

CRM Boot Camp for Dynamics 365

Course Level: 100

This instructor-led course provides a key step for administrators and customizers who are beginning or advancing their knowledge of CRM for Microsoft Dynamics 365 in their learning evolution. With the evolution of the Dynamics 365 product, this course will focus on the core out-of-the-box capabilities while driving understanding surrounding the competencies needed for attendees to have big impacts on their organization. This fast pace course covers the latest and greatest in Microsoft new feature releases to ensure that attendees are empowered to leverage the full capabilities of their organization's Dynamics 365 environment.

DYNAMICS 365
UNIVERSITY 



At A Glance: CRM Boot Camp for Dynamics 365

Why Enroll?

Empower Admins, Power Users, & Customizers to make enhancements & gain a wholistic understanding of the CRM backend features & functionality.



Who to Enroll?

System Administrators -
Power Users -
Customizers -
Developers -



Key Takeaways

Concepts & Basics, Marketing, Sales, Service, Administration, Data Management, Structure Customization, User Interface Customization, Processes, Reporting



Register

Register for a CRM Boot Camp today!

[Click to Register.](#)

About this Training



Intended Audience

This course is designed to support individuals who will be administering or configuring Microsoft Dynamics 365. This course provides attendees who have limited or no exposure to Dynamics 365 a breadth understanding of the solution. Attendees who are migrating from a previous version of Microsoft Dynamics CRM or database solution will find value in learning new features and functionality of the most recent release. This course is not recommended for end users.



Recommended Prerequisites

Prerequisites are recommendations, and while not required, they are *highly* advised to ensure a successful learning experience:

- Understanding of data or relational databases is helpful
- Exposure to Microsoft Dynamics 365 is helpful, but not necessary

Key Takeaways

This Training Will Allow You To:

- Use advanced find, search, forms, views, activities, default system views, dashboards, charts, document templates and reports
- Understand the default record types and built in processes and process flows for Sales, Marketing and Service
- Understand configuration and administrative options and best practices
- Create personal views, dashboards, and charts
- Set up and define a custom entity or record type
- Customize the user interface including forms and search
- Understand security structure and features
- Gain familiarity with options and capabilities for process guidance, automation, data analysis, & presentation



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CRM CONCEPTS & BASICS

Dynamics 365 Overview

- Deployment Options
- Dynamics 365 Home (home.dynamics.com)
 - Dynamics 365 common header and task pane; App Source; Terminology
- Getting Started Guide: Navigation and Terminology

Working with the Application

- Navigation Bar
 - Categorized Search
 - Recently Viewed
 - Quick Create
 - Advanced Find

- Personal Options
- Learning Paths

- Command Bar
- Quick Find
- Views
- Editable Grids

Working with Records

- Functional Records
- Record types in CRM
- Customer Records
- Working with Forms
 - Form Navigation
 - Business Process Flows
 - Composite Fields
 - Auto-Save
 - Related Records

- Record Actions
 - Status and Status Reason
 - Record Ownership
 - Assigning Records
 - Users & Teams vs. Queues
 - Sharing Records
 - Deleting Records
 - Bulk Delete
 - Editing Multiple Records

Working with Activities

- Activities
 - Defined
 - Types
 - Viewing Activities
- Activity Feeds
- Posts

- Notes and Attachments
- Best Practices
- **Apps, Hubs, App for Outlook**
- Dynamics 365 App for Outlook
 - Integration with Outlook Web Access
 - Track Activities and Create Records
 - Track Contacts

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MARKETING

Marketing Overview

- Core Marketing Records
- Working with Leads

Marketing Lists

- Creating and Using Marketing Lists
 - Static Lists
 - Dynamics Lists

Email Templates

- Email Template Uses
 - Entity for Personal or System Email Template
 - Email Templates and Marketing Lists

Implementing and Managing Marketing Campaigns

- Quick Campaigns
- Campaigns
 - Planning
 - Creating
 - Templates
 - Campaign Responses
- Marketing Benefits
 - Marketing Integration Options

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SALES

Sales Overview

- Core Sales Records
- Sales Cycles
- Overview of the Sales Process

Sales Order Processing

- Sales Business Process Flows
- Opportunities Management
 - Closing Opportunities
- Working with Quotes, Orders and Invoices
- Tracking Competitors
- Incorporating Sales Literature

- Sales Territories

Embedded Intelligence

- Relationship Assistant
- Email Engagement
- Auto-Capture
- Intelligence Configuration
- Sales-Insights Add-On (Preview Feature)
 - Relationship Analytics
 - Predictive Lead Scoring

Working with the Product Catalog

- Purpose
- Benefits

- Components

- Unit Groups
- Products
 - Properties
 - Relationships
 - Families
 - Bundles
- Price Lists
 - Price List Items
 - Territory Pricing
 - Discount Lists

SERVICE

Customer Service Overview

- Cases
 - Typical Service Process
 - Service Business Process Flow
- Case Management
 - Merge Cases
 - Case Hierarchies
 - Case Settings
 - Resolving Cases
 - Other Case Actions
- Customer Service Hub
 - Dashboards

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SALES

- Forms

Service Management: Knowledge Management

- Service Management Settings
 - Subject Tree
 - Categories
- Knowledge Base
 - Structure
 - Article Features
 - Article Management in Customer Service Hub
 - Using Articles with Cases

Service Management: Working with Teams and Queues

- Introduction to Owner Teams
 - Introduction to Queues
 - Common Uses of Queues
 - Working with Queue Items
 - Queue Item Views
 - Case Assignment and Routing Rules
- ### Service Management: Service Level Agreements and Entitlements
- Service Level Agreements (SLAs)
 - Overview

- Creating SLAs
- Using SLAs with Cases
- SLA Types
- SLAs on Other Entities

- Entitlements
 - Creating Entitlements
 - Using Entitlements with Cases

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ADMINISTRATION

System Settings Overview

Security

- Security Planning
- Overview of Security Structure

Business Units, Users and Teams

- Business Units
- Purpose of Business Units
- Structure of Business Units
- Creating and Managing Business Units
- Users
- User Management

- User Creation and Maintenance

- Teams
- Team Configuration and Management
- Owner Teams
- Access Teams

Security Roles

- Using Role Based Security
- Security Role Components
- Privileges
- Access Levels
- Managing Security Roles

Hierarchy Security

- Manager Hierarchy
- Positions Hierarchy

DATA MANAGEMENT

Data Management Overview

Searching CRM Data

- Quick Find
- Categorized Search
- Relevance Search
- Full Text Indexing

Advanced Find

- Uses
- Creating Queries
 - Search Operators
 - Alternative Criteria
 - Modifying Columns

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Data Management Overview

Searching CRM Data

- Quick Find
- Categorized Search
- Relevance Search
- Full Text Indexing

Advanced Find

- Uses
 - Search Operators
 - Alternative Criteria
 - Modifying Columns

• Related Records

- Capabilities
- Saving Views

Export to Excel

- Excel Online
- Download Static and Dynamic Worksheets
- Pivot Tables

Duplicate Detection

- Duplicate Detection Rules
- Duplicate Detection Jobs
- Merging Records

Data Import

- Import Wizard
- Templates & Data Maps

Auditing

- Features
- Configuring
- Managing and Using Audit Data
- Best Practices

Data Management Considerations

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STRUCTURE CUSTOMIZATION

Structure Customization Overview

- Levels of Customization
- Customization Roles
- Types of Customizations
- Customizations Area
 - Themes

Solutions

- Defined / Purpose
 - Components
 - Subcomponents
- Default Solution
- Unmanaged Solutions

- Managed Solutions
- Solution Lifecycle
 - Solution Deployment
 - Conflict Resolution

Entities

- Defined / Purpose
- Creating Custom Entities
 - Activities Entities
 - Standard Entities
- Security Considerations

Entity Relationships

- Defined

- Types and Behavior
- Connections
- Cascading and Mapping**
- Cascading Actions Defined
- Customize Cascading Rules
- Mapping Capabilities

Fields

- Defined
- Types
- Creating Fields
 - Field Properties
 - Field Formats

- Calculated Fields
- Rollup Fields
- Global Option Sets
- Field Level Security**
- Defined / Scope
- Configuring

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USER INTERFACE CUSTOMIZATION

User Interface Customization Overview

Forms

- Components
- Form Editor
- Role Based Forms
- Form Order
- Types

Business Rules

- Defined
- Visual Designer
- Creating Business Rules
- Business Rule Scope

Visualizations

- System Views
 - Types and Configurations
 - Configuring Editable Grid Views
- Charts
 - Capabilities
 - Personal Charts vs. System Charts
 - Chart Styles
 - Terminology
 - Editing
- Dashboards
 - Capabilities

- Creating Dashboards
- Sharing Dashboards
- Hierarchy Visualizations
 - Default Availability
 - End User Experience
 - Configuration

Apps & Sitemaps

- App Designer and Sitemap Designer
- Accessing Apps and App Security
- Manage as Solution Components

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PROCESS

Processes Overview

Workflows

- Capabilities
- Types of Workflows
 - Real-time Workflows
 - Background Workflows
- Creating Workflow Processes
 - Workflow Components
 - Workflow Actions
 - Child Workflows
 - Testing Workflows

Dialogs

- Defined
- Creating and Using Dialogs
- Business Process Flows**
 - Defined
 - Multiple Entity Business Process Flows
 - Business Process Flow Commands
 - Business Process Flow Management
 - Order Processes
 - Role Based Processes
 - Creating & Modifying Process Flows
 - Components
 - Process Flow Branching

REPORTING

Reporting Overview

Reports

- Using Default Reports
- Report Wizard
- Reporting Tools which integrate w/ CRM

Goals

- Components
 - Metric
 - Goal Record
 - Parent & Child Goals
 - Roll Up Queries
- Reporting

- Default Reports & Charts
- Excel and Word Templates**
 - Document Templates
 - System vs. Personal Documents
 - Security and Document
 - Manage Document Templates
 - Excel Templates
 - Using an Excel Template
 - Building and Refreshing Data
 - Word Templates
 - Using a Word Template
 - Building Word Templates

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DYNAMICS 365 UNIVERSITY

Dynamics 365 University is designed to be **foundational training for those responsible for implementing and supporting Dynamics 365** within your organization. Dynamics 365 University focuses on out-of-the-box features and functionality **training for your core team**. Participants get an understanding of how the Dynamics 365 processes and architecture can be leveraged and customized to **support your unique organizational processes**.

GET STARTED