



D365 CE/CRM Admin Black Belt Training Series



What is the D365 Administrator Black Belt Series?

This is a training series on Microsoft Dynamics 365 Customer Engagement (CE) for Administrators and Super-Users, to help them keep your system running at optimal performance. The series is designed to help you master the art of administering, configuring and adapting to D365 CE. Students will progress through a series of modules responding to questions along the way.

Where do I start?

Sign-up for the White Belt course and start watching videos. The first section will walk you through where to get the software, sample files and anything else you may need to learn.

How will it benefit me?

There series is designed to help you master the art of administering, configuring and adapting Microsoft Dynamics 365 Customer Engagement.

What are the objectives of the training series?

- An introduction to the various components within your Dynamics 365 (CRM) system that can be configured
- An exploration of organization and user management, providing information on how to set up different groups and users
- How to configure basic forms and basic views
- Dynamics 365 (CRM) security management and how to set up user rights for accessing appropriate data only
- How to set up and manage various types of information audit features
- Developing custom entities within the database and creating relationships with other data
- Creating custom forms for generating workflows or reports
- Creating Views, Charts, Dashboards and Reports for managing different types of information
- Customizing the interface to match your company's needs
- CRM data management techniques and how to maintain the integrity of your data
- Replicating CRM data safely to provide access to offline data



- Understanding what workflows are, and how to use them
- How to choose between real time and background workflows
- Automated process management to enable the development of sophisticated workflow processing
- An introduction to the advanced capabilities of Dynamics
- How to decide between canvas and model driven methods
- How to use 3rd party tools

Who is the target audience?

- CRM Administrators
- Power Users

Preparation

Online classroom access will be granted within 1 working day of registration. Once granted access, students will have 30 days to complete their class. Students can work at their own pace and access the materials 24x7 during that 30 day period.

Prerequisites

Students must progress through the belts in order to receive Black Belt Certification.

Why should I choose this training?

You can learn at your desk, at your pace, at your convenience.

This class format includes high quality videos streamed directly to your device, online labs, and additional resources.

Roles





White Belt

The White Belt course is the introductory course to the Black Belt Series for administrators. This course includes the content in the lessons list, along with learning labs and assessment questions.

This course covers:

- An introduction to the various components within your Dynamics 365 (CRM) system that can be configured
- An exploration of organization and user management, providing information on how to set up different groups and users
- How to configure basic forms and basic views

Lessons List:

- User Overview
- User Maintenance
- System Settings
- Basics of Workflow
- Form Configuration 1
- Form Configuration 2
- View Configuration 1
- View Configuration 2





Blue Belt

The Blue Belt course is the second introductory course for the Black Belt Series for administrators. This course includes the content in the lessons list, along with learning labs and assessment questions.

This course covers:

- Dynamics 365 (CRM) security management and how to set up user rights for accessing appropriate data only
- How to set up and manage various types of information audit features

Lessons List:

- Security Concepts
- Business Units
- Security Roles Concept
- Security Roles Application
- Hierarchy Security Concept
- Hierarchy Security Application
- Ownership Teams
- Access Teams
- Auditing





Purple Belt 1

The Purple Belt 1 course is the first intermediate course in the Black Belt Series for administrators. This course includes the content in the lessons list, along with learning labs and assessment questions.

This course covers:

- Developing custom entities within the database and creating relationships with other data
- Creating custom forms for generating workflows or reports

Lessons List:

- Advanced Form Configuration: Sub-grids and Charts
- Advanced Form Configuration: Navigation Links and I-frames
- Creating Custom Entities
- Calculated and Roll Up Fields
- Field Level Security
- Working with Multiple Forms

Purple Belt 2

The Purple Belt 2 course is the second intermediate course in the Black Belt Series for administrators. This course includes the content in the lessons, along with learning labs and assessment questions.

This course covers:



- Creating Views, Charts, Dashboards and Reports for managing different types of information
- Customizing the interface to match your company's needs

Lessons List:

- Working with Charts
- Working with Dashboards
- Working with Reports
- Document Generation – Word
- Document Generation – Excel
- Working with Business Rules
- Working with Business Process Flows
- Custom Interface – Branding
- Custom Interface – Site Map Editor





Brown Belt

The Brown Belt course is the third intermediate course in the Black Belt Series for administrators. This course includes the content in the lessons list, along with learning labs and assessment questions.

This course covers:

- CRM data management techniques and how to maintain the integrity of your data
- Replicating CRM data safely to provide access to offline data

Lessons List:

- Overview
- Duplicate Detection 1
- Duplicate Detection 2
- Data Import Wizard 1
- Data Import Wizard 2
- Data Import Best Practices
- Data Mapping
- Bulk Deletion
- Cascading Relationships between Entities
- Mapping Fields between Associated Records
- How-to Think about Data Integration





Black Belt 1

The Black Belt 1 course is the first advanced course in the Black Belt Series for Administrators. This course includes the content in the lessons list, along with learning labs and assessment questions.

This course covers:

- Understanding what workflows are, and how to use them
- How to choose between real time and background workflows
- Automated process management to enable the development of sophisticated workflow processing

Lessons List:

- Introduction
- What is Workflow?
- Understanding Workflows
- Workflow Scenario 1: Background Workflow
- Workflow Scenario 2: Real-time Workflow

Black Belt 2

The Black Belt 2 course is the second advanced course, and final course in the Black Belt Series for Administrators. This course includes the content in the lessons list, along with learning labs and assessment questions.

This course covers:

- An introduction to the advanced capabilities of Dynamics
- How to decide between canvas and model driven methods



- How to use 3rd party tools

Lessons List:

- Microsoft Flow
- Portal Overview
- Document Storage
- Extending CRM with 3rd Party Tools
- PowerApps Introduction
- PowerApps - Model
- PowerApps - Canvas
- Next Steps

