

Boot Camp for Dynamics 365 Customer Engagement

Course Level: 100

This instructor-led course provides a key step for administrators and customizers who are beginning or advancing their knowledge of Microsoft Dynamics 365 Customer Engagement. With the evolution of the Dynamics 365 product, this course will focus on the core out-of-the-box capabilities while driving understanding surrounding the competencies needed for attendees to have big impacts on their organization. This fast paced course covers the latest and greatest in Microsoft new feature releases to ensure that attendees are empowered to leverage the full capabilities of their organization's Dynamics 365 environment.



Break Return Time:
1:20 PM



At A Glance: Boot Camp for Dynamics 365 Customer Engagement

Why Enroll?

Empower Admins, Power Users, & Customizers to make enhancements & gain a wholistic understanding of the CRM backend features & functionality.



Who to Enroll?

System Administrators -
Power Users -
Customizers -
Developers -



Key Takeaways

Concepts & Basics, Administration, Data Management, Structure Customization, User Interface Customization, Processes, Reporting



Register

Register for a Boot Camp today!

[Click to Register.](#)

About this Training



Intended Audience

This course is designed to support individuals who will be administering or configuring Microsoft Dynamics 365. This course provides attendees who have limited or no exposure to Dynamics 365 Customer Engagement a broad understanding of the solution. Attendees who are migrating from a previous version of Microsoft Dynamics CRM or database solution will find value in learning new features and functionality of the most recent release. This course is not recommended for end users.



Recommended Prerequisites

Prerequisites are recommendations, and while not required, they are *highly* advised to ensure a successful learning experience:

- Understanding of data or relational databases is helpful
- Exposure to Microsoft Dynamics 365 Customer Engagement is helpful, but not necessary

Key Takeaways

This Training Will Allow You To:

- Use advanced find, search, forms, views, activities, default system views, dashboards, charts, document templates and reports
- Understand configuration and administrative options and best practices
- Create personal views, dashboards, and charts
- Customize the data structure including entities and fields
- Customize the user interface including forms and search
- Understand security structure and features
- Gain familiarity with options and capabilities for process guidance, automation, data analysis, & presentation



DAY 1



DAY 2



DAY 3



DAY 4

USE DYNAMICS 365 CUSTOMER ENGAGEMENT

Accessing the System

○ Infrastructure

- Deployment Options
- Business Applications
- Power Platform

○ User Experience

- Web Browser
- Mobile Overview
- Outlook Overview

Terminology & Navigation

- Navigation Bar
 - Site Map
 - Categorized Search
 - Task Flows
 - Relationship Assistant
 - Quick Create
 - Advanced Find
 - Settings
- Command Bar
- Quick Find
- Views

Searching

- Categorized Search
- Relevance Search
 - Search Preferences

Working with Records

- Records / Record types
 - Functional Records
 - Customer Records
 - Activity Records

• Form Navigation

- Auto-Save
- Bing Maps
- Status and Status Reason
- Record Ownership
- Users & Teams vs. Queues
- Record Actions
 - Assigning Records
 - Sharing Records
 - Deleting Records
- Editing with Task Flows



DAY 1



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USE DYNAMICS 365 CUSTOMER ENGAGEMENT

Working with Activities

- Activities Defined
 - Types
 - Views
 - Actions
- Timeline
 - Activities
 - Posts
 - Notes and Attachments
- Best Practices

Email Templates

- Personal Email Templates
 - Entity Specific vs. Global
 - Using Dynamic Values
- Email Signatures

Working with Data

○ Advanced Find

- Users
- Creating Queries
- Saving Personal Views

○ Export to Excel

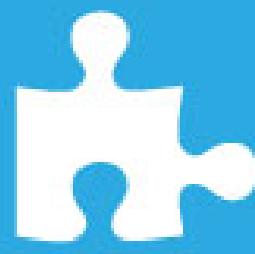
- Static Worksheets
- Dynamic Worksheets & Pivot Tables
- Excel Online

○ Charts

- Capabilities
- Personal Charts vs. System Charts
- Chart Styles
- Terminology
- Creating Personal Charts

○ Dashboards

- Types
- Capabilities
- Creating Personal Dashboards
- Sharing Personal Dashboards



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ADMINISTER DYNAMICS 365 CUSTOMER ENGAGEMENT

Advanced Settings

- Business Management
- Templates
- System Settings
 - Navigation & Search
 - Full Name

Security

○ Overview

- Security Model
- Components

○ Business Units

- Purpose and Structure
- Creating and Managing

○ Security Roles

- Using Role Based Security
- Security Role Components
- Managing Security Roles

○ Users and Teams

- User Management
- User Creation and Maintenance
- Owner Teams
- Access Teams

○ Hierarchy Security

- Manager Hierarchy
- Positions Hierarchy

○ Field Level Security

- Defined/Scope
- Configuring

Data Management

○ Data Management Considerations

○ Search Configuration

- Categorized Search
- Relevance Search (Online)
- Full Text Indexing (On-premises)
- Quick Find View

○ Duplicate Detection

- Duplicate Detection Rules
- Duplicate Detection Jobs
- Merging Records

○ Bulk Record Actions

- Merge Accounts or Contacts
- Edit Multiple Records
- Bulk Delete



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ADMINISTER DYNAMICS 365 CUSTOMER ENGAGEMENT

○ Data Import

- Import Wizard
- Templates & Data Maps

○ Auditing

- Features and Functions
- Viewing Audit Data
- Managing Audit Logs
- Best Practices
- Activity Logging

Embedded Intelligence

- Relationship Assistant
- Email Engagement
- Auto-Capture

○ Intelligence Configuration

Report Administration

- Default Reports
 - Display Options
 - Default Filter
- Report Wizard
 - Design Capabilities
 - Personal vs. System
 - Alternatives

Document Templates

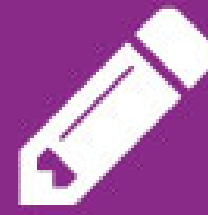
- Overview
 - Personal vs. System
 - Security
- Excel Templates
 - Default
 - Creating and Managing
- Word Templates
 - Default
 - Creating and Managing



DAY 1



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DAY 4

MODIFY & MAINTAIN DYNAMICS 365 CUSTOMER ENGAGEMENT

Customization Overview

- Levels of Customization
- Customization Roles
- Types of Customizations
- Customizations Area

Solutions

- Defined / Purpose
 - Components
 - Subcomponents
- Types
 - Default Solution
 - Custom Solutions
 - Unmanaged Solutions
 - Managed Solutions
- Solution Lifecycle

Entity Relationships

- Defined
 - Types
 - Behavior
- Org Chart
- Connection Roles
- **Cascading and Mapping**
 - Cascading Actions Defined
 - Customize Cascading Rules
 - Set up Field Mapping

Entities

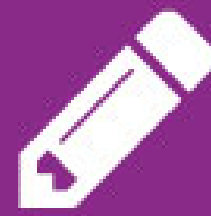
- Defined / Purpose
- Creating Custom Entities
 - Activities Entities
 - Standard Entities
- Security Considerations



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MODIFY & MAINTAIN DYNAMICS 365 CUSTOMER ENGAGEMENT

Fields

- Types
 - Simple Fields
 - Calculated Fields
 - Rollup Fields
- Creating Fields
 - Format
 - Options
 - Local Option Sets
 - Global Option Sets

Forms

- Form Types
- Form Editor
 - Main Form Components
 - Custom Controls
 - Timeline Configuration
 - Quick Create Form
 - Quick View Form
 - Card Form
- Enable for Security Roles
- Form Order

Visualizations

- **System Views**
 - Types
 - Configuration
 - Enable Editable Grid Views
- **System Charts**
 - Types
 - Configuration
- **System Dashboards**
 - Standard D365 CE Dashboards
 - Interactive Experience Dashboards

Apps & Sitemaps

- App Designer
- Sitemap Designer
- Accessing Apps
- App Security

Themes

- Default Themes
- Creating Custom Themes



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INTRODUCTION TO DYNAMICS 365 CUSTOMER ENGAGEMENT AUTOMATION

Business Rules

- Capabilities
 - Conditions
 - Actions
 - Scope
- Business Rule Designer

Task Flows

- Capabilities
 - Components
 - Business Rules
 - Enable for Security Roles
- Task Flow Designer

Workflows

- Capabilities
- Types of Workflows
 - Real-time Workflows
 - Background Workflows
- Creating Workflow Processes
 - Workflow Components
 - Workflow Actions
 - Child Workflows
 - Testing Workflows

Actions

- Defined
- Using Actions

Business Process Flows

- Capabilities
 - Features & Components
 - Branching
 - Multiple Entity
 - Automation
 - Concurrent Processes
- Order Processes
- Process Entity Security
- Business Process Flow Designer

Microsoft Flow

- Availability
- Capabilities

PowerApps Canvas Apps

- Availability
- Capabilities



Dynamics 365 University is designed to be foundational training for those responsible for implementing and supporting Dynamics 365 within your organization. Dynamics 365 University focuses on out-of-the-box features and functionality training for your core team. Participants get an understanding of how the Dynamics 365 processes and architecture can be leveraged and customized to support your unique organizational processes.

GET STARTED