

# Microsoft Dynamics 365 CRM

**Course Duration: 8 Hours (1 Day)**

## Course Syllabus

### **Learning Path 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

### **Learning Path 2: 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

## **Learning Path 3: 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

## **Learning Path 4: 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