

Manage Microsoft Dataverse

8 Labs

MODULES

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

Create Model-Driven Apps in Power Apps

3 Labs

MODULES

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

Create Canvas Apps in Power Apps

Lab

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

Make Portals in Power Pages

Lab

MODULES

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

Build Automation with Power Automate

2 Labs

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

Build Chatbots with Co-Pilot Agents

Lab

MODULES

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

Introduction to Developing with Power Platform

2 Labs

TOPICS

- 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

DAY 4

Extending the Model-Driven Apps User Experience

Lab

TOPICS

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

Create Code Components with the Power Apps Component Framework

Lab

TOPICS

- Get started with Power Apps component framework

Create Extending Microsoft Dataverse

Lab

TOPICS

- Introduction to Dataverse for developers Create plug-ins



Integrate with Dataverse and Azure

2 Labs

TOPICS

Integrate with Azure · Integrate with Dataverse

11

Integrate with Dataverse and Azure

Lab

TOPICS

Custom Connectors

12

Application Lifecycle Management

TOPICS

- Solutions and Application Lifecycle Management

HANDS-ON ACTIVITIES

Practise What You Learn

#	MODULE	ACTIVITY
	Explore the Core Capabilities of Microsoft Dynamics 365 Customer Engagement Apps	LAB EXERCISES ■ Working with customer engagement apps ■ Managing customers and activities
	Learn the Fundamentals of Microsoft Dynamics 365 Customer Insights	Lab Exercises: Creating a simple customer journey
03	Explore the Fundamentals of Microsoft Dynamics 365 Sales	Lab Exercises: Creating and managing a lead and an opportunity
	Explore the Fundamentals of Microsoft Dynamics 365 Customer Service	Lab Exercises: Creating and managing cases
	Work with Microsoft Dataverse	LABS ■ Validate lab environment ■ Environments ■ Publisher and Solution ■ Import solution ■ Tables ■ Columns ■ Relationships

#	MODULE	ACTIVITY
	Manage 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	LABS ■ Forms ■ Views ■ Dashboards
	Create Canvas Apps in Power Apps	Labs: Build a canvas app
	Make Portals in Power Pages	Labs: Build a Power Pages portal
	Build Automation with Power Automate	LABS ■ Cloud flows ■ Business process flows
	Build Chatbots with Co-Pilot Agents	Labs: Create Power Virtual Agents
	Introduction to Developing with Power Platform	LABS ■ Power Platform tools ■ Power Platform APIs
	Extending the Model-Driven Apps User Experience	Labs: Client scripting
	Create Code Components with the Power Apps Component Framework	Labs: Power Apps Component Framework (Optional)
	Create Extending Microsoft Dataverse	Labs: Dataverse Plug-ins
	Integrate with Dataverse and Azure	LABS ■ Azure Functions (Optional) ■ Publishing events externally
11	Integrate with Dataverse and Azure	Labs: Custom connector (Optional)

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

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Live Online Classes (ILO)

Fly-Me-A-Trainer (FMAT)

Flexi (Self-Paced)

1-on-1 Training

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