Microsoft Dynamics 365 CRM Apps: Fundamentals Training

Duration: **1 Day**

BILGINC IT Academy
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The Microsoft Dynamics 365 CRM Apps: Fundamentals course is a one-day training designed to introduce the core capabilities of Dynamics 365 Customer Engagement applications. Participants will explore four key apps: Customer Insights – Journeys, Sales, Customer Service, and Field Service.

This course provides a strong foundation for understanding CRM capabilities, evaluating business requirements, and selecting the right solutions. Key topics include lead and opportunity management, case handling, field service operations, and customer insights, along with the role of Copilot in enhancing productivity.

Prerequisites

Participants should have:

- Basic understanding of business processes and data management
- Familiarity with Microsoft 365 applications

No prior Dynamics 365 experience is required.

Who Should Attend

This course is suitable for:

- Functional users
- Sales representatives
- Customer service agents
- Field technicians
- Business analysts
- Managers and decision-makers

Anyone looking to understand Dynamics 365 CRM applications can benefit from this course.

What You Will Learn

By the end of this course, learners will be able to:

- Understand the core capabilities of Dynamics 365 Customer Engagement apps
- Explore the Dataverse platform
- Work with customer and activity records
- Use Customer Insights – Journeys for marketing automation
- Understand the sales lifecycle and manage sales data
- Manage cases and customer service operations
- Work with SLAs, queues, and knowledge management
- Manage work orders and scheduling in Field Service
- Understand how Copilot enhances productivity

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Training Outline

Module 1: Customer Engagement Apps Overview

- Application overview
- Dataverse fundamentals
- Navigation and data management
- Customer and activity records

Module 2: Customer Insights – Journeys

- Marketing automation
- Customer segmentation
- Email campaigns
- Journey creation

Module 3: Dynamics 365 Sales

- Sales lifecycle
- Lead and opportunity management
- Quotes, orders, and invoices
- Product catalog
- Copilot capabilities

Module 4: Customer Service

- Case management
- Queues and routing
- SLA management
- Knowledge base
- Copilot usage

Module 5: Field Service

- Work orders
- Incident types and service tasks
- Scheduling with schedule board
- Field operations management