MB-901T00: Dynamics 365 Fundamentals

- **Download Latest Student Handbook and AllFiles Content /home/ll/Azure_clone/Azure_new/MB-901T00-Microsoft-Dynamics-365-Fundamentals/../../releases/latest**
- **Are you a MCT?** - Have a look at our GitHub User Guide for MCTs
- **Need to manually build the lab instructions?** - Instructions are available in the MicrosoftLearning/Docker-Build repository

What are we doing?

- To support this course, we will need to make frequent updates to the course content to keep it current with the Dynamics 365 and Power Platform services used in the course. We are publishing the lab instructions and lab files on GitHub to allow for open contributions between the course authors and MCTs to keep the content current with changes in the platform.

- We hope that this brings a sense of collaboration to the labs like we've never had before - when the Power Platform changes and you find it first during a live delivery, go ahead and make an enhancement right in the lab source. Help your fellow MCTs.

How should I use these files relative to the released MOC files?

- The instructor handbook and PowerPoints are still going to be your primary source for teaching the course content.
- These files on GitHub are designed to be used in conjunction with the student handbook, but are in GitHub as a central repository so MCTs and course authors can have a shared source for the latest lab files.
- It will be recommended that for every delivery, trainers check GitHub for any changes that may have been made to support the latest Azure services, and get the latest files for their delivery.

What about changes to the student handbook?

- We will review the student handbook on a quarterly basis and update through the normal MOC release channels as needed.

How do I contribute?

- Any MCT can submit a pull request to the code or content in the GitHub repro, Microsoft and the course author will triage and include content and lab code changes as needed.

- You can submit bugs, changes, improvement and ideas. Find a new Azure feature before we have? Submit a new demo!

Notes

Classroom Materials

It is strongly recommended that MCTs and Partners access these materials and in turn, provide them separately to students. Pointing students directly to GitHub to access Lab steps as part of an ongoing class will require them to access yet another UI as part of the course, contributing to a confusing experience for the student. An explanation to the student regarding why they are receiving separate Lab instructions can highlight the nature of an always-changing cloud-based interface and platform. Microsoft Learning support for accessing files on GitHub and support for navigation of the GitHub site is limited to MCTs teaching this course only.

title: Online Hosted Instructions permalink: index.html layout: home

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Content Directory

Hyperlinks to each of the lab exercises and demos are listed below.

Labs

{% assign labs = site.pages | where_exp:"page", "page.url contains '/Instructions/Labs'" %} | Module | Lab | | --- | --- | {% for activity in labs %}| {{ activity.lab.module }} | [{{ activity.lab.title }}{% if activity.lab.type %} - {{ activity.lab.type }}{% endif %}] | {% endfor %}

Demos

{% assign demos = site.pages | where_exp:"page", "page.url contains '/Instructions/Demos'" %} | Module | Demo | | --- | --- | {% for activity in demos %}| {{ activity.demo.module }} | [{{ activity.demo.title }}]({{ site.github.url }}{{ activity.url }}) | {% endfor %}

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lab: title: 'Lab: Validate lab environment' module: 'Module 0: Course introduction'

Module 0: Course introduction

Practice Lab - Validate Customer Engagement lab environment

Scenario

In this Module 0 lab, you will validate that your Customer Engagement classroom tenant is working as expected. You will access your individual credentials, record your ���alias���, and open the Dynamics 365 model-driven application that we will be using throughout the course.

Important Note: This lab will provide you with an actual Dynamics 365 tenant and licenses for the Power Platform applications you will be using in this course. Please be aware that the Power Platform is evolving all the time. The instructions in this document may be different from what you experience in your actual tenant. It is also possible to experience a delay of several minutes before the virtual machine has network connectivity to begin the labs.

Exercise 1 - Access the Dynamics 365 application

Task 1 ��� Log into the Power Platform admin center

1. Access https://admin.Powerplatform.microsoft.com and log in with your user credentials.

2. Record your user credential up to the @ symbol on a scratch piece of paper or in Notepad. This will be your lab alias that you will use to differentiate the data you create within the shared Dynamics 365 organization.

Important: Please be aware that this tenant and the Dynamics 365 organization will be shared with the other students in your classroom, like employees would share a tenant when using the Dynamics 365 instance belonging to their organization. Do not use any PII (personally identifiable information) when creating records. It is also good practice to use your username prefix (ex., **mollyc**) in front of all records, data, apps, flows, etc. you create.

1. Feel free to explore the Power Platform admin center but **do not make any changes.**

Task 2 ��� Access the Dynamics 365 application

1. Expand the grid button at the top left of the screen, directly to the left of **Power Platform admin center.** Select **Dynamics 365.**

2. Select the **Edit** button. You will open the Contoso environment in the **Power Platform admin center.**

3. From the list of available Dynamics 365 apps, select **Sales.**

5. Spend a few minutes exploring the application.

lab: title: 'Lab 01: Explore Dynamics 365 Sales' module: 'Module 03: Introduction to Dynamics 365 Sales'

MB-901: Dynamics 365 Sales

Module 3, Lab 1 ��� Explore Dynamics 365 Sales

Prerequisites: Prior to performing the steps of this lab, perform the following tasks:

1. Create and save a word document with a sample text such as ���Guide To Dynamics 365 Sales��� on your desktop.

Create new contact

1. In the **Dynamics 365 Sales Hub**, navigate to **Customers > Contacts**.
2. Select **New**.
3. In the **First Name** field, type **Cameron**.
4. In the **Last Name** field, type **Azadi**.
5. In the **Job Title** field, type **Xbox X-Series Development Manager**.
6. In the **Account Name** field, type **Microsoft**.
7. In the **Email** field, type your email alias.
8. In the **Business Phone** field, type **949-555-1212**.
9. In the **Address 1: Street 1** field, type **1 Microsoft Way**.
10. In the **Address 1: City** field, type **Redmond**.
    - **Note:** if demo data has been uploaded the **Address Suggestions** form will appear. Click **OK**. It will auto populate the **Address 1** fields.
11. In the **Address 1: Sate/Province** field, type **WA**.
12. In the **Address 1: ZIP/Postal Code** field, type **98007**.

13. In the **Address 1: Country/Region** field, type **United States**.

14. Select **Save & Close**.

Create new lead

1. In the **Dynamics 365 Sales Hub**, navigate to **Sales > Leads**
2. Select **New**

3. In the **Topic** field, type **Likes our Xbox products**.
4. In the **First Name** field, type **Cameron**.
5. In the **Last Name** field, type **Azadi**.

6. In the **Company** field, type **Microsoft**.

7. Select **Save**.

Add notes to the new lead

1. In the **Timeline** section, click **+** to add a new **Note**.
2. In the **Title** field, type **Meeting with Cameron regarding the Xbox X-Series**.
3. Select **Add note**.
4. In the **Timeline** section, click **+** to add another **Note** with attachment.
5. In the **Title** field, type **Xbox X-Series product information**.
6. Select the attachment icon and select the word document you have created at the beginning of this lab.
7. Select **Add note**.

Qualify the new lead

1. In the **Dynamics 365 Sales Hub**, navigate to **Sales** > **Leads**.
2. Select **Cameron Azadi**.
3. Select **Qualify** button on the top menu bar.
4. A dialog box will open to indicate that matching information has been found. Link the lead to the Microsoft account and the "Cameron Azadi" contact you entered earlier.
5. Select **Continue**.

Note: The lead will progress to Develop stage.

Verify the notes created in the lead from Opportunities

1. In the **Dynamics 365 Sales Hub**, navigate to **Sales** > **Opportunities**.
2. Switch the view by clicking the dropdown menu and selecting **All Opportunities**.
3. Select the opportunity **Likes our Xbox products** for Cameron Azadi.

4. Note that the attachment and notes created in the lead form is also available in the opportunity form.
5. In the **Timeline** section, click **+** to draft and send an **Email**. The email pop-up will appear.
6. In the **Subject** field, type **Xbox X-Series**.
7. Type a message such as ���Hi Cameron, Thank you for your interest in the Xbox X-Series. We look forward to our meeting.���
8. Optionally, from either the opportunity record or the related records such as contact record by navigating to it, in the background, you can copy and paste any information to the email message without losing the focus and save time.
9. Select **Save**.
10. Select **Send**.

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lab: title: 'Lab 01: Explore Dynamics 365 Marketing' module: 'Module 04: Introduction to Dynamics 365 Marketing'

MB-901: Dynamics 365 Fundamentals

Module 4, Lab 1 -Explore Dynamics 365 Marketing

Prerequisites: Prior to performing the steps of this lab, perform the following tasks: 1. Go to **Marketing** > **Files**. 1. Select **New**. 1. Select **Add files**. 1. Upload at least one image from your desktop. 1. Select **Upload**. 1. Once the upload is complete, click **Done.**

Create engaging emails

1. Go to **Marketing** > **Marketing Emails**. This takes you to a list of existing marketing emails. Select **New** on the command bar.
2. The **Marketing email templates** dialog box opens. For this exercise, select **Skip**, so that you can start with a blank template and step through all the required content. **Tip:** Several standard templates are provided out of the box, and you can also create your own templates that feature your organization's graphical identity, required elements, and messaging standards. More information: https://docs.microsoft.com/dynamics365/marketing/create-templates) You now have the **New Marketing email** page open.
3. From the dropdown next to the **Name** and **Status reason** fields in the upper right corner, select the down arrow to open a drop-down dialog and then enter a **Name** for your new message.
4. Enter a **Subject** for your message. This is a very important setting because this is one of the first things recipients will see when they receive the email, and they may use this to decide whether or not to read the message.
5. In the main part of the page, you now see the design canvas (on the left side), where you can drag, arrange, and enter content. Since you chose the blank template, your design includes just a single one-column section (layout) element with nothing in it.
6. A **Toolbox** on the right side of the page provides design elements that you'll use to construct your message. Drag a **Text** element from the **Toolbox** tab into the section element. When you have dragged

the element to a suitable location, a blue shaded region appears. Release the mouse button to drop the element at that location.

7. When you drop the text element, you'll see some placeholder text within the element and a floating toolbar just below or above it.
8. Select and remove the placeholder text, and then add your own. Use the toolbar buttons to style your text as you would in a text editor like Microsoft Word (point to any toolbar button to see what it does). Most of the buttons are for styling text and paragraphs, but there are also buttons for creating links; entering dynamic text (more on this later); and moving, copying, or deleting the entire text element. **Tip:** The very first text that you enter on the page is especially important because most email clients show this as preview text for the messages in their inbox list. Here is how it looks in Microsoft Outlook:
9. An easy way to personalize the message is to include the name of the recipient in the greeting. Add the recipient's name as dynamic text by using the **Assist edit** feature as follows:
    - Working in the text element you just added, enter a suitable opening such as "Dear".
    - On the pop-up toolbar, select the Assist edit button. This opens the assist-edit dialog.
    - **Note:** Assist edit helps you construct valid dynamic expressions to position field values from recipient contact records, the message content settings, and other database values. This button is provided on the text formatting toolbar whenever you select a text element in the graphical designer. The button is also provided for some settings fields, such as the subject, from-address, and from-name fields.
10. Select the **Dynamic content** radio button, and then select **Contact** from the combo box here. The **Dynamic** setting means that you will place a dynamic value related to the context where you use the message, while the **Contact** setting means that the context relates to the individual recipient (contact) of the message.
11. Select **No relationship** for relationship.
12. On the previous page, you choose the contact settings entity (in context). On this page you must choose which field from that entity you want to place. We're building the salutation, so we'd like to show the recipient's name here. Select the **Select field** radio button and then start to type "First Name" into the combo box here. This searches the available fields for those that include the text "First Name", which greatly reduces the number of fields you need to look through. Select **First Name** from the list as soon as you can see it.

13. Select **Insert** to place the expression you've built and close the assist-edit tool. The full salutation now looks like this: **Dear {{contact.firstname}},**. **Tip:** You might have noticed that the **Subject** field also has an assist-edit button. This means that you can put dynamic text (including the recipient's name) in the subject too.
14. The body of all email messages must include both a subscription-center link and your organization's physical address. These are required by law in many jurisdictions, and **Dynamics 365 Marketing** won't let you publish any marketing email that doesn't have them. Place them by using assist edit as follows:
15. Choose a suitable location for your **address**, and then use assist edit to place it. Select **Dynamic** and then **Select entity** on the first page of the assist-edit tool. Select **Contact** and then pick **No relationship**. For **Select Field** and **Address 1** on the second page. Select **Insert** to place the expression {{msdyncrm_contentsettings.msdyncrm_addressmain}} into your message.
16. Choose a suitable location for the subscription-center link, and then enter some anchor text there (such as "Manage your subscriptions"). Select the anchor text, and then select the **Link** button from the floating toolbar, which opens the **Link** dialog box. Select the **Assist edit** button for the **Link** field. In the assist-edit dialog, select **Dynamic** and then **ContentSettings** on the first page. Select **No relationship.** For select field select **subscriptioncenter** on the second page.
17. Select **Insert** to place the expression {{msdyncrm_contentsettings.msdyncrm_subscriptioncenter}} into the **Link** field. Then select **OK.**
18. You should usually include at least one visible image in your design because this will invite recipients to load images, which is required for Dynamics 365 Marketing to log the message-open event. Drag an **Image** element from the **Toolbox** onto the canvas. This time, when you drop the element, you'll see an image placeholder and the **Properties** tab, which shows configuration settings for the selected element.
19. On the **Properties** tab, select the **Image gallery** button at the right side of the **Source** field. The **Select a file** dialog box opens. Here you can see all the images that have already been uploaded to your Dynamics 365 Marketing server. Select an image, and then choose **Select** to place it in your message design. (If you don't see any images, choose Upload to add a new one.)

20. **Tip:** When a message goes live, **Dynamics 365 Marketing** uploads all relevant images from your library to its content-delivery network, where they become available as a single source to all recipients. The images aren't attached to each message, but instead are included as links that are redirected through **Dynamics 365 Marketing** for tracking purposes. Recipients won't download any images until they open the message, which saves bandwidth both for you and them. When a recipient's email client requests the images, **Dynamics 365 Marketing** knows that the message has been opened, and by whom.
21. Your message now includes all the minimal required and recommended content, so go to the **Preview** tab to see an approximation of how it will be rendered on various screen sizes and how its dynamic content will get resolved. Use the buttons in the leftmost column to choose a screen size and orientation to preview. Use the **Contact** and **Content Settings** fields in the **Properties** column to see how your dynamic content will resolve for various recipients and settings.
22. To make sure your message includes all required content and is ready to send, select **Check for Errors** in the command bar. Dynamics 365 Marketing checks your message, and then displays results in the notification bar at the top of the page. If more than one error is found, then select the expansion button to see all of them. If you followed this procedure, your message should pass the error check. If it doesn't, read the error message, fix the reported issue, and try again until it passes.
23. Until now, your previews and error checks have been simulated. The final test is to deliver the message to yourself, open it in your email program, and inspect the results. On the command bar, select **Test Send**. A **Quick Create** form slides in from the side. Enter your own **Email Address** in the field provided, and select the **Test Contact** and **Test Content Settings** records to use when resolving dynamic content (these work the same as for the simulated preview). Select **Save** to send yourself the message. You should receive it in a few minutes.
24. If your message still looks good after you receive it in your inbox and open it, you're ready to publish it by selecting **Go Live** on the command bar. **Dynamics 365 Marketing** copies your design to the email marketing service, which makes the message available for use by a customer journey (but doesn't deliver any messages yet). The go-live process also activates any dynamic code and replaces links with trackable versions that are redirected through **Dynamics 365**

Marketing (which identifies the recipient and logs the click). Finally, your message **Status Reason** is updated to Live.

25. **Tip:** While the message is live, it's locked for editing in Dynamics 365 Marketing. If you need to edit a live message, you must first open it in Dynamics 365 Marketing, and then select **Deactivate** on the command bar.

Pinpoint your audience

Scenario: You need to set up a collection of segments, which you'll define by using terms that resemble those you already use to describe groups of customers. Then you'll use these segments to target marketing initiatives like email-marketing campaigns and customer journeys. Segments like these, which you define by using a set of rules and conditions, are called dynamic segments because membership in these segments changes constantly and automatically based on information in your database. Note: Static segments are populated by adding contacts explicitly, one at a time.

1. Go to **Marketing** > **Contacts**. This takes you to a list of existing contacts. On the command bar, select **New**.
2. The **New Contact** page opens. Fill out the following fields:
3. **First Name:** Enter a fictional first name.
4. **Last Name:** Enter a fictional last name.
5. **Email:** Enter your own email address (or one that you can receive mail from).
6. **Address 1: City:** Enter a fictional city (for this example, we use **Atlantis**). This will make it easy to create a segment that only includes fictional contacts.
7. On the command bar, select **Save & Close**.
8. Create a second contact similar to the one you just made. Use the same email address and fictional city, but use a different first and last name.
9. On the command bar, select **Save & Close**.
10. Go to **Customers** > **Segments**. This takes you to a list of existing segments. On the command bar, select **New Dynamic Segment.**
11. A pop-up screen will appear, where you can select a segment template. Click **Skip**.
12. The **New Segment** page opens.
13. **Dynamics 365 Marketing** creates a demographic segment, which already includes a query against the contact entity. You can see the

Contact entity being queried by checking the value shown on the drop-down list at the top of the query block.

14. Your segment currently includes no filters (clause rows), which means it will find all the contacts in your database. But we only want to find the new test contacts that we just created, so let's add a filter.
15. The **Select attribute** field to open a drop-down list that shows all attributes available on the contact entity. Then type "city" to filter the list and choose **Address 1: City** from the list.
16. Two new drop-down lists are now added to the row. Leave the next drop-down list set to **Equals**. This is the operator, which defines the way we are going test values in the **Address 1: City** field of the **Contact** entity. Other operators include **Contains**, **Begins with**, **Contains data**, and more, depending on which type of value (string, number, date, and so on) you are working with.
17. Select the third drop-down list, which contains the ghost text **Enter text** and type the fictional city name that you chose for your test contacts (such as "Atlantis" if that's what you chose).
18. Select the field at the top of the query, which contains the ghost test **Enter segment name** and enter a name for your segment (such as "Contacts from Atlantis").
19. Select **Save** on the command bar to save your segment and then select **Go Live** to publish the segment (you won't be able to use it in a customer journey until it goes live, even though you've saved it). Dynamics 365 Marketing checks the segment for errors and reports any problems it finds. If an error is reported, fix it and try again. If no error is found, your segment is copied to the marketing services, which make it available for use by a customer journey.
20. Wait for about a minute and then select **Refresh** on the command bar to refresh the page. You should now see that a **Members** tab has been added (if you don't see it, wait a little longer and try to **Refresh** again until you do). When the **Members** tab appears, open it and note that your segment includes the two fictional contacts that you added earlier.

Build a campaign

Scenario: You need to create a customer journey that executes a one-time email blast.

1. Go to **Marketing execution** > **Customer Journeys**. This takes you to a list of existing customer journeys. Select **New** on the command

bar.

2. The **New Customer Journey** page opens with the **Select a Customer Journey Template** dialog box shown. Select **Skip**, and then choose **Select**. The dialog box closes, and your selected template is copied to your new journey.
3. Now you are looking at the customer journey designer, where you will assemble a pipeline that defines each step of the journey. Like all journeys, this one starts with the participants, who in this case are the people you specify as part of a market segment. Drag a **Segment** tile from the **Toolbox** tab onto the first position of the pipeline.
4. Select the expand button at the lower-right corner of your new **Segment Group** tile to view the member segments of this group. Right now, there's just one, so select it.
5. With the nested segment still selected, open the **Properties** tab to the right of the canvas. The **Properties** tab provides settings that apply to the selected tile. Set the **Segment** to the name of the segment that you want to target with your campaign.
6. Go back to the **Toolbox** tab and drag an **Marketing email message** tile to the space immediately to the right of the **Segment Group** tile.
7. With the new **Email** tile still selected, open the **Properties** tab again. Set the **Marketing Email Message** to the name of the message that you created earlier in the Create engaging emails section of this lab.
8. Until now, you've been working on the **Designer** tab. Now go to the **General** tab, where you can name your journey and configure its run schedule. Make the following settings here:
9. **Name:** Enter a name for the customer journey that you can easily recognize later. This name is internal-only.
10. **Start Date and Time:** Enter the time when the journey should begin processing contacts. When you select the field, a suggested default time is provided.
11. **End Date and Time:** Enter the time at which the journey should stop processing contacts. All actions will stop at this time, even if some contacts are still in the middle of the journey. If you're just testing, allow a couple of weeks.
12. **Time Zone:** Select your local time zone (if needed). The other dates and times on the page will be displayed relative to this zone.
13. **Content Settings:** This should already be set to the default content settings record set for your instance.

14. On the command bar, select **Save** to save the work you've done so far.
15. To make sure your journey includes all required content and settings, select **Check for Errors** in the command bar. **Dynamics 365 Marketing** checks it and then displays results. If errors were found, you'll see a message at the top of the window and various indicators to show where the problems are. For example, if one of your tiles is misconfigured, you'll see an error count above the relevant tile, and you can read details about the error by selecting the tile and opening its Properties tab.
16. If you followed this procedure and your email message is live, your journey should pass the error check. If it doesn't, read the error message, fix the reported issue, and try again until it passes.
17. Your journey is now ready to go. To start it running, publish it by selecting **Go Live** on the command bar.
18. Dynamics 365 Marketing copies the journey to its email marketing service, which executes the journey by processing contacts, performing actions, and collecting results during the time it is set to run. The journey's **Status Reason** is updated to Live.
19. It might take several minutes for your messages to get sent, so allow some time for them to arrive in your inbox. After they do, open them and load the images. Then you can go back to Dynamics 365 Marketing and see how your journey is going. The **Designer** tab now shows information and results for each tile from your pipeline. Open the **Insights** tab to see detailed analytics.

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lab: title: 'Lab 01: Explore Dynamics 365 Customer Service' module: 'Module 05: Introduction to Dynamics 365 Customer Service '

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Module 5, Lab 1 - Explore Dynamics 365 Customer Service

Scenario: As a customer service representative, you need to keep track of your customer requests and issues by creating support cases in Dynamics 365 Customer Service. When a customer contacts support with a question or problem, you can quickly check if there is an existing case or open a new case and start tracking the issue. You can also escalate, reassign, or put a case back into the service queue if you don���t have enough information or time to work on it.

Before you provide support, you can also check the customer���s entitlements. Entitlements are like contracts that tell you what kind of support a customer is eligible for. You can see if the support terms are based on number of hours or cases, support channel, or based on the product or service that the customer has purchased.

To help you select the right status of a case, your administrator may have set things up so that you only see a limited set of statuses based on the current status of a case.

Instructions

Create a case

1. In the **Customer Service Hub**, go to **Service** > **Cases**.
2. Select **New Case**.
3. In the **Case Title** field, type **Seahorse Smart Watch**.
4. In the **Customer** field, select customer **Fabrikam** and select an existing record for the account.
5. In the **Description** field, type **Issue with the Smart watch**
6. Select **Details** tab.
7. Select **Save**.
8. To track your conversation with the customer, in the **Timeline** section click **+** to add info and activities.
9. Select **Note**.
10. In the **Title** field, type **Smart Watch Defect**.
11. In the **Note** field, type **Send for repair**.
12. Select **Add note**.
13. To see what kind of support you should provide the customer, select the **Entitlements lookup** button and select an active entitlement. **Note:** If there is no entitlement on the customer, this will be blank.
14. Select **Save**.

Find a solution from similar cases

Note: You can look at resolved cases to see if they can help you resolve the open case you���re working on. For example, if the subject of the case you���re working on is ���**Smart Watch Defect**��� you could look for resolved cases with the same subject to get help with your current case.

Resolve a case

Before you resolve a case, make sure that all the case activities are closed. Otherwise, you���ll get a message saying that you still have open activities associated with the case, which will be canceled if the case is resolved.

1. Go to **Service** > **Cases**.

2. In the list of active cases, open the **Seahorse Smart Watch** case to resolve.
3. On the command bar, select **Resolve case**.
4. In the **Resolve Case** dialog box, in the **Resolution Type** list, select **Problem Solved**.
5. In the **Resolution** box, type **Repaired**.
6. The actual time spent on all activities for this case, as recorded in the **Duration** box in each activity, is filled out automatically in the **Total Time** box.
7. In the **Billable Time** list, select **30 minutes** as the amount of time spent on the case to be billed to the customer. **Note:** If this case is linked to a contract or entitlement, the billable time will be subtracted from the allotted minutes for that contract.
8. Select **Resolve**. A case resolution activity is created and shown in the **Activities** area.

The resolution activity contains information about a resolved case, including the resolution and total time spent on the case. You can reactivate a resolved case at any time.

lab: title: 'Lab 01: Explore Dynamics 365 Finance' module: 'Module 7: Introduction to Dynamics 365 Finance'

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Module 7, Lab 1 - Explore Dynamics 365 Finance

Prerequisites: Prior to performing the steps of this lab, perform the following tasks:��

Note: You need a deployed environment with demo data prior to perform this lab. Your Dynamics 365 Finance and Operations apps instance can be launched by directly going to the URL of the instance.

You will need to change the company to **USMF.** In order to login to the Dynamics 365 Finance and Operations apps instance you need to have a user name and password with either **Chief Executive Officer** or a **System administrator** security role.

In case your environment does not have demo data, follow the instructions below:

Navigate to **Modules>Demo Data**, and click **Generate data** then click **OK.**

Import exchange rates

1. Change the company to **USMF.**

2. Go to **General ledger > Currencies > Exchange rate types**.

3. Select **New**.

4. In the **Exchange rate type** field, type 'GTL-EXCH'.

5. In the **Name** field, type 'Seahorse Exchange Rate'.

6. Select **Exchange rates**.

7. Note there is not any exchange rates available.
8. Close Exchange rates form
9. Close exchange rate type form
10. Go to **General ledger > Currencies > Configure exchange rate providers**.
11. Select **New**.
12. Select **Central Bank of the Russian Federation**
13. Select **OK**.
14. Close the page.
15. Go to **General ledger > Currencies > Import currency exchange rates**.
16. In the **Exchange rate type** field, enter or select GTL-EXCH
17. Select **Central Bank of the Russian Federation**
18. In the **Exchange rate provider** field, enter or select **Central Bank of the Russian Federation**
19. Select **OK**.
20. Go to **General ledger > Currencies > Exchange rate types**.
21. Select **GTL-EXCH**
22. Select **Exchange rates**.
23. Note the imported values
24. Close all forms

Create a purchase order, post a product receipt

1. Go to��**Accounts Payables > Purchase orders > All purchase orders**.

2. Select��**New**.
3. In the��**Vendor account**��field, select **1001 Acme Office Supplies**.
4. In the **Warehouse** field, select **11**.
5. Click��**OK**.
6. In the��**Item number**��field, Select item **1000 Surface Pro 128 GB**.
7. On the Action Pane, click��**Purchase**.
8. Select��**Confirm**.
9. On the Action Pane, click��**Receive**.
10. Select��**Product receipt**.
11. In the��**Product receipt**��field, type **GTL02020**.
12. Select��**OK**.
13. Close all forms.

Create a free text invoice

1. Go to��**Accounts receivable > Invoices > All free text invoices**.
2. Select��**New**.
3. In the��**Customer account**��field, select **US-003**.
4. In the��**Description**��field, enter **Guide To Free Text Invoice**. in the dialog box click **Yes**.
5. In the��**Main account**��field, select **110180** account number.
6. In the��**Quantity**��field, enter **17**.

7. In the��**Unit price**��field, enter **817.00**. The amount is calculated as the quantity times the unit price. However, you can override that calculation by entering an amount.

8. Select��**Charges**��to add a charge to the invoice.

9. In the��**Charges code**��field, enter **FREIGHT**.

10. In the��**Charges value**��field, enter **150**.

11. Close the page.

12. Select��**Totals**��to view a summary of the invoice details and totals.

13. Select��**Close**.

14. Select��**Post**��to post the invoice. You will still have an opportunity to cancel before you actually post.

    - You can change the timing of invoice printing. Select��**Current**��to print each invoice as it's updated. Select��**After**��to print after all invoices have been updated.

    - To change how the customer's credit limit is verified before the invoice is posted, change the value in the��**Credit limit type**��field.

    - To print the invoice, set the option to��**Yes**.

    - To post the invoice, set the option to��**Yes**. You can print the invoice without posting it.

15. Select��OK.

lab: title: 'Lab 01: Explore Dynamics 365 Supply Chain Management' module: 'Module 8: Introduction to Dynamics 365 Supply Chain Management'

MB-901: Dynamics 365 Fundamentals

Module 8, Lab 1 - Explore Dynamics 365 Supply Chain Management

Create a product

In **USMF**, you need to create a new item for a new configuration of cabinet to be purchased from vendors.

1. Navigate to **Product information management > Products>Released products**.
2. Click **New**.
3. In the **Product type** field, select **Item**
4. In the **Product subtype** field, select **Product**
5. In the **Product number** field, type **GTL007**
6. In the **Product name** field, type **Cabinet 2**
7. In the **Item model group** field, select **FIFO** (First In-First Out)
8. In the **Item group** field, select **TV&Video**
9. In the **Storage dimension group** field, select **SiteWH**
10. In the **Tracking dimension group** field, select **None**
11. In the **Inventory unit** field, select **ea** (Each)
12. In the **Purchase unit** field, select **ea** (Each)
13. In the **Sales unit** field, select **ea** (Each)
14. In the **BOM unit** field, select **ea** (Each)
15. In the **Purchase price** field, type **30.00**
16. In the **Sales price** field, type **30.00**
17. In the **Sales Taxation, Item sales tax group** field, select **ALL** (All sales tax codes)
18. In the **Purchase Taxation, Item sales tax group** field, select **ALL** (All sales tax codes)
19. Select **OK**.
20. Select **Validate** to ensure the product is completely finalized. This button is located on the product action pane.
21. Close all pages.

Create product masters

In **USMF**, you need to create a new item (V neck T-shirt) to buy. This item will be available in size Small, Medium and Large and in colors: Black and Red.

1. Navigate to **Product information management** > **Products** > **Released products**.
2. Select **New**.
3. In the **Product type** field, select **Item**
4. In the **Product subtype** field, select **Product master**
5. In the **Product number** field, type **GTLPM001**
6. In the **Product name** field, type **V Neck T-Shirt**
7. In the **Search name** field, type **VNeckTShirt**
8. In the **Retail category** field, select **Apparel and Footwear**
9. In the **Product dimension group** field, select **ColorSize**
10. In the **Configuration technology** field, select **Predefined variant**
11. In the **Item model group** field, select **FIFO** (First In-First Out)
12. In the **Item group** field, select **Audio**
13. In the **Storage dimension group** field, select **SiteWH**
14. In the **Tracking dimension group** field, select **None**
15. In the **Inventory unit** field, select **ea** (Each)
16. In the **Purchase unit** field, select **ea** (Each)
17. In the **Sales unit** field, select **ea** (Each)
18. In the **BOM unit** field, select **ea** (Each)
19. In the **Sales Taxation, Item sales tax group** field, select **ALL** (All sales tax codes)
20. In the **Purchase Taxation, Item sales tax group** field, select **ALL** (All sales tax codes)
21. In the **Purchase price** field, type **19.95**
22. In the **Sales price** field, type **29.95**
23. Select **OK**.
24. Close all pages.
25. Navigate to **Product information management** > **Products** > **Released products**.
26. Using quick filter search by item number for **GTLPM001**.
27. Select item **GTLPM001** to open the product master record.
28. Select the **Product dimensions** button from **Product action** pane.
29. Select the **Sizes** tab.
30. Select **New in the Define sizes for a product master** section.
31. In the **Size** field, enter **Small**.
32. In the **Name** field, enter **Small**.

33. In the **Description** field, enter **Small Size**.
34. Select **New**.
35. In the **Size** field, enter **Medium**.
36. In the **Name** field, enter **Medium**.
37. In the **Description** field, enter **Medium Size**.
38. Select **New**.
39. In the **Size** field, enter **Large**.
40. In the **Name** field, enter **Large**.
41. In the **Description** field, enter **Large Size**.
42. Select the **Colors** tab.
43. Select **New** in the **Define sizes for a product master** section.
44. In the **Color** field, enter **Black**.
45. In the **Name** field, enter **Black**.
46. In the **Description** field, enter **Black** color.
47. Select **New**.
48. In the **Name** field, enter **Red**.
49. In the **Description** field, enter **Red** color.
50. Click **Save**.
51. Close the form.
52. Select **Released Product variants** button from **Product action** pane.
53. Select **Variant suggestions** from **Product Variant action** pane.
54. Select **Select all**.
55. Select **Create**.
56. Close all pages.

Create a Purchase Order

Create one purchase order for Acme Office Supplies, to be delivered today, with 5 of item number T0003 to be delivered to Site 1, and 5 of M1101 Foam Reacting Agent to be delivered to the Quality Testing Center123 W. Cherry Street, Zip Code 83642.

1. Go to the **Procurement and sourcing > Purchase orders > All purchase orders**.
2. Select **New**.
3. **Vendor account:** Select **1001** (Acme Office Supplies)
4. **Delivery date:** Verify the current date in the **Delivery date** field (this should be the default value).
5. Select **OK**

Add items to the purchase order

1. **Item number:** Select **T0003**.
2. **Quantity:** Enter **5**.
3. **Unit:** Enter **ea**.
4. Select **Add line**
5. **Item number:** Select **C0004**.
6. **Quantity:** Enter **4**.
7. **Unit:** Enter **pcs**.

Select delivery addresses for the items

1. Select the line for item **T0003** in the **Purchase order lines** FastTab.
2. In the **Lines Details** fast tab, change to the **Address** tab.
3. Change the **Delivery address** to **Contoso Entertainment System USA**.
4. Select the line for item **C0004** in the **Purchase order lines** FastTab.
5. Change to the **Address** FastTab.
6. Select the **Add address** button **(+)** to the right of the **Delivery address** field.
7. **Name or description:** Enter **Quality Testing Center**.
8. **Zip/postal code:** Enter **83642**.
9. **Street:** Enter **123 W. Cherry Street**.
10. Select **OK**.
11. Select **Save**.
12. On the **Action Pane**, click **Purchase**.
13. Select **Confirm**.
14. On the **Action Pane**, click **Receive**.
15. Select **Product receipt**.
16. In the **Product receipt** field, enter the product receipt number. For example, enter **PR123**.
17. Select **OK** to post the product receipt.
18. Close all pages.

Create sales orders

This procedure shows you how to create a sales order. You can use the procedure in demo data company USMF. Sales orders are typically created by a sales order processor.

1. Go to **Sales and marketing > Sales orders > All sales orders**.

2. Select **New**.
3. In the **Customer account** field, click the drop-down button to open the lookup.
4. In the list, find and select the customer **US-004**.
5. Select **OK**.
6. Select **Sales order line**.
7. Select **Dimensions**.
8. For this example, select the Color, Site and Warehouse dimensions. The dimensions you select here will appear in the sales order grid. If you want your selections to persist, set the **Save setup option** to **Yes**.
9. Select **OK**.
10. In the **Item number** field, click the drop-down button to open the lookup.
11. For this example, select item number **T0004**.
12. In the **Color** field, click the drop-down button to open the lookup.
13. In the list, find and select **Black**.
14. In the **Quantity** field, enter **1**.
15. On the **Action Pane**, click **Sales order**.
16. Select **Totals**.
17. The Totals page displays details about the entire order. This includes the subtotal amount, which is a sum of all line net amounts adjusted for eventual line discounts, the total invoice amount, which is a subtotal amount adjusted for eventual order-level discount, charges, and sales tax, the customer credit limit situation, and more. The invoice amount is the amount that will appear on the customer's invoice document.
18. Select **OK**.

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lab: title: 'Lab 01: Explore security roles in Dynamics 365 model-driven applications' module: 'Module 12: Recognize Dynamics 365 security'

MB-901: Dynamics 365 Fundamentals

Module 12, Lab 1 - Explore security roles in Dynamics 365 model-driven applications

Scenario: As a system administrator, you need to find out what are the available out of the box security roles of Dynamics 365.

Note: Given that this lab requires admin access to the environment, this lab will need to be demonstrated by the instructor.

Instructions

1. In order to navigate to Dynamics 365 Settings dashboard, add **?settingsonly=true** at the end of the URL link of your Dynamics 365 business applications. Your URL should look like the following: **https://crmYOURID.crm.dynamics.com/main.aspx?settingsonly=true**. (This example resembles a sample only and does not work if you navigate to it.)
2. The **System** settings dashboard appears.
3. Use the **Dynamics 365** > **Settings** menu from the action pane to see the menu items. From the **System** group area, select **Security**
4. The **Security** dashboard appears. From the dashboard select **Security roles**.
5. Here, you can see all of out of the box security roles in Dynamics 365.
6. Select the **Sales Manager** role. Select **Core Records** tab. By using the **Security role** form, you can change security settings for this role in different functional areas.

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lab: title: 'Lab 02: Explore security roles in Dynamics 365 Finance and Operations applications' module: 'Module 12: Recognize Dynamics 365 security'

MB-901: Dynamics 365 Fundamentals

Module 12, Lab 2 - Explore security roles in Dynamics 365 Finance and Operations applications

Exclude role

Scenario: The HR department of USMF has requested to remove access to the Accounts receivable clerk role in Dynamics 365 Finance and Operations applications for an employee who has changed role. You, as a system administrator need to exclude Accounts receivable clerk role for the employee.

1. Go to **System administration** > **Security** > **Assign users to roles**.
2. In the tree, select **'Accounts receivable clerk'**.
3. Select **Manually assign / exclude users**.
4. In the list, select a user.
5. Select **Exclude from role** to exclude the selected users from the role.
6. To remove exclusions, select the users that you want to remove exclusions for, and then click **Reset status**.

Create segregation of duties rule

Scenario: The HR department of USMF has requested having a rule for segregation of duties for **Access benefits workspace** as the first and **Approve production journal** as the second duty. You, as a system administrator need to create the rule.

1. Go to **System administration** > **Security** > **Segregation of duties** > **Segregation of duties rules**.
2. Select **New**.
3. In the **Name** field, enter a name for the rule.

4. In the **First duty** field, click the drop-down button to open the lookup.
5. In the list, find and select the first duty that is controlled by the rule.
6. In the list, click the link in the selected row.
7. In the **Second duty** field, click the drop-down button to open the lookup.
8. In the list, find and select the second duty that is controlled by the rule.
9. In the list, click the link in the selected row.
10. In the **Severity** field, select the severity of the risk that occurs when the same user or role performs both duties.
11. In the **Security risk** field, enter a description of the security risk.
12. In the **Security mitigation** field, type a value.
13. Enter a description of the actions that you take to mitigate the security risk. For example, you can mitigate the risk by conducting more detailed reviews of the process, by conducting a monthly managerial review, or by sharing resources with other departments.
14. Select **Save**.

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lab: title: 'Lab 03: Enhance security by encrypting your data' module: 'Module 12: Recognize Dynamics 365 security'

MB-901: Dynamics 365 Fundamentals

Module12, Lab 3: Enhance security by encrypting your data

Scenario: You, as a system administrator need to change and copy the organization encryption key.

Note: Given that students do not have adminstrator access to the environment, the instructor will need to demo this lab.

Instructions

1. Navigate to Power Platform Admin center.
2. These settings can be found in to **Environments** > [select an environment] > **Settings** > **Encryption** > **Data encryption**.
3. In the **Change Encryption Key** box type the new encryption key and then select **Change**.
4. Select **OK** in the confirmation message and then select **Close** to exit the **Data Encryption** page.

We strongly recommend that you make a copy of your data encryption key.

1. Select the same environment you used in steps 1-4 and go to **Settings** > **Encryption**.
2. In the **Data Encryption** dialog box, select **Show Encryption Key**, in the **Current encryption key box** select the encryption key, and copy it to the clipboard.
3. Paste the encryption key into a text editor such as Notepad.

Note: By default, model-driven apps in Dynamics 365 generate a passphrase that is a random collection of Unicode characters. Therefore, you must save the system-generated passphrase by using an application and file that supports Unicode characters. Some text editors, such as Notepad use ANSI coding by default. Before you save the passphrase using Notepad, select Save As, and then in the Encoding list, select Unicode.

As a best practice, save the text file that contains the encryption key on a computer in a secure location on an encrypted hard drive.

lab: title: 'Lab 01: Build your first model-driven app from scratch' module: 'Module 13: Connect and analyze your Dynamics 365 data'

MB-901: Dynamics 365 Fundamentals

Module 14, Lab 1: Build your first model-driven app from scratch

Scenario: You need to simplify create a model-driven app by using one of the standard entities that's available in your Power Apps environment. Model-driven apps don't run in the Power Apps mobile app. Instead, you run a model-driven app on a mobile device using either the Dynamics 365 mobile app or in the phone's web browser.

Sign in with your window���s live id to Power Apps. If you don���t already have a Power Apps account, select the Get started free link from https://signup.microsoft.com/Start?sku=powerapps_viral&ru=https%3a%2f%2fweb.powerapps.com%2flogin%2fportal

Instructions

1. Access the Power Platform Admin Center.
2. Select **Environments**.
3. Select your trial CRM environment.
4. Select Dynamics 365 Administration Center hyperlink.
5. Select **GTLPowerApps**.
6. Select **Open**.
7. Select **Create new App**.
8. On the **Create a New App** page, enter the following details, and then select **Done**:
   - **Name:** Type **GuideToPowerApp**.
   - **Unique Name:** By default, the unique name uses the name you specify in the Name box without spaces and preceded by the publisher prefix and an underscore (_).
   - **Description:** Type **GuideToPowerApp**.
9. Select **Done**.
10. From the app designer you add components to your app. Select pencil icon on the **Site Map** button to open the sitemap designer.
11. You are going to use Accounts entity in this power app to manage customer accounts.
12. On the **Properties** tab, type **Accounts** for the Area name.
13. On the sitemap designer select **New Subarea**, in the right pane select the **Properties** tab, and then select the value of following properties:
    - **Type: Entity**
    - **Entity: Account**
    - Select **Save.**
14. Select **App Designer**.
15. On the app designer canvas select **Forms**, and then on the right pane under the **Main Forms** group select the **Account** form.
16. Select the **back** button.
17. On the app designer canvas select **Views**, and then select the **Active Accounts**, **All Accounts**, and **My Active Accounts** views.
18. Select the **back** button.
19. On the app designer canvas select **Charts**, and then select the **Accounts by Industry chart**.
20. Select the **back** button.
21. On the app designer toolbar, click **Save** and then **Publish**.
22. Select **Play**.

23. Review the results and interact with your first model-driven application.
24. Try it on your mobile device by Installing the Dynamics 365 for phones or Dynamics 365 for tablets app from your device���s app store. More information: https://docs.microsoft.com/dynamics365/customer-engagement/mobile-app/install-dynamics-365-for-phones-and-tablets
25. Enter the application URL directly into your phone���s web browser and follow the directions on your screen to load the app. **Note:** An example of your application URL will look like the following: https://orgxxxxx.crm.dynamics.com/main.aspx?appid=e4547538-e20f-ea01-a811-000d3a33438d&pagetype=entitylist&etn=account

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