



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

Course ID #: 7000-604-ZZ-Z

Hours: 7

Course Content

Course Description:

In this course, you will cover a broad introduction to the customer engagement capabilities of Dynamics 365. You will become familiar with the concept of customer engagement, the core capabilities of customer engagement apps as well as with each of the customer engagement apps, including Dynamics 365 Marketing, Dynamics 365 Sales, Dynamics 365 Customer Service and Dynamics 365 Field Service. This course will include lecture as well as hands-on-labs.

Course Objectives:

Upon successful completion of this course, students will be able to:

- Explain what Microsoft Dataverse is and how it is used by Dynamics 365 customer engagement apps
- Explore different reporting options
- Explain how to create and leverage customer journeys in Dynamics 365 Marketing
- Describe how to use Customer Insights to create more targeted customer segments that can be brought into Dynamics 365 Marketing
- Describe the typical sales lifecycle process looks like and how an organization might use it to manage their sales
- Describe the options available for building and delivering quotes using Dynamics 365 Sales
- Identify cases where additional sales apps could be leveraged
- Examine the sales pipeline and forecasting available in Dynamics 365 Sales
- Explain the case lifecycle
- Examine how to manage queues
- Describe Omnichannel for Dynamics 365 Customer Service
- Examine the lifecycle of a work order
- Schedule qualified resources
- And so much more!

Prerequisites:

None. An understanding of cloud computing is helpful but isn't necessary.



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Target Audience:

The Microsoft Dynamics 365 Fundamentals (CRM) course is targeted to those looking to familiarize themselves with and gain a broad exposure to the marketing, sales, customer service, and field service capabilities of Dynamics 365.

This audience wants to explore the features and capabilities of Microsoft Dynamics 365 Marketing, Dynamics 365 Sales, Dynamics 365 Customer Service, and Dynamics 365 Field Service.

People in various roles and stages in their careers can benefit from this fundamentals course. The course is designed for IT professionals, business stakeholders, entrepreneurs, students, and people starting or changing careers who want to be exposed to the marketing, sales, customer service, and field service capabilities of Dynamics 365.

Topics:

Lesson 1: Describe the foundations of Dynamics 365 customer engagement apps

- Introduction
- Describe customer relationship management
- Describe Microsoft Power Platform and Dynamics 365 customer engagement apps
- Describe Microsoft Dataverse and Dynamics 365 customer engagement apps
- Describe use cases for Dynamics 365 customer engagement apps
- Navigate to and within Dynamics 365 customer engagement apps
- Knowledge check
- Summary and resources

Lesson 2: Describe shared activities and integration options in Dynamics 365 customer engagement apps

- Introduction
- Describe customers and activities
- Exercise: Manage customers and activities
- Describe search criteria and filters
- Describe reporting capabilities including charts, dashboards, and views
- Describe Excel integrations
- Describe Microsoft Teams integration
- Describe Outlook integration
- Knowledge check
- Summary and resources



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Lesson 3: Explore Dynamics 365 Marketing

- Introduction
- Describe use cases for Dynamics 365 Marketing
- Explore a Dynamics 365 Marketing business scenario
- Describe email marketing
- Describe how to target customers by using marketing lists and segments
- Describe customer journeys
- Describe lead generation and qualification
- Describe use cases for marketing forms
- Describe event management features and capabilities
- Knowledge check
- Summary and resources

Lesson 4: Describe Dynamics 365 Marketing apps

- Introduction
- Explore a Dynamics 365 Marketing related apps business scenario
- Describe use cases for and capabilities of Dynamics 365 Customer Insight
- Describe use cases for and capabilities of Dynamics 365 Customer Voice
- Knowledge check
- Summary and resources

Lesson 5: Explore Dynamics 365 Sales

- Introduction
- Describe use cases for Dynamics 365 Sales
- Review the sales lifecycle
- Explore a Dynamics 365 Sales business scenario
- Describe leads and the process for qualifying leads
- Describe the opportunity management process
- Exercise: Lab: Work with leads and opportunities
- Describe Dynamics 365 Sales business process flows
- Describe sales order processing
- Knowledge check
- Summary and resources

Lesson 6: Describe Dynamics 365 Sales capabilities and related apps

- Introduction
- Identify additional Dynamics 365 Sales capabilities and related apps
- Explore a Dynamics 365 Sales related apps business scenario
- Describe sales pipeline and forecasting concepts
- Describe use cases for and capabilities of Sales Insights
- Describe use cases for and capabilities of LinkedIn Sales Navigator
- Describe the Dynamics 365 Sales mobile app
- Describe Viva Sales
- Knowledge check
- Summary and resources



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Lesson 7: Explore Dynamics 365 Customer Service

- Introduction
- Describe use cases for Dynamics 365 Customer Service
- Explore a Dynamics 365 Customer Service business scenario
- Describe the case lifecycle including service-level agreements (SLAs) and entitlements
- Describe the functionality for workload management
- Describe Dynamics 365 Customer Service business process flows
- Describe knowledge management in Dynamics 365 Customer Service
- Knowledge check
- Summary and resources

Lesson 8: Describe Dynamics 365 Customer Service capabilities and related apps

- Introduction
- Explore a Dynamics 365 Customer Service-related apps business scenario
- Describe Omnichannel for Customer Service
- Describe reporting and data visualization options in Dynamics 365 Customer Service
- Describe Dynamics Customer Voice use cases for customer service
- Knowledge check
- Summary and resources

Lesson 9: Explore Dynamics 365 Field Service

- Introduction
- Describe use cases for Dynamics 365 Field Service
- Explore a Dynamics 365 Field Service business scenario
- Describe the work order lifecycle
- Describe inspections in Dynamics 365 Field Service
- Describe the Dynamics 365 Field Service mobile app
- Knowledge check
- Summary and resources

Lesson 10: Describe Dynamics 365 Field Service scheduling capabilities and related apps

- Introduction
- Describe resource and scheduling processes
- Explore a Dynamics 365 Field Service-related apps business scenario
- Describe asset management and customer assets
- Describe Connected Field Service for Dynamics 365 Field Service
- Knowledge check
- Summary and resources

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