



MICROSOFT TRAINING

Microsoft Dynamics Crm Course

Master Microsoft Dynamics CRM. Learn to configure and customize solutions to optimize customer relationship management and drive business growth.

DURATION

24 Hours

LEVEL

Intermediate

FORMAT

Instructor-Led

- Globally Recognized Certification

- Expert-Led Hands-On Training

- Flexible Scheduling

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COURSE OVERVIEW

Unlock the full potential of customer relationship management with our comprehensive Microsoft Dynamics CRM Course. Designed for intermediate users, this program dives deep into the architecture and powerful functionalities of Microsoft Dynamics 365 Customer Service, Sales, and Marketing. You will gain hands-on expertise in configuring, customizing, and managing the platform to optimize sales processes, enhance customer service delivery, and streamline marketing efforts, ultimately driving business growth and efficiency. This course focuses on practical application, ensuring you can immediately apply your new skills in a professional setting.

Duration	24 Hours
Level	Intermediate
Vendor	Microsoft

COURSE CURRICULUM

01 Module 1: Microsoft Dynamics 365 CRM Fundamentals & Core Entities

- Overview of Dynamics 365 Customer Engagement apps
- Understanding CRM principles and business benefits
- Navigating the Dynamics 365 interface
- Managing core entities: Accounts, Contacts, Leads, Opportunities
- Working with Activities: Tasks, Phone Calls, Emails, Appointments

02 Module 2: Sales & Service Process Automation

- Deep dive into the Sales process lifecycle (Lead to Order)
- Managing Quotes, Orders, and Invoices
- Configuring Product Catalog, Price Lists, and Discount Lists
- Customer Service Hub: Cases, Queues, Knowledge Base
- Service Level Agreements (SLAs) and Entitlements

03 Module 3: Customization & Configuration

- Customizing forms, views, and dashboards
- Creating and managing custom entities and fields
- Implementing Business Rules for form logic
- Working with Relationships and Rollup/Calculated Fields
- Solutions management and deployment

04 Module 4: Business Process Flows & Workflows

- Designing and implementing Business Process Flows
- Automating processes with classic Workflows (real-time and background)
- Introduction to Power Automate for advanced automation scenarios
- Conditional branching and loops in workflows
- Monitoring and troubleshooting workflows

05 Module 5: Reporting, Analytics & Data Management

- Creating Advanced Finds for data segmentation
- Building custom reports using FetchXML and Report Wizard
- Configuring interactive dashboards and charts
- Data Import and Export Wizard functionalities

- Duplicate detection rules and data cleansing strategies

06 Module 6: Security Roles & User Management

- Understanding security model in Dynamics 365 CRM
- Creating and assigning Security Roles
- Managing Teams and Business Units
- User licensing and access management
- Auditing and activity logging

CAREER PATHWAYS

Graduates of this program are prepared for the following roles:

- > **Microsoft Dynamics 365 CRM Administrator**
- > **CRM Business Systems Analyst**
- > **Sales Operations Specialist with CRM Expertise**

FREQUENTLY ASKED QUESTIONS

Q: What are the prerequisites for enrolling in this intermediate Microsoft Dynamics CRM Course?

This course is designed for individuals who have a foundational understanding of CRM concepts or basic experience navigating the Microsoft Dynamics 365 interface. While not strictly required, prior exposure to sales, customer service, or marketing operations within an organization would be beneficial to grasp the advanced configuration and customization topics covered.

Q: How will mastering Microsoft Dynamics CRM customization and workflow automation benefit my career?

Upon completing this course, you will be equipped to significantly enhance business efficiency by tailoring Dynamics CRM to specific organizational needs. This skill set is highly sought after by employers, enabling you to take on roles such as a CRM Administrator or Business Analyst, where you can optimize sales pipelines, streamline customer service processes, and implement data-driven strategies to improve customer engagement and operational performance.

Q: Does this course cover the latest features of Dynamics 365 Customer Engagement applications, including integration capabilities?

Yes, this course focuses on the current versions of Microsoft Dynamics 365 Customer Engagement applications (Sales, Service, Marketing). While the primary focus is on core customization and configuration, we will introduce concepts related to integration through Power Automate and discuss how Dynamics 365 can be extended to connect with other business systems, providing a holistic view of its capabilities in a modern IT ecosystem.

ABOUT COMPUTER PRIDE



computerpride

East Africa's Premier IT Training Center

With over 15 years of excellence, Computer Pride delivers globally recognized certification programs from leading technology vendors. Located on Kenyatta Avenue in Nairobi's CBD, our state-of-the-art facilities and expert instructors have empowered thousands of professionals across East Africa.

15+

Years of Excellence

10,000+

Professionals Trained

50+

Vendor Certifications

READY TO ENROL?

Take the next step in your technology career.

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