

Microsoft Dynamics 365 Fundamentals (CRM)

Content

Module 1: Describe the Foundations of Dynamics 365 Customer Engagement Apps

- **Lessons**
 - Describe use cases for Dynamics 365
 - Describe how the Microsoft Power Platform relates to Dynamics 365 apps
 - Explain what Microsoft Dataverse is and how it is used by Dynamics 365 customer engagement apps
 - Describe the different Dynamics 365 customer engagement apps
 - Describe options for accessing Dynamics 365 customer engagement apps
 - Describe Copilot in Dynamics 365 customer engagement apps

Module 2: Describe Shared Activities and Integration Options in Dynamics 365 Customer Engagement Apps

- **Lessons**
 - Work with customers and manage activities
 - Explore different reporting options
 - Describe the available integration options

Module 3: Explore Dynamics 365 Customer Insights - Journeys

- **Lessons**
 - Identify use cases for Dynamics 365 Customer Insights - Journeys
 - Explain email marketing
 - Describe how to target customers with segments
 - Explain how to create and leverage customer journeys in Dynamics 365 Customer Insights - Journeys
 - Describe lead generation and qualification

Module 4: Describe Dynamics 365 Customer Insights - Data and Dynamics 365 Customer Voice

- **Lessons**
 - Describe when other marketing applications might be required
 - Describe how to use Customer Insights - Data to create more targeted customer segments that can be brought into Dynamics 365 Customer Insights - Journeys
 - Describe how to capture customer feedback with Customer Voice

Module 5: Explore Dynamics 365 Sales

- **Lessons**

- Describe what a typical sales lifecycle process looks like and how an organization might use it to manage their sales
- Describe the tools provided in Dynamics 365 Sales to assist organizations in creating, managing, and qualifying potential sales leads
- Describe the process for creating and managing opportunities
- Describe how Dynamics 365 Sales uses business process flows to provide sellers assistance while managing sales opportunities
- Describe the options available for building and delivering quotes using Dynamics 365 Sales
- Describe Sales Accelerator
- Describe how to use orders and invoices

Module 6: Describe Dynamics 365 Sales Capabilities and Related Apps

- **Lessons**

- Identify cases where additional sales apps could be leveraged
- Examine the sales pipeline and forecasting available in Dynamics 365 Sales
- Describe the capabilities of Dynamics 365 Sales Insights
- Describe the capabilities of LinkedIn Sales Navigator
- Examine the Dynamics 365 Sales mobile application
- Describe the capabilities of Microsoft Sales Copilot

Module 7: Explore Dynamics 365 Customer Service

- **Lessons**

- Identify use cases for Dynamics 365 Customer Service
- Explain the case lifecycle
- Examine how to manage queues
- Dynamics 365 Customer Service business process flows
- Describe Service-Level Agreements (SLAs) and entitlements

Module 8: Describe Dynamics 365 Customer Service Capabilities and Related Apps

- **Lessons**

- Describe Omnichannel for Dynamics 365 Customer Service
- Describe Omnichannel Supervisor Experiences
- Explain reporting and visualization options in Dynamics 365 Customer Service
- Describe Dynamics 365 Customer Voice use cases for Dynamics 365 Customer Service

Module 9: Explore Dynamics 365 Field Service

- **Lessons**

- Describe a typical field service lifecycle
- Examine the lifecycle of a work order
- Explain inspections
- Describe the Field Service mobile app

Module 10: Describe Dynamics 365 Field Service Scheduling Capabilities and Related Apps

- **Lessons**
 - Describe the scheduling capabilities available in Dynamics 365 Field Service
 - Schedule qualified resources
 - Describe the asset management capabilities available
 - Explain the relationship between Customer Assets and Connected Field Service