Microsoft

Dynamics 365 Customer Engagement: Administration and Troubleshooting

WorkshopPLUS

Focusing On

- *Core Administration*

Gain a deeper understanding of how to administer and maintain Dynamics 365 Customer Engagement for optimal functionality, performance, user adoption, and ultimately, return on investment.

Target Audience:

This course is designed for Dynamics 365 Customer Engagement administrators. The key focus of this course is to learn how to support the environment in a more productive manner. The prerequisite that helps participants to see the most value from this course is:

- *Previous experience with or a good understanding of Dynamics 365 Customer Engagement*

Overview

The Dynamics 365 Customer Engagement: Administration and Troubleshooting WorkshopPLUS is a three-day course designed for Dynamics 365 Customer Engagement administrators that will:
- Focus on the key components and features of the application and the supporting technology.
- Discuss the tools and impart the knowledge to troubleshoot common issues with the application.
- Discuss the best practices on how to support the users of Dynamics 365 Customer Engagement application.

Focusing on

This review focuses on core Administration functionality and does not deep dive into individual apps

Key Features and Benefits

During the course, participants are provided with the content and the hands-on exercises encompassing several different aspects of administering Dynamics 365 Customer Engagement. The key areas include:
- Setup and Configuration
- Application Core Components
- Customizations and Basic Troubleshooting

This is a level 200 Workshop, which emphasizes on hands-on labs to ensure that concepts are practiced and understood.

Syllabus

This WorkshopPLUS runs for **three** full days. Participants should anticipate consistent start and end times for each day. Early departure on any day is not recommended.

Participants will receive instructions via email for setting up a free Dynamics 365 Online trial for use during the workshop. This includes the setup of an Exchange Online trial. Please note that Exchange Online trials now require a valid credit card. This is done for identity verification purposes only and the card will not be charged.

Day 1: Setup and Configuration
- Feature Overview of Dynamics 365 Customer Engagement
- Deployment and Configuration of Dynamics 365 Customer Engagement Overview and Demo
- Server-Side Synchronization Setup and Configuration
- Dynamics 365 App for Outlook Deployment, Setup and Configuration
- Customizations and Solutions

Day 2: Application and Customizations
- Reporting Overview
- Processes: Workflows, Business Process Flows and Actions
- Data Management, Auditing and Field-Level Security
- Dynamics 365 Customer Engagement Performance and Troubleshooting

Day 3: Mobile, Apps, and add-on Solutions/Integrations
- SharePoint and Office 365 Group Integration
- Microsoft Flow Integration
- Learning Path
- Custom App Creation
- Mobile
- Relationship and Organization Insights

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