



Dynamics 365 Core

Training

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Content

This section covers details on the course framework, and a brief description on why it is important to cover these.

Core Functional

Solutions, Entities, forms, views, relationships

A solution is a bucket where we can store all the customizations of a particular project. Creating a solution helps the user to move the changes from one environment to another. We can use solutions to extend the capability of Dynamics 365. There are basically three different types of solutions: System/Default, managed and unmanaged.

Entity Relationships is the ability to relate an entity to itself, which is referred as self-referential. Relationships are user friendly and do not need to be a database administration expert to configure relationships between entities.

Apps, Site Map and Ribbon customization

The Site Map provides the structure for navigation in Dynamics 365 for Customer Engagement. "SiteMapXml" attribute stores the XML that defines the site map. The site map XML is exposed as the SiteMap node in the customizations.xml file of an exported unmanaged solution.

Business rules

Business Rules provide a simple drag-and-drop interface to implement and maintain fast-changing, commonly used rules. A business rule runs in real-time, so you will see the action as soon as a condition has been met (unlike a workflow that will run on form save). You can apply a business rule on a Main Form or Quick Create Form. They will work online, on Microsoft Dynamics 365 for Tablets and in Dynamics 365 for Outlook (supported in both online and offline modes)

Processes - Business process flow, Workflow, Action

A Business Process Flow in Microsoft Dynamics 365 is a tool which is meant to help guide users through a business process in the system. Business process flows are representations of your business processes and are displayed visually in Dynamics 365 as a heading across the top of an entity form.

A business process flow is composed of Stages, and within each stage there are Steps to complete which are fields. In the business process flow heading, a user can see which stage they are at in the process, and which steps they need to complete before they proceed in the process.

Advanced Find, Understanding of Fetch xml query

Advanced find is one most of practical tool in the Dynamic 365 CE. With the assistance of advanced find you can find lists of data with specific criteria, edit that data, export, review, and so much more.

Business management setting

working in the Advanced Settings > Business Management section of the Settings work area. Import data and manage imports, Export data or templates, keep your data clean by using duplicate detection.

Templates - Article, Mail merge, word templates

The template document is the one that is used as a basis for creating the main mail merge document.

Security roles/Teams, Field security profile

Using teams in Dynamics 365 Customer Engagement (on-premises) is optional. However, teams provide an easy way to share business objects and let you collaborate with other people across business units. While a team belongs to one business unit, it can include users from other business units. You can associate a user with more than one team. Field Level Security in Microsoft Dynamics CRM allows you to expand your security model beyond entities to include specific fields. However, you cannot secure fields as part of your typical security role setup.

Data management

Data management framework to manage data entities and data entity packages in Finance and Operations. The data management framework consists of the following concepts: The data management framework supports using data entities in the following core data management scenarios:

- Data migration
- Set up and copy configurations
- Integration

Administration - System settings, personal settings, Auto numbering etc

Browse through CE as an actual CE user would be. These settings are important from day to day working. Some of the settings covered are how to select Time zones, Currency, Decimal values to a little more complicated setting as email template, signature etc.

Auditing

Dynamics CE provides an inbuilt functionality of storing

System jobs (Introduction)-

New Attractions

Sales AI Insights

Dynamics 365 Sales Insights continuously analyses the vast collection of customer-interaction data already stored in your Dynamics 365 Sales and Microsoft 365 databases. This helps you to better understand your business relationships, evaluate your activities in relation to previous successes, and choose the best path forward. Also, it enables you to build strong relationships with customers, take actions based on insights, and close opportunities faster.

Forms Pro

Microsoft Forms Pro is an enterprise survey capability powered by both Office 365 and Dynamics 365. Forms Pro is built on Microsoft Forms, and it offers new capabilities that make capturing and



analyzing customer and employee feedback simpler than ever. 'Forms Pro' will eventually replace the existing Dynamics Voice of the Customer Survey.

Customer Insights

This module has been rechristened as Audience insights. Some of the key features are:

- Eliminate data silos and unify customer data
- Enrich customer profiles
- Enable powerful AI and insights
- Extend business processes and personalize customer experiences

Product Insights

Dynamics 365 Product Insights enables organizations to understand their customers' journey, usage, and experience across all channels of their products (web, mobile, and connected devices). With Product Insights, organizations can easily, with little to no code, collect signals from all their products and services and gain actionable insights tailored to their industry and strategy.

Latest CE Wave 2 functionalities:

- Convert to PDF
- Embed Power BI dashboards
- Updates to existing modules

Timeline

- 2-3 weeks (1 hour on each week-day)

Benefits

Below details would be provided

1. Live project environment. – Focus would be more on task-based approach and hands-on.
2. Using Azure dev-ops and Microsoft teams for completing training to familiarize with the Corporate culture.
3. All the required licenses like Customer voice, will be pre-setup and included in the training cost.
4. You will have life-long access to the Materials both the video and the decks, resource links with a nominal charge.
5. Video links would be provided for download
6. Being a Gold partner with MS, Additional insights, latest product features access would be provided.

Other Trainings

Please ask Dynamics Monk latest and greatest offerings on:

- Power Platform – Power apps, Power Automate and Power BI
- Dynamics 365 CE Field service & Connected Field services
- Dynamics 365 CE Technical Training – Server side and client-side extensions
- Azure Integration suite – Azure integrations framework comprising of:
 - Integrations design frameworks
 - Azure Integrations framework

- Azure Data factory

Reference link

- <C:\Users\user\Downloads\Dynamic CRM.docx>{Reference doc for introduction to Dynamic CE}
- https://www.tutorialspoint.com/microsoft_crm/microsoft_crm_solutions.htm
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