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Microsoft Dynamics 365 Fundamentals

Business applications, implementation choices and integration

FA-0644

Mainframe & Enterprise Systems

Understand Dynamics 365 application families, business-process uses, deployment constraints and implementation considerations at foundational level.

Introduction

This course introduces Dynamics 365 enterprise business applications and the ERP/CRM concepts they support. Learners examine application capabilities, deployment and integration choices, security questions and implementation planning through illustrative business scenarios.

The emphasis is on informed foundational discussion, not configuring every application or proving improved organisational performance. Capabilities, licensing, deployment models and support requirements differ across applications and releases; the source does not specify a duration, so none is invented.

Learning outcomes

The course teaches participants to:

- Explain common Dynamics 365, ERP and CRM terminology.
- Identify application families relevant to a business need.
- Compare deployment choices where supported by the particular application.
- Evaluate proposed process automation, collaboration and reporting uses against requirements.
- Recognise access-control, data-governance and compliance questions.
- Describe integration, configuration and extension choices at overview level.
- Outline implementation, maintenance and support considerations.

Prerequisites

Basic familiarity with business processes and technology concepts; no specialist Dynamics 365 experience is required.

Experience with office applications and ERP/CRM concepts is helpful but not mandatory.

Prepared demonstrations or an authorised training environment are used where an application example is needed.

Training outline

1. Dynamics 365 Overview

- Dynamics 365 overview
- Core concepts and terminology
- Licensing and pricing models at overview level: requirements vary by application, user role, region and current terms; no fixed price is promised.

2. Application Families and Capabilities

- Current application families and how their capabilities differ; Dynamics 365 is not one universally interchangeable module set.
- Sales and customer-engagement/journey capabilities, including the current Customer Insights family where relevant.
- Financial management and accounting
- Supply chain management
- Customer service and support
- Human Resources capabilities and their relationship to the relevant application environment.

3. Deployment, Security and Governance

- Primarily cloud services, with on-premises options only for applications/releases that support them; review Finance + Operations as a specific example.
- Cloud/on-premises integration and hybrid scenarios where supported; not a universal deployment option for every application.
- Identity/access, data handling, retention and applicable governance requirements; software features do not automatically establish compliance.

4. Business-Process Uses

- Evaluate potential process automation and its dependencies rather than guarantee streamlined operations.
- Enhancing collaboration with Dynamics 365
- Reporting/analytics capabilities and data-refresh/integration limits; real-time behaviour is use-case dependent.

5. Integration and Extension

- Integration with relevant Microsoft services and their application-specific prerequisites.
- Third-party integration options, available APIs/connectors and permission/licensing considerations.
- Configuration versus custom extension choices and their maintenance implications.

6. Implementation and Maintenance

- Requirements, scope, data, testing and rollout planning at foundational level.
- System customization and configuration
- Maintenance and support

Course Assessment

Quizzes and short scenario assignments review the key concepts, followed by a course-level knowledge assessment. This is a learning assessment, not a claim of a Microsoft certification examination.

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