



MB901: Microsoft Dynamics 365 Fundamentals

Course ID #: 7000-370-ZZ-Z

Hours: 14

Course Content

Course Description:

This course provides learners with a broad overview of Dynamics 365 applications. We will introduce you each of the applications, articulate their business value, and discuss and demo core functionality. We will cover Dynamics 365 security, reporting, and familiarize you with data and product integrations available.

At Course Completion:

After competing this course, student will be able to:

- Distinguish between the different Dynamics 365 applications
- Articulate the business value and core functionality of the Dynamics 365 apps
- Describe artificial intelligence (AI) and mixed reality (MR)
- Define the digital transformation loop
- Describe cloud-based security
- Summarize role-based security in Dynamics 365
- Explain Dynamics 365 reporting options
- Give examples of cross-Dynamics app integration
- Describe Office 365 and Dynamics 365 integration

Topics:

Module 1: Introduction to Microsoft Dynamics

365

- Introduction
- Dynamics 365 Applications
- What is artificial intelligence (AI)?
- What is mixed reality (MR)?
- Digital Transformation
- Summary

Module 2: Principles of cloud computing

- Introduction
- What is cloud computing?
- Benefits of cloud computing
- Compliance, terms, and requirements
- Types of cloud services
- Deployment
- Azure DevOps
- Microsoft Dynamics Lifecycle Services (LCS)
- Explore Power Platform Admin Center
- Summary



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Module 3: Introduction to Dynamics 365 Sales

- Introduction
- Automation of business processes with Dynamics 365 Sales
- Manage the sales process and pipeline
- Benefits of Microsoft Relationship Sales Solution (MRSS)
- Dynamics 365 Sales Insights
- Microsoft Forms Pro
- Dynamics 365 Product Visualize
- Summary
- Lab : Explore Dynamics 365 Sales
- Create or edit quotes
- Create or edit orders
- Create or edit invoices

Module 4: Introduction to Dynamics 365

Marketing

- Introduction
- The benefits of Dynamics 365 Marketing
- Features and functionality of Dynamics 365 Marketing
- Lead generation and qualification
- Customer journey
- Segmentation
- Event management
- Summary
- Lab : Explore Dynamics 365 Marketing
- Create engaging emails
- Pinpoint your audience
- Build a campaign

Module 5: Introduction to Dynamics 365

Customer Service

- Introduction
- Overview of Dynamics 365 Customer Service
- Account management
- Case lifecycle management
- Knowledge articles
- Omnichannel for Dynamics 365 Customer Service
- Power Apps Portals
- Dynamics 365 Customer Service Insights
- Summary
- Lab : Explore Dynamics 365 Customer Service
- Create and manage a case

Module 6: Introduction to Dynamics 365 Field Service

- Introduction
- Benefits of Dynamics 365 Field Service
- Connected Field Service
- Service resource scheduling
- Resource Scheduling Optimization (RSO)
- Field Service Mobile
- Dynamics 365 Remote Assist
- Dynamics 365 Guides
- Summary

Module 7: Introduction to Dynamics 365 Finance

- Introduction
- Overview of Dynamics 365 Finance
- Dynamics 365 Finance core capabilities
- Summary
- Lab : Explore Dynamics 365 Finance



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Module 8: Introduction to Dynamics 365 Supply Chain Management

- Introduction
- Overview of Dynamics 365 Supply Chain Management
- Dynamics 365 Supply Chain Management core capabilities
- Dynamics 365 Layout
- Summary
- Lab : Explore Dynamics 365 Supply Chain Management
- Create a product
- Create product masters
- Create a purchase order

Module 9: Introduction to Dynamics 365 Business Central

- Introduction
- Overview of Dynamics 365 Business Central
- Finance and budgeting
- Supply chain management
- Project management
- Sales and service
- When should you use Business Central versus other Dynamics 365 applications?
- Summary

Module 10: Introduction to Dynamics 365 Human Resources

- Introduction
- Overview of Dynamics 365 Human Resources
- Employee Self-service
- Personnel management
- Benefits management
- Employee development
- Summary
- Lab : Explore Dynamics 365 Human Resources
- Create a job

Module 11: Introduction to Dynamics 365 Commerce

- Introduction
- Overview of Dynamics 365 Commerce
- Omnichannel and Channel management
- Dynamics 365 Commerce core functional areas
- Assisted Selling
- Merchandizing and inventory
- Dynamics 365 Commerce deployment options
- Dynamics 365 Fraud Protection
- Summary

Module 12: Recognize Dynamics 365 Security

- Introduction
- Dynamics 365 cloud security
- Cloud security basics
- Understanding role-based security
- Security in Finance and Operations apps
- Summary
- Lab : Explore security roles in Dynamics 365 model-driven apps
- Lab : Explore security roles in Finance and Operations apps
- Lab : Enhance security by encrypting your data

Module 13: Connect and analyze your Dynamics 365 data

- Introduction
- The use of Microsoft Power Platform in Dynamics 365
- Benefits of Common Data Service
- Dynamics 365 reporting
- Summary
- Lab : Explore Power Platform Admin Center



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Module 14: Explore model-driven app integrations and Dynamics 365 Customer Insights

- Introduction
- Integration across Dynamics 365 applications
- Integration with Microsoft products
- Integration with third-party applications
- Dynamics 365 Customer Insights
- Summary

Module 15: Explore Finance and Operations cross-app integrations

- Introduction
- Integration across Dynamics 365 apps
- Discover the Data Management Framework
- Integrations across Microsoft products
- Integrations with third-party apps
- Explore external system integration capabilities
- Summary