INTRODUCTION TO MICROSOFT DYNAMICS 365 FUNDAMENTALS (CRM) (MB-910)

Course Code: 821333

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

Do you want to learn more about Dynamics 365? 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, the core capabilities of customer engagement apps as well as with each of the customer engagement apps, including Dynamics 365 Customer Insights, Dynamics 365 Sales, Dynamics 365 Customer Service and Dynamics 365 Field Service. You will also learn how Copilot can assist you in executing customer engagement tasks in Dynamics 365. This course includes lectures and hands-on-labs.

LEARN MORE

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Access this course and over 50 other instructor-led training courses for only $2,999.

What You'll Learn

Students will learn to,

- Explore the core capabilities of Microsoft Dynamics 365 customer engagement apps
- Explore the fundamentals of Microsoft Dynamics 365 Customer Insights
- Explore the fundamentals of Microsoft Dynamics 365 Sales
- Explore the fundamentals of Microsoft Dynamics 365 Customer Service
- Explore the fundamentals of Microsoft Dynamics 365 Field Service

Who Needs to Attend

The Microsoft Dynamics 365 Fundamentals (CRM) course is targeted to those looking to familiarize themselves with and gain a broad exposure to the marketing, sales, customer service, and field service capabilities of Dynamics 365. This

audience wants to explore how customer engagement apps (CRM) for Dynamics 365 can be used to:

- Unify profiles and tailor targeted customer journeys by using Dynamics 365 Customer Insights apps.
- Efficiently assist users through the complete sales order lifecycle by using Dynamics 365 Sales.
- Assist agents with case management through the complete customer support lifecycle by using Dynamics 365 Customer Service.
- Schedule and complete work orders by using Dynamics 365 Field Service.
- Evaluate how Copilot can assist with each of these. People in various roles and stages in their careers can benefit from this fundamentals course. The course is designed for IT professionals, business stakeholders, entrepreneurs, students, and people starting or changing careers who want to be exposed to the customer relationship capabilities of Dynamics 365.

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CLASSROOM LIVE	$675 USD	1 Day

Classroom Live Outline

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

- Describe the foundations of Dynamics 365 customer engagement apps
- Describe shared activities and integration options in Dynamics 365 customer engagement apps

Module 2: Explore the fundamentals of Microsoft Dynamics 365 Customer Insights

- Explore Dynamics 365 Customer Insights - Journeys
- Describe Dynamics 365 Customer Insights - Data

Module 3: Explore the fundamentals of Microsoft Dynamics 365 Sales

- Explore Dynamics 365 Sales
- Describe Dynamics 365 Sales capabilities and related apps

Module 4 : Explore the fundamentals of Microsoft Dynamics 365 Customer Service

- Explore Dynamics 365 Customer Service
- Describe Dynamics 365 Customer Service capabilities and related apps

Module 5 : Explore the fundamentals of Microsoft Dynamics 365 Field Service

- Explore Dynamics 365 Field Service
- Describe Dynamics 365 Field Service scheduling capabilities and related apps

Classroom Live Labs

- Lab : Validate lab environment and work with the customer engagement apps
- Lab : Manage Customers and Activities

- Lab : Create a Customer Journey
- Lab : Create a Segment
- Lab : Create and manage a Lead
- Lab : Create and manage an Opportunity
- Lab : Create and manage Cases
- Lab : Create and publish a Knowledge Base article
- Lab : Create work orders in Dynamics 365 Field Service
- Lab : Create an Inspection

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VIRTUAL CLASSROOM LIVE	$675 USD	1 Day

Virtual Classroom Live Outline

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

- Describe the foundations of Dynamics 365 customer engagement apps
- Describe shared activities and integration options in Dynamics 365 customer engagement apps

Module 2: Explore the fundamentals of Microsoft Dynamics 365 Customer Insights

- Explore Dynamics 365 Customer Insights - Journeys
- Describe Dynamics 365 Customer Insights - Data

Module 3: Explore the fundamentals of Microsoft Dynamics 365 Sales

- Explore Dynamics 365 Sales
- Describe Dynamics 365 Sales capabilities and related apps

Module 4 : Explore the fundamentals of Microsoft Dynamics 365 Customer Service

- Explore Dynamics 365 Customer Service
- Describe Dynamics 365 Customer Service capabilities and related apps

Module 5 : Explore the fundamentals of Microsoft Dynamics 365 Field Service

- Explore Dynamics 365 Field Service
- Describe Dynamics 365 Field Service scheduling capabilities and related apps

Virtual Classroom Live Labs

- Lab : Validate lab environment and work with the customer engagement apps
- Lab : Manage Customers and Activities

- Lab : Create a Customer Journey
- Lab : Create a Segment
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- Lab : Create and publish a Knowledge Base article
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- Lab : Create an Inspection

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PRIVATE GROUP TRAINING	1 Day

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