

# MB-910T00

## Microsoft Dynamics 365 Fundamentals Customer Engagement Apps (CRM)

This course provides you with a comprehensive introduction to the customer engagement capabilities of Dynamics 365. You will be introduced to the concept of customer engagement and learn about each of the customer engagement apps, including Dynamics 365 Marketing, Dynamics 365 Sales, Dynamics 365 Customer Service, Dynamics 365 Field Service, and the Customer Relationship Management (CRM) capabilities of Dynamics 365 Project Operations. This course includes both lectures and hands-on labs.

### Course Contents

- Module 1: Learn the Fundamentals of Dynamics 365 Marketing
- Module 2: Learn the Fundamentals of Dynamics 365 Sales
- Module 3: Learn the Fundamentals of Dynamics 365 Customer Service
- Module 4: Learn the Fundamentals of Dynamics 365 Field Service
- Module 5: Learn the Fundamentals of Dynamics 365 Project Operations (CRM)

**E-Book** The original Microsoft courseware is made available to you online.

### Target Group

People in different roles and at different stages of their career can benefit from this foundation course. This includes IT professionals, business stakeholders and others who want to familiarize themselves with the customer engagement features of Dynamics 365, students, graduates and career changers who want to use Dynamics 365 to reach the next level.

### Prerequisites

Learners should have a basic understanding of the principles of customer engagement and business processes. An understanding of cloud computing is helpful but not necessary.

### Course Target

The course supports participants in preparing for the MB-910 exam, which is required for the certifications "Microsoft Certified: Dynamics 365 Fundamentals Customer Engagement Apps (CRM)" certifications.

### This Course in the Web



You can find the up-to-date information and options for ordering under the following link:

[www.expertech-training.com/go/MB91](http://www.expertech-training.com/go/MB91)

### Reservation

On our Website, you can reserve a course seat for 7 days free of charge and in a non-committal manner. This can also be done by phone under +49 6074/4868-0.

### Guaranteed Course Dates

To ensure reliable planning, we are continuously offering a wide range of guaranteed course dates.

### Your Tailor-Made Course!

We can precisely customize this course to your project and the corresponding requirements.

Status 03/19/2025

Training	Prices, excl. of V.A.T.	
Classes in Germany	1 Day	€ 995
Online Training	1 Day	€ 995
Dates upon request		

# Table of Contents

## MB-910T00 – Microsoft Dynamics 365 Fundamentals Customer Engagement Apps (CRM)

### Module 1: Learn the Fundamentals of Dynamics 365 Marketing

This module covers the basic concepts of customer engagement and what the customer engagement apps have in common before diving into Dynamics 365 Marketing. We begin with the standard marketing business processes and how Marketing addresses those. Then we examine the product capabilities. Finally, we cover additional marketing apps such as LinkedIn Campaign Manager, Dynamics 365 Customer Voice and Dynamics 365 Customer Insights.

#### Lessons

- Get introduced to the Dynamics 365 customer engagement apps
- Examine Dynamics 365 Marketing
- Describe Dynamics 365 Marketing capabilities
- Review Additional Marketing Apps

#### Lab : Working with customer engagement apps

##### Lab : Manage Customers and Activities

##### Lab : Search and filter data

##### Lab : Dynamics 365 Marketing Capstone Lab

- Create a marketing email
- Create a Segment in Dynamics 365 Marketing
- Create a Customer Journey

After completing this module, students will be able to:

- Describe the customer engagement apps and what they have in common
- Describe the standard marketing processes and how Dynamics 365 Marketing addresses them
- Describe Dynamics 365 Marketing features and capabilities
- Describe additional marketing apps

### Module 2: Learn the Fundamentals of Dynamics 365 Sales

This module provides an introduction to Dynamics 365 Sales. We begin with the standard sales business processes and how Sales addresses those. Then we examine the product capabilities. Finally, we cover additional sales apps such as Sales Insights and Sales Navigator.

#### Lessons

- Explore Dynamics 365 Sales
- Manage the sales lifecycle with Dynamics 365 Sales
- Review additional sales apps

#### Lab : Dynamics 365 Sales Capstone Lab

- Create and qualify a Lead
- Manage a sales Opportunity

After completing this module, students will be able to:

- Describe the standard sales processes and how Dynamics 365 Sales addresses them

- Describe Dynamics 365 Sales capabilities

- Describe additional sales apps such as Sales Insights and Sales Navigator

### Module 3: Learn the Fundamentals of Dynamics 365 Customer Service

This module provides an introduction to Dynamics 365 Customer Service. We begin with the standard customer service business processes and how Customer Service addresses those. Then we examine the product capabilities. Finally, we cover additional customer service apps such as Omnichannel for Customer Service, Dynamics 365 Customer Service Insights, Customer Service Scheduling and Connected Customer Service.

#### Lessons

- Examine Dynamics 365 Customer Service
- Describe Dynamics Customer Service capabilities

- Review additional customer service apps

#### Lab : Dynamics 365 Capstone Lab

- Create and publish a Knowledge Article
- Manage a support Case through its life cycle

After completing this module, students will be able to:

- Describe the standard customer service processes and how Dynamics 365 Customer Service addresses them
- Describe Dynamics Customer Service capabilities
- Describe additional sales apps such as Sales Insights and Sales Navigator

### Module 4: Learn the Fundamentals of Dynamics 365 Field Service

This module provides an introduction to Dynamics 365 Field Service. We begin with the standard field service business processes and how Field Service addresses those. Then we examine the product capabilities, including work order generation, scheduling, inventory management and asset management.

#### Lessons

- Examine Dynamics Field Service
- Generate Work Orders in Dynamics 365 Field Service
- Describe the scheduling capabilities of Dynamics 365 Field Service
- Examine the inventory management capabilities of Dynamics 365 Field Service
- Review the asset management capabilities of Dynamics 365 Field Service

### Lab : Dynamics 365 Capstone Lab

- Create a Case and escalate to a Work Order
- Schedule items with Dynamics 365 Field Service

After completing this module, students will be able to:

- Describe the standard field service business processes and how Dynamics 365 Field Service addresses
- Describe how to generate Work Orders
- Describe the scheduling capabilities of Dynamics 365 Field Service
- Describe the inventory management capabilities of Dynamics 365 Field Service
- Describe the asset management capabilities of Dynamics 365 Field Service

### Module 5: Learn the Fundamentals of Dynamics 365 Project Operations (CRM)

This module provides an introduction to the customer engagement aspects of Dynamics 365 Project Operations. We begin with the standard project-based business processes and how Project Operations addresses those. Then we examine the product capabilities, including sales, project management, and resource utilization.

#### Lessons

- Examine Dynamics 365 Project Operations
- Describe the sales capabilities of Dynamics 365 Project Operations
- Plan projects with Dynamics 365 Project Operations

- Review the resource utilization capabilities of Dynamics 365 Project Operations

#### Lab : Dynamics 365 Project Operations Capstone Lab

- Create a project-based Lead
- Manage a project-based Opportunity
- Create a Project Quote and Project Estimate

After completing this module, students will be able to:

- Describe project-based customer engagement processes addressed by Dynamics 365 Project Operations
- Describe the sales capabilities of Dynamics 365 Project Operations
- Describe the project management capabilities of Dynamics 365 Project Operations
- Describe the resource utilization capabilities of Dynamics 365 Project Operations

