Contents

1 INF99X: Sample Course

- **Download Latest Student Handbook and AllFiles Content**
- **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

1.1 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 Azure 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 Azure platform.

- We hope that this brings a sense of collaboration to the labs like we've never had before - when Azure 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.

1.2 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.

1.3 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.

1.4 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!

1.5 Notes

1.5.1 Classroom Materials

1.6 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.

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

2 Content Directory

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

2.1 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 %}](/home/ll/Azure_clone/Azure_new/MB-910T00A-Microsoft-Dynamics-365-Fundamentals-Customer-Engagement-Apps/{{ site.github.url }}{{ activity.url }}) | {% endfor %}

2.2 Demos

2.3 {% assign demos = site.pages | where_exp:"page", "page.url contains '/Instructions/Demos'" %} | Module | Demo | | --- | --- | {% for activity in demos %}| {{ activity.demo.module }} | [{{ activity.demo.title }}](/home/ll/Azure_clone/Azure_new/MB-910T00A-Microsoft-Dynamics-365-Fundamentals-Customer-Engagement-Apps/{{ site.github.url }}{{ activity.url }}) | {% endfor %}

2.4 demo: title: 'Demo: Working with Dynamics 365 Marketing' module: 'Module 1: Learn the Fundamentals of Dynamics 365 Marketing'

3 Demo: Working with Dynamics 365 Marketing

3.1 Instructions

Dynamics 365 Marketing lets your organization take control of all the different aspects of marketing from delivering and executing campaigns to managing events.

1. Navigate to and open Dynamics 365 Marketing.

- Dynamics 365 Marketing, lets, you easily identify and target specific customers based on tailored demographics.
  - Start on the Marketing Sales Pipeline Dashboard
  - Leverage Multi-Channel Campaign to target leads
  - Manage and Qualify leads to Sales
- Work with Customer Segments
  - Open Lead Scoring Model Designer
  - Walk though Conditions & Walk Actions
- Manage Customer Journeys
  - Open Customer Journeys, and demonstrate open an existing Customer Journey
  - View Customer Journey Details.
  - Highlight the Customer Segment being used.
  - Open the Customer Journey Designer
  - Defining how customers are interacted can be easily modified, by creating and defining which activities will be used in the Journey as well as how the when the activity will be used.

```
- Add an Activity to the Journey.

- Modify the Conditions to show the flexibility

- Save and Publish Customer Journey
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- Based on the journey that you created, are provided with a targeted marketing experience based on who they are and what path they choose as they interact you're your organizations marketing content.
  - Switch to a customer persona and open a pre-defined marketing email that was sent. Walk through and explain how the different content in the email can be leveraged.
  - Click on a link in the email and browse through the web page that you are sent to.
  - Interact with the content in the page and select a link.
- Navigate back to the customer journey and demonstrate tracking the data and the reporting information that is available.

2. Manage and register for events from event management portal
   - Open the Marketing Portal

    - Navigate to an Event
    - Register for the Event
    - Manage Sessions and Schedules
- Manage event sessions, speakers, and venue Logistics
    - Create an Event
    - Define Event Details
    - Manage Event Speakers, and Sessions
    - Manage Room Registrations

3.2 demo: title: 'Demo: Customer Voice' module: 'Module 1: Learn the Fundamentals of Dynamics 365 Marketing'

4 Demo: Customer Voice

4.1 Instructions

With Dynamics 365 Customer Voice, organizations can easily engage with their customers to collect important feedback related to customer satisfaction, experiences, sentiment and more. Once created, Customer Voice Surveys can be easily distributed to customers and leveraged by other Dynamics 365 applications such as Customer Service, and Marketing.

1. To start working with Customer Voice, navigate to https://Customervoice.microsoft.com.
2. Projects are created, by selecting create a project.
3. Multiple project template types are available, select the option you want such as **Periodic Customer Feedback**, and select **Next**
4. Select the **Dynamics 365 Environment** you want to work with and select **Next**
5. Existing questions can be easily updated based on you needs
    - Select the **How would you rate your satisfaction** question, edit the text
    - **Modify the symbol** used, as well as the levels that are presented.
    - Change the wording to match the terminology used by your organization.
    - Notice that you can change requirement level and visibility
    - Question modification options will vary, based on the type of question that you select.
6. Customer Voice makes it easy to create additional questions in many ways.
    - New questions can be created from scratch.
        - Select the **Add new Option**
            1. Select the question type you want from the list

- Existing Questions can be used to create new questions by selecting **Copy Question**.

7. With Customer Voice, you can easily tailor the survey to meet your needs, branding, etc.
    - Expand **Customization** on the right
    - Select the **Satisfaction metrics**
        - Expand **Customer Satisfaction** and modify the questions

- Select Branding
    - Modify the **Theme Color** to match your organizations branding
    - Upload a **Background Image** that matches your organization

8. You can simulate the experience your responders will have by, **previewing** your survey.

    - This lets you preview what the survey will look like to responders who take it.
    - The survey can be previewed on both mobile and desktop interfaces.

9. After your survey is complete, and you are ready to deliver it, you can easily distribute it to your customer base by leveraging multiple distribution options.
    - Several **Power Automate** Templates are available.
    - The embedding option lets you embed the survey in web apps and other areas.
10. After customers take your survey, you can easily view reporting metrics at a survey and question lever.

As you can see Customer Voice, makes it easy to create effective customer surveys that help you capture feedback and gain more insight into your organization.

4.2 demo: title: 'Demo: Customer Insights' module: 'Module 1: Learn the Fundamentals of Dynamics 365 Marketing'

5 Demo: Customer Insights

5.1 Instructions

With the Audience Insights capabilities available in Dynamics 365 Customer Insights. Organizations can take their transactional, organizational, and behavioral data from all their different data silos and combine it into a single unified customer profile. This unified customer profile provides a true 360-degree view of your customer.

1. Navigate to https://home.ci.ai.com to access your Customer Insights application.
2. What information is available in Customer Insights
    - Once you have unified your data into a single customer profile, you a complete detailed view of you customer at your fingertips.
    - This will include:
        - Unified Customer Profile Details
        - Timeline of Activities across all data silos
        - Key Measures and KPIs such as spending totals and more
        - Brand Enrichment information such as brand affinities, and interests.
3. What can you do with it?
    - Customer Data can be easily consumed in the application
        - Go to Customers
        - Filter the Customer List
        - Search for a Customer
        - Open a Customer Profile record

- Walk through what information is available on the Customer Card
    - Show the Activity TimeLine
    - Explain the Customer Measures
    - Explain the Brand Affinities

4. Use information to target your Customers
    - Create a Segment
        - Select Segments – Select New
        - Create a Segment from a customer Profile
        - Create a segment for customers in California

- Export the Data to be used in Dynamics 365 Marketing

5.2 demo: title: 'Demo: Working with Dynamics 365 Sales' module: 'Module 2: Learn the Fundamentals of Dynamics 365 Sales'

6 Demo: Working with Dynamics 365 Sales

6.1 Instructions

Dynamics 365 Sales is an adaptive selling solution that helps your sales team sell more effectively. This Demo will help users see the application at a high level.

1. Navigate to and open Dynamics 365 Sales Hub
2. Dynamics 365 for Sales, lets, you easily manage and maintain relationships with customers.
    - Show how the different dashboards provide you with the information needed to complete you daily activities.
    - Open the Sales Activity Dashboard
        - Review pipeline reports
        - Leverage the assistant to work on sales activities
        - Call out the Assistant on the side and drill into a few activities
        - Select Forecasts and call out how to manage projections with Sales Forecasting.

- Leverage the Business Card scanner to create new leads

3. By Leveraging Artificial Intelligence, your Organization can make more informed decisions related to your customers, better manage and maintain relationships and more effectively target sales opportunities.
    - Navigate to Accounts Relationship health
        - Show the health score and how to see if you are improving you slipping
        - Show information available at a opportunity level

- Open a Lead and walk through the Lead Scoring

4. Opportunity Management
    - Open Opportunity
    - Add Products from the Product Catalog
    - Demonstrate working the opportunity through Business Process Flow
        - Demonstrate how Sales Accelerator helps get work done effectively based on different Types of Prospects and Sequences.

6.2 demo: title: 'Demo: Dynamics 365 Sales Insights' module: 'Module 2: Learn the Fundamentals of Dynamics 365 Sales'

7 Demo: Dynamics 365 Sales Insights

7.1 Instructions

Dynamics 365 Sales Insights, is a suite of artificial intelligence tools that help organizations better understand their customers, proactively manage and execute sales activities, and more effectively target selling opportunities.

. Maintain healthy relationships with Sales Insights

- Manage Health of Account Relationship
    - Open and examine Account by overall Relationship Health.

    - Open an account Record
        * Examine the Relationship Health Statistics
        * Examine how we might be able to improve the overall Relationship Health.
- Examine the Contact statistics, and engage with Contacts
    - Open a Contacts from the organization
    - Show how the Relationship Health status is calculated also at a contact level.
    - Call out the Activities that have been auto captured by the application. Notice how that can easily be converted into actual activities.
    - Since the customer Score is slipping, engage with the customer through an email. Show the ability to track the information in the email such as when it is opened, forwarded etc.
    - Walk through Shared Attachments.

2. Examine Sales Opportunities and Management Options
    - From the Account Record, Review list of Open Opportunities
    - Show how the different Opportunities listed have scores associated with them
    - Open an Opportunity
        - Call out the Relationship Health associated with the Opportunity
        - See what the next scheduled interactions are,
        - Initiate an email with customer to check in and see how things are going.
        - View Tracked statistics from the email

7.2 demo: title: 'Demo: LinkedIn Sales Navigator' module: 'Module 2: Learn the Fundamentals of Dynamics 365 Sales'

8 Demo: LinkedIn Sales Navigator

8.1 Instructions

LinkedIn Sales Navigator's prospecting capabilities compliment the Customer Engagement capabilities of Dynamics 365. With Sales navigator, you can easily research account and contact record in LinkedIn, leverage you existing LinkedIn network to help facilitate introductions, track activities that take place in LinkedIn in Dynamics 365

1. Open LinkedIn Sales Navigator.
2. With LinkedIn Sales Navigation you can easily uncover prospects and organization based on the information that matters to your organization.
    - Perform an Advanced Search
    - Modify the criteria to target a specific industry
    - Modify the criteria to target a specific role
    - Modify the criteria to target a specific region.
    - View the results and show how the results vary based on if you are leveraging your network.
    - Save an Account as a prospect in the application.
3. LinkedIn Sales Navigator functionality can be easily included in Dynamics 365 Sales records to help sellers more effectively leverage this information in during their selling process.
    - Open an Account Record
        - Call out the LinkedIn Sales Navigator information that is surfaced on the Record
        - Show how to interact with the information and research the Account.

- Open a Contact record
  - Show the LinkedIn Sales Navigator information
  - Call out the Sales Navigator activities that are being displayed in the record timeline
  - Talk about the Contact Image being updated automatically.

8.2 demo: title: 'Demo: Working with Dynamics 365 Customer Service' module: 'Module 3: Learn the Fundamentals of Dynamics 365 Customer Service'

9 Demo: Working with Dynamics 365 Customer Service

9.1 Instructions

With Dynamics 365 for Customer Service, your organization can work through cases effectively and manage daily caseloads.

Open the Customer Service Hub Application

1. With Dynamics 365 Customer Service Hub, customer service agents, have all the information they need to help support their customers.
   - Show the Different Interactive Dashboards available
   - Expand the Visual Filter and highlight how agents can easily filter case information based on specific criteria.
   - Explain what streams are and how they help agents when working on Cases.
     - Highlight the fact that they can be related to different queues that agents might belong to.

- Dynamics 365 Queues help agents to more effectively service customers by grouping like cases together, so qualified agents are pick which cases to service.
  - Open Queues
  - Demonstrate filtering Queue information
  - Pick Items from a Queue to work on
  - Work with assigned items in a Personal Queue

2. Work a case through its lifecycle
   - Open a case that was recently created
     - Show the SLA back timers
     - Leverage the Case Resolution Business Process Flow to provide Agent Guidance
       1. Business Process Flow steps will change when the type of case is modified.

- Leverage the Timeline Create Case related activities
- Create a Task / Phone Call

3. Leverage Knowledge Articles to assist in case resolution
   - Use the Reference Panel to demonstrate searching for articles
   - Open the article, and send it to the customer
   - Attach the article to the case as part of the resolution
4. Resolve the case
5. Complete the Case Resolution Business Process Flow
   - Resolve the Case

9.2 demo: title: 'Demo: Customer Service Scheduling' module: 'Module 3: Learn the Fundamentals of Dynamics 365 Customer Service'

10 Demo: Customer Service Scheduling

10.1 Instructions

With Dynamics 365 Customer Service Scheduling, organization that provide services for their customers can easily schedule services to be executed by their service staff. As services are scheduled, resources such as service locations, people, equipment are recommended to assist in the scheduling process.

1. Open the Dynamics 365 Customer Service application
2. Organizations can define the services they provide to their customers such as in this case doing an oil change. When the service is created, the organization defines the necessary details about the service such as the type of resource required, amount of time needs, equipment needed etc.
3. Once the service is created, and a customer requires service a Service Activity is created.
    - Select Service Activities and click create Service Activity.
    - Enter Oil Change Service for Subject, select Oil Change for Service, select Main Ave Location for Organizational Unit, and click Save.
4. Once you have defined the service and the location you can schedule the item by selecting Book.
    - Filter the information by location
    - Expand one of the available slots and see what resources are included in it. In our case Service Bay 1 and Jennifer Leary will be included.
    - Go to the Resources pane and click on the Start date picker.
    - Select a data one week from today. The rest of the dates will change to reflect the change you made.
    - Click Book & Exit.
5. After the record is refreshed, the status should now change form Requested to Reserved.
    - Select the Bookings tab. You should see the booked resources for this service activity.
    - Select Scheduling, select Main Ave Location for Organizational Units and click Search.
    - Select Horizontal View and click on the date picker.
    - Select the date you booked the Oil Change service activity.
    - Jennifer Leary and Service Bay 1 should show as booked for 30 minutes. Click on the Jennifer Leary's booking.
    - Go to the Details pane. You should see more information about the booking.

10.2 demo: title: 'Demo: Connected Customer Service' module: 'Module 3: Learn the Fundamentals of Dynamics 365 Customer Service'

11 Demo: Connected Customer Service

11.1 Instructions

1. Remotely Monitor and Manage Customer connected devices
    - Start in IoT Central to show what how telemetry is displayed
        - Simulated devices with be leveraged
        - Walk through an event being triggered

- Switch to Connected Customer Service
    - Show how IoT Devices are reflected in in the application

- Show how IoT Alerts are surfaced in the application
    1. Use the IoT Alert Business Process flow to walk though resolving the IoT Alerts
    2. Initiate an IoT Command from the Alert
    3. Send the Command from the Alert.
- Convert the IoT Alert to a Case

11.2 demo: title: 'Demo: Omnichannel for Customer Service' module: 'Module 3: Learn the Fundamentals of Dynamics 365 Customer Service'

12 Demo: Omnichannel for Customer Service

12.1 Instructions

Dynamics 365 Omnichannel for Customer Service helps organizations provide customer support to multiple customers at the same time across any channel that your organization provides support functionality from.

1. Open the Dynamics 365 Omnichannel app.
2. When an agent first accesses the application, they will see all the work items that not only are they working on, but available to be worked on by anyone in the organization.
    - Review the items in the dashboard.
    - Highlight the sessions that are open on the left side of the screen.
    - Open a Session and walk through the tabs that are available at the top.
3. As Conversations come in agents are sent conversations based on their current status and workload capacity.
    - Accept a Chat conversation that comes in
        - Demonstrate interacting with a customer.
        - Demonstrate the real-sentiment analysis as you interact client
        - Call out the Customer Summary Screen to view the Context.
        - Leverage the Productivity Pane to View the available agent scripts
        - Use the Agent script to resolve the conversation
        - Demonstrate using Quick Replies to interact with the customer
        - Use the Knowledge Base to Resolve a Case

12.2 demo: title: 'Demo: Customer Service Insights' module: 'Module 3: Learn the Fundamentals of Dynamics 365 Customer Service'

13 Demo: Customer Service Insights

13.1 Instructions

1. Navigate to https://CSI.ai.dynamics.com
2. When you first launch the application, you will be provided with detailed information related to your topics. Information can be filtered to display information or different time periods such as 24 Hours, 7 or 30 days.
    - Call out that Topics are created based on all the different case titles in you case repository.
    - Talk about why this is important and what Information it provides to you.
3. Use Customer Insights to execute actions

- Show the different case and emerging case related information
- Show how to filter and sort information to dive deeper into specific items.
- Once sorted, you can see that almost between 15 & 20 percent of your cases were related to the use of a promo code. Over the last Thirty days, the overall customer satisfaction has started to fall slightly.
- Using the time period filters at the top, change the time with period to **Last 7** days. You can see that the topic is trending downward and the customer satisfaction has fallen by **almost 2 percent**.
- Change the Time Period to Last 24 hours. Over the last 24 hours the score has fallen even more.
- We can see by the CSAT visual, most of the customer dissatisfactions appear to be centered around Twitter and Facebook.
- Back in **the Customer satisfaction** drivers, select **Details** on the use of customer promo code topic.

4. Create a Topic in Power Virtual Agents based on the information customer Insights information.

13.2 demo: title: 'Demo: Working with Dynamics 365 Field Service' module: 'Module 4: Learn the Fundamentals of Dynamics 365 Field Service'

14 Demo: Working with Dynamics 365 Field Service

14.1 Instructions

With Dynamics 365 Field Service, your organization can deliver exceptional customer experiences dispatch the right resource to the right place at the right time and ensuring that they have all the tools to succeed the first time.

1. Open Dynamics 365 Field Service
2. When you first access the application dispatcher and Field Service managers have all the information they need right at their fingertips.
   - Walk through a very quick overview of the application's areas and features including:
     - Review different dashboards that are available.
     - Show how to view the work orders in the system calling out the different types, scheduling statuses, etc.
     - Review Account and Geo coding Data
     - Quickly show the schedule board and speak to basic capabilities.
     - Examine Asset Management
3. High-level Work Order Lifecycle Demo
   - Talk through Work Creation, highlight various options for creating work orders
   - Walk through key elements on a Work Order such as Types, Incident Types, Scheduling Preferences, Skills, etc.
   - Show how to leverage the schedule assistant to schedule a work order
4. Managing Schedules
   - Open the Schedule Board and walk through basic navigation and filtering
   - Call out important components such as Resources, Requirements, Maps, etc.
   - Show to manually schedule an item.
   - Walk through the process of Rescheduling and sub statute resources.
5. Work order Execution
   - Use the Mobile Application
   - Provide a tour of the application and functionality

- Walk through executing a Work Order in the Mobile Application
- Fire Remote Assist
- Do an Inspection

6. Asset Management
   - Show the process for creating and managing assets
   - Examine IoT Enabled Assets
   - View maintenance History
   - Create a Work Order for an Asset

14.2 demo: title: 'Demo: Creating Purchase Orders' module: 'Module 4: Learn the Fundamentals of Dynamics 365 Field Service'

15 Demo: Creating Purchase Orders

15.1 Instructions

Most work orders will contain some type of product on it. This might be products to be installed, or replacement parts. May times, the parts needed to execute a work order or booking will already be on hand in a warehouse. Other times they may need to be ordered. Dynamics 365 Field Service includes the ability requisition purchase orders for ordering product as well as the ability to initiate returns when a product what not used.

Open Dynamics 365 Field Service

Depending on your organizational needs the process for requesting product can vary. Some organizations do not want technicians creating purchase orders directly while others do. Regardless of the specific policies for an Organization, Dynamics 365 Field Service provides the ability to create Purchase orders directly in the application. Purchase Orders can be created by Technicians, Purchasers, or other employees.

1. Switch the Area to Inventory and Click Purchase Orders.
   - Create a New Purchase Order
     - Call out information on the Details tab that are important such as Warehouse information, Payment details, work order and booking information, vendor etc.
     - Be sure to mention and show the Purchase order process that is highlighted at the top of the application.
     - Define the Product or Products that are being ordered as part of the purchase order.
     - Talk through what the approval process might look like.
2. Receive Po Products
   - Sometimes all the product being requested will come in at one time, other times depending on factors such as back order status, quantities, etc, only partial quantities of product will arrive. Dynamics 365 lets you receive the product as it comes in and document the specific quantities you received vs the quantities ordered.
     - Open an existing Product
     - Go to Product Receipts and create a Product Receipt
     - On the Product Receipt, receive Product Quantities.
       1. Show receiving both complete quantities and partial quantities.

- Walk through creating multiple receipts as different quantities of product come in.
- Once the all items have been received, walk through getting the Purchase Order Ready for Billing.

15.2 demo: title: 'Demo: Asset Management and Connected Field Service' module: 'Module 4: Learn the Fundamentals of Dynamics 365 Customer Service'

16 Demo: Asset Management and Connected Field Service

16.1 Instructions

IoT devices are becoming a larger part of everyday life.

1. Customers often have physical assets that require work and maintenance to be performed. These assets are often installed initially typically will have preventative maintenance contracts opened against them Dynamics 365 Field Service Includes Asset Management functionality that works hand-in-hand with Connected Field Service Functionality
    - Create a Customer Asset
    - Walk through the different option available for managing them.
    - Walk through reviewing Work Order history
    - Explain how the Functional Location is used.
    - Talk through the Process of Connecting a Customer Asset to an IoT Device. Work with Customer Assets
2. Remotely Monitor and Manage Customer connected devices
    - Start in IoT Central
        - Explain key concepts such as Telemetry, Measurements, Events, etc.
        - Use the visuals provided to help students visualize how events are leveraged.
        - Using a Simulated device, trigger an event such as an IoT Garbage Can being full and needing to be picked up.
        - Walk through what is happen when the event is triggered.

- While the telemetry and events are being tracked and reported on in IoT applications such as IoT Central, The physical execution of the action in response to that event is likely going to occur in Dynamics 365 applications such as Field Service.
    - Switch to Connected Field Service
        1. Show how IoT Devices are reflected in Connected Field Service
        2. Show how IoT Alerts are surfaced in the application
            * Use the IoT Alert Business Process flow to walk though resolving the IoT Alerts

3. Initiate an IoT Command from the Alert
4. Send the Command from the Alert.

- Convert the IoT Alert to a Case
    1. Attempt to resolve the case
    2. Convert case to Work Order
- Proactive Cases
    - Show viewing of sensor details and identify past patterns.
        1. Highlight key metric fields on the device
        2. Show when and how sensors have failed in the past
- Talk through a Work Order being automatically generated, based on replacement of a sensor Trigger automatic case creation based on sensor replacement recommended.
    1. Show the created Work Order
    2. Show how the Work Order Scheduled with RSO

16.2 demo: title: 'Demo: Working with Dynamics 365 Project Operations' module: 'Module 5: Learn the Fundamentals of Dynamics 365 Project Operations'

17 Demo: Working with Dynamics 365 Project Operations

17.1 Instructions

Microsoft Dynamics 365 Project Operations connects sales, resourcing, project management, and finance teams in a single application to win more deals, accelerate project delivery, and maximize profitability.

1. Navigate to and open Dynamics 365 Project Operations.
2. Explain the different Deployment Types
    - Lite
    - Resource/non-stocked
    - Stocked/Production order scenarios
3. Based on your Deployment type, Project Operations provides a variety of tools that can be used to manage every aspect of your organization's projects including sales, planning, resource management, and project execution.
    - Project Sales
        - Walk through the Project Sales Process.
        - Open a Lead and examine the project specific details.

- Project Management
    - Overview
    - Walk through the User interface and call out specific areas.
    - Explore Projects in different stages
- Resource Management
    - Explain Key Concepts
    - Walk through a few resource reports
- Expense and Time Management
    - Walk through Expense Management.

17.2 demo: title: 'Demo: Working with Project Leads and Opportunities' module: 'Module 5: Learn the Fundamentals of Dynamics 365 Project Operations'

18 Demo: Working with Project Leads and Opportunities

18.1 Instructions

1. If necessary open the Dynamics 365 Project Operations Application.
2. Create a Project Lead
    - Walk through the Process and call out Project specific details
    - Add activities and manage activities using the timeline.
    - Qualify a Project Lead
3. Manage a Project Opportunity.
    - Walk through the Process of adding Project Opportunity Line items
    - Create Project Quote for an Opportunity

    - Close a Project Opportunity
4. Manage a Project Quote
    - Modify Quote Line Items
    - Close a Project Quote
5. Manage Project Contracts
    - Examine Project Contract Items
    - Close a Project Quote

18.2 demo: title: 'Demo: Expense Management' module: 'Module 5: Learn the Fundamentals of Dynamics 365 Project Operations'

19 Demo: Expense Management

19.1 Instructions

1. If necessary open the Dynamics 365 Project Operations Application.
    - Create and Manage Time Entries
        1. Navigate the Time Entry User Interface
        2. Create a Time entry & Associate with project
- Create and Manage Expenses
    1. Navigate the Expense user Interface
    2. Create an Expense Entry
- Time and Expense Approvals
    1. Navigate the User Interface
    2. Approve Time and Expenses
- Review Time and Expense Reports

19.2 demo: title: 'Demo: Schedule Items' module: 'Module 5: Learn the Fundamentals of Dynamics 365 Project Operations'

20 Demo: Schedule Items

20.1 Instructions

1. If necessary open the Dynamics 365 Project Operations Application.
2. Create a Project
    - Defining Work Breakdown Structures
        1. Creating Assignments
- Estimating a Project
    1. Defining Resource Estimates
- Creating a Project Team
    1. Adding and Maintaining Members

20.2 lab: title: 'Lab 1.1: Validate lab environment' module: 'Module 1: Learn the Fundamentals of Dynamics 365 Marketing'

21 Module 1: Learn the Fundamentals of Dynamics 365 Marketing

21.1 Practice Lab 1.1 - Validate lab environment

In this lab, you will validate that your 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.

21.2 Exercise 1 - Access the Dynamics 365 application

21.2.1 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.

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

21.2.2 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 **Marketing.**
4. Spend a few minutes exploring the application.

21.3 lab: title: 'Lab 1.2: Work with customer engagement apps' module: 'Module 1: Learn the Fundamentals of Dynamics 365 Marketing'

22 Module 1: Learn the Fundamentals of Dynamics 365 Marketing

22.1 Practice Lab 1.2 - Work with customer engagement apps

22.2 Objectives

During this exercise, you will see that it is very easy to access the different Dynamics 365 applications available to you directly from the Home screen. Once you have opened an app, you can easily switch between the different applications as required. Accessing and using the basic functionality in Dynamics 365 applications is something you as a user will do daily.

22.3 Lab Setup

- **Estimated Time**: 15 minutes

22.4 Instructions

In this exercise, you will become familiar with how to access the different Dynamics 365 Customer engagement applications by using the Dynamics 365 Home screen.

1. In a web browser, navigate to **https://home.dynamics.com.** All the applications that you have access to will be displayed.
2. To reduce the number of applications being displayed, select the **Filter Icon** located next to the Get more apps button.
3. Under **BY INSTANCE NAME**, select **NONE**. And choose the Environment that you want to leverage.
4. Select the **X** in the upper right-hand corner of the **Filter box** to close the filter box.
5. To locate a specific app, you can search for it by clicking in the **Search my apps** field on the left side of the screen.
6. Type the text **Sales Hub** and select the **Sales Hub** app to open it.
7. When you are within an app, there will be different areas that you can work with based on what you are trying to do. For example, the Sales Hub application contains different administrative settings that you can work with.
8. On the lower left side of the screen, select the text **Sales**, from the list that appears, select **App Settings.** This part of the application is where you can make administrative changes to it.
9. Select the Area selector again and change it from **App Settings** back to **Sales**.
10. If you want to switch from the Sales app to a different app such as Customer Service hub, select the **Sales Hub** text in the upper left part of the screen next to the text Dynamic 365.
11. The Apps screen will appear, select **Customer Service Hub** and you will be taken to the Customer Service Hub Application.
12. Select the **Customer Service Hub** text at the top to switch back to the **Sales Hub** App.

22.5 lab: title: 'Lab 1.3: Manage Customers and Activities' module: 'Module 1: Learn the Fundamentals of Dynamics 365 Marketing'

23 Module 1: Learn the Fundamentals of Dynamics 365 Marketing

23.1 Practice Lab 1.3 - Manage Customers and Activities

23.2 Objectives

Defining and working with account and contact records in Dynamics 365 applications is one of the most common activities you will do in the application. Once accounts and contacts are created, activities such as phone calls, tasks, and appointments will represent the interactions that you have with your customers.

23.3 Lab Setup

- **Estimated Time**: 15 minutes

23.4 Instructions

In this exercise, you will be working with common records that are leveraged by all the first party customer engagement apps.

1. If is not open already, open the **Dynamics 365 Sales Hub** application.
2. Using the navigation on the left side of the screen, select **Accounts**.
3. On the Command Bar, select the **New** button.
4. Complete the account record as follows:
   - **Account Name:** Contoso Corporate – Your Initials

- **Phone:** 888-555-1234
- **Address 1 Street 1:** 191 181st Ave N
- **Address 1 City:** Seattle
- **Address 1 State/ Province:** WA
- **Address 1 Postal Code:** 98101

5. On the Command Bar, select the **Save and Close** button to save and exit the account record.
6. On the Command bar, for the list of accounts, select the **New** button again
7. Complete the account record as follows:
   - **Account Name:** Contoso North America – Your Initials
   - **Phone:** 888-555-4321
   - **Address 1** – **Street 1**: 187 11th ST N
   - **Address 1 City:** Chicago
   - **Address 1 State/ Province:** IL
   - **Address 1 Postal Code:** 60176
8. Set the **Parent Account** field to the **Contoso Corporate** account you created earlier.
9. Click the **Save** button to save the account and leave it open.
10. Locate the **Contacts Sub-grid** on the right side of the screen.
11. Select the **Vertical Ellipsis**, and from the menu that appears, select **New Contact**.
12. Using the **Quick Create Contact** form, complete the contact as follows:
    - **First Name:** Jackson
    - **Last Name:** Anderson - Your initials
    - **Job Title:** CEO
    - **Email:** Jackson@contososample.com
13. Select the **Save and Close** button.
14. Just above the Contact sub-grid, select the **Primary Contact** field, and set it to the **Jackson Anderson** contact you just created.
15. On the **Record Timeline** located in the middle of the screen, select the **Plus Sign Icon** to add a new item.
16. From the menu that appears, select **Appointment.**
17. Complete the Appointment as follows:
    - **Subject:** Meeting with Jackson
    - **Start Time:** Today at 3:00 PM
    - **End Time:** Today at 4:00 PM
18. Select the **Save and Close** button.
19. On your keyboard, press the **F5 key** to refresh the screen.
20. Notice that the **Assistant** on the right side of the screen now displays information about the appointment.
21. **Save and close** the account.
22. Click to select the **Appointment** and display the details about it.
23. Select the **Open Appointment** link.
24. With the appointment record open, from the **Command Bar**, select the **Mark Complete** button to finish the appointment.
25. Select the **Save and Close** button to return to the account record.

26. Select **Save and Close** on the account record to leave the account record.

23.5 lab: title: 'Lab 1.4: Search and filter data' module: 'Module 1: Learn the Fundamentals of Dynamics 365 Marketing'

24 Module 1: Learn the Fundamentals of Dynamics 365 Marketing

24.1 Practice Lab 1.4 - Search and filter data

24.2 Objectives

Locating data in the application is almost a daily task. The more efficient you are at finding and searching, the quicker you will be at handling customer inquiries, and navigating through the application in general. This lab will walk you through the process.

24.3 Lab Setup

- **Estimated Time**: 15 minutes

24.4 Instructions

In this exercise, you will leverage the searching and filtering capabilities of Dynamics 365 to locate and work with different records.

1. If is not open already, open the **Dynamics 365 Sales Hub** application.
2. Using the navigation on the left side of the screen, select **Accounts**.
3. In the **All Accounts** view, select the **Address 1 City** column.
4. From the menu that appears, select **Filter By**.
5. In the Filter by box, leave the **operator** as **Equals**, enter **Redmond** for the value, click **Apply**.
6. Notice that only accounts with a city of Redmond are being displayed.
7. Select the **Address 1 City** column again, from the menu that appears select **Clear Filter**.
8. Locate the **Search this View** field on the upper right side of the screen, enter the text **Coho** and press **enter**.
9. Notice that the **Coho Vinyard & Winery** account record is displayed.
10. Click on the **Coho Vinyard & Winery** text to open the record.
11. On the **Record Timeline** in the middle of the screen, click the **Plus Sign** icon to add a new activity.
12. From the menu that appears, select **Task**.
13. Complete the **Quick Create Task** form as follows:
    - **Subject:** Send Marketing Materials -Your Initials
    - **Due:** Tomorrow at 8:30 AM
    - **Priority:** High
14. Select the **Save and Close** button.
15. On the **Command Bar** for the Coho Vinyard & Winery account, select the **Save and Close** button to exit the record.
16. Using the navigation on the left side of the screen, select the **down arrow** next to the word **Recent** to expand the **Recently Viewed Records** section. Notice that Coho Vinyard & Winery is on the list.
17. Since we will be working with Coho Vinyard & Winery a lot, hover over the record name in the recent list and select the **Pin Icon**. Coho Vinyard & Winery will be added to the pinned section.
18. Expand the **Pinned** section to verify that Coho Winery is listed.
19. Using the navigation on the left, locate and select **Activities** under the **My Work** heading.

20. Under the my **My Activities** view, set the **Due** filter to **Tomorrow or earlier**.
21. Set **Activity Type** filter to **Task**.
22. Click the **Send Marketing Materials text** to open the task you created earlier.
23. On the **Command Bar**, select the **Mark Complete** button.
24. Using the navigation on the left, select **Accounts**.
25. Open the **Coho Vinyard & Winery** account record and verify that the **Send Marketing Materials** task is displaying as **Closed** on the Record Timeline.
26. Select **Save and Close** on the account record to leave the account record.

24.5 lab: title: 'Lab 1.5: Create a Segment in Dynamics 365 Marketing' module: 'Module 1: Learn the Fundamentals of Dynamics 365 Marketing'

25 Module 1: Learn the Fundamentals of Dynamics 365 Marketing

25.1 Practice Lab 1.5 - Create a Segment in Dynamics 365 Marketing

25.2 Objectives

During this exercise you will see that it is very easy to create customer segments that target specific contacts based on common demographic information such as where they live or interests. The creation on customer segments in Dynamics 365 Marketing is extremely common because customer segments are used for key marketing activities such as defining the target contacts in Customer Journeys.

25.3 Lab Setup

- **Estimated Time**: 20 minutes

25.4 Instructions

1. Using the navigation on the left, select Segments under Marketing.
2. On the command bar, select **New**.
3. From the drop-down menu that appears, select **New Dynamic Segment**.
4. In the **Segment Templates** dialog box that opens, select **Skip** to close it and continue to the **New Segment** screen.
5. Select **Add query block** to create a query against the contact table.
6. Select the ghost text **Select attribute**.
7. Then type "city" to filter the list and choose **Address 1: City** from the list.
8. Leave the next drop-down list set to **Equals**.
9. Select the third drop-down list, which contains the ghost text **Enter text** and type **Redmond**.
10. Click to select the **Name** field at the top of the query and enter **Fargo Contacts - Your initials**.
11. Select **Save** on the command bar to save your segment
12. Select **Go Live** to publish the segment
13. Wait for about a minute and then select **Refresh** on the command bar to refresh the page.
14. You should now see that a **Members** tab has been added.

25.5 lab: title: 'Lab 1.6: Create a simple Customer Journey' module: 'Module 1: Learn the Fundamentals of Dynamics 365 Marketing'

26 Module 1: Learn the Fundamentals of Dynamics 365 Marketing

26.1 Practice Lab 1.6 - Create a simple Customer Journey

26.2 Objectives

During this exercise you will see that Customer Journeys are a key component in Dynamics 365 Marketing. You will create customer journeys as a basis for any marketing effort to guide the path a customer takes while interacting with your organization's marketing process. The goal of the journey, when it is complete, is to turn them into revenue.

26.3 Lab Setup

- **Estimated Time**: 10 minutes

26.4 Instructions

Note: Before we create a customer journey, we need to make sure that we have an active email that can be added to the customer journey.

1. If necessary open the Dynamics 365 Marketing Application.
2. Using the navigation on the left, select **Marketing emails** under the Marketing Execution group
3. Locate and open the **Introduction to Chairs** marketing email.
4. On the **Command Bar** at the top, select the **Go Live** button.
5. Now that the email is live, use the navigation on the left to select **Customer Journeys** under the Marketing Execution group
6. Using the command bar, select **New**
7. The **New Customer Journey** page opens with the **Select a Customer Journey Template** dialog box shown. Select **Skip** to start creating the journey from scratch.
8. Select **Set audience** (or, alternatively, select +). Select the Fargo Customers segment that you created in the previous exercise. The first tile populates with the segment name and the **Audience** pane displays the segment properties.
9. Select + on the canvas, and then select **Send an email** from the contextual menu.
10. Select the **Introduction to Chairs** email that you activated earlier.
11. Select the General tab located towards the top of the Customer Journey Record. Enter the following information into the **General** tab:
    - **Name**: Fargo Customer Journey
    - **Start date and time**: Enter Todays Date
    - **End date and time**: One Month from Today
    - **Time zone**: Select your local time zone
12. On the command bar, select **Save** to save the work you've done so far.
13. Your journey is now ready to go. To start the journey, publish it by selecting **Go live** on the command bar.

26.5 lab: title: 'Lab 1.7: Dynamics 365 Marketing capstone lab' module: 'Module 1: Learn the Fundamentals of Dynamics 365 Marketing'

27 Module 1: Learn the Fundamentals of Dynamics 365 Marketing

27.1 Practice Lab 1.7 - Dynamics 365 Marketing capstone lab

27.2 Lab Scenario

ABC company specializes in the manufacturing, selling, installation and servicing of security equipment. Their products include both indoor and outdoor security cameras, moisture and fire sensors, monitoring services, and more.

ABC company uses Dynamics 365 applications to engage with all their customers across different areas of their organization from sales to service.

Sales and Marketing

ABC Company markets to their residential customers directly through targeted marketing campaigns. Customers are targeted based on their city, and other factors. Marketing materials are sent through email and based on their interaction with the email are guided accordingly.

While some of their smaller products are sold through retailers, most products are sold direct to consumers by their internal sale staff.

Internally, they focus on two key areas:

- **Residential Customers:** Residential customers are typically looking for either individual components, or to buy a whole home solution. These sales cycles are typically shorter and originate from social media, websites, referrals, or direct contact from the prospect. Since residential customers are typically more focused on specific products or smaller installs, their sales cycles typically last a few days or weeks.
- **Enterprise Customers:** Enterprise sellers focus on customers who need a more specialized and tailored business solutions. Enterprise sales typically span multiple locations with linked communication, and often require multiple resources to complete the project. These sales cycles are typically longer and have many more moving parts.

It is important that all of ABC company's sellers have the tools, resources, and guidance necessary regardless of their focus area while selling to their customers.

System Installation:

The installation process for purchased security equipment varies based on the type of customer that was sold.

- **Residential Customers:** Since residential installs typically take less than a day, they are done by internal employees. After the sale is made, a work order is created, and a qualified technician is identified and scheduled to perform the install.
- **Enterprise Customers:** Enterprise deploys can take months, and require a project manager to oversee the day-to-day operations. This includes creating project plans, defining project teams, and scheduling resources.

Service and Support:

Once the systems are installed, ABC Company provides support after the sale. If a customer has an issue, they can contact customer support. An agent will attempt to work with the customer remotely to resolve their issue. If their issue cannot be resolved remotely, the support agent can escalate the issue to a work order that will be scheduled and worked on by a qualified field technician.

27.3 Objectives

ABC Company markets to their residential customers directly through targeted marketing campaigns. Customers are targeted based on their city, and other factors. Marketing materials are sent through email and based on their interaction with the email are guided accordingly.

A recent marketing campaign targeting homeowners in Portland led to a lot of new leads. ABC Company was able to convert many those leads into sales revenue. You have been asked to do something similar in the Seattle area.

Upon completion of the lab, you will have completed the following:

- Create a customized marketing email.
- Create a dynamic customer segment.
- Create a Customer Journey that leverages your marketing email and customer segment.

27.4 Lab Setup

- **Estimated Time**: 45 minutes

27.5 Instructions

27.6 Exercise 1: Create a Marketing email

1. If necessary open the Dynamics 365 Marketing Application.
2. Using the navigation on the left, select **Marketing emails** under **Marketing execution** group
3. To create a new marketing email, on the **Command Bar**, select **New**.
4. From the list of **Marketing email Templates**, select **1 column newsletter**, and click the **Select** button.
5. After the new record opens, select the drop-down arrow next to the **Status reason** field in the record header at the top.
6. In the **Name** field enter **Home Security – Your Initials**.
7. In the **Subject** field enter the text **Keep you family Safe**!
8. In the message window, locate and select the small image **above** the text a **Short headline goes here**.
9. Hover over and select the **Image gallery** button.
10. Select the **Security2 Image** and click the **Select** button to insert into your email.
11. Use the size handles on the image to size the image to the desired size.
12. Click to select the **A short headline goes here** box. Change the text to **Feel Safe 24/7**.
13. Click in the section below the text you just modified.
14. Replace the text with the following text: Do you know what is always happening in and around your home? You and your family deserve to feel safe and secure whether you are home or away. The right security system can not only provide that sense of security but might also save you money on your insurance.
15. Select the **Image** just below the text you added.
16. Hover over and select the **Image gallery** button.
17. Select the **Security1** image, and then click the **Select** button to insert into your email.
18. Size the image until it takes up a solid portion on the message window.
19. Select the **Headline or title box** just below the image, replace the text with the text **We have everything you need**.
20. Click in the text box below the heading you just modified.
21. Replace the text with the following text: **Our award-winning systems protect you.**
22. Click to select the entire section below the section you just modified. Press the **trash can** icon to remove the section.
23. Repeat the process for the remaining sections in the message.
24. Before we make the email live, we will check it for errors. On the **Command Bar**, select the **Check for Errors** button.
25. Once you have verified that there are no errors, on the **Command Bar**, select the **Go Live** button.
26. Click the drop-down arrow next to the **Save** button on the command bar and select **Save and Close**.

You have now successfully created a marketing email that you can leverage in other areas of the marketing application.

27.7 Exercise 2: Create a Segment in Dynamics 365 Marketing

27.7.1 Task 1: Add some sample Contacts to work with

1. Using the navigation on the left, select Contacts under the Customers Group
2. On the command bar, select **New**.
3. Complete the **New Contact** page as follows.
    - **First Name**: Piper
    - **Last Name**: Smith – Your Initials
    - **Email**: Enter an email address that you can receive mail from.
    - **Address 1 Street 1:** 1989 191st Ave N
    - **Address 1: City**: Seattle
    - **Address 1 State:** WA
    - **Address 1 Zip/Postal:** 98001
4. Once you have completed the contact, select **Save & Close**.
5. Next, we will have you add yourself as a contact, so you have multiple people to work with.
6. On the **Command Bar**, select the **New** button.
7. Complete the second contact as follows:
    - **First Name**: Your First Name
    - **Last Name**: Your Email Address
    - **Email**: Enter an email address that you can receive mail from.
    - **Address 1 Street 1:** 1989 191st Ave N
    - **Address 1: City**: Seattle
    - **Address 1 State:** WA
    - **Address 1 Zip/Postal:** 98001

NOTE: We are using the same address information, to make it easy to recognize the contacts as sample data.

27.7.2 Task 2: Create a Customer Segment

Creating a customer segment will let us define the customers that we want to target different marketing actions towards.

1. Using the navigation on the left, select **Segments** under the **Customers** group.
2. On the command bar, select **New**.
3. Since we had the membership to change as contacts are added, removed, or edited, we will select **New Dynamic Segment** from the menu that appears.
4. In the **Segment Templates** dialog box that opens, select **Skip** to close it and continue to the **New Segment** screen.
5. After the new record opens, select the drop-down arrow next to the **Status reason** field in the record header at the top.
6. In the **Name** field enter **Seattle Customers – Your Initials**.
7. In the segment definition window, select **Add query block**.
8. Notice that the Contact table is selected by default. Do not Change it.
9. Click to select the ghost text **Select attribute**.

10. Enter the word City to filter the list. Choose **Address 1: City** from the list.
11. Leave the next drop-down list set to **Equals**.
12. Select the third drop-down list, which contains the ghost text **Enter text** and type **Seattle**.
13. Select **Save** on the command bar to save your segment.
14. Select **Go Live** to publish the segment.
15. Wait for about a minute and then select **Refresh** on the command bar to refresh the page.
16. You should now see that a **Members** tab has been added.

27.7.3 Task 3: Test your Customer Segment

Now that we have successfully created your segment, let's verify the dynamics segment will populate correctly as contacts are added or removed. To do this we will create a new contact who lives in Seattle.

1. Using the navigation on the left, select **Contacts** under the Customers Group
2. On the command bar, select **New**.
3. Complete the **New Contact** page as follows.
   - **First Name**: Rick
   - **Last Name**: Jones – Your Initials
   - **Email**: Enter an email address that you can receive mail from.
   - **Address 1 Street 1:** 1989 191st Ave N
   - **Address 1: City**: Seattle
   - **Address 1 State:** WA
   - **Address 1 Zip/Postal:** 98001
4. Once you have completed the contact, select **Save & Close**.
5. Using the navigation on the left, select **Segments** under the **Customers** group.
6. Open the **Seattle Customers – Your Initials** segment you created earlier.
7. Select the **Members** tab. Notice that **Rick Jones – Your Initials** should now be present.

IMPORTANT: Since we are working a shared environment and everyone is working in the same system, you will likely see other Contacts in the Dynamic Marketing segment as well. That is OK for purposes of this course.

27.8 Exercise 3: Create a Customer Journey

Now that we have created the marketing content that we want to deliver and defined a segment of customers to target, we are ready to create a Customer Journey to target the customers.

1. Using the navigation on the left, select **Customer Journeys** under the **Marketing Execution** group.
2. Using the command bar, select **New**
3. The **New Customer Journey** page opens with the **Select a Customer Journey Template** dialog box shown. Select **Skip** to start creating the journey from scratch.
4. In the **Audience** area, verify the **Source type** is set to **Segment**.
5. Click in the segment look up below the **Inclusion** drop-down.
6. Enter the text **Seattle** and select the **Seattle Customers** segment you created earlier.
7. On the design canvas, move your cursor between **Start** and **End**. Select the + sign, from the menu that appears, select **Send an email**.
8. Enter the text **Home** and select the **Home Security – Your Initials** marketing email message you created in Exercise 1.
9. Move your cursor after the Send an email action. Select the + sign, from the menu that appears, select **If/Then**.

10. In the **If/Then** area on the left side of the screen, under conditions click in the **Select a source** field.
11. Select the **Home Security – Your Initials** segment.
12. Click in the **Select a Condition** field. Choose **a link has been clicked**.
13. In the **Yes** path, select the + sign. From the menu that appears, select **Create lead**.
14. Do not modify or add anything to the **No** path.
15. Select the General tab located towards the top of the Customer Journey Record. Enter the following information into the **General** tab:
    - **Name**: Seattle Area Fall Promotion – Your Initials
    - **Start date and time**: Enter Todays Date
    - **End date and time**: One Month from Today
    - **Time zone**: Select your local time zone
16. On the command bar, select **Save** to save the work you've done so far.
17. Your journey is now ready to go. To start the journey, publish it by selecting **Go live** on the Command Bar.

27.9 lab: title: 'Lab 2.1: Create and manage a Lead in Dynamics 365 Sales' module: 'Module 2: Learn the Fundamentals of Dynamics 365 Sales'

28 Module 2: Learn the Fundamentals of Dynamics 365 Sales

28.1 Practice Lab 2.1 - Create and manage a Lead in Dynamics 365 Sales

28.2 Objectives

During this exercise, you will be capturing a sales lead for Suzanne Burke. She recently reached out to you and is interested in some of your organization's products and services. Not only will you be capturing the lead in the system, but you will be using the tools available in Dynamics 365 Sales to work the lead through the qualification process.

28.3 Lab Setup

- **Estimated Time**: 15 minutes

28.4 Instructions

1. If is not open already, open the **Dynamics 365 Sales Hub** application.
2. Using the navigation on the left side of the screen, select **Leads**.
3. From the **My Open Leads** view, Select the **New** button on the Command bar.
4. Complete your new lead record as follows:
    - **Topic:** Looking for New Equipment – Your Initials
    - **First Name:** Suzanne
    - **Last Name:** Burke
    - **Job Title:** CFO
    - **Business Phone:** 888 555-8715
    - **Email:** Suzanne@contososample.com
    - **Company:** Contoso - Washington
    - **Street 1:** 1989 Smith Ave
    - **City:** Seattle

- **State/Province:** WA
- **ZIP/Postal Code:** 98001

5. Select the **Save** button on the Command Bar to save the new the Lead and leave it open.
6. Notice the **Lead to Opportunity** Business Process Flow at the top of the record. Click the **Qualify Stage** to select it. Complete the stage as follows:
   - **Purchase Timeframe:** This Quarter
   - **Estimated Budget:** 25000
   - **Purchase Process:** Individual
   - **Identify Decision Maker:** Completed
7. Go to the **Record Timeline** in the middle of the screen and click the **Plus Sign Icon** to add a new activity.
8. From the menu that appears, select **Phone Call**.
9. On the **Quick Create Phone Call** screen, set the **Subject** field to **Initial Phone Call** and leave the rest of the information as is.
10. Click the **Save and Close** button.
11. Notice the **Initial Phone Call** activity is now displayed on the **Record Timeline**. Hover over the activity and select the close activity **Check Mark Icon** to mark the phone call as completed.
12. On the **Close Phone Call** window, select the **Close** button
13. Next you will qualify the lead record. This will create a related Opportunity record and move to the next stage of the Lead to Opportunity sales process. On the **Command Bar**, select the **Qualify** button.
14. After the system qualifies the lead, a new Opportunity record will be created, and the business process will advance to the **Develop** stage. Select the **Qualify** stage to view the original lead record.
15. Select the **Develop** stage to return to the opportunity.

28.5 lab: title: 'Lab 2.2: Create and manage an Opportunity in Dynamics 365 Sales' module: 'Module 2: Learn the Fundamentals of Dynamics 365 Sales'

29 Module 2: Learn the Fundamentals of Dynamics 365 Sales

29.1 Practice Lab 2.2 - Create and manage an Opportunity in Dynamics 365 Sales

29.2 Objectives

During this exercise, you will be manually capturing a sales opportunity for an existing customer named Jim Glynn. He works for a company called Adventure Work. Not only will you be capturing the opportunity in the system, but you will be using the tools available in Dynamics 365 Sales to work through and close the opportunity.

29.3 Lab Setup

- **Estimated Time**: 25 minutes

29.4 Instructions

In this exercise, you will become familiar with how to access the different Dynamics 365 Customer engagement applications by using the Dynamics 365 Home screen.

1. If it not open already, open the **Dynamics 365 Sales Hub** application.
2. Using the navigation on the left side of the screen, select **Opportunities**.
3. On the My Open Opportunities view, select the **New** button to create a new opportunity.
4. Complete the opportunity information as follows:

- **Topic:** Wants to upgrade their existing equipment – Your Initials
- **Account:** Adventure Works
- **Contact:** Jim Glynn
- **Purchase Timeframe:** This Quarter
- **Budget Amount:** 50,000
- **Purchase Process:** Individual

5. On the **New Opportunity Header** at the top of the record, select the down arrow next to the owner field.
6. Complete as follows:
   - **Est. Close Date:** Two days from today
   - **Est Revenue:** 50,000
7. On the **Command Bar** at the top, select the **Save and Close** button.
8. On the **My Open Opportunities** view, locate and open the **Looking for new equipment** opportunity that was created when you qualified the lead in the previous exercise.
9. Notice the record is already in the **Develop** phase of the opportunity of the Lead to Opportunity process.
10. On the **Looking for new equipment opportunity header** at the top of the record, select the down arrow next to the owner field.
11. Complete as follows:
    - **Est. Close Date:** Tomorrow
    - **Est Revenue:** 70,000
12. In the Stakeholders sub-grid, notice the Suzanne Burke is already defined as a stakeholder.
13. On the Sales Team sub-grid, select the **Vertical Ellipsis**. From the menu that appears select **New Connection**.
14. Search for and select your user record. Once completed, click the **Add** button.
15. On the Competitors sub-grid, select the **Vertical Ellipsis**. From the menu that appears select **Add Existing Competitor**.
16. On the **Lookup Record** screen, select **New Record**, and then select **Competitors**.
17. In the **Quick Create Competitor** screen, set the **Name** field to **Coho Technologies**.
18. Select the **Save and Close** button.
19. **Coho Technologies** should be selected in the lookup record window. Click the **Add** button to finishing adding the competitor.
20. Click to select the **Develop** stage on the **Lead to Opportunity** business process flow set both the **Identify Stakeholders** and **Identify Competitors** steps to **Completed**.
21. Click the **Next Stage** button to advance to the **Propose** stage.
22. On the **Propose** stage, mark all four steps as **Completed**, and click the **Next Stage** button to advance to the **Close** stage.
23. On the **Close** stage, mark the **Complete Final Proposal**, **Present Final Proposal**, **Send Thank You**, and **File De-brief** steps as **Completed**.
24. Set **Confirm Decision Date** to **Todays date**.
25. Click the **Finish** button.
26. Now that you have completed the business process, you need to close the opportunity. On the **Command Bar** of the opportunity, select the **Close as Won** button.
27. On the **Close Opportunity** screen, click the **OK** button to finish closing the opportunity record.

29.5 lab: title: 'Lab 2.3: Dynamics 365 Sales capstone lab' module: 'Module 2: Learn the Fundamentals of Dynamics 365 Sales'

30 Module 2: Learn the Fundamentals of Dynamics 365 Sales

30.1 Practice Lab 2.3 - Dynamics 365 Sales capstone lab

30.2 Lab Scenario

ABC company specializes in the manufacturing, selling, installation and servicing of security equipment. Their products include both indoor and outdoor security cameras, moisture and fire sensors, monitoring services, and more.

ABC company uses Dynamics 365 applications to engage with all their customers across different areas of their organization from sales to service.

Sales and Marketing

ABC Company markets to their residential customers directly through targeted marketing campaigns. Customers are targeted based on their city, and other factors. Marketing materials are sent through email and based on their interaction with the email are guided accordingly.

While some of their smaller products are sold through retailers, most products are sold direct to consumers by their internal sale staff.

Internally, they focus on two key areas:

- **Residential Customers:** Residential customers are typically looking for either individual components, or to buy a whole home solution. These sales cycles are typically shorter and originate from social media, websites, referrals, or direct contact from the prospect. Since residential customers are typically more focused on specific products or smaller installs, their sales cycles typically last a few days or weeks.
- **Enterprise Customers:** Enterprise sellers focus on customers who need a more specialized and tailored business solutions. Enterprise sales typically span multiple locations with linked communication, and often require multiple resources to complete the project. These sales cycles are typically longer and have many more moving parts.

It is important that all of ABC company's sellers have the tools, resources, and guidance necessary regardless of their focus area while selling to their customers.

System Installation:

The installation process for purchased security equipment varies based on the type of customer that was sold.

- **Residential Customers:** Since residential installs typically take less than a day, they are done by internal employees. After the sale is made, a work order is created, and a qualified technician is identified and scheduled to perform the install.
- **Enterprise Customers:** Enterprise deploys can take months, and require a project manager to oversee the day-to-day operations. This includes creating project plans, defining project teams, and scheduling resources.

Service and Support:

Once the systems are installed, ABC Company provides support after the sale. If a customer has an issue, they can contact customer support. An agent will attempt to work with the customer remotely to resolve their issue. If their issue cannot be resolved remotely, the support agent can escalate the issue to a work order that will be scheduled and worked on by a qualified field technician.

30.3 Objectives

You are working as a sales representative on ABC company's residential sales side. While many of your leads come from company sponsored events, marketing campaigns, and purchased lists you still often receive inquiries from customers directly. When you receive those inquiries, you need to manually enter and work those the lead through the sales lifecycle.

You recently took a call from someone named Piper Smith. There has been a series of thefts in her neighborhood, and she would like to purchase some home security equipment. You are going to enter the lead from piper into the system, attempt to qualify her, and advance her through the sales cycle.

Upon completion of the lab, you will have completed the following:

- Enter a lead into Dynamics 365 Sales
- Qualify and convert a lead into a sales opportunity.
- Manage daily activities associated with an opportunity.
- Add a quote to an opportunity.
- Close a Sales Opportunity.
- Generate an invoice.

30.4 Lab Setup

- **Estimated Time**: 30 minutes

30.5 Instructions

30.6 Exercise 1: Create and Qualify a Lead in Dynamics 365 Sales

30.6.1 Task 1: Create a new Lead

1. If necessary, open an InPrivate browser and navigate to Https://home.Dynamics.com
2. When prompted, log in with the user credentials provided to you by the instructor.
3. From the list of applications that appears, select **Sales Hub.**
4. Using the navigation on the left side of the screen, select **Leads**.
5. To view all the current sales leads in the system, select the down arrow next to **My Open leads**, from the menu that appears select **Active Leads**.
6. To navigate back to your list of leads, select the down arrow next to Active Leads, and from the menu that appears, select **My Open Leads**.
7. Next, we will create a new lead for Piper Smith, from the **My Open Leads** view, Select the **New** button on the Command bar.
8. Complete your new lead record as follows:
   - **Topic:** Looking for Security Equipment – "Your Name"
   - **First Name:** Piper
   - **Last Name:** Smith - Your Initials
   - **Mobile Phone:** 888 555-1762
   - **Email:** piper@sample.com
   - **Street 1:** 1989 191st Ave N
   - **City:** Seattle
   - **State/Province:** WA
   - **ZIP/Postal Code:** 98001
9. Select the **Save** button on the Command Bar to save the new the Lead and leave it open.
10. Notice the **Lead to Opportunity** Business Process Flow at the top of the record. Click the **Qualify Stage** to select it. Complete the stage as follows:
    - **Purchase Timeframe:** This Quarter
    - **Estimated Budget:** 10000
    - **Purchase Process:** Individual
    - **Identify Decision Maker:** Completed
11. Click the **X** on the stage window to close the window.

12. Go to the record **Timeline** in the middle of the screen and click the **Plus Sign Icon** to add a new activity.
13. From the menu that appears, select **Phone Call**.
14. On Quick Create Phone Call Screen, complete the phone call as follows:
    - **Subject:** Looking for home security equipment
    - **Phone Number:** 888 555-1762
    - **Direction:** Incoming
    - **Description:** After some instances in her neighborhood, she is looking to purchase a security system.
15. Click the **Save and Close** button.
16. Notice the **Looking for home security equipment** activity is now displayed on the record **Timeline**. Hover over the activity and select the close activity **Check Mark Icon** to mark the phone call as completed.
17. On the **Close Phone Call** window, verify the state is set to **Completed**, and select the **Close** button.

IMPORTANT: Do not close the lead record. Leave it open as we will use it in the next task.

30.6.2 Task 2: Qualify the Lead as an Opportunity

After visiting with Piper, you identify that there is enough interest on her end to justify moving forward, and that we have products and services that would benefit her. Next you will qualify the lead record. This will create a related Opportunity record and move to the next stage of the Lead to Opportunity sales process.

1. On the **Command Bar**, select the **Qualify** button.
2. After the system qualifies the lead, a new Opportunity record will be created, and the business process will advance to the **Develop** stage. Select the **Qualify** stage to view the original lead record.
3. Select the **Develop** stage to return to the opportunity.
4. Click the **Save & Close** button to close the Opportunity record that was created.

30.7 Exercise 2: Manage a sales opportunity in Dynamics 365 Sales

Now that we have successfully qualified the lead as an opportunity, it is time to work the opportunity through its lifecycle.

30.7.1 Task 1: Manage a Sales Opportunity & Create a Quote

1. Using the navigation on the left side of the screen, select **Opportunities**.
2. Select the drop-down arrow next to the **My Open Opportunities** view, from the menu that appears, select **Open Opportunities**.
3. On the Command Bar, select Show Chart. Notice that the Top Customers chart displays based on the Opportunity table.
4. Select the drop-down arrow next to Top Customers, from the menu that appears, select **Sales Pipeline**.
5. Select the Qualify portion of the Funnel. Notice that the list of Opportunities changes to display on the opportunities that in the qualify stage.
6. Click anywhere in the white space of the chart to display all open opportunities again.
7. Select the drop-down arrow next to the **Open Opportunities** view, from the menu that appears, select **My Open Opportunities**. The **Looking for Security Equipment – Your Initials** will likely be the only item that appears, and the chart should reflect this.
8. On the **Command Bar**, select the **Hide Chart** button.
9. Open the **Looking for Security Equipment – Your Initials** that was created when you qualified the lead earlier. Notice the record is already in the **Develop** phase since it was created from a previously qualified Lead.

10. On the **Looking for Security Equipment – Your Initials** opportunity header at the top of the record, select the down arrow next to the owner field.
11. Complete as follows:
    - **Est. Close Date:** Tomorrow
    - **Est Revenue:** 12,500.00
12. Go to the **Record Timeline** in the middle of the screen and click the **Plus Sign Icon** to add a new activity.
13. From the menu that appears, select **Appointment**.
14. On the **Quick Create: Appointment** screen, complete as follows:
    - **Subject:** Quick Meeting – "Your Initials"
    - **Location:** Online
    - **Start Time**: Tomorrow @ 10:00 AM
    - **End Time:** Tomorrow @ 10:30 AM
15. On the Command bar, select **Save & Close**
16. On the Lead to Opportunity business process flow, select the **Develop** Stage. Notice that you need to Identify Stakeholders and Competitors.
17. Click the **X** on the stage window to close it so you can continue working.
18. In the **Stakeholders** sub-grid, notice **Piper** is already defined as a stakeholder.
19. On the Sales Team sub-grid, select the **Vertical Ellipsis**. From the menu that appears select **New Connection**.
20. In the **Search** field, enter the text **System** and select the **System Administrator** record. Once completed, click the **Add** button. System Administrator should now appear on the sale team. If not, select the **Refresh** button on the command bar.
21. On the Competitors sub-grid, select the **Vertical Ellipsis**. From the menu that appears select **Add Existing Competitor**.
22. On the **Lookup Record** screen, select **New Record**, and then select **Competitors**.
23. In the Quick Create: **Competitor** screen, set the **Name** field to **Coho Security – "Your Initials"**.
24. Select the **Save and Close** button.
25. Ensure that the Coho Security record you just created is selected, select the **Add** button.
26. Click to select the **Develop** stage on the **Lead to Opportunity** business process flow set both the **Identify Stakeholders** and **Identify Competitors** steps to **Completed**.
27. Click the **Next Stage** button to advance to the **Propose** stage.
28. On the **Propose** stage, mark **Identify Sales Team** as **Completed**.
29. Click the **X** on the Propose stage to close the stage window.
30. On the opportunity record, select the **Quotes** tab.
31. On the Quotes sub-grid, click the **New Quote** button.

IMPORTANT: Sine these environments have multiple first party apps deployed it is possible that the quote form that is currently displayed is not the correct one for sales related functionality. If the text under the quote name **Looking for Security Equipment – Your Initials** reads: **Quote . Quote**, the correct form is loaded. If it reads, **Quote . Field Service Information**, you will need to switch it. If you need to change it, Select the drop-down arrow next to **Quote . Field Service Information**. From the menu that appears select **Quote**.

30.7.2 Task 2: Manage a Quote

Now that you have a related quote, you will prepare the quote to present it to a customer. Under normal circumstances, we would likely add products to the quote record before it is delivered to a customer. Because we are working in shared environments, we are going to skip the adding of quote lines and walk through the delivery of the quote.

1. On the **Command Bar**, select the **Activate Quote** button to activate the Quote.
2. You now need to select a Price List to attach to the Opportunity. Under **Price List** on the left pane, select the Search icon and then select **Default Price List** from the options.
3. Now that the quote has been created, let's update the opportunity record to reflect the new data. On the Quote record, select the **Looking for Security Equipment – "Your name"** opportunity in the **Opportunity** field under the **Sales Information** section. The opportunity record should open on your screen.
4. On the Opportunity record, select the **Propose** Stage.
5. Mark **Develop Proposal**, **Complete Internal Review**, and **Present Proposal** as **Completed**, and click the **Next Stage** button to advance to the **Close** stage.
6. On the **Close** stage, mark the **Complete Final Proposal**, **Present Final Proposal**, **Send Thank You**, and **File De-brief** steps as **Completed**.
7. Set **Confirm Decision Date** to **Todays date**.
8. Click the **Finish** button.
9. Select the **X** on the Close stage window to close the window.
10. Select the **Quotes** Tab.
11. Open the **Looking for Security Equipment – Your Initials** Quote.
12. On the **Command Bar**, select the **Create Order** button.
13. On the Create Order Window, complete it as follows:
    - **Status Reason:** Won
    - **Date Won:** Today's Date
    - **Close Opportunity:** Yes
    - **Calculate actual Revenue from quotes:** No
    - **Actual Revenue:** $12,500
14. Select the **OK** button

The system creates a new sales order related to the item. In addition, it will close both the quote record, and the related opportunity record. Once everything has been completed the Order will be opened on your screen. Leave the order open.

30.7.3

30.7.4 Task 3: Manage the Order and Invoice

Now that you have create a sales order, we will close the order and generate an invoice. Under normal circumstances, products from the quote record would be added to the sales order. Since we are working in shared environments, we are going to move forward as if there were products attached.

1. On the **Command Bar**, select the **Fulfill Order** button.
2. On the Fulfill Order screen, complete is at follows:
    - **Status Reason:** Complete
    - **Date Fulfilled:** Todays Date
3. Select the **Fulfill** button.
4. On the **Command Bar** of the order, select the **Create Invoice** button.

5. Once the Invoice record is open, select the **Invoice Paid*.

30.8 lab: title: 'Lab 3.1: Create and publish a Knowlege Article in Dynamics 365 Customer Service' module: 'Module 3: Learn the Fundamentals of Dynamics 365 Customer Service'

31 Module 3: Learn the Fundamentals of Dynamics 365 Customer Service

31.1 Practice Lab 3.1 - Create and publish a Knowlege Article in Dynamics 365 Customer Service

31.2 Lab Setup

- **Estimated Time**: 15 minutes

31.3 Instructions

1. If is not open already, open the **Dynamics 365 Customer Service Hub** application.
2. Using the navigation on the left side of the screen, select **Knowledge Articles**.
3. To easily see the which articles are in different stages, select the drop-down arrow next to **My Active Articles**.
4. Select **Draft Articles**. You will likely see two articles in draft mode.
5. Select **Approved Articles**. You should see at least one approved article.
6. Switch back to **My Active Articles**
7. On the **Command Bar**, select the **New** button.
8. Complete the article as follows:
   - **Title:** Item Broken on Arrival – your initials
   - **Keywords:** Broken Item, Damaged, Return
   - **Description:** Helps resolve issues when an Item arrives damaged.
9. Enter the following text into the Content Designer text.

   Item Arrived Damaged

   When an item arrives damaged, do the following:

   1. Open our web portal
   2. Locate your order record
   3. Select return Item
   4. Select damaged for the reason
   5. Click Print

Once we have received the returned / damaged item, your account will be credited back the amount.

NOTE: You can add formatting to the text if desired.

10. On the **Command Bar**, select the **Save** button to save the Knowledge Article and leave it open.
11. On the **New Process**, select the **Author** stage, set the **Article Subject** field to **Delivery** (Located under Service).
12. Set the **Mark for Review** field to **Completed**.
13. Select **Next Stage** button to advance to **Review** stage.
14. On the **Command Bar**, select the **Save and Close** button to save your changes and close the article.

After the author initially creates the record, it will generally go through an approval process before it is live. Next, we will act as an approver and approve the article.

15. In the Knowledge Articles, switch the view to **Proposed Articles** to see which articles need your approval.
16. Open the **Item Broken on Arrival – your initials** article you just created.
17. On the **New Process**, select the **Review** stage. Set the **Review** field to **Approved**.
18. You will be asked to confirm the article approval, select **OK**.
19. Click the **Next Stage** button to advance to the **Publish** stage.
20. On the **Command Bar** at the top of the article, select the **vertical ellipsis** at the left of the command bar. From the menu that appears, select **Relate Product**.
21. In the **Relate Product** window, select **Office 365 for Enterprise (Sample).**
22. Click the **Associate** button.
23. On the **New Process**, select the **Publish** stage.
24. Mark the **Set Product Associations** as **Complete**.
25. Set the **Expiration Date** to **one year from today at 12:00 AM**.
26. Click the **Finish** button to complete the process.
27. On the **Command Bar** for the article, click the **Publish** button.
28. Confirm that the following is selected:
    - **Publish:** Now
    - **Published Status:** Published
    - **Expiration Date:** One year from today at 12:00 AM
    - **Expiration State:** Expired
    - **Expiration Status:** Expired
    - **Publish Approved translations:** No

31.4 lab: title: 'Lab 3.2: Create and manage Cases in Dynamics 365 Customer Service' module: 'Module 3: Learn the Fundamentals of Dynamics 365 Customer Service'

32 Module 3: Learn the Fundamentals of Dynamics 365 Customer Service

32.1 Practice Lab 3.2 - Create and manage Cases in Dynamics 365 Customer Service

32.2 Lab Setup

- **Estimated Time**: 10 minutes

32.3 Instructions

1. If is not open already, open the **Dynamics 365 Customer Service Hub** application.
2. Using the navigation on the left side of the screen, select **Cases**.
3. On the **Command Bar**, select the **New** button to create a new case record.
4. Complete the new case record as follows:
    - **Case Title:** Item arrived Damaged – Your Initials
    - **Customer:** Alpine Ski House (Sample)

- **Origin:** Phone

5. Select the **Save** button to save the record and leave it open.
6. On the **Phone to Case Process**, select the **Identify** stage and set the **Find Contact Field** to **Dwayne Elijah**.
7. Click the **X** on the **Identify** stage fly out window to remove the window so you can continue working.
8. Using the **Record Timeline**, select the **Plus Sign Icon**, to create a new activity.
9. From the menu that appears, select **Phone Call**.
10. Set the **Subject** field to **Return Call to Patrick – Your Initials** and leave the rest of the fields as is.
11. Click the **Save and Close** button.
12. On the **Phone to Case Process**, select the **Identify** stage.
13. Click the **Next Stage** button to advance to the **Research** stage.
14. Click the **X** on the **Research** stage fly out window to remove the window so you can continue working.
15. On the right side of the case screen, locate and select the **Knowledge** book Icon. (It will be directly below the wrench icon).
16. Notice that the title of the case you created is automatically provided as the search text. Locate and select the **Item Broken on Arrival** article you created earlier.
17. The full contents of the article will be displayed, select the **Link this article to the current record** icon. Verify that the text **Linked to Case** appears.
18. Now we will get ready to resolve the case. On the **Record Timeline**, hover over the **Return call to Patrick** Phone Call activity you created earlier. Select the mark complete **Check Mark Icon** to complete the activity.
19. On the **Close Phone Call** screen, select the **Close** button. Verify the activity says **Closed**.
20. On the **Phone to Case Process**, select the **Research** stage, and select **Next Stage** to advance to the **Resolve** stage.
21. On the **Resolve** stage, select the **Finish** button to complete the process flow.
22. On the **Command Bar** for the case record, select the **Resolve Case** button.
23. On the **Resolve Case** window, set the **Resolution** field to **Knowledge Article**.
24. Select the **Resolve** button to complete the process.

32.4 lab: title: 'Lab 3.3: Dynamics 365 Customer Service capstone lab' module: 'Module 3: Learn the Fundamentals of Dynamics 365 Customer Service'

33 Module 3: Learn the Fundamentals of Dynamics 365 Customer Service

33.1 Practice Lab 3.3 - Dynamics 365 Customer Service capstone lab

33.2 Lab Scenario

ABC company specializes in the manufacturing, selling, installation and servicing of security equipment. Their products include both indoor and outdoor security cameras, moisture and fire sensors, monitoring services, and more.

ABC company uses Dynamics 365 applications to engage with all their customers across different areas of their organization from sales to service.

Sales and Marketing

ABC Company markets to their residential customers directly through targeted marketing campaigns. Customers are targeted based on their city, and other factors. Marketing materials are sent through email and based on their interaction with the email are guided accordingly.

While some of their smaller products are sold through retailers, most products are sold direct to consumers by their internal sale staff.

Internally, they focus on two key areas:

- **Residential Customers:** Residential customers are typically looking for either individual components, or to buy a whole home solution. These sales cycles are typically shorter and originate from social media, websites, referrals, or direct contact from the prospect. Since residential customers are typically more focused on specific products or smaller installs, their sales cycles typically last a few days or weeks.
- **Enterprise Customers:** Enterprise sellers focus on customers who need a more specialized and tailored business solutions. Enterprise sales typically span multiple locations with linked communication, and often require multiple resources to complete the project. These sales cycles are typically longer and have many more moving parts.

It is important that all of ABC company's sellers have the tools, resources, and guidance necessary regardless of their focus area while selling to their customers.

System Installation:

The installation process for purchased security equipment varies based on the type of customer that was sold.

- **Residential Customers:** Since residential installs typically take less than a day, they are done by internal employees. After the sale is made, a work order is created, and a qualified technician is identified and scheduled to perform the install.
- **Enterprise Customers:** Enterprise deploys can take months, and require a project manager to oversee the day-to-day operations. This includes creating project plans, defining project teams, and scheduling resources.

Service and Support:

Once the systems are installed, ABC Company provides support after the sale. If a customer has an issue, they can contact customer support. An agent will attempt to work with the customer remotely to resolve their issue. If their issue cannot be resolved remotely, the support agent can escalate the issue to a work order that will be scheduled and worked on by a qualified field technician.

33.3 Objectives

Many times, customers may encounter issues with their equipment. When issues are encountered, they are reported to ABC company's help desk. Issues can be reported in multiple ways. In some cases, the equipment can proactively report issues. As issues are reported, agents attempt to resolve them remotely. If they cannot, a field technician will be dispatched to resolve the issue. Recently, you have been fixing a lot of sensors that have gone out. You noticed that it was due to a software bug. You want to create a knowledge article that other agents can reference when they encounter the same issue.

As a help desk agent, you are responsible for working on issues that are reported by customers. You recently just took a call from Piper Smith. Piper is reporting that one of the sensors on her system is not working. You need to log the call from piper and attempt to locate a resolution to her problem.

Upon completion of the lab, you will have completed the following:

- Created a knowledge Article
- Managed Cases using Customer Service Hub.
- Created and log a Case.
- Manage a case record through its lifecycle.

33.4 Lab Setup

- **Estimated Time**: 45 minutes

33.5 Instructions

33.6 Exercise 1: Create and Publish a Knowledge Article

33.6.1 Task 1: Create a Knowledge Article

1. If is not open already, open the **Dynamics 365 Customer Service Hub** application.
2. Using the navigation on the left side of the screen, select **Knowledge Articles**.
3. To easily see the which articles are in different stages, select the drop-down arrow next to **My Active Articles**.
4. Select **Draft Articles**. You will likely see two articles in draft mode.
5. Us the view selector to select **Approved Articles**. You should see at least one approved article.
6. Use the view selector to switch back to **My Active Articles**
7. On the **Command Bar**, select the **New** button.
8. Complete the article as follows:
   - **Title:** Sensor is not working – Your Initials
   - **Keywords:** Sensor, Damaged, Not Working
   - **Description:** Helps work through scenarios where a sensor is not working.
9. Enter the following text into the **Content Designer** text.

   Sensor is not currently working

   When a sensor is not working as it should, do the following:

   1. Locate and replace the batteries on the device.
   2. Press and hold the power button for 3 seconds.
   3. The device will open in admin mode.
   4. Press and hold the pair button until the light changes from red to blue.
   5. Press reset button.

   Once the device reboots, it will be back online.
10. In the content editor, select the Sensor is not currently working text
11. Change the font size to **22** and select the **Bold** button.
12. On the **Command Bar**, select the **Save** button to save the Knowledge Article and leave it open.
13. On the **New Process**, select the **Author** stage, set the **Article Subject** field to **Service**.
14. Set the **Mark for Review** field to **Completed**.
15. Select **Next Stage** button to advance to **Review** stage.
16. On the **Command Bar**, select the **Save and Close** button to save your changes and close the article.

33.6.2 Task 2: Manage an article through the approval process

In most organizations, after the article author creates the record, it goes through an approval process before it is live. Most of the time this is done by a different individual. In this instance, we will act as an approver.

1. In the Knowledge Articles, switch the view to **Proposed Articles** to see which articles need your approval.
2. Open the **Sensor is not working – your initials** article you just created.
3. On the **New Process**, select the **Review** stage. Set the **Review** field to **Rejected**.
4. On the Reject knowledge Article screen, enter the text **These steps do not work, when I try to replicate it.**
5. Select the **Reject** button
6. Select the **Save & Close** to close the article record.

7. Using the **view selector**, change the view to **My Active Articles**.
8. Open the **Sensor is not working – your initials** record.
9. Once the record is open, select the **Summary** tab.
10. On the record **Timeline**, notice a note that indicated that the article was rejected and why it was rejected.
11. Select the **Content** tab
12. In the **Content** field, place your cursor before the word **Press** on step 5.
13. Press your **Enter** key.
14. Enter the text press the **Confirm** button.
15. On the **Command Bar**, select the **Save & Close** button.
16. Use the **View Selector** and switch the view to **Proposed Articles.**
17. Open the **Sensor is not working – Your Initials** article.
18. On the **New Process** business process flow, select the **Review** stage.
19. Change the Status to **Approved**.
20. You will be asked to confirm the article approval, select **OK**.

33.6.3 Task 3: Approve the Knowledge Article

Now that the article has been approved, we will publish it so that it will be available for people working on cases.

1. Click the **Next Stage** button to advance to the **Publish** stage.
2. Mark the **Set Product Associations** as **Complete**.
3. Set the **Expiration Date** to **one year from today at 12:00 AM**.
4. Click the **Finish** button to complete the process.
5. On the **Command Bar** for the article, click the **Publish** button.
6. Confirm that the following is selected:
   - **Publish:** Now
   - **Published Status:** Published
   - **Expiration Date:** One year from today at 12:00 AM
   - **Expiration State:** Expired
   - **Expiration Status:** Expired
7. Click the **Publish** button to publish the article.

33.7 Exercise 2: Manage a support case through its lifecycle

33.7.1 Task 1: Create and manage a case

1. If is not open already, open the **Dynamics 365 Customer Service Hub** application.
2. Using the navigation on the left side of the screen, select **Dashboards**. This will open the **Tier 1** dashboard.
3. On the **Command Bar**, select the **Show Visual Filter** button.
4. On the **Case Mix (By Origin)** chart, select **Phone**. Notice that the Cases filter to only display Phone Cases.
5. Select **Clear Al** to clear the filter.
6. On the **Cases by Priority** chart, select **High**. Notice that the case list will be further filtered to include High priority cases.

7. Click the first case that appears in the list to open it. After the case open, click the **Save & Close** button on the command bar to close the case and return to the **Tier 1** Dashboard.
8. Remove any currently applied filters, by selecting **Clear All**.
9. Additional dashboards provide further details about the current case load. You can work with other dashboards by using the dashboard selector. Change the dashboard from **Tier 1 Dashboard** to **Tier 2 Dashboard**.

Now that you are familiar with some of the different views and dashboards, we will create a new case record to assist Piper with her problem.

10. Using the navigation on the left side of the screen, select **Cases**.
11. On the **Command Bar**, select the **New** button to create a new case record.
12. Complete the new case record as follows:
    - **Case Title:** Sensor is not working – Your Initials
    - **Customer:** Piper Smith
    - **Origin:** Phone
    - **Description:** Piper is reporting that one of the sensors that she received is not working properly.
13. Select the **Save** button to save the record and leave it open.
14. Using the **Record Timeline**, select the **Plus Sign Icon**, to create a new activity.
15. From the menu that appears, select **Phone Call**.
16. On the **Quick Create: Phone Call** form complete the activity as follows:
    - **Subject:** Return Call to Piper
    - **Direction:** Outgoing
    - **Phone number:** 888 555-1762
    - **Duration:** 15 minutes.
17. Click the **Save and Close** button.
18. On the **Phone to Case Process**, select the **Identify** stage.
19. Click the **Next Stage** button to advance to the **Research** stage.
20. Click the **X** on the **Research** stage fly out window to remove the window so you can continue working.
21. Using the **Record Timeline**, select the **Plus Sign Icon**, to create a new activity.
22. From the menu that appears, select **Task**.
23. On the **Quick Create: Phone Call** form complete the activity as follows:
    - **Subject:** Research Pipers issue
    - **Description:** Leveraging the knowledge base to research Pipers Issue.
    - **Duration:** 30 minutes.
24. Click the **Save and Close** button.
25. On the right side of the case screen, locate and select the **Knowledge** book Icon. (It will be directly below the wrench icon).
26. Notice that the title of the case y is automatically being used as the search text. Locate and select the **Sensor is not working – your initials** article you created earlier.
27. The full contents of the article will be displayed, select the **Thumbs Up** icon at the bottom of the article to indicate the article was helpful.
28. Select the **Link this article to the current record** icon. Verify that the text **Linked to Case** appears.

33.7.2 Task 2: Close the case

Now that we have identified a resolution to the customers problem, we will get ready to resolve the case. The first step in closing a case is to close any open activities that were associated with it.

1. On the cases record **Timeline**, hover over the **Research Pipers Issue task** that you created earlier**.** Select the mark complete **Check Mark Icon** to complete the activity.
2. On the **Close Task** screen, verify the stat is Completed and select the **Close** button. The status of the task should say **Closed**.
3. Hover over the **Return call to piper Phone Call** you created earlier**.** Select the mark complete **Check Mark Icon** to complete the activity.
4. On the **Close Phone Call** screen, verify the **State** is **Completed** and the **Status** is **Made**. Select the **Close** button. Verify the activity appears as closed on the Timeline.
5. On the **Phone to Case Process**, select the **Research** stage, and select **Next Stage** to advance to the **Resolve** stage.
6. On the **Resolve** stage, select the **Finish** button to complete the process flow.
7. On the **Command Bar** for the case record, select the **Resolve Case** button.
8. On the **Resolve Case** window, set the **Resolution** field to **Knowledge Article**.
9. Verify that the **Total Time** and **Billable Time** fields are set to **45 minutes** (This represents the total time spent on both the Phone Call and Task activities added to the record.)
10. Select the **Resolve** button to complete the process.

33.8 lab: title: 'Lab 4.1: Creating Work Orders in Dynamics 365 Field Service' module: 'Module 4: Learn the Fundamentals of Dynamics 365 Field Service'

34 Module 4: Learn the Fundamentals of Dynamics 365 Field Service

34.1 Practice Lab 4.1 - Creating Work Orders in Dynamics 365 Field Service

34.2 Lab Setup

- **Estimated Time**: 10 minutes

34.3 Instructions

1. Using the navigation on the left, select **Work Orders**.
2. On the **Command Bar**, select the **New** button to create a new Work Order.
3. Complete the Work Order details as follows:
    - **Service Account:** Adventure Works
    - **Work Order Type**: Service
    - **Price List:** Default Price List
    - **Taxable:** No
4. Select the **Settings** tab.
5. Set the **Service Territory** field to **WA**.
6. Under **Preferences**, configure the time preferences as follows:
    - **Time from Promised:** Today @ 9:00 AM
    - **Time to Promised:** Today @ 11:00 AM
7. Select **Save**.

8. Note the work order number and write it down.
9. Select **Save and Close** to save you changes and exit the new work order.

34.4 lab: title: 'Lab 4.2: Schedule Items in Dynamics 365 Field Service' module: 'Module 4: Learn the Fundamentals of Dynamics 365 Field Service'

35 Module 4: Learn the Fundamentals of Dynamics 365 Field Service

35.1 Practice Lab 4.2 - Schedule Items in Dynamics 365 Field Service

35.2 Lab Setup

- **Estimated Time**: 20 minutes

35.3 Instructions

1. If is not open already, open the **Dynamics 365 Field Service** application.
2. Using the navigation on the left, select **Work Orders**.
3. On the **Command Bar**, select the **New** button to create a new Work Order.
4. Complete the Work Order details as follows:
    - **Service Account:** A. Datum Corporation (sample)
    - **Work Order Type:** Service
    - **Price List:** Default Price List
    - **Taxable:** No
    - **Primary Incident Type:** Unit Overheating
5. Select **Save** to save you changes.
6. On the **Command Bar** of the **Work Order**, select the **Book** button. This will open the **Schedule Assistant.**
7. You should be presented with options for scheduling the item. Select the **Ryan Brim** record.
8. In the **Create Resource Booking** window, set the **Start Time** to the top of the next hour.
9. Set the **End Time** to the **2.5 hours** after that.
10. Select the **Book & Exit** button to book the item and leave the scheduling window.
11. Once back on the Work Order click the **Save and Close** button from the Command Bar.
12. Using the left navigation, select **Schedule Board**.
13. At the bottom of the screen in the requirements panel, select **Unscheduled Work Orders**.
14. Select the **Adventure Works** Work Order you created earlier using the work order number you wrote down. From the options that appear select **Find Availability**.
15. This will open the **Schedule Assistant.**
16. You should be presented with options for scheduling the item. Select the Bob Kozak record.
17. In the **Create Resource Booking** window, set the **Start Time** to the top of the next hour.
18. Set the **End Time** to the **2.5 hours** after that.
19. Select the **Book & Exit** button to book the item and leave the scheduling window.
20. At times, you may need to reschedule a work order based on technician conflicts or other items. This can be easily done by dispatchers leveraging the schedule board.

21. Click in search resources box on the schedule board (Located right above the resource name column), enter Ryan and locate the work order that is scheduled for Ryan later today.
22. Right-click on the work order, and from the menu that appears, select **Substitute Resource**, select the **Find Substitution** button**.**

35.4 lab: title: 'Lab 4.3: Dynamics 365 Field Service capstone lab' module: 'Module 4: Learn the Fundamentals of Dynamics 365 Field Service'

36 Module 4: Learn the Fundamentals of Dynamics 365 Field Service

36.1 Practice Lab 4.3 - Dynamics 365 Field Service capstone lab

36.2 Lab Scenario

ABC company specializes in the manufacturing, selling, installation and servicing of security equipment. Their products include both indoor and outdoor security cameras, moisture and fire sensors, monitoring services, and more.

ABC company uses Dynamics 365 applications to engage with all their customers across different areas of their organization from sales to service.

Sales and Marketing

ABC Company markets to their residential customers directly through targeted marketing campaigns. Customers are targeted based on their city, and other factors. Marketing materials are sent through email and based on their interaction with the email are guided accordingly.

While some of their smaller products are sold through retailers, most products are sold direct to consumers by their internal sale staff.

Internally, they focus on two key areas:

- **Residential Customers:** Residential customers are typically looking for either individual components, or to buy a whole home solution. These sales cycles are typically shorter and originate from social media, websites, referrals, or direct contact from the prospect. Since residential customers are typically more focused on specific products or smaller installs, their sales cycles typically last a few days or weeks.
- **Enterprise Customers:** Enterprise sellers focus on customers who need a more specialized and tailored business solutions. Enterprise sales typically span multiple locations with linked communication, and often require multiple resources to complete the project. These sales cycles are typically longer and have many more moving parts.

It is important that all of ABC company's sellers have the tools, resources, and guidance necessary regardless of their focus area while selling to their customers.

System Installation:

The installation process for purchased security equipment varies based on the type of customer that was sold.

- **Residential Customers:** Since residential installs typically take less than a day, they are done by internal employees. After the sale is made, a work order is created, and a qualified technician is identified and scheduled to perform the install.
- **Enterprise Customers:** Enterprise deploys can take months, and require a project manager to oversee the day-to-day operations. This includes creating project plans, defining project teams, and scheduling resources.

Service and Support:

Once the systems are installed, ABC Company provides support after the sale. If a customer has an issue, they can contact customer support. An agent will attempt to work with the customer remotely to resolve their issue. If their issue cannot be resolved remotely, the support agent can escalate the issue to a work order that will be scheduled and worked on by a qualified field technician.

36.3 Objectives

Typically, ABC Company will dispatch field technicians onsite to work on customer items one of three scenarios.

- When a new security system is purchased and needs to be installed.
- When a help desk agent is unable to resolve a customer issue remotely.
- When a customer contacts use directly to request onsite service.

Recently a corporate customer Active Transport, Inc. contacted support about an issue they were having with a camera on their security system. The help desk technician was unable to resolve their issue remotely so a field technician will need to be dispatched. In this scenario, you will be doing the following:

- Converting a Case record into a work order
- Scheduling a work order
- Resolving a work order using the mobile app.

36.4 Lab Setup

- **Estimated Time**: 45 minutes

36.5 Instructions

36.6 Exercise 1: Create a Case and Escalate to a Work Order

36.6.1 Task 1: Create a Case record

1. If is not open already, open the **Dynamics 365 Field Service** application.
2. Using the navigation on the left side of the screen, select **Cases**.
3. On the **Command Bar**, select the **New** button to create a new case record.
4. Complete the new case record as follows:
    - **Case Title:** Camera Down
    - **Customer:** Active Transport Inc.
    - **Origin:** Phone
5. Select the **Field Service** tab
6. Set the **Incident Type** field to **Camera Down**.
7. On the **Command bar**, select the **Save and Close** button to save and close the case record.

36.6.2 Task 2: Manually create a Word Order

We will come back to your created case record later. Next, let's examine how to manually create a work order record.

1. Using the navigation on the left, select **Work Orders**.
2. On the **Command Bar**, select the **New** button to create a new Work Order.
3. Complete the Work Order details as follows:
    - **Service Account:** Brakes & Gears
    - **Price List:** Default Price List
    - **Primary Incident Type:** Fan Out
    - **Taxable:** No
4. Note the Work Order Number to ensure that you are working with the correct work order later.
5. Select the **Settings** tab.
6. Set the **Service Territory** field to **WA**.
7. Under **Preferences**, configure the time preferences as follows:

- **Time from Promised:** Today @ 9:00 AM
- **Tom to Promised:** Today @ 11:00 AM

8. Select **Save and Close** to save you changes and exit the new work order.

36.6.3 Task 3: Generate a Work Order from a Case

Another way to generate work orders is by escalating case records. In this example, we will escalate the Camera Down case record we created earlier.

1. Using the left navigation, select **Cases**.
2. Open the **Camera Down** case you created earlier.
3. On the **Command Bar**, select the **Convert to Work Order** button.
4. After the work order creation has completed, click the **OK** button on the pop-up screen to view the Work Order details.
5. Select the **Services** Tab and verify that the **Inspect System Health** and **Inspect Range of Motion** services were added to the work order. **NOTE:** If you do not see them initially, press F5 to refresh your screen.
6. Select the **Service Task** Tab and verify that 4 tasks were added.

Both of your newly created work orders are ready to be scheduled.

36.7 Exercise 2: Schedule Items with Dynamics 365 Field Service

36.7.1 Task 1: Schedule Directly from a Work Order

1. Using the left navigation, select **Schedule Board**.
2. In the upper right-hand corner of the screen, set the **New Schedule Board** experience to **ON**.
3. Using the **Search resources** lookup field, enter the name of your user account. (Your resource record should be displayed.)
4. At the bottom of the screen in the requirements panel, select **Unscheduled Work Orders**. (If the requirements panel is not displayed, select the arrow at the bottom of the screen to expand it.)
5. Locate the **Active Transport** Work Order you created from the case record. (Remember the work order number).
6. Drag the **Active Transport** record and place it at an open slot for your user record.
7. At times, you may need to reschedule a work order based on technician conflicts or other items. This can be easily done by dispatchers leveraging the schedule board.
8. Click in search resources box on the schedule board (Located right above the resource name column), enter **Brady** and locate the work order that is scheduled for **Brady Hannon** later today.
9. **Right-click** on the scheduled item. From the menu that appears, select **Re-assign**. Click in the using the search box, select your resource record.

36.7.2 Task 2: Schedule with the Schedule Board

1. Using the left navigation, select **Schedule Board**.
2. Using the **Search resources** lookup field, enter the name of your user account. (Your resource record should be displayed.)
3. At the bottom of the screen in the requirements panel, select **Unscheduled Work Orders**. (If the requirements panel is not displayed, select the arrow at the bottom of the screen to expand it.)
4. Locate the **Active Transport** Work Order you created from the case record. (Remember the work order number).
5. Drag the **Active Transport** record and place it at an open slot for your user record.
6. At times, you may need to reschedule a work order based on technician conflicts or other items. This can be easily done by dispatchers leveraging the schedule board.

7. Click in search resources box on the schedule board (Located right above the resource name column), enter **Brady** and locate the work order that is scheduled for **Brady Hannon** later today.
8. **Right-click** on the scheduled item. From the menu that appears, select **Substitute Resource**. Click in the Select/Search box, select your resource record, and select **Re-assign**

36.8 lab: title: 'Lab 5.3: Dynamics 365 Project Operations capstone lab' module: 'Module 5: Learn the Fundamentals of Dynamics 365 Project Operations'

37 Module 5: Learn the Fundamentals of Dynamics 365 Project Operations

37.1 Practice Lab 5.3 - Dynamics 365 Project Operations capstone lab

37.2 Lab Scenario

ABC company specializes in the manufacturing, selling, installation and servicing of security equipment. Their products include both indoor and outdoor security cameras, moisture and fire sensors, monitoring services, and more.

ABC company uses Dynamics 365 applications to engage with all their customers across different areas of their organization from sales to service.

Sales and Marketing

ABC Company markets to their residential customers directly through targeted marketing campaigns. Customers are targeted based on their city, and other factors. Marketing materials are sent through email and based on their interaction with the email are guided accordingly.

While some of their smaller products are sold through retailers, most products are sold direct to consumers by their internal sale staff.

Internally, they focus on two key areas:

- **Residential Customers:** Residential customers are typically looking for either individual components, or to buy a whole home solution. These sales cycles are typically shorter and originate from social media, websites, referrals, or direct contact from the prospect. Since residential customers are typically more focused on specific products or smaller installs, their sales cycles typically last a few days or weeks.
- **Enterprise Customers:** Enterprise sellers focus on customers who need a more specialized and tailored business solutions. Enterprise sales typically span multiple locations with linked communication, and often require multiple resources to complete the project. These sales cycles are typically longer and have many more moving parts.

It is important that all of ABC company's sellers have the tools, resources, and guidance necessary regardless of their focus area while selling to their customers.

System Installation:

The installation process for purchased security equipment varies based on the type of customer that was sold.

- **Residential Customers:** Since residential installs typically take less than a day, they are done by internal employees. After the sale is made, a work order is created, and a qualified technician is identified and scheduled to perform the install.
- **Enterprise Customers:** Enterprise deploys can take months, and require a project manager to oversee the day-to-day operations. This includes creating project plans, defining project teams, and scheduling resources.

Service and Support:

Once the systems are installed, ABC Company provides support after the sale. If a customer has an issue, they can contact customer support. An agent will attempt to work with the customer remotely to resolve their issue. If their issue cannot be resolved remotely, the support agent can escalate the issue to a work order that will be scheduled and worked on by a qualified field technician.

37.3 Objectives

ABC Company's enterprise sellers focus their attention on customers who security needs require more specialized and tailored business solutions. For this reason, their enterprise sales typically span multiple locations with linked communication, and often require multiple resources to complete the project. ABC companies' enterprise sales cycles can take many months and require multiple moving part to execute.

Once an enterprise customer is sold a system, it can take months to implement the project. Each project is assigned to a project manager who oversee the project planning and day to day operations. This includes creating project plans, defining project teams, and scheduling resources.

As an enterprise seller, you are responsible for selling high end customized security solutions to customers. You recently fielded a call from a company called Consolidated Sample. They would like to have a completely integrated security solution that spans all their locations. You are going to enter the lead for Consolidated Sample into the system, advance them through the project selling cycle and create a corresponding project.

Upon completion of the lab, you will have completed the following:

- Manage daily activities associated with a project opportunity.
- Add create and define a project quote.
- Generate a project contract.
- Create a Project and define a Project Team.

37.4 Lab Setup

- **Estimated Time**: 45 minutes

37.5 Instructions

37.6 Exercise 1: Create a Project Quote & Project Estimate

The Project Opportunity is used to capture high level details about a potential project. As more and more details about the project emerge, you can create a Project Quote. The project quote often includes details related to different roles, timelines, and pricing. The project quote is what is presented to the customer. The project quote is also where you can begin to create a project plan that is associated with the project you are selling. This save time after the project is sold, because much of the details related to the project are already captured.

In this exercise you will be creating a project and defining detailed related to the project quote.

37.6.1 Task 1: Create a Project Quote.

1. With the Project Opportunity open, select the **Quotes** tab.
2. On the Quotes sub-grid, click the **New Quote** button.
3. After the new quote record open, set the **Product Price List** field on the quote to **Products and packaged Services**.
4. Select the **Quote Lines** Tab.
5. Select and open the **System Implementation** line item.
6. In the **Project** field, select **New Project.**
7. On the **Quick Create Project** screen, complete the project as follows:
    - **Name:** Complete Global Implementation – Your Initials
    - **Project Manager:** Select you user record
    - **Calendar template:** Default Work Template
    - **Contracting Unit:** Fabrikam US
    - **Estimated Start Date:** One week from today
    - **Estimated Labor Cost:** $ 175,000

- **Estimated Expense Cost:** $ 50,000
- **Estimated Total Cost:** $ 225,000

8. Select **Save and Close** button.
9. Next, we will define the if we can charge for specific roles that are assigned to the project. Select the **Chargeable Roles** tab.
10. Select and open the **Robotics Engineer** role and set the billing type to Non-Chargeable.
11. On the **Command Bar**, select the **Save and Close** button.
12. Select the **Quote Line Details** tab.
13. On the sub-grid, select the **New Quote Line Detail** button.
14. Complete the **Quote line detail** item as follows:
    - **Description:** Communication Line Run – Your Initials
    - **Transaction Class:** Time
    - **Role:** Network Technician
    - **Category:** Time
    - **Start Date:** One Month form today
    - **End Date:** Two months from today
    - **Resourcing Unit:** Fabrikam US
    - **Unit:** Hour
    - **Sales Amount:** 50,000
15. Select the **Save and Close** button to close the line detail item.
16. On the **Command Bar**, select the **Save and Close** button.

Note: Leave the Project Quote open so it can be used in the next task.

37.6.2 Task 2: Close the Project Quote and create a Project Contract.

In this task you will be closing the project quote that you created and converting it into a project contract. The Project Contract can be used and leveraged while the project is being executed.

1. With the **Complete Global Security Implementation – Your Initials** Project Quote record open, select the **Close as Won** button on the Command Bar.
2. On the **Are you sure you want to close the quote** screen, select **OK**.
3. Once the quote is closed, the newly created **Complete Global Security Implementation – Your Initials** Project Contact will be displayed.

Note: Leave the Project Contact open so it can be used in the next task.

37.7 Exercise 2: Manage a Project

One of the advantages of leveraging the project selling capabilities of Project Operations, is the ability to create a project during the sales process. The created project will be accessible from different sales related records such as Project Quotes and Project Contracts.

In this exercise, you will be managing some of the initial tasks related to a project such as defining project details, defining a project team, and outlining project tasks.

37.7.1 Task 1: Manage basic project data.

1. With the **Complete Global Security Implementation- Your Initials** Project Contract open, select the **Related** tab.
2. From the menu that appears, select **Projects.**
3. Open the **Global Security Implementation – Your Initials** Project.

4. On the **Project Service** Business Process Flow, select the **New** Stage, and select the **Next Stage** button to advance to the **Quote** stage.
5. In the **Quote** stage, set the **Estimated Finish Date** field to **six months from today**.
6. Select the **Next Stage** button to advance to the **Plan** stage.

37.7.2 Task 2: Create a Project Team.

Each project will have a team of members that will assist in the execution of the project. In this task we will be defining the resources that will make up the project team members.

1. With the **Complete Global Security Implementation – Your Initials** project record open, select the **Team** tab
2. On the **All Team Members** sub-grid, select the **+ New** button.
3. Configure the team member record as follows:
   - **Position Name:** Robotics Engineer – Your Initials
   - **Bookable Resource:** Allison Dickson
   - **Role:** Robotics Engineer
4. Select the arrow next to the Save and Close button. From the menu that appears, select **Save and Create New.**
5. Configure the next team member record as follows:
   - **Position Name:** Software Engineer – Your Initials
   - **Bookable Resource:** Bob Kozak
   - **Role:** Software Engineer
6. Select the arrow next to the Save and Close button. From the menu that appears, select **Save and Create New.**
7. Configure the team member record as follows:
   - **Position Name:** Network Technician – Your Initials
   - **Bookable Resource:** Dianna Woodward
   - **Role:** Network Technician
8. Select the **Save & Close** button.

37.7.3 Task 3: Define a Project Schedule.

Another important part of defining a project is to define the project tasks and schedule for the project. In this task we are adding some project tasks and associating them will different roles.

1. With the **Complete Global Security Implementation – Your Initials** project open, select the **Schedule** tab.
2. On the toolbar in the schedule sub-grid, select the **+ Add** button.
3. In the row that appears, set the **Name** field to **System Development**.
4. On the toolbar in the schedule sub-grid, select the **+ Add** button again to add another item.
5. Configure the Item as follows:
   - **Name:** Create System Layout
   - **Effort:** 25
6. On the toolbar in the schedule sub-grid, select the **+ Add button** again to add another task.
7. Configure the Item as follows:
   - **Name:** Design Cameras
   - **Predecessor:** Create System Layout

- **Effort:** 50

8. On the toolbar in the schedule sub-grid, select the **+ Add button** again to a finial task.
9. Configure the Item as follows:
   - **Name:** Verify and Approve design
   - **Predecessor:** Design Cameras
   - Effort: 8

Note: Stay on the schedule tab as we will be making some additional modifications in the next task.

37.7.4 Task 4: Associate resources with a project.

As part of defining a project schedule, you can specify the types of resources that will be used to fill the staffing requirements. These can be actual named resources, or generic resources that will be replaced by named resources in the future. In this task you will be defining both named and generic resources for the project tasks you created.

1. If necessary, open the **Complete Global Security Implementation – Your Initials** project, and select the **Schedule** tab.
2. Locate the **Create System Layout** task you added earlier and click in the **Resources** field.
3. From the menu that appears, select **Create**.
4. Configure the Project Team Member as follows
   - **Position Name:** Generic Robotics Engineer – Your Initials
   - **Bookable Resource:** Generic Resource
   - **Role:** Robotics Engineer
5. Select the **Save and Close** button.
6. Verify that **Generic Robotics Engineer – Your Initials** resources has been added to Resources field.
7. Locate the **Design Cameras** task and select the **Resources** field.
8. From the menu that appears, select **Create**.
9. Configure the Project team Member as follows:
   - **Position Name:** Generic Robotics Engineer – Your Initials
   - **Bookable Resource:** Generic Resource
   - **Role:** Robotics Engineer
10. Select the **Save and Close** button.
11. Locate the **Verify and Approve Design** task and select **Resources** field.
12. From the menu that appears, select **Allison Dickson**.

Congratulations, you have successfully sold and created a project in Dynamics 365 Project Operations. For here Project Managers, can manage different aspects of the project such as scheduling resources, monitoring the project schedule, and managing time and expenses.