

KOENIG SOLUTIONS • COURSE OUTLINE

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

Learn to manage leads, cases and work orders across Dynamics 365 Sales, Customer Service and Field Service, extended with Power Platform.

31

MODULES

75

TOPICS

34

HANDS-ON ACTIVITIES

COURSE OVERVIEW

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.

WHO THIS COURSE IS FOR

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.

LEARNING OBJECTIVES

What You Will Learn

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

COURSE SYLLABUS

31 Modules, 75 Topics

Learning Path A - Microsoft Dynamics 365 Fundamentals (CRM)

01

2 Labs

Core Capabilities of Dynamics 365 Customer Engagement Apps

TOPICS

- Foundations of Dynamics 365 Customer Engagement
- Shared Activities and Integration Options

02

Lab

Fundamentals of Microsoft Dynamics 365 Customer Insights

TOPICS

- Explore Dynamics 365 Customer Insights - Journeys
- Describe Dynamics 365 Customer Insights - Data and Dynamics 365 Customer Voice

03

Lab

Fundamentals of Microsoft Dynamics 365 Sales

TOPICS

Explore Dynamics 365 Sales · Sales Capabilities and Related Apps



04**Lab**

Fundamentals of Microsoft Dynamics 365 Customer Service

TOPICS

- Explore Dynamics 365 Customer Service
- Describe Dynamics 365 Customer Service Capabilities and Related Apps

05

Fundamentals of Microsoft Dynamics 365 Field Service

TOPICS

Explore Dynamics 365 Field Service · Describe the Scheduling Process · Customer Assets and Connected Field Service

Learning Path B - Microsoft Dynamics 365 Sales

01**Lab**

Get Started with Dynamics 365 Sales

TOPICS

- Introduction to Dynamics 365 Sales
- Configure Organization and Management Settings

02**Lab****Demo**

Manage Leads and Opportunities in Dynamics 365 Sales

TOPICS

Manage Leads with Dynamics 365 Sales · Manage Opportunities with Dynamics 365 Sales · Track Customer Interactions with Activities

03**3 Labs**

Manage Orders and the Product Catalog with Dynamics 365 Sales

TOPICS

- Manage and Organize Your Product Catalog with Dynamics 365 Sales
- Process Sales Orders with Dynamics 365 Sales



04

Manage Goals and Forecasts with Dynamics 365 Sales

TOPICS

Define and Track Goals in Dynamics 365 Sales · Manage Forecasting in Dynamics 365 Sales

05**Lab**

Analyze Dynamics 365 Sales Data

TOPICS

Analyze Data with Dynamics 365 Sales · Analyze Data with Power BI

06**Demo****Lab**

Work with Dynamics 365 Sales Insights and the Sales Accelerator

TOPICS

Get Started with Dynamics 365 Sales Insights · Get Started with the Sales Accelerator

07

Create Surveys with Dynamics 365 Customer Voice

TOPICS

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

08

Enhance Seller Productivity by Extending Dynamics 365 Sales

TOPICS

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

Learning Path C - Microsoft Dynamics 365 Customer Service

01**Lab****Demo****Lab**

Case Management

TOPICS

- Get Started with Dynamics 365 Customer Service
- Managing Cases with Dynamics 365 Customer Service
- Use Microsoft Dynamics 365 Customer Service Queues to Manage Case Workloads
- Create or Update Records Automatically in Customer Service Hub



02**Lab**

Entitlements and Service Level Agreements

TOPICS

- Create and Manage Entitlements in Microsoft Dynamics 365 Customer Service
- Manage Service Level Agreements

03**Lab**

Knowledge Management

TOPICS

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

04**Lab**

Multi-session Experiences

TOPICS

- Enhance Agent Productivity with Customer Service Workspace
- Create Custom Experiences with Agent Experience Profiles

05

Routing

TOPICS

Examine Routing Options Available · Basic Record Routing · Get Started with Unified Routing

06

Omnichannel for Dynamics 365 Customer Service

TOPICS

- Getting Started with Omnichannel for Customer Service
- Configure Channels in Omnichannel for Customer Service
- Deploy Chat Widgets with Omnichannel for Customer Service

07**Lab**

Customer Voice

TOPICS

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

08**Lab**

Service Scheduling

TOPICS

- Configure Customer Service Scheduling
- Schedule Services with Customer Service Scheduling

09**Demo**

Analytics and Insights

TOPICS

Get Started with Customer Service Insights · Create Visualizations for Customer Service · Omnichannel Insights

10

Connected Customer Service

TOPICS

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

11

Power Platform for Customer Service

TOPICS

- Create Custom Apps for Dynamics 365 Customer Service
- Integrate a Power Virtual Agents Bot with Omnichannel for Customer Service

01

4 Labs

Configure Field Service Applications

TOPICS

- Configure Microsoft Dynamics 365 Field Service
- Configure Bookable Resources
- Schedule Crews, Facilities, and Resource Pooling

02

2 Labs

Manage Work Orders

TOPICS

Work Order Management · Manage Incident Types · Create and Perform Inspections

03

2 Labs

Schedule and Dispatch Work Orders

TOPICS

Manage Scheduling Options · Configure Schedule Boards · Resource Scheduling Optimization

04

Lab

Manage the Field Service Mobile App

TOPICS

- Get Started with the Dynamics 365 Field Service Mobile Application
- Customize and Configure the Dynamics 365 Field Service Mobile App
- Integrate Dynamics 365 Remote Assist with Dynamics 365 Field Service

05

Lab

Manage Inventory and Purchasing

TOPICS

Manage Inventory and Warehouses · Manage Purchasing and Returns

06

Lab

Implement Assets and Connected Devices

TOPICS

Customer Assets · Connected Field Service

07

Power Platform for Field Service

Practise What You Learn

#	MODULE	ACTIVITY
01	Core Capabilities of Dynamics 365 Customer Engagement Apps	LAB - Working with Customer Engagement Apps - Managing Customers and Activities
02	Fundamentals of Microsoft Dynamics 365 Customer Insights	Lab: Creating a Simple Customer Journey
03	Fundamentals of Microsoft Dynamics 365 Sales	Lab: Creating and Managing a Lead and an Opportunity
04	Fundamentals of Microsoft Dynamics 365 Customer Service	Lab: Creating and Managing Cases
01	Get Started with Dynamics 365 Sales	Lab: Validate Lab Environment
02	Manage Leads and Opportunities in Dynamics 365 Sales	Lab: Manage Customers Demo: Customize the Sales Process
03	Manage Orders and the Product Catalog with Dynamics 365 Sales	LAB - Manage Product Catalog - Build Quotes - Orders and Invoices
05	Analyze Dynamics 365 Sales Data	Lab: Configure a Dashboard
06	Work with Dynamics 365 Sales Insights and the Sales Accelerator	Demo: Sales Insights Lab: Create a Sequence
01	Case Management	Lab: Validate Lab Environment Demo: Set up Customer Service Environment Lab: Creating Cases, Queues, Resolving Cases, and Routing Cases
02	Entitlements and Service Level Agreements	Lab: Entitlements and Templates
03	Knowledge Management	Lab: Create Knowledge Articles
04	Multi-session Experiences	Lab: Customer Service Workspace and Agent Experience Profiles
07	Customer Voice	Lab: Create Survey
08	Service Scheduling	Lab: Configure Customer Service Scheduling and Define Services

#	MODULE	ACTIVITY
09	Analytics and Insights	Demo: Configure Insights in Customer Service
01	Configure Field Service Applications	LAB ■ Validate Lab Environment ■ Configure Field Service ■ Skills and Characteristics ■ Creating Resources
02	Manage Work Orders	LAB ■ Incident Types, Work Order Management, and Agreements ■ Inspections
03	Schedule and Dispatch Work Orders	LAB ■ Scheduling ■ Configure the Schedule Board
04	Manage the Field Service Mobile App	Lab: Field Service Mobile App
05	Manage Inventory and Purchasing	Lab: Inventory
06	Implement Assets and Connected Devices	Lab: Customer Assets

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.

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Live Online Classes (ILO)

Fly-Me-A-Trainer (FMAT)

Flexi (Self-Paced)

1-on-1 Training

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