

## **Dynamics 365 Customer Engagement (CE) Course Content**

### **Dynamics 365 CE Overview**

- Dynamics 365 CRM Introduction
- Dynamics CRM Deployment model
- Dynamics CRM Components
- Dynamics CRM Architecture

### **Dynamics 365 CE Modules**

- Sales management
- Service management
- Project Service management
- Marketing management
- Field service management

### **Dynamics 365 Customization and Configuration**

- Introduction to SDK
- Solution Management
- Entity Customization
- APP Management

### **Dynamics 365 Security Model**

- Security model of Customer Engagement
- Role & record based security
- User & Team management
- Hierarchical & Position security

### **Extending Dynamics 365 - Client**

- Introduction to XRM Framework
- Webresources
- Dynamics CRM Webservices
- SOAP Logger
- Ribbon Customization
- Javascript
- REST and SOAP
- Third Party Tools

### Extending Dynamics 365 - Server

- Introduction to XRM DLL's
- Plugins
- Querying CRM Data
- CRM Webservice and Complex Entities
- CrmSvcUtil
- Custom Workflows
- Azure Extensions
- CRM Webapi

### Extending Dynamics 365 - Reports

- Introduction to Reports
- Custom Reports – Perquisites
- FetchXML Based Reports
- Out-of-Reports
- SQL Based Reports

### Dynamics 365 – Data Management

- Data Management Overview
- Out-of-Box Data Import
- Available Add-Ons
- Data Import Approaches
- SSIS + KingswaySoft

### Extending Dynamics 365 – Integration & Deployment

- CRM and 3<sup>rd</sup> Party Integration Approach
- Multi sever CRM Deployment
- CRM Roadmap
- Upgrade Discussion
- CRM on Mobile

### Dynamics 365 – Add-ons Overview

- Microsoft Flow
- Microsoft D365 Portals
- Unified Service Desktop
- PowerApps
- Power BI