

Microsoft Dynamics CRM – Complete Detailed Notes (2026)

Overview:

Microsoft Dynamics 365 CRM is a cloud-native platform unifying Sales, Customer Service, and Marketing modules.

Core CRM Modules:

1. Dynamics 365 Sales: Lead & opportunity management, forecasting, pipeline tracking, AI insights for next-best-action.
2. Customer Service: Omnichannel case management, knowledge base, automation workflows, real-time insights.
3. Marketing: Customer journeys, segmentation, campaign automation, event management.
4. Field Service: Work order scheduling, technician dispatch, remote assist via AR. (Microtek Learning)
5. Project Operations: Resource planning, project accounting, task management. (Microtek Learning)

Platform Capabilities:

- Unified Dataverse storage.
- AI-powered analytics and forecasting.
- Seamless Microsoft 365 integration (Teams, Outlook, Excel).
- Automation via Power Automate and embedded Copilot.

Key Features:

- Lead & Opportunity Management.
- Omni-channel Customer Support.
- Marketing Automation & Segmentation.
- Custom Dashboards & Reports.
- Social Listening & Insights. (TEC 2026 Features)

2026 Updates:

- Enhanced AI forecasting in Finance & Sales (Microtek Learning).
- Updated release cycles—Wave 1 (Apr–Sept) and Wave 2 (Oct–Mar). (Microsoft Learn)

Benefits:

- Improved customer engagement.
- Faster sales cycles.
- Scalable modular architecture.
- Global availability & localization support.