Introduction to Microsoft Dynamics 365 (CRM) (MB-910) Training

Duration: **1 Day**

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

Audience profile

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 as well as students, recent graduates, and people changing careers who want to leverage Dynamics 365 to move to the next level.

Accessing your courseware and registering attendance with Microsoft

To access your Official Curriculum (MOC) course materials you will need a Microsoft.com/Learn account. In Learn you will also be able to register your completion of the event and receive your achievement badge. You will be issued with a unique code during your event.

Prerequisites

Important - This course has MFA Requirements. Please read this link and download the MFA app, prior to attending.

- Learners should have a fundamental understanding of customer engagement principles and business operations. An understanding of cloud computing is helpful, but isn't necessary.

What You Will Learn

- Describe the capabilities and functionality of Dynamics 365 Marketing
- Describe the capabilities and functionality of Dynamics 365 Sales
- Describe the capabilities and functionality of Dynamics 365 Customer Service
- Describe the capabilities and functionality of Dynamics 365 Field Service
- Describe the core capabilities of Dynamics 365 customer engagement apps

Training Outline

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

This module serves as an introduction to the shared features for the 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 searching and filtering data and finally, available

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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 provides an introduction to 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

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- 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 provides an introduction to Dynamics 365 Customer Service. We begin with the standard case mangement 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 provides an introduction to 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:

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- 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