

# Microsoft Dynamics 365 CRM

**Course Duration: 120 Hours (3 Weeks)**

## Week 1

**Explore the core capabilities of Microsoft Dynamics 365 customer engagement apps**

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

- Understanding customer engagement
- Power Platform and Dynamics 365 integration
- Introduction to Microsoft Dataverse
- Accessing Dynamics 365 customer engagement apps
- Overview of Copilot in Dynamics 365

**Lesson 2: Describe shared activities and integration options**

- Working with customers and activities
- Using search criteria and filters
- Exploring reporting options
- Understanding integration capabilities

**Lab Exercises:**

- Working with customer engagement apps
- Managing customers and activities

**Learn the Fundamentals of Microsoft Dynamics 365 Customer Insights**

**Lesson 1: Explore Dynamics 365 Customer Insights - Journeys**

- Key capabilities of Customer Insights – Journeys
- Segmentation and email marketing
- Customer journey mapping
- Lead generation and qualification
- Use cases for marketing forms
- Event management features

## **Lesson 2: Describe Dynamics 365 Customer Insights - Data and Dynamics 365 Customer Voice**

- Overview of Customer Insights - Data
- Exploring Unified Customer Profiles
- Measures, segments, and predictions
- Consuming Customer Insights in other apps

### **Lab Exercises:**

- Creating a simple customer journey

## **Learning Path 3: Explore the Fundamentals of Microsoft Dynamics 365 Sales**

### **Lesson 1: Explore Dynamics 365 Sales**

- Using Dynamics 365 Sales in the sales process
- Working with leads
- Understanding the Product Catalog
- Opportunity management
- Business Process flows in Sales
- Quote, order, and invoice management
- Overview of Sales accelerator
- Copilot in Sales

### **Lesson 2: Sales capabilities and related apps**

- Dynamics 365 sales forecasting
- LinkedIn Sales Navigator integration
- Sales Insights key capabilities
- Microsoft Sales Copilot

### **Lab Exercises:**

- Creating and managing a lead and an opportunity

## **Explore the Fundamentals of Microsoft Dynamics 365 Customer Service**

### **Lesson 1: Explore Dynamics 365 Customer Service**

- Case lifecycle management
- Case management in Dynamics 365
- Understanding entitlements and SLAs
- Using queues for workload management
- Knowledge management in Customer Service
- Overview of Copilot in Customer Service

### **Lesson 2: Describe Dynamics 365 Customer Service capabilities and related apps**

- Omnichannel for Customer Service
- Historical Analytics reports
- Dynamics 365 Customer Voice and Customer Service

#### **Lab Exercises:**

- Creating and managing cases

## **Learn the Fundamentals of Microsoft Dynamics 365 Field Service**

### **Lesson 1: Explore Dynamics 365 Field Service**

- Overview of Dynamics 365 Field Service
- Work order lifecycle
- Inspections
- Dynamics 365 Field Service mobile application

### **Lesson 2: Describe the scheduling process**

- Scheduling capabilities in Field Service
- Defining resources
- Resource Scheduling Optimization
- Customer assets and Connected Field Service

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step forward



## Week 2

### Work with Microsoft Dataverse

#### Modules:

- What is a relational database?
- Introduction to Microsoft Dataverse
- Manage environments
- Manage customizations with solutions
- Create and manage tables in Microsoft Dataverse
- Create and manage columns in Microsoft Dataverse
- Create relationships between tables in Dataverse
- Create and define calculated and rollup columns

#### Labs

- Validate lab environment
- Environments
- Publisher and Solution
- Import solution
- Tables
- Columns
- Relationships

### Manage Microsoft Dataverse

#### Modules:

- Define and create business rules in Dataverse
- Load/export data in Microsoft Dataverse
- Manage security in Microsoft Dataverse
- Administration options in Microsoft Dataverse

#### Labs

- Business rules
- Import data
- Export data
- Security roles
- Users and Teams
- Bulk delete data

- Duplicate detection
- Audit

## **Create model-driven apps in Power Apps**

### **Modules:**

- Introduction to model-driven apps
- Design and create model-driven apps
- Configure forms
- Configure views
- Configure charts
- Configure dashboards

### Labs

- Forms
- Views
- Dashboards

## **Create canvas apps in Power Apps**

### **Modules:**

- Introduction to canvas apps
- Customize a canvas app
- Build the UI in a canvas app
- Navigation in a canvas app
- Manage apps
- Build a mobile-optimized app
- Connect to other data

### Labs

- Build a canvas app

## **Make portals in Power Pages**

### **Modules:**

- Introduction to Power Pages
- Core components and features
- Portals architecture

- Explore design studio

#### Labs

- Build a Power Pages portal

## **Build automation with Power Automate**

### **Modules:**

- Introduction to automation in Dataverse
- Introduction to Power Automate
- Create Power Automate cloud flows
- Use Dataverse triggers and actions in Power Automate cloud flows
- Introduction to expressions in Power Automate
- Test and troubleshoot Power Automate cloud flows
- Administer Power Automate cloud flows
- Create business process flows

#### Labs

- Cloud flows
- Business process flows

## **Build chatbots with Co-Pilot Agents**

### **Modules:**

- Identify use cases for Co-Pilot Agents
- Identify components of Co-Pilot Agents

#### Labs

- Create Power Virtual Agents

## Week 3

### **Introduction to developing with Power Platform**

- Introduction to Microsoft Power Platform developer resources
- Use developer tools to extend Microsoft Power Platform
- Introduction to extending Microsoft Power Platform
- Work with Dataverse API

Labs:

- Power Platform tools
- Power Platform APIs

### **Extending the model-driven apps user experience**

- Performing common actions with client script
- Best practices with client script

Labs :

- Client scripting

### **Create code components with the Power Apps Component Framework**

- Get started with Power Apps component framework

Labs:

- Power Apps Component Framework (Optional)

### **Create Extending Microsoft Dataverse**

- Introduction to Dataverse for developers Create plug-ins

Labs:

- Dataverse Plug-ins

### **Integrate with Dataverse and Azure**

- Integrate with Azure
- Integrate with Dataverse

Labs

- Azure Functions (Optional)
- Publishing events externally

## **Learning Path 11: Integrate with Dataverse and Azure**

- Custom Connectors

Labs :

- Custom connector (Optional)

## **Learning Path 12: Application lifecycle management**

- Solutions and Application Lifecycle Management