

Dynamics 365 Customer Engagements App with Customization

Duration: 40 Hours (5 Days)

Overview

The Dynamics 365 Customer Engagement Apps with Customization course is a comprehensive learning pathway designed for individuals looking to master the suite of Microsoft Dynamics 365 CE Apps, including Marketing, Sales, Customer Service, and Field Service. The course begins with Module 1, introducing learners to the core capabilities of these customer engagement apps, ensuring a solid foundation of knowledge. As participants progress through the curriculum, they will delve into the Power Platform, exploring Dataverse, creating model-driven and Canvas apps with Power Apps, and constructing portals. Automation plays a significant role, with lessons on creating cloud and desktop flows with Power Automate and building chatbots with Power Virtual Agents. Understanding data analysis is critical, and Power BI is covered to provide insights into visualization. The latter modules tackle advanced concepts of customization and management within the Dynamics 365 and Power Platform ecosystems. Learners will gain hands-on experience managing Dataverse, developing Model-driven apps, and integrating solutions. By the end of the course, students will be equipped with the skills to customize and extend Dynamics 365 apps to meet business requirements, making them valuable assets in any organization looking to leverage Microsoft's powerful business applications suite.

Audience Profile

This Dynamics 365 Customer Engagement course is ideal for professionals seeking to master CRM customization and app integration.

- Target audience for the course:
- CRM Administrators
- Sales Operations Managers
- Marketing Professionals
- Customer Service Managers
- Field Service Technicians
- IT Professionals focused on business application deployment
- Business Analysts
- System Customizers
- Application Developers
- Power Platform Developers
- Solution Architects
- Functional Consultants
- Technical Consultants
- Data Analysts
- Project Managers overseeing CRM implementations

Course Syllabus

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

- This module serves as an introduction to the shared features for 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 search 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.
- Lab: Validate lab environment and work with the customer engagement apps
- Lab: Manage Customers and Activities

After completing this module, students will be able to:

- Describe the different Dynamics 365 customer engagement applications.
- Describe Microsoft Dataverse and how it is used.
- Describe how to search and filter data.
- Describe the process for working with customers and activities.
- Describe available reporting options.
- Describe available 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.

Lessons

- Explore Dynamics 365 Marketing
- Explore other marketing capabilities and apps.
- Lab: Create a Customer Journey
- Lab: Create a Segment

After completing this module, students will be able to:

- Describe the use cases for Dynamics 365 Marketing
- Describe segments and how they are used.
- Describe customer journeys.
- Describe how to generate and qualify leads.
- Describe event management.
- Describe how to capture customer feedback with Dynamics 365 Customer Voice
- Describe how to use Dynamics 365 Customer Insights

Module 3: Learn the fundamentals of Dynamics 365 Sales

- This module introduces 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.

Lessons

- Examine Dynamics 365 Sales
- Use sales capabilities.
- Lab: Create and manage a Lead
- Lab: Create and manage an Opportunity

After completing this module, students will be able to:

- Describe the typical sales lifecycle.
- Describe the process for creating and managing leads, opportunities, and quotes.
- Describe the use of business process flows in Dynamics 365 Sales
- Describe sales forecasting.
- Describe additional sales apps such as Sales Insights and Sales Navigator

Module 4: Learn the Fundamentals of Dynamics 365 Customer Service

- This module introduces 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.

Lessons

- Explore Dynamics Field Service
- Examine knowledge management in Dynamics 365 Customer Service and related apps.
- Lab: Create and manage Cases
- Lab: Create and publish a Knowledge Base article

After completing this module, students will be able to:

- Describe use cases for Dynamics 365 Customer Service
- Describe the case lifecycle.
- Describe queues, entitlements, and SLAs.
- Describe Knowledge Management options.
- Describe Omnichannel for Dynamics 365 Customer Service
- Describe Customer Service Historical Analytic reports.

Module 5: Learn the Fundamentals of Dynamics 365 Field Service

- This module introduces 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.

Lessons

- Explore Dynamics 365 Field Service
- Describe the scheduling process.
- Lab: Create work orders in Dynamics 365 Field Service
- Lab: Create an Inspection

After completing this module, students will be able to:

- Describe Dynamics 365 Field Service use cases.
- Describe the field service business process.
- Describe the work order lifecycle.
- Describe inspections.
- Describe the scheduling capabilities of Dynamics 365 Field Service.
- Describe asset management.
- Describe Connected Field Service

Section - B

Microsoft Dynamics 365 CE Apps- Customization

Module 1: Introduction to Microsoft Power Platform

- This module will provide the learner with background about Microsoft Power Platform and its 4 key
- components: Power Apps, Power Automate, Power BI, and Power Virtual Agents.

Lessons

- Microsoft Power Platform overview.
- Lab: Validate lab environment

After completing this module, students will be able to:

- Identify the key components of the Microsoft Power Platform

Module 2: Work with Dataverse

- In this module, students will learn about creating a data model in Microsoft Dataverse, including
- importing data, using tabular reporting options, and configuring security. They will also learn about
- creating easy AI with AI Builder.

Lessons

- Work with tables
- Understand data types and behavior.
- Configure security settings.
- Lab: Create an app
- Lab: Create tables and columns
- Lab: Create relationships
- Lab: Additional table settings

After completing this module, students will be able to:

- Understand tables, columns, rows, and relationships
- Configure a data model in Dataverse
- Work in an environment within the Microsoft Power Platform admin center

Module 3: Make model-driven apps with Power Apps

- In this module, students will learn the business value of Power Apps model-driven apps. They will
- then learn how to configure and design them, including user experience considerations.

Lessons

- Building blocks of model-driven apps
- Design model-driven apps
- Forms and views
- Lab: Modify views
- Lab: Modify forms
- Lab: App designer

After completing this module, students will be able to:

- Connect to data in Power Apps
- Build a Power Apps model-driven app.
- Design an application user experience.

Module 4: Make canvas apps with Power Apps

- In this module, students will learn the business value of Power Apps canvas apps. They will then
- learn how to configure and design them, including user experience considerations.

Lessons

- Power Apps studio
- Canvas apps capabilities
- User experience
- Lab: Build a canvas app
- Lab: Work with data and services
- Lab: User experience

After completing this module, students will be able to:

- Build a Power Apps canvas app.
- Configure user experience in a canvas app.
- Understand the building blocks of a canvas app.

Module 5: Make portals with Power Apps

- In this module, students will learn the business value of Power Apps portals. They will then learn to
- how to access Dataverse data in a portal and how portal authentication works.

Lessons

- Power Apps portals architecture
- Access Microsoft Dataverse in your portal
- Authentication and user management

After completing this module, students will be able to:

- Understand how to use Dataverse data in a portal.
- Recognize types of Power Apps portals for different audiences.

- Register users for portal access.

Module 6: Introduction to Automation

- In this module, students will learn about business rules and when they can be used. Students will
- also get an overview of Power Automate.

Lessons

- Business Rules
- Power Automate overview.
- Lab: Configure a new business rule
- Lab: Create security roles
- Lab: Create users
- Lab: Advanced business rules

After completing this module, students will be able to:

- Create users and grant security roles.
- Create and configure security roles.
- Create and configure advanced business rules.

Module 7: Build Power Automate cloud flows.

- In this module, students will learn the fundamentals of cloud flows, including triggers and flows.
- They will create two flows, including an approval flow.

Lessons

- Fundamentals of cloud flows
- Triggers
- Actions
- Lab: Create a flow
- Lab: Build an approval flow

After completing this module, students will be able to:

- Create cloud flows.
- Understand the fundamentals of cloud flows.
- Use triggers and actions.

Module 8: Build Power Automate desktop flows.

- In this module, students will learn what desktop flows are and how they are created. Students will
- also learn how desktop flows are used and how to use process advisor to better understand places to
- streamline workflows.
- Build desktop flows.
- Use desktop flows.
- Process advisor

After completing this module, students will be able to:

- Understand the value of desktop flows.

- Identify when to use desktop flows and how to process advisor can help

Module 9: Build business process flows.

- In this module, students will learn the value of business process flows and how to use the business process flow designer. They will also practice building business process flows and learn how they can
- be automated.

Lessons

- Why use business process flows
- Using business process flow designer
- Automating your business process flow
- Lab: Build a branching business process flow
- Lab: Build a business process flow

After completing this module, students will be able to:

- Create business process flows.
- Use the business process flow designer.
- Know how to add automation to a business process flow.

Module 10: Build chatbots with Power Virtual Agents

- In this module, students will learn how to automate customer interactions with a chatbot using
- Power Virtual Agents.

Lessons

- Create a chatbot.
- Configure topics.
- Automate and integrate.
- Configure entities.
- Test and publish chatbots.
- Lab: Build a chatbot

After completing this module, students will be able to:

- Create a chatbot.
- Include a flow in a chatbot.
- Create topics and entities.

Module 11: Analyse data with Power Bi

- In this module, students will learn how to work with Power BI Desktop and Power BI Service to
- analyze data and create visualizations.
- Use tabular reporting options in Dataverse.
- Use charts and dashboards in Dataverse.
- Get started with Power BI
- Model data in Power BI
- Create visualizations and dashboards.
- Publish and share in Power BI

After completing this module, students will be able to:

- Create visualizations.
- Consume data in Power BI
- Export data visualizations for stakeholders

Module 12: Putting it all together

- In this module, students will learn how the concepts of this course pull together and how to use
- functional consultant skills on Microsoft Power Platform engagements. They will also learn how
- solutions are used in Microsoft Power Platform and will be introduced to AI Builder.

Lessons

- Using solutions
- AI Builder
- Consultant skills
- Lab: Build charts
- Lab: Build dashboards
- Lab: Build delete data
- Lab: Build a Word template
- Lab: Build an Excel template
- Lab: Duplicate detection
- Lab: Import data
- Lab: Export data

After completing this module, students will be able to:

- Understand how the concepts of this course work together.
- Manage solutions in Microsoft Power Platform
- Use AI Builder to create and manage models.
- Apply functional consultant skills.