

# Dynamics 365 CRM – Functional and Technical Overview

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## Course Overview:

This course provides a comprehensive, end-to-end introduction to Microsoft Dynamics 365 CRM, covering both functional and technical dimensions of the platform. Participants will explore core capabilities across the Sales, Customer Service, and Marketing modules and gain insight into how business processes are managed within the system. The course also introduces technical customization options including plugins, JavaScript, Power Pages, and Power Automate.

This training is ideal for professionals looking to understand both the operational and development aspects of Dynamics 365 CRM without deep-diving into hands-on labs.

Note: This course does not include lab exercises. Demos will be provided in select modules to illustrate key concepts.

## Prerequisites:

- Basic understanding of business processes in Sales, Customer Service, and Marketing.
- Familiarity with Microsoft 365 environment is helpful but not mandatory.
- No prior coding experience required for the functional modules.
- For the technical modules, a general awareness of programming concepts (especially C# and JavaScript) is beneficial but not essential.

## Course Content:

### Functional Track – No Labs

#### Dynamics 365 CRM – Functional (Sales, Service, Marketing)

##### *Dynamics 365 CE Overview – Platform & Modules – No Demo*

- Unified Customer Engagement platform and navigation
- Brief on Sales, Customer Service, Marketing modules

##### *Sales, Customer Service & Marketing Essentials – No Demo*

- Core business processes: Lead to Opportunity, Case to Resolution
- Campaigns, activities, queues

### ***Forms, Views, and Dashboards – Functional Use***

- What are forms, views, dashboards?
- How users interact with records and data
- 1 basic demo

### ***Business Rules & Automation***

- Declarative rules and workflows
- Automation without coding
- 1 basic demo

## **Technical Track – No Labs**

### **Dynamics 365 CRM – Technical (Plugins, JavaScript, Power Pages, Power Automate)**

#### ***Technical Architecture & Extensibility Model – No Demo***

- Client-side vs server-side logic
- Integration and extensibility layers

#### ***Plugins in C# – Event Pipeline and Use Cases***

- Overview of plugin development lifecycle
- Common use cases like validation or custom logic
- 1 basic demo

#### ***JavaScript for UI Logic – Form-Level Customization***

- Where and how JavaScript is used in forms
- Typical use cases like field validation or auto-fill
- 1 basic demo

#### ***Power Pages – External Site Integration Overview***

- What Power Pages offer (formerly Power Portals)
- No Demo

#### ***Power Automate in CRM – Integration Examples – No Demo***

- How flows connect to CRM data
- Sample flows like auto-email on lead creation