

MB-901T00 Microsoft Dynamics 365 Fundamentals

Course Overview

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This is a 2-day class

This course gives you a broad overview of Dynamics 365 applications. You will be able, by the end of the course, to identify each of the applications, articulate their business value, and discuss their core functionality. You will be introduced to the concepts behind Dynamics 365 security and reporting, and familiarize yourself with the latest data and product integrations available.



Who Should Attend

This course is targeted to learners who want to acquire a solid grounding in the fundamentals of Dynamics 365.

Course Objectives

After completing this course, students will be able to:

- Distinguish between the different Dynamics 365 applications

Course Outline

1 INTRODUCTION TO MICROSOFT DYNAMICS 365

Introduction
Dynamics 365 Applications
What is artificial intelligence (AI)?
What is mixed reality (MR)?
Digital Transformation
Summary

2 PRINCIPLES OF CLOUD COMPUTING AND DEPLOYMENT

Introduction
What is cloud computing?
Benefits of cloud computing
Compliance, terms and requirements
Types of cloud services
Deployment
Azure DevOps
Microsoft Dynamics Lifecycle Services (LCS)
Explore Power Platform Admin Center
Summary

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3 RECOGNIZE DYNAMICS 365 SECURITY

- Introduction
- Dynamics 365 cloud security
- Cloud security basics
- Understanding role-based security
- Security in Finance and Operations apps
- Summary

4 CONNECT AND ANALYZE YOUR DYNAMICS 365 DATA

- Introduction
- The use of Microsoft Power Platform in Dynamics 365
- Benefits of Common Data Service
- Dynamics 365 reporting
- Summary

5 INTRODUCTION TO DYNAMICS 365 SALES

- Introduction
- Automation of business processes with Dynamics 365 Sales
- Manage the sales process and pipeline
- Benefits of Microsoft Relationship Sales Solution (MRSS)
- Dynamics 365 Sales Insights
- Microsoft Forms Pro
- Dynamics 365 Product Visualize
- Summary

6 INTRODUCTION TO DYNAMICS 365 MARKETING

- Introduction
- The benefits of Dynamics 365 Marketing
- Features and functionality of Dynamics 365 Marketing
- Lead generation and qualification
- Customer journey
- Segmentation
- Event management
- Summary

7 INTRODUCTION TO DYNAMICS 365 CUSTOMER SERVICE

- Introduction
- Overview of Dynamics 365 Customer Service
- Account Management
- Case lifecycle management
- Knowledge articles
- Omnichannel for Dynamics 365 Customer Service
- PowerApps Portals
- Dynamics 365 Customer Service Insights
- Summary

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8 INTRODUCTION TO DYNAMICS 365 FIELD SERVICE

Introduction
Benefits of Dynamics 365 Field Service
Connected Field Service
Service resource scheduling
Resource Scheduling Optimization (RSO)
Field Service Mobile
Dynamics 365 Remote Assist
Dynamics 365 Guides
Summary

9 EXPLORE MODEL-DRIVEN APP INTEGRATIONS AND DYNAMICS 365 CUSTOMER INSIGHTS

Introduction
Integration across Dynamics 365 applications
Integration with Microsoft products
Integration with third-party applications
Dynamics 365 Customer Insights
Summary

10 INTRODUCTION TO DYNAMICS 365 FINANCE

Introduction
Overview of Dynamics 365 Finance
Dynamics 365 Finance core capabilities
Summary

11 INTRODUCTION TO DYNAMICS 365 SUPPLY CHAIN MANAGEMENT

Introduction
Overview of Dynamics 365 Supply Chain Management
Dynamics 365 Supply Chain Management core capabilities
Dynamics 365 Layout
Summary

12 INTRODUCTION TO DYNAMICS 365 BUSINESS CENTRAL

Introduction
Overview of Dynamics 365 Business Central
Finance and budgeting
Supply chain management
Project management
Sales and service
When should you use Business Central versus other Dynamics 365 applications?
Summary

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13 INTRODUCTION TO DYNAMICS 365 HUMAN RESOURCES

- Introduction
- Overview of Dynamics 365 Human Resources
- Employee Self-service
- Personnel management
- Benefits management
- Employee development
- Summary

14 INTRODUCTION TO DYNAMICS 365 COMMERCE

- Introduction
- Overview of Dynamics 365 Commerce
- Omnichannel and Channel management
- Dynamics 365 Commerce core functional areas
- Assisted Selling
- Merchandizing and inventory
- Dynamics 365 Commerce deployment options
- Dynamics 365 Fraud Protection
- Summary

15 EXPLORE FINANCE AND OPERATIONS CROSS-APP INTEGRATIONS

- Introduction
- Integration across Dynamics 365 apps
- Discover the Data Management Framework
- Integrations across Microsoft products
- Integrations with third-party apps
- Explore external system integration capabilities
- Summary