

# Dynamics 365 Course Contents

## Introduction

Introduction and Getting Started  
Dynamics CRM Overview  
What is CRM and what is the need of CRM?  
Purpose of this training

## CRM Functional

Sales Module Overview

- *Manage Leads*
- *Manage Sales Process*
- *Identify and Manage Opportunities*

Marketing Module Overview

- *Marketing Lists*
- *Campaigns*

Service Module Overview

- *Create and Manage Cases*
- *Manage case lists and views, search for case records and create a new case record*
- *Perform case resolution processes and implement case routing rules*

Field service Module Overview

- *Work orders*
- *Scheduling*
- *Dispatching*

Microsoft CRM for Outlook

CRM Database overview

Microsoft Dynamics CRM Architecture

## CRM Technical

### Configuration

Introduction to Configuring in Dynamics 365

- *Configure Microsoft Dynamics 365 CRM Settings*
- *Introduction to system settings*

The Security Model

- *Identify security roles, define permissions and privileges, configure access levels, configure security roles and assign security roles*

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- *Configure business units and manage teams*
- *Hierarchical Security*

## Business Process Flows

- *Implement and manage business process flows*
- *Implement steps, stages and categories*

## Data Management

- *Data Import*
- *Bulk Edit*

## Themes and Branding

### Editable Grids

## Customization

### Introduction to Customizing Dynamics 365

#### Entity and Field Customizations

- *Manage entity ownership, manage entity properties, configure system entities and describe activity entities*
- *Configure fields, configure field properties, use calculated fields, use rollup fields and configure global option sets*

#### Entity Relationships

- *Define relationship types, create relationships, configure cascading rules and identify types of cascading behavior*

#### Customizing Forms

- *Identify Microsoft Dynamics 365 CRM form types and build a form*

#### Views and Visualizations

- *Identify view types, create, modify, manage and delete views*
- *Customize views, create system and personal charts.*

#### Business Rules

- *Determine when to use business rules, describe business rule scopes and identify actions that trigger business rules*
- *Configure business rules and conditions.*

#### Solutions

- *Create, export and import solutions.*

#### Supported vs Unsupported Customization

#### Site Map Customization



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## Extending CRM

Client Scripting (Jscript)

Ribbon Customization

Web Resources

Overview of Plugins

Overview of Custom Workflow Activities

Overview of Dynamics 365 Web Services