

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

- **Formato do curso:** Presencial e Live Training
- **Localidade:** Live Training
- **Data:** 21 Mar. 2022 a 22 Mar. 2022
- **Preço:** 510€
- **Horário:** Laboral - das 9h00 às 17h00
- **Nível:** Iniciado
- **Duração:** 7 horas

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.

### Destinatários

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

### Pré-requisitos

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

# Objetivos

You will learn to:

- 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 core capabilities of Dynamics 365 customer engagement apps
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# Programa

## **Examine the core capabilities of Microsoft Dynamics 365 customer engagement apps**

This module serves as an introduction to the shared features for the customer engagement apps. Learners are introduced to Microsoft Dataverse, and how data is made accessible and managed in the customer engagement apps, from shared entities to searching and filtering data and finally, available reporting and integration options.

Lessons

- Navigate the Dynamics 365 customer engagement apps
- Explore common Dynamics 365 activities and integration options

Lab : Validate lab environment and work with the customer engagement apps

Lab : Manage Customers and Activities

## **Learn the fundamentals of Dynamics 365 Marketing**

This module introduces learners to the core capabilities of Dynamics 365 Marketing. In the first lesson you will learn about the core product capabilities to support key marketing tasks, from email marketing to segments and customer journeys. The next lesson covers event management, as well as Dynamics 365 Customer Voice for customer surveys and Dynamics 365 Customer Insights for AI-based analytics.

Lessons

- Explore Dynamics 365 Marketing
- Explore other marketing capabilities and apps

Lab : Create a Customer Journey

Lab : Create a Segment

## **Learn the fundamentals of Dynamics 365 Sales**

This module provides an introduction to Dynamics 365 Sales, focusing on managing leads, lead qualification, opportunities and sales orders as part of the standard sales lifecycle. Then we shift our attention to sales forecasting and the use of LinkedIn Sales Navigator and Dynamics 365 Sales Insights for improved relationship

selling.

Lessons

- Examine Dynamics 365 Sales
- Use sales capabilities

Lab : Create and manage a Lead

Lab : Create and manage an Opportunity

### **Learn the Fundamentals of Dynamics 365 Customer Service**

This module provides an introduction to Dynamics 365 Customer Service. We begin with the standard case management business processes and how Customer Service addresses those. Then we examine the product capabilities, including business process flows, entitlements and SLAs, and knowledge management. Finally, we cover Omnichannel for Customer Service and historical analytics.

Lessons

- Explore Dynamics Field Service
- Examine knowledge management in Dynamics 365 Customer Service and related apps

Lab : Create and manage Cases

Lab : Create and publish a Knowledge Base article

### **Learn the Fundamentals of Dynamics 365 Field Service**

This module provides an introduction to Dynamics 365 Field Service. We begin with a discussion of the work order lifecycle. Then we examine the product capabilities, including work order generation, inspections, scheduling, asset management and Connected Field Service.

Lessons

- Explore Dynamics 365 Field Service
- Describe the scheduling process

Lab : Create work orders in Dynamics 365 Field Service

Lab : Create an Inspection