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# Dynamics 365 Functional Training

3 days (21 hours)

## Presentation

Our [Microsoft Dynamics 365](#) training courses are dedicated to Microsoft technology professionals wishing to gain expertise on the latest versions.

The aim of this training course is to provide an understanding of Dynamics 365 in the CRM functional area, so that you can acquire all the knowledge you need to use it on a day-to-day basis.

As in all our training courses, we use the latest versions of the tools available.

## Objectives

- Understand the advanced concepts of Microsoft Dynamics 365 Customer Engagement
- Dynamics 365 settings

## Target audience

Anyone wishing to learn more about CRMs

## Prerequisites

Basic knowledge of basic IT tools (office automation/Outlook) as well as commercial culture

## Microsoft Dynamics 365 Functional training program

The concepts behind Dynamics 365 Customer Engagement

- Quick history
- Data flow diagram
- Main business processes
  - Qualifying prospects
  - Business opportunity
  - Activities: tasks, appointments, calls, e-mails, etc.
  - Ordering
  - Incident handling
- Technical overview of CRM Online
  - CRM data centers
  - Licensing
  - Quarterly trends
  - Linking with Outlook
  - Possible actions
    - Backup/restore
    - Data import
    - Migration from the On Premise version
    - Administration of organizations, users and their roles
    - Duplicate management
    - Asynchronous process management
    - Interaction with Office
    - Interaction with SharePoint
  - Authentication
  - Link with Azure

## Main objects handled and actions

- Entities
- Relations
- Search
- Import / Export data
- Print
- Workflow, Plugins, Applications

## Focus on the role of director

- Create users
- Delete users
- Main server parameters
  - Email management
  - Link with SharePoint
  - Links with external applications

## Parameterization interface

- The notion of a solution
  - Managed and unmanaged solutions
  - Solution management
- Divisions (BUs) and roles

- Add new entities / extend existing ones
  - Meta-attributes
    - Global entities / user
    - Activities
    - Other
  - Columns
  - Relations
  - User interface
    - Forms
    - Simplified forms
    - Interface components
    - Global / user / role views
    - Using Javascript
- Workflow design
- Report creation
- Attaching a process to an entity
- Add a web portal
- Using Power BI
- Interface parameter limitations and solutions
  - Plugins
  - Azure service
  - Microsoft Flow
  - Other
    - Announced developments
    - AI exploitation
  - Fragmentation of functionalities into applications
  - Other

## Companies concerned

This course is aimed at both individuals and companies, large or small, wishing to train their teams in a new advanced computer technology, or to acquire specific business knowledge or modern methods.

## Positioning on entry to training

Positioning at the start of training complies with Qualiopi quality criteria. As soon as registration is finalized, the learner receives a self-assessment questionnaire which enables us to assess his or her estimated level of proficiency in different types of technology, as well as his or her expectations and personal objectives for the training to come, within the limits imposed by the selected format. This questionnaire also enables us to anticipate any connection or security difficulties within the company (intra-company or virtual classroom) which could be problematic for the follow-up and smooth running of the training session.

## Teaching methods

Practical course: 60% Practical, 40% Theory. Training material distributed in digital format to all participants.

## Organization

The course alternates theoretical inputs from the trainer supported by examples and

brainstorming sessions and group work.

## Validation

At the end of the session, a multiple-choice questionnaire verifies the correct acquisition of skills.

## Sanction

A certificate will be issued to each trainee who completes the course.