Dynamics 365 CRM Functional Consultant Course Content:

Job Opportunities

The demand for certified Dynamics 365 CRM consultants is higher in the market. 2-3 years experienced Dynamics CRM functional consultant can earn as much as INR 5,00,000 to 8,00,000 per annum on an average. On successful completion of this course you will be eligible to apply for any of the following job roles:

- CRM Sales and Customer service executive

- CRM Business Analysts

- Dynamics 365 CRM Functional Consultant

- Quality Analysts/ Testing Professional

- CRM Pre-sales Consultant

Course Duration: 2 months

Prerequisites for the training

- Basic computer knowledge.

- Passion to learn a new technology.

- Passion to work in the Corporate industry

- Basic awareness of Sales and Customer service operations

Expected Audience for the training

The ideal candidates for this training are, but not limited to, the following:

- BBA/ MBA graduates

- Tech / BSc / BCA graduates

- MTech/ MCA graduates

What you learn from this course?

Module 1: Dynamics 365 Functionality

Module 2: Configuring Dynamics 365 CRM

Module 3: Customizing Dynamics 365 CRM using Code

Module 4: Interview skills training

Detailed Course Content

Introduction to Microsoft Dynamics 365 CRM

Dynamics product Stack | History of Microsoft Dynamics CRM | Editions in Microsoft Dynamics CRM | Deployment types & Licensing Options | Comparison with other CRM's in the Market XRM Framework | Out of Box Features (OOB Concepts)

Sales Module

Lead Management | Opportunity Management | Product Management | Quotes, Orders and Invoices | Goal Management

Marketing Module

Marketing Lists | Campaigns | Sales Literature | Quick Campaigns

Service Module

Services | Service Calendar | Case Management | Knowledge Base | Contracts

Working with Dashboards

Working with Reports

Module 2: Configuring Dynamics 365 CRM

Administration & Security

Creating and managing Business Units, Users and Teams | Privileges, Access Levels and Security Roles | Positions & Hierarchies | Creating and managing Security Roles | Auto Numbering, Languages | System Settings | Auditing

Business Management

Sites, Sales Territories, Facilities and Resource Groups | Working with Multi-Currency | System Queues and Custom Queues | Services and Business Closures | Fiscal Year Settings | Subjects | Connections

Data Management

Duplication Detection Settings, Rules and Jobs | Bulk Record Deletion | Data Maps and Imports

Product Catalog

Understanding the Product Catalog | Unit Groups | Adding Products | Creating Price Lists | Creating Discount Lists

Module 3: Customizing Dynamics 365 CRM using Code

Dynamics 365 CRM Entity Model

Customization Concepts – Entity Types and Attributes | Filtered Views | Creating Custom Entities and Attributes | Entity Customization | Form Customizations |UI Customization Capabilities | Form Customization – Working with Tabs, Sections, Fields and Iframes | Introduction to Application Event Programming | Using Form and Field Events | Mobile Forms

Relationships, Views and Advanced Views

Types of Relationships | Relationship Behaviors | Creating Entity Relationships | Entity Mapping

Views and Advanced Views

Public, Personal and System Views | View Customizations – Common Tasks | Advanced Views Customizations

Report Wizard, Exporting Reports
Working with Dashboards
Processes (Workflows & Dialogs)

Overview of Workflow | Creating Workflows steps through Workflow Designer | Overview of Dialogs | Creating Dialog Pages, Prompt and Response | Working with Input Parameters in Dialogs.