



Let's Reach For Excellence!

TAN DUC INFORMATION TECHNOLOGY SCHOOL JSC

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MB-910: Microsoft Dynamics 365 Fundamentals (CRM)

Duration: 01 day

This course will provide you with 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 Customer Insights, Dynamics 365 Sales, Dynamics 365 Customer Service and Dynamics 365 Field Service. You will also learn how Copilot can assist you in executing customer engagement tasks in Dynamics 365. This course includes lectures and hands-on-labs.

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 how customer engagement apps (CRM) for Dynamics 365 can be used to:

- Unify profiles and tailor targeted customer journeys by using Dynamics 365 Customer Insights apps.
- Efficiently assist users through the complete sales order lifecycle by using Dynamics 365 Sales.
- Assist agents with case management through the complete customer support lifecycle by using Dynamics 365 Customer Service.
- Schedule and complete work orders by using Dynamics 365 Field Service.
- Evaluate how Copilot can assist with each of these. 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 customer relationship capabilities of Dynamics 365.

Job role: Business Owner

PREREQUISITES

Learners should have a fundamental understanding of customer engagement principles and business operations. An understanding of cloud computing is helpful, but isn't necessary.

AT COURSE COMPLETION

- Describe the capabilities and functionality of Dynamics 365 Marketing
- Describe the capabilities and functionality of Dynamics 365 Sales
- Describe the capabilities and functionality of Dynamics 365 Customer Service
- Describe the capabilities and functionality of Dynamics 365 Field Service
- Describe the core capabilities of Dynamics 365 customer engagement apps

COURSE OUTLINE

Module 1: Examine the core capabilities of Microsoft Dynamics 365 customer engagement apps

This module serves as an introduction to the shared features for the customer engagement apps. Learners are introduced to Microsoft Dataverse, and how data is made accessible and managed in the customer engagement apps, from shared entities to searching and filtering data and finally, available reporting and integration options.

Lessons

- Navigate the Dynamics 365 customer engagement apps

- Explore common Dynamics 365 activities and integration options

Module 2: Learn the fundamentals of Dynamics 365 Marketing

This module introduces learners to the core capabilities of Dynamics 365 Marketing. In the first lesson you will learn about the core product capabilities to support key marketing tasks, from email marketing to segments and customer journeys. The next lesson covers event management, as well as Dynamics 365 Customer Voice for customer surveys and Dynamics 365 Customer Insights for AI-based analytics.

Lesson

- Explore Dynamics 365 Marketing
- Explore other marketing capabilities and apps

Module 3: Learn the fundamentals of Dynamics 365 Sales

This module provides an introduction to Dynamics 365 Sales, focusing on managing leads, lead qualification, opportunities and sales orders as part of the standard sales lifecycle. Then we shift our attention to sales forecasting and the use of LinkedIn Sales Navigator and Dynamics 365 Sales Insights for improved relationship selling.

Lesson

- Examine Dynamics 365 Sales
- Use sales capabilities

Module 4: Learn the Fundamentals of Dynamics 365 Customer Service

This module provides an introduction to Dynamics 365 Customer Service. We begin with the standard case management business processes and how Customer Service addresses those. Then we examine the product capabilities, including business process flows, entitlements and SLAs, and knowledge management. Finally, we cover Omnichannel for Customer Service and historical analytics.

Lesson

- Explore Dynamics Field Service
- Examine knowledge management in Dynamics 365 Customer Service and related apps

Module 5: Learn the Fundamentals of Dynamics 365 Field Service

This module provides an introduction to Dynamics 365 Field Service. We begin with a discussion of the work order lifecycle. Then we examine the product capabilities, including work order generation, inspections, scheduling, asset management and Connected Field Service.

Lesson

- Explore Dynamics 365 Field Service
- Describe the scheduling process