

Introduction to Microsoft Dynamics 365 (CRM) (MB-910)

Duration: 1 Day **Course Code: M-MB910** **Delivery Method: Company Event**

Overview:

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.

Company Events

These events can be delivered exclusively for your company at our locations or yours, specifically for your delegates and your needs. The Company Events can be tailored or standard course deliveries.

Target Audience:

People in different roles and at various stages in their careers can benefit. 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.

Objectives:

- 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

Testing and Certification

- Microsoft Certified: Dynamics 365 Fundamentals (CRM)

Content:

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

Further Information:

For More information, or to book your course, please call us on Head Office 01189 123456 / Northern Office 0113 242 5931

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