

# MICROSOFT DYNAMICS 365 SALES TECHNO

## FUNCTIONAL WORKSHOP

**Duration: 4 days; Course Code: CDC-101; Virtual Instructor-led / Instructor-led**

### WHAT WILL YOU LEARN

Microsoft Dynamics 365 Sales is an end-to-end application to manage the handling of customers and potential customers. Using Dynamics 365 Sales, organizations can track data against sales goals, automate best practices, learn from data, and more.

Join our team of globally recognized experts as they take you step by step from lead to opportunity to closed deal. Using the application's available automation and customization options you will learn how to enable sales staff to be their most productive selves.

This course provides students with a detailed hands-on experience of setting up, configuring, customizing, extending and maintaining Microsoft Dynamics 365 Customer Engagement (CRM) Apps and Model-driven Apps using the Power Apps Maker Portal and the Power Platform Admin Center. Attendees of this course will gain an in-depth understanding of configuring Environments through the Power Platform Admin Center, set up and maintaining Security, learn how to customize the Sales app.

### OBJECTIVES

- Install and configure the application
- Identify common sales scenarios
- Complete a sales cycle
- Configure product catalog
- Manage customer records
- Setup and configuration of entities
- Customization of forms, fields, views and relationship

### PREREQUISITES

No prerequisites.

### AUDIENCE

A Dynamics 365 Functional Consultant is responsible for performing discovery, capturing requirements, engaging subject matter experts and stakeholders, translating requirements, and configuring the solution and applications. The Functional Consultant implements a solution using out of the box capabilities, codeless extensibility, application and service integrations.

### COURSE CONTENTS

#### Module 1: Manage leads and opportunities with Dynamics 365 Sales

In this module, you will learn how to manage customer data records, use built-in sales tools, and take a lead through the lead lifecycle.

##### Lesson

- Manage leads with Dynamics 365 Sales

- Manage opportunities with Dynamics 365 Sales

#### Lab 1.1: Manage customers

After completing this module, you will be able to:

- Create customer records.
- Use sales tooling.
- Create leads and opportunities.

#### Module 2: Manage orders and the product catalog with Dynamics 365 Sales

In this module, we will learn how to use quotes and orders to further use Dynamics 365 Sales to manage your sales opportunities and turn them into closed deals.

##### Lesson

- Manage and organize your product catalog with Dynamics 365 Sales
- Process sales orders with Dynamics 365 Sales

After completing this module, you will be able to:

- Create and use the product catalog.
- Add quotes to opportunities.
- Complete a sale with an order.

#### Module 3: Manage goals with Dynamics 365 Sales

In this module, we will learn how to manage goals to track the success of your sales organization and gather key metrics about sales performance.

##### Lesson

- Define and track individual goals with Dynamics 365 Sales
- Use goal metrics in Dynamics 365 Sales

After completing this module, you will be able to:

- Use rollup columns to define sales metrics.
- Track individual goals for sales and teams.

#### Module 4: Create surveys with Dynamics 365 Customer Voice

In this module, students will learn about Dynamics 365 Customer Voice, a powerful tool for gathering and analyzing customer sentiment.

##### Lesson

- Create a survey project with Dynamics 365 Customer Voice
- Create surveys with Dynamics 365 Customer Voice
- Send Dynamics 365 Customer Voice surveys

After completing this module, students will be able to:

- Set up survey projects to organize and create surveys
- Create a survey with variables and entities
- Send Dynamics 365 Customer Voice surveys using multiple modalities

### Module 5: Introduction to Dynamics 365 Customer Engagement

This module provides the attendee with an introduction to the concept of creating custom Apps for Microsoft Dynamics 365 Customer Engagement. The concept of the Power Platform and Power Apps is presented, together with an initial overview of the Power Apps Maker portal and the Power Platform Admin Center.

#### Lessons

- Introduction to Microsoft Dynamics 365 Customer Engagement (CE)
- The Microsoft Power Platform
- The Power Apps Maker Portal
- The Power Platform Admin Center
- Power Platform Environments
- Solutions Overview
- As introduction to Release Wave Updates
- Review further reading and resources

### Module 6: Setup and Configuration

This module presents some of the most common features and areas that require configuration when provisioning and managing Dynamics 365 Apps and Power Platform Environments. This module guides you through the different portals and interfaces as well as common configuration Environmental Settings.

#### Lessons

- The Microsoft 365 Admin Center
- The Power Platform Admin Center
- The Dynamics 365 Admin Center
- The Power Apps Maker Portal
- Dynamics 365 Classic
- Microsoft Power Automate
- Microsoft Power BI
- Environment Level Settings
- Format Settings
- Email Settings
- Skype and Teams Integration
- SharePoint Integration

#### Lab 1: Configure Environment Settings

- Configure Environment Settings
- Configure Formatting Settings

#### Lab 2: Configure Audit Settings

- Enable Auditing
- Enable Auditing for an Entity
- Configure Auditing for a Field

After completing this module, students will be able to:

- Understand where to configure Users, Security and Licenses
- Understand the different admin interfaces and portals in the Microsoft Power Platform
- Work with the Power Platform Admin Center

- Be able to configure Environment Settings
- Be aware of integration with SharePoint, Skype, Teams and Outlook
- Configure Auditing

### Module 7: Security

This module highlights the importance of maintaining a robust security model in Microsoft Dynamics 365 by stepping through how to configure Business Units, Security Roles, Users and Teams. Access Teams and Hierarchy Security are also considered.

#### Lessons

- Design and configure Business Units
- Configure Security Roles
- Manage Users and Teams
- Implement Access Teams
- Configure Hierarchy Security

#### Lab 1: Configure Users, Business Units, Security Roles and Access Levels

- Create new Users in Microsoft 365
- Add Users to an Environment and assign Security Roles
- Create new Business Units
- Copy a Security Role and Configure Access Levels
- Assign Users to Security Roles

After completing this module, students will be able to:

- Manage Security in Power Platform Environments
- Configure Business Units, Security Roles, Access Levels, Users and Teams
- Know the difference between Teams and Access Teams
- Configure Manager and Position Hierarchy Security

### Module 8: Creating and Managing Entities

In this module we will start to look at customizing the data model of the Common Data Service (CDS) to build custom apps in Microsoft Dynamics 365. The model consists of Entities, Relationships and Fields which can be customized and extended using the Power Apps Maker portal. This module serves as an introduction to the Data Modelling, including customizing Entities and configuring Entity properties.

#### Lessons

- Introduction to the Data Modelling
- System and Custom Entities
- Create new Custom Entities
- Entity Properties
- Entity Type and Ownership
- Custom Entity Security
- Entities and Solutions

#### Lab 1: Creating and Managing Entities

- Creating a Solution
- Creating Custom Entities
- Add existing System Entities to a Solution
- Configure permissions for Custom Entities
- Create a Model-driven App

After completing this module, students will be able to:

- Understand Common Data Service and modelling fundamentals
- Know the different Entity Types
- The process to create new Custom Entities
- Manage Entity Properties
- Configure Entity Security
- Manage Entity customizations with Solutions

### Module 9: Customizing Fields

Fields are used in Dynamics 365 Apps to capture data entered by the user. The Common Data Services (CDS) supports a number of different Field data types and formats, all of which are presented in this module. Special Field types such as Calculated Fields are also considered, as well as securing data using Field Level Security.

#### Lessons

- Introduction to Field
- Understand the different Field Types
- Field Data Types
- Create a new Field
- Fields and Solutions
- Implement a Calculated Field
- Configure Field Level Security

#### Lab 1: Creating and Managing Fields

- Creating Fields
- Create a Global Option Set

#### Lab 2: Creating a Calculated Field

- Creating a Calculated Field
- Add Fields to an Entity Form

#### Lab 3: Configuring Field Level Security

- Enable a Field for Field Level Security
- Configure a Field Security Profile

After completing this module, students will be able to:

- Understand the process to customize Fields in the Common Data Service
- Know the different Field Types and Formats
- Be able to manage Field customizations using Solutions
- Create a Calculated Field
- Configure Field Level Security
- Use the Business Rule Designer to configure Field validation

### Module 10: Customizing Relationships and Mappings

Relationships associate an Entity with another Entity. This module provides an overview of the different types of Relationships that can be created in the Common Data Services. We also look at Relationship Mappings and how they can be used to pass values between related Entities to reduce duplicate data entry.

#### Lessons

- Introduction to Relationships
- Relationship Types
- Create a Relationship
- Relationships and Solutions
- Understand Relationship Behaviour
- Implement a Hierarchy Relationship
- Configure Field Mappings

#### Lab 1: Create Entity Relationships

- Create a 1 to Many Relationship

#### Lab 2: Create a Hierarchical Relationship

- Configure a Hierarchical Relationship

#### Lab 3: Configure Field Mappings

- Configure Field Mappings

After completing this module, students will be able to:

- Understand the different Relationship Types
- Be able to create a 1 to Many and Many to Many Relationship
- Know how to manage Relationship customizations using Solutions
- Understand how to configure Relationship Behaviour
- Know how to create a Hierarchical Relationships
- Be able to configure Field Mappings

### Module 11: Customizing Forms, Views and Visualizations

In this module you will learn how to customize and create the different Form types that exist in Dynamics 365 Model-driven Apps, as well as control access to forms using Form Level Security. The process to configure the different View types is also presented, as well as creating custom Charts and Dashboards.

#### Lessons

- Creating a new Form
- Form types
- Using the Form Designer
- Customizing the Main, Card, Quick View and Quick Create Forms
- Configure Form Security
- Review the different View types
- Customizing Views
- Customizing Charts and Dashboards

#### Lab 1: Customizing Forms

- Customising Forms
- Create a Quick Create Form
- Embed a Quick View Form

#### Lab 2: Configuring System Views

- Create Custom Views

#### Lab 3: Configuring Charts and Dashboards

- Configure Charts
- Construct a Dashboard

After completing this module, students will be able to:

- Know the various Form Types for Model-driven Apps
- Be able to customize existing Forms and create new custom Forms
- Configure Form Security
- Be able to customize Views and create new Custom Views
- Be able to customize Charts and create new Custom Charts
- Be able to customize Dashboards and create new Custom Dashboards

## **Module 12: Processes: Workflows, Business Process Flows and Power Automate**

In this module you will learn how to create and maintain Workflows, and Business Process Flows .

### **Lessons**

- Introduction to Processes
- Workflow
- Business Process Flows
- Building Flows in Power Automate

### **Lab 1: Create a Workflow**

- Create a Workflow
- Define when a Workflow Starts
- Adding Workflow Steps
- Activating a Workflow

### **Lab 2: Create Business Process Flows**

- Create a Business Process Flow
- Add Stages to a Business Process Flow
- Add Data and Action Steps to a Business Process Flow
- Configure Branching Logic in a Business Process Flow