

Dynamics 365 University: Boot Camp Detailed Agenda

Course Level: 100

This instructor-led course provides a key step for Microsoft Dynamics 365 administrators and customizers who are beginning or advancing their knowledge of 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 be impactful for their organization. This fast pace course covers the latest and greatest Microsoft new feature releases to ensure that attendees are empowered to leverage the full capabilities of their organization's Dynamics 365 environment.

Audience

This course offering is designed to support individuals who will be administrating 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.

Prerequisites

This course requires that students meet the following prerequisites:

- Understanding of data or relational databases is helpful
- Exposure to Microsoft Dynamics 365 is helpful

Dynamics 365 Navigation and Terminology

Dynamics 365 Overview

Accessing the System: Application, Client, Mobile and Portals

Deployment Options

Accessing and Working with Dynamics 365 Records

Dynamics 365 Home

Dynamics 365 common header and task pane

App Source

Navigation

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
- Activity Pane & Timeline

Outlook Integration

- Outlook and Dynamics 365 Integration Options
- Dynamics 365 App for Outlook
 - Integration with Outlook Web Access
 - Track Activities and Create Records
 - Track Contacts
- Dynamics 365 for Outlook
 - Filters and Options
 - Tracking Outlook Items
 - Working Offline

Core Modules: Sales, Marketing and Service

SALES

- Core Sales Records
- Overview of the Sales Process
- LinkedIn: Sales
- Relationship Insights
- Sales Order Processing
- Sales Business Process Flows
- Working with Leads
- Opportunities Management
- Closing Opportunities
- Working with Quotes, Orders and Invoices
- Tracking Competitors
- Incorporating Sales Literature
- Working with the Product Catalog

MARKETING

- Marketing Overview
- Core Marketing Records
- Marketing Lists
- Implementing and Managing Marketing Campaigns
- Quick Campaigns
- Campaigns

Email Templates and Mail Merge

- Mail Merge Capabilities
- Email Template Uses

Customer Insights

CUSTOMER SERVICE

Service Management: Introduction

- Core Customer Service Records
- Service Business Process Flow
- Case Management
 - Merge Cases
 - Case Hierarchies
 - Case Settings
 - Resolving Cases

Unified Client Interface

- Interactive Service Hub
- Dashboards
- Forms

Service Management: Knowledge Management

- Service Management Settings
- Knowledge Base
 - Structure
 - Article Features
 - Article Management
 - 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)
- Entitlements

Data Management, Administration and Customization

Data Management

- Advanced Find

Uses

Creating Queries

Search Operators

Alternative Criteria

Modifying Columns

Related Records

Export to Excel

Excel Online

Download Static and Dynamic Worksheets

Data Integrity and Importing

Duplicate Detection

Data Import

ADMINISTRATION

System Settings

Auditing

Features

Configuring

Managing and Using Audit Data

Best Practices

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

SCHEMA CUSTOMIZATION

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

Solutions

- Defined / Purpose
 - Components
 - Subcomponents
- Default Solution
- Unmanaged Solutions vs. Managed Solutions
- Solution Lifecycle
 - Solution Deployment
 - Conflict Resolution

Entities

- Creating Custom Entities
 - a. Activities Entities
 - b. Standard Entities

Entity Relationships

- Defined
- Types and Behavior
- Connections
- Cascading and Mapping

Fields

- Types
- Creating Fields
 - Field Properties
 - Field Formats
 - Calculated Fields
 - Rollup Fields
 - Multi-select Fields
- Global Option Sets

Field Level Security

- Defined / Scope
- Configuring

USER INTERFACE CUSTOMIZATIONS

Forms

- Components
 - Form Editor
 - Main Forms
 - Quick Create Forms
 - Quick View Forms
 - Custom Control
- Form Security and Visibility
 - a. Role Based Forms
 - b. Form Order
- Business Rules
 - Defined
 - Creating Business Rules
 - Business Rule Scope
- Timeline

Visualizations

- Charts
 - Personal Charts vs. System Charts
 - Chart Styles
 - Editing
- Dashboards
 - Capabilities
 - Sharing Dashboards
- Hierarchy Visualizations
 - Configuration
 - Considerations

System Views

- Configuring Editable Grid Views
- Quick Find System View
- Advanced Find and Lookup System Views

Configuring Search

- Categorized Search
- Relevance Search
- Full Text Indexing

Apps & Sitemaps

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

Introduction to Processes and Reporting

PROCESSES

- Processes Defined
- Process Management

Workflows

- Capabilities
- Types of Workflows
- Creating Simple Workflow Processes

Dialogs

- Capabilities
- Dialog Components
- Creating and Using Dialogs

Actions

- Using Command Actions
- Capabilities of Custom Actions

Business Process Flows

- Capabilities
- Business Process Flow Management
 - Order Processes
 - Role Based Processes
 - Modify Default Processes

REPORTING

Goals

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

Reporting

- Default Reports
- Default Charts

Excel and Word Templates

Document Templates

System vs. Personal Documents Templates

Security and Document Templates

Manage Document Templates

Excel Templates

Using an Excel Template

Refreshing Data

Word Templates

Using a Word Template

Organizational Insight

Reports

Using Default Reports

Report Wizard

At Training Material Completion

After completing this course, you will be able to:

- Understand the Sales, Marketing and Service modules and their out-of-the-box functionality of Microsoft Dynamics 365
- Understand Advance Find Capabilities
- Understand best practices surrounding configuration of the user experience for your organization
- Understand the Dynamics 365 Security structure
- Set up and define a Custom Entity
- Gain exposure and understanding of Microsoft Dynamics 365 Processes