Microsoft Dynamics 365 Fundamentals (CRM) – Intensive Training («MB910»)

This course will provide you with a broad introduction to the customer engagement capabilities of Dynamics 365.

Duration: 1 day
Price: 900.–
Course documents: Official Microsoft Courseware and Microsoft Learn
Vendor code: MB-910

Content

Become familiar with the concept of customer engagement, as well as each of the customer engagement apps, including Dynamics 365 Marketing, Dynamics 365 Sales, Dynamics 365 Customer Service, Dynamics 365 Field Service, and the customer relationship management (CRM) capabilities of Dynamics 365 Project Operations.
This course will include lecture as well as hands-on-labs.

Course outline:

Module 1: Learn the Fundamentals of Dynamics 365 Marketing
This module covers the basic concepts of customer engagement and what the customer engagement apps have in common before diving into Dynamics 365 Marketing. We begin with the standard marketing business processes and how Marketing addresses those. Then we examine the product capabilities. Finally, we cover additional marketing apps such as LinkedIn Campaign Manager, Dynamics 365 Customer Voice and Dynamics 365 Customer Insights.
Lessons

- Get introduced to the Dynamics 365 customer engagement apps
- Examine Dynamics 365 Marketing
- Describe Dynamics 365 Marketing capabilities
- Review Additional Marketing Apps

Lab : Working with customer engagement apps
Lab : Manage Customers and Activities
Lab : Search and filter data
Lab : Dynamics 365 Marketing Capstone Lab

- Create a marketing email
- Create a Segment in Dynamics 365 Marketing
- Create a Customer Journey

Module 2: Learn the Fundamentals of Dynamics 365 Sales
This module provides an introduction to Dynamics 365 Sales. We begin with the standard sales business processes and how Sales addresses those. Then we examine the product capabilities. Finally, we cover additional sales apps such as Sales Insights and Sales Navigator.
Lessons

- Explore Dynamics 365 Sales
- Manage the sales lifecycle with Dynamics 365 Sales
- Review additional sales apps

- Create and qualify a Lead
- Manage a sales Opportunity

Module 3: Learn the Fundamentals of Dynamics 365 Customer Service

This module provides an introduction to Dynamics 365 Customer Service. We begin with the standard customer service business processes and how Customer Service addresses those. Then we examine the product capabilities. Finally, we cover additional customer service apps such as Omnichannel for Customer Service, Dynamics 365 Customer Service Insights, Customer Service Scheduling and Connected Customer Service.

Lessons

- Examine Dynamics 365 Customer Service
- Describe Dynamics Customer Service capabilities
- Review additional customer service apps

Lab : Dynamics 365 Capstone Lab

- Create and publish a Knowledge Article
- Manage a support Case through its life cycle

Module 4: Learn the Fundamentals of Dynamics 365 Field Service

This module provides an introduction to Dynamics 365 Field Service. We begin with the standard field service business processes and how Field Service addresses those. Then we examine the product capabilities, including work order generation, scheduling, inventory management and asset management.

Lessons

- Examine Dynamics Field Service
- Generate Work Orders in Dynamics 365 Field Service
- Describe the scheduling capabilities of Dynamics 365 Field Service
- Examine the inventory management capabilities of Dynamics 365 Field Service
- Review the asset management capabilities of Dynamics 365 Field Service

Lab : Dynamics 365 Capstone Lab

- Create a Case and escalate to a Work Order
- Schedule items with Dynamics 365 Field Service

Module 5: Learn the Fundamentals of Dynamics 365 Project Operations (CRM)

This module provides an introduction to the customer engagement aspects of Dynamics 365 Project Operations. We begin with the standard project-based business processes and how Project Operations addresses those. Then we examine the product capabilities, including sales, project management, and resource utilization.

Lessons

- Examine Dynamics 365 Project Operations
- Describe the sales capabilities of Dynamics 365 Project Operations
- Plan projects with Dynamics 365 Project Operations
- Review the resource utilization capabilities of Dynamics 365 Project Operations

Lab : Dynamics 365 Project Operations Capstone Lab

- Create a project-based Lead
- Manage a project-based Opportunity

- Create a Project Quote and Project Estimate

Key Learnings

- Describing the capabilities and functionality of Dynamics 365 Marketing
- Describing the capabilities and functionality of Dynamics 365 Sales
- Describing the capabilities and functionality of Dynamics 365 Customer Service
- Describing the capabilities and functionality of Dynamics 365 Field Service
- Describing the capabilities and functionality of Dynamics 365 Project Operations (CRM)

Target audience

People in different roles and at various stages in their careers can benefit from this fundamentals course. This includes IT professionals, business stakeholders and others who want to be exposed to the customer engagement capabilities of Dynamics 365, students, recent graduates, and people changing careers who want to leverage Dynamics 365 to move to the next level.

Further courses

- Power Platform Functional Consultant – Intensive Training («PL200»)
- Power Platform Functional Consultant – Flexible Training («PL200V»)
- Dynamics 365 Customer Insights (Journeys) – Intensive Training («MB220»)
- Microsoft Dynamics 365 Sales – Intensive Training («MB210»)
- Microsoft Dynamics 365 Customer Service – Intensive Training («MB230»)
- Microsoft Dynamics 365 Customer Service – Flexible Training («MB230V»)
- Microsoft Dynamics 365 Field Service – Intensive Training («MB240»)
- Flexible Training – Microsoft Dynamics 365 Field Service («MB240V»)

Any questions?

We are happy to advise you on +41 44 447 21 21 or info@digicomp.ch. You can find detailed information about dates on www.digicomp.ch/courses-microsoft-technology/microsoft-business-applications-dynamics-365/microsoft-dynamics-365-fundamentals/course-microsoft-dynamics-365-fundamentals-crm-intensive-training-mb-910