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Course MB-910T00: Microsoft Certified: Dynamics 365 Fundamentals (CRM)

Course (2 days)

OVERVIEW

About this course

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

Job role: Business Owner

Preparation for exam: MB-910

Skills gained

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 capabilities and functionality of Dynamics 365 Project Operations (CRM)

Prerequisites

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

Module 1: Learn the Fundamentals of Dynamics 365 Marketing

This module covers the basic concepts of customer engagement and what the customer engagement apps have in common before diving into Dynamics 365 Marketing. We begin with the standard marketing business processes and how Marketing addresses those. Then we examine the product capabilities. Finally, we cover additional marketing apps such as LinkedIn Campaign Manager, Dynamics 365 Customer Voice and Dynamics 365 Customer Insights.

Lessons
Get introduced to the Dynamics 365 customer engagement apps

Examine Dynamics 365 Marketing

Describe Dynamics 365 Marketing capabilities

Review Additional Marketing Apps

Lab : Working with customer engagement apps
Lab : Manage Customers and Activities
Lab : Search and filter data
Lab : Dynamics 365 Marketing Capstone Lab
Create a marketing email

Create a Segment in Dynamics 365 Marketing

Create a Customer Journey

After completing this module, students will be able to:

Describe the customer engagement apps and what they have in common

Describe the standard marketing processes and how Dynamics 365 Marketing addresses them

Describe Dynamics 365 Marketing features and capabilities

Describe additional marketing apps

Module 2: Learn the Fundamentals of Dynamics 365 Sales

This module provides an introduction to Dynamics 365 Sales. We begin with the standard sales business processes and how Sales addresses those. Then we examine the product capabilities. Finally, we cover additional sales apps such as Sales Insights and Sales Navigator.

Lessons
Explore Dynamics 365 Sales

Manage the sales lifecycle with Dynamics 365 Sales

Review additional sales apps

Lab : Dynamics 365 Sales Capstone Lab
Create and qualify a Lead

Manage a sales Opportunity

After completing this module, students will be able to:

Describe the standard sales processes and how Dynamics 365 Sales addresses them

Describe Dynamics 365 Sales capabilities

Describe additional sales apps such as Sales Insights and Sales Navigator

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Module 3: Learn the Fundamentals of Dynamics 365 Customer Service

This module provides an introduction to Dynamics 365 Customer Service. We begin with the standard customer service business processes and how Customer Service addresses those. Then we examine the product capabilities. Finally, we cover additional customer service apps such as Omnichannel for Customer Service, Dynamics 365 Customer Service Insights, Customer Service Scheduling and Connected Customer Service.

Lessons
Examine Dynamics 365 Customer Service

Describe Dynamics Customer Service capabilities

Review additional customer service apps

Lab : Dynamics 365 Capstone Lab
Create and publish a Knowledge Article

Manage a support Case through its life cycle

After completing this module, students will be able to:

Describe the standard customer service processes and how Dynamics 365 Customer Serviceaddresses them

Describe Dynamics Customer Service capabilities

Describe additional sales apps such as Sales Insights and Sales Navigator

Module 4: Learn the Fundamentals of Dynamics 365 Field Service

This module provides an introduction to Dynamics 365 Field Service. We begin with the standard field service business processes and how Field Service addresses those. Then we examine the product capabilities, including work order generation, scheduling, inventory management and asset management.

Lessons
Examine Dynamics Field Service

Generate Work Orders in Dynamics 365 Field Service

Describe the scheduling capabilities of Dynamics 365 Field Service

Examine the inventory management capabilities of Dynamics 365 Field Service

Review the asset management capabilities of Dynamics 365 Field Service

Lab : Dynamics 365 Capstone Lab
Create a Case and escalate to a Work Order

Schedule items with Dynamics 365 Field Service

After completing this module, students will be able to:

Describe the standard field service business processes and how Dynamics 365 Field Service addresses

Describe how to generate Work Orders

Describe the scheduling capabilities of Dynamics 365 Field Service

Describe the inventory management capabilities of Dynamics 365 Field Service

Describe the asset management capabilities of Dynamics 365 Field Service

Module 5: Learn the Fundamentals of Dynamics 365 Project Operations (CRM)

This module provides an introduction to the customer engagement aspects of Dynamics 365 Project Operations. We begin with the standard project-based business processes and how Project Operations addresses those. Then we examine the product capabilities, including sales, project management, and resource utilization.

Lessons
Examine Dynamics 365 Project Operations

Describe the sales capabilities of Dynamics 365 Project Operations

Plan projects with Dynamics 365 Project Operations

Review the resource utilization capabilities of Dynamics 365 Project Operations

Lab : Dynamics 365 Project Operations Capstone Lab
Create a project-based Lead

Manage a project-based Opportunity

Create a Project Quote and Project Estimate

After completing this module, students will be able to:

Describe project-based customer engagement processes addressed by Dynamics 365 Project Operations

Describe the sales capabilities of Dynamics 365 Project Operations

Describe the project management capabilities of Dynamics 365 Project Operations

Describe the resource utilization capabilities of Dynamics 365 Project Operations

Additional Reading
Please review the content associated with this course on Microsoft Learn. Please note that there is a separate learning path per product.