

MICROSOFT DYNAMICS 365 CUSTOMIZATION CUSTOMER ENGAGEMENT APPS (CRM) (55263)

Course Code: 821432

This course will provide you with the skills needed to deploy and support business applications that make up the customer engagement capabilities of Dynamics 365.

In this course you will learn best practice techniques to successfully execute projects to deploy and support Dynamics 365 Customer Engagement Apps, including Dynamics 365 Sales, Dynamics 365 Marketing, Dynamics 365 Customer Service, Dynamics 365 Field Service and Dynamics 365 Project Operations. This course is perfect for organizations that are planning to embark on a new Dynamics 365 Customer Engagement Apps project, with best practice techniques and methodologies to help make your project a success. In addition, this course provides you with an understanding of strategies to help you own, support and maintain Dynamics 365 Customer Engagement Apps.

What You'll Learn

Students will,

- Learn how to Deploy, Customize, Configuring and Support Dynamics 365 Sales
- Learn how to Deploy, Customize, Configuring and Support Dynamics 365 Marketing
- Learn how to Deploy, Customize, Configuring and Support Dynamics 365 Customer Service
- Learn how to Deploy, Customize, Configuring and Support Dynamics 365 Field Service
- Learn how to Deploy, Customize, Configuring and Support Dynamics 365 Project Operations (CRM)

Who Needs to Attend

This course is suitable for IT professionals, business stakeholders and others who want to learn how to deploy Microsoft Dynamics 365 Customer Engagement Apps.

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CLASSROOM LIVE

\$2,595 CAD

4 Day

Classroom Live Outline

Module 1: Overview

In this module you will learn about the different approaches and methodologies available to help you deploy, own and support Microsoft Dynamics 365 Customer Engagement Apps in your organization.

Lessons

- Microsoft licensing options
- Considerations for Microsoft Dynamics 365 Projects
- Extending Dynamics 365 Apps with the Power Platform
- Waterfall Project Methodologies
- Agile Project Methodologies
- Project Stages and Phases
- Project Teams and Roles
- The need for Design
- The need for Governance
- Recommended Change Management Strategies

Module 2: Deploy, Customize, Configuring and Support Dynamics 365 Sales

In this module you will learn how to deploy and support the Microsoft Dynamics 365 Sales App in your organization.

Lessons

- Dynamics 365 Sales Settings Configuration
- Making Customizations the Sales App Navigation

- Capturing custom Sales data
- Customizing the Sales Business Process in Power Automate
- Customizing the Lead Qualification Process
- Configuring Sales Users Permissions
- Configuring Sales Settings in the Power Platform
- Product Catalog Settings
- Creating a custom Quote process
- Deploying Updates and Supporting the Sales App
- Create a Sales Dashboard for your Sales Users

Module 3: Deploy, Customize, Configuring and Support Dynamics 365 Marketing

In this module you will learn how to deploy and support the Microsoft Dynamics 365 Marketing in your organization.

Lessons

- Dynamics 365 Marketing Settings Configuration
- Making Customizations in the Marketing App Navigation
- Capturing custom Marketing data
- Customizing the Marketing Process in Power Automate
- Configuring Marketing Users Permissions
- Configuring Marketing Settings in the Power Platform
- Configuring and customizing Event Management
- Branding Marketing Pages, Forms and Email Templates
- Deploying Updates and Supporting the Marketing App
- Create a Marketing Dashboard for your Marketing Users

Module 4: Deploy, Customize, Configuring and Support Dynamics 365 Customer Service

In this module you will learn how to deploy and support the Microsoft Dynamics 365 Customer Service in your organization.

Lessons

- Dynamics 365 Customer Service Settings Configuration
- Making Customizations in the Customer Service App Navigation
- Capturing custom Customer Service data
- Customizing the Case Resolution Process in Power Automate
- Configuring Customer Service Users Permissions
- Configuring Customer Service Settings in the Power Platform
- Configuring and customizing the Knowledge Base
- Customizing Case Management to fit your Organization
- Deploying Updates and Supporting the Customer Service App
- Create a Customer Service Dashboard for your Customer Service Users

Module 5: Deploy, Customize, Configuring and Support Dynamics 365 Field Service

In this module you will learn how to deploy and support the Microsoft Dynamics 365 Field Service in your organization.

Lessons

- Dynamics 365 Field Service Settings Configuration
- Making Customizations in the Field Service App Navigation
- Capturing custom Field Service data
- Customizing the Field Service Process in Power Automate
- Configuring Field Service Users Permissions
- Configuring Field Service Settings in the Power Platform
- Configuring and customizing Inventory Management
- Customizing Field Service to fit your Organization
- Deploying Updates and Supporting the Field Service App
- Create a Field Service Dashboard for your Field Service Users

Module 6: Deploy, Customize, Configuring and Support Dynamics 365 Project Service

In this module you will learn how to deploy and support the Microsoft Dynamics 365 Project Service in your organization.

Lessons

- Dynamics 365 Project Service Settings Configuration
- Making Customizations in the Project Service App Navigation
- Capturing custom Project Service data
- Customizing the Project Service Process in Power Automate
- Configuring Project Service Users Permissions
- Configuring Project Service Settings in the Power Platform
- Configuring and customizing Project Operations
- Customizing Project Service to fit your Organization
- Deploying Updates and Supporting the Project Service App
- Create a Project Service Dashboard for your Project Service Users

Classroom Live Labs

Lab : Starting a Microsoft Dynamics 365 Customer Engagement Project

- Change Management in the Dataverse
- Implementing an Agile Project Methodology

Lab : Dynamics 365 Sales Lab

- Deploy a Sales App
- Configure and customize a Sales App
- Make changes to the Sales App

Lab : Dynamics 365 Marketing Lab

- Deploy the Marketing App

- Configure and customize a Marketing App
- Make changes to the Marketing App

Lab : Dynamics 365 Customer Service Lab

- Deploy the Customer Service App
- Configure and customize a Customer Service App
- Make changes to the Customer Service App

Lab : Dynamics 365 Marketing Lab

- Deploy the Field Service App
- Configure and customize a Field Service App
- Make changes to the Field Service App

Lab : Dynamics 365 Project Service Lab

- Deploy the Project Service App
- Configure and customize a Project Service App
- Make changes to the Project Service App

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VIRTUAL CLASSROOM LIVE

\$2,595 CAD

4 Day

Virtual Classroom Live Outline

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In this module you will learn about the different approaches and methodologies available to help you deploy, own and support Microsoft Dynamics 365 Customer Engagement Apps in your organization.

Lessons

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- Project Teams and Roles
- The need for Design
- The need for Governance
- Recommended Change Management Strategies

Module 2: Deploy, Customize, Configuring and Support Dynamics 365 Sales

In this module you will learn how to deploy and support the Microsoft Dynamics 365 Sales App in your organization.

Lessons

- Dynamics 365 Sales Settings Configuration
- Making Customizations the Sales App Navigation

- Capturing custom Sales data
- Customizing the Sales Business Process in Power Automate
- Customizing the Lead Qualification Process
- Configuring Sales Users Permissions
- Configuring Sales Settings in the Power Platform
- Product Catalog Settings
- Creating a custom Quote process
- Deploying Updates and Supporting the Sales App
- Create a Sales Dashboard for your Sales Users

Module 3: Deploy, Customize, Configuring and Support Dynamics 365 Marketing

In this module you will learn how to deploy and support the Microsoft Dynamics 365 Marketing in your organization.

Lessons

- Dynamics 365 Marketing Settings Configuration
- Making Customizations in the Marketing App Navigation
- Capturing custom Marketing data
- Customizing the Marketing Process in Power Automate
- Configuring Marketing Users Permissions
- Configuring Marketing Settings in the Power Platform
- Configuring and customizing Event Management
- Branding Marketing Pages, Forms and Email Templates
- Deploying Updates and Supporting the Marketing App
- Create a Marketing Dashboard for your Marketing Users

Module 4: Deploy, Customize, Configuring and Support Dynamics 365 Customer Service

In this module you will learn how to deploy and support the Microsoft Dynamics 365 Customer Service in your organization.

Lessons

- Dynamics 365 Customer Service Settings Configuration
- Making Customizations in the Customer Service App Navigation
- Capturing custom Customer Service data
- Customizing the Case Resolution Process in Power Automate
- Configuring Customer Service Users Permissions
- Configuring Customer Service Settings in the Power Platform
- Configuring and customizing the Knowledge Base
- Customizing Case Management to fit your Organization
- Deploying Updates and Supporting the Customer Service App
- Create a Customer Service Dashboard for your Customer Service Users

Module 5: Deploy, Customize, Configuring and Support Dynamics 365 Field Service

In this module you will learn how to deploy and support the Microsoft Dynamics 365 Field Service in your organization.

Lessons

- Dynamics 365 Field Service Settings Configuration
- Making Customizations in the Field Service App Navigation
- Capturing custom Field Service data
- Customizing the Field Service Process in Power Automate
- Configuring Field Service Users Permissions
- Configuring Field Service Settings in the Power Platform
- Configuring and customizing Inventory Management
- Customizing Field Service to fit your Organization
- Deploying Updates and Supporting the Field Service App
- Create a Field Service Dashboard for your Field Service Users

Module 6: Deploy, Customize, Configuring and Support Dynamics 365 Project Service

In this module you will learn how to deploy and support the Microsoft Dynamics 365 Project Service in your organization.

Lessons

- Dynamics 365 Project Service Settings Configuration
- Making Customizations in the Project Service App Navigation
- Capturing custom Project Service data
- Customizing the Project Service Process in Power Automate
- Configuring Project Service Users Permissions
- Configuring Project Service Settings in the Power Platform
- Configuring and customizing Project Operations
- Customizing Project Service to fit your Organization
- Deploying Updates and Supporting the Project Service App
- Create a Project Service Dashboard for your Project Service Users

Virtual Classroom Live Labs

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- Change Management in the Dataverse
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- Deploy a Sales App
- Configure and customize a Sales App
- Make changes to the Sales App

Lab : Dynamics 365 Marketing Lab

- Deploy the Marketing App

- Configure and customize a Marketing App
- Make changes to the Marketing App

Lab : Dynamics 365 Customer Service Lab

- Deploy the Customer Service App
- Configure and customize a Customer Service App
- Make changes to the Customer Service App

Lab : Dynamics 365 Marketing Lab

- Deploy the Field Service App
- Configure and customize a Field Service App
- Make changes to the Field Service App

Lab : Dynamics 365 Project Service Lab

- Deploy the Project Service App
- Configure and customize a Project Service App
- Make changes to the Project Service App

Aug 11 - 14, 2025 | 9:00 AM - 5:00 PM EDT

Oct 20 - 23, 2025 | 9:00 AM - 5:00 PM EDT



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PRIVATE GROUP TRAINING

4 Day

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