



Microsoft Dynamics 365 Fundamentals (CRM)

Online Course

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Microsoft Dynamics 365 Fundamentals (CRM)

Course Modules

1. Describe Dynamics 365 Customer Insights



Explore Customer Insights - Journeys

- Describe use cases for Customer Insights - Journeys
- Describe lead generation and qualification
- Describe use cases for marketing forms
- Target customers by using segments & subscription lists
- Describe email marketing
- Describe customer journeys
- Describe event management features and capabilities

Customer Insights - Data & Dynamics 365 Customer Voice

- Use cases of and capabilities for Customer Insights - Data
- Describe use cases for and capabilities of Customer Voice

2. Describe Dynamics 365 Sales

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Explore Sales

- Describe use cases for Dynamics 365 Sales
- Describe leads and the process for qualifying leads
- Describe the opportunity management process
- Describe the quote lifecycle
- Order management and invoice management processes
- Describe use cases for business process flows



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Describe Sales capabilities and related apps

- Describe sales pipeline and forecasting concepts
- Describe use cases for and capabilities of Sales Insights
- Use cases for and capabilities of LinkedIn Sales Navigator
- Describe use cases for the Dynamics 365 Sales mobile app

3. Describe Dynamics 365 Customer Service

Explore Customer Service

- Describe use cases for Dynamics 365 Customer Service
- Describe the functionality for workload management
- Knowledge mgmt in Dynamics 365 Customer Service
- Describe the case lifecycle

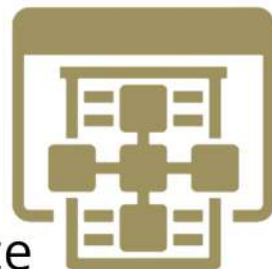
Describe Customer Service capabilities and related apps

- Describe Omnichannel for Customer Service
- Report & data visualization opts in D365 Customer Service
- Describe use cases of Dynamics 365 Customer Voice

4. Describe Dynamics 365 Field Service

Explore Field Service

- Describe use cases for Dynamics 365 Field Service
- Describe common field service processes
- Describe the work order lifecycle
- Describe inspections in Dynamics 365 Field Service
- Describe the Field Service mobile app



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Describe the scheduling capabilities of Field Service

- Describe resource and scheduling processes
- Describe asset management and customer assets
- Describe Connected Field Service for Dynamics 365

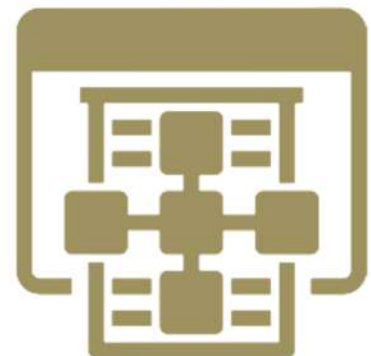
5.Core capabilities of customer engagement apps

Describe the foundations of customer engagement apps

- Describe use cases for customer engagement apps
- Microsoft Power Platform as it relates to customer egmt
- Describe Microsoft Dataverse as the foundation
- Navigate to and within customer engagement apps

Describe shared activities and integration options

- Describe customers and activities
- Describe search options and filter criteria
- Reporting capabilities including dashboards, charts, etc.,
- Describe Microsoft Teams integration
- Describe Microsoft Outlook integration
- Describe Microsoft Excel integration



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in terms of time management,
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