Customer Insights & Marketing

Microsoft Dynamics 365 Fundamentals (CRM)

KNOWLEDGE CHEATSHEET

CUSTOMER ENGAGEMENT

Data Unify profiles → **Segments** Select audience → **Journeys** Engage → **Feedback** Measure

01 Customer Insights and marketing

Audiences and customer profiles

- **Customer Insights - Data** unifies customer information from separate sources. Matching and merging produce unified profiles; activities show interactions, **measures** calculate metrics, and **segments** group customers.
- **Customer Insights - Journeys** orchestrates personalized engagement. Recognize **Dynamics 365 Marketing** in older terminology; distinguish its outbound features from real-time journeys.
- **Dynamic segments** recalculate membership from conditions such as location or engagement. **Static segments** use explicitly selected members. Segmentation selects an audience; a journey controls engagement.
- **Marketing lists** group accounts, contacts or leads for campaign activities. Outbound **subscription lists** manage contact subscriptions. Lists, segments and consent have separate purposes.

Journeys, forms and email

- **Segment-based journeys** reach a selected audience, once or on a recurring schedule. **Trigger-based journeys** start from an action such as a form submission or abandoned cart.
- A **customer journey** combines messages, waits, conditions and branches. Personalize content with customer and interaction data; evaluate engagement rather than treating every recipient identically.
- **Marketing forms** capture prospect information and can create or update customer records. Link an email to a form or landing page when recipients must submit information.
- **A/B testing** compares content variants, such as subjects or designs, against a success metric. Apply the winning variant to the remaining audience according to the test configuration.
- **Consent** governs whether and why a contact point can receive messages. Use preference management and suppression rules alongside audience selection; segment membership alone is not permission to email.

Events and lead generation

- **Event management** organizes events, sessions, speakers, registration and attendance. Venue capacity, waitlists, sponsors and event finances support planning and follow-up.
- **Webinars** combine marketing registration and attendee management with an online meeting provider such as **Microsoft Teams**. Event organization and live meeting delivery serve different roles.
- **Lead scoring** evaluates profile fit and engagement, such as webpage visits and form submissions. A scoring threshold helps identify sales-ready leads; sales qualification determines the opportunity.

Customer Insights & Marketing / Sales

Microsoft Dynamics 365 Fundamentals (CRM)

KNOWLEDGE CHEATSHEET

SALES LIFECYCLE

Lead Qualify → **Opportunity** Develop → **Quote** Propose → **Order & invoice** Fulfill

- **LinkedIn Lead Gen Forms** integration imports form submissions for lead generation and matching. **LinkedIn Campaign Manager** manages advertising; **Sales Navigator** supports seller prospecting.
- In **outbound marketing** terminology, social posting can schedule supported posts. Keep that capability distinct from social listening, sentiment analysis and one-to-one service conversations.

Customer Voice feedback

- **Customer Voice** creates surveys, distributes invitations and analyzes responses. A **project** groups related surveys and satisfaction metrics for a business area.
- Choose **choice**, **rating**, **text**, **ranking**, **Likert** or **Net Promoter Score** questions according to the response needed. Structured choices support consistent reporting.
- Distribute surveys through **email**, a **link**, **QR code** or an embedded webpage. Use anonymous responses when identity is unnecessary; personalized invitations support respondent context.
- **Power Automate** can send a survey after case resolution. Survey variables personalize details such as case number; invitation and response relationships connect feedback to Dataverse records.

02 Dynamics 365 Sales

Customers and the sales lifecycle

- An **account** represents an organization; a **contact** represents a person. A **lead** is potential business awaiting qualification; an **opportunity** is a qualified potential sale.
- **Qualifying a lead** can create or associate account, contact and opportunity records according to configuration. Reuse existing customers and resolve duplicates to preserve a coherent customer history.
- **Disqualification** closes an unsuitable lead without deleting its history. Reactivate it if interest returns, then qualify it when the opportunity is ready.
- The sales lifecycle commonly progresses through **lead** → **opportunity** → **quote** → **order** → **invoice**. An opportunity tracks estimated revenue, close date, products and a won or lost outcome.

Product catalog and pricing

- **Products** describe goods or services. **Product families** organize related products and shared properties; **bundles** combine items sold together.
- **Unit groups** define related measurements, such as each, box and case. A **unit** specifies the quantity sold; a product has a unit group and default unit.
- **Price lists** supply selling prices; **price list items** associate a product, unit and pricing method. **Discount lists** define quantity-based reductions.

Sales

Microsoft Dynamics 365 Fundamentals (CRM)

KNOWLEDGE CHEATSHEET

SALES LIFECYCLE

Lead Qualify → **Opportunity** Develop → **Quote** Propose → **Order & invoice** Fulfill

- An environment has a **base currency** and can use additional transaction currencies. Exchange rates convert monetary values to base currency; maintain rates manually or through configured integration.
- **Quotes** communicate proposed prices and terms. Generate customer documents with **Word templates** or supported **PDF export**; an order records acceptance and an invoice requests payment.

Pipeline, forecasts and intelligence

- **Sales forecasts** roll up opportunity revenue across periods and hierarchies. Sellers inspect their pipeline, managers compare commitments with targets, and leaders identify gaps and coaching needs.
- **Predictive lead and opportunity scoring** prioritizes records by likelihood of conversion or success. A score supports judgment; it is different from a revenue forecast.
- **Relationship analytics** summarizes interaction patterns and relationship health. **Who knows whom** helps locate colleagues with connections to a prospective customer.
- **Assistant cards** surface reminders and suggested actions. **Auto capture** suggests relevant emails or meetings for tracking; **talking points** help prepare personalized conversations.
- **Sales Professional**, **Enterprise** and **Premium** distinguish sales capability levels. Premium adds advanced sales intelligence; feature access also depends on licensing, configuration and assigned permissions.

LinkedIn and sales assistance

- **LinkedIn Sales Navigator** surfaces people and company insights inside Sales. **Related Leads** helps find other relevant people; lead and account controls provide profile context.
- **Data validation** helps identify differences between CRM and LinkedIn information. Embedded LinkedIn information does not imply unrestricted copying of profiles into CRM.
- **Microsoft Relationship Sales** combines Dynamics 365 Sales Enterprise with LinkedIn Sales Navigator capabilities for relationship-based selling.
- **Microsoft Copilot for Sales** brings CRM context together with Microsoft 365 emails, meetings and documents to assist sellers with preparation, summaries and content. Access follows connected-system permissions.

Activities and deal collaboration

- **Activities** include email, appointments, phone calls and tasks. The **timeline** shows activities and notes related to a record; custom activity tables support additional interaction types.
- A **note attachment** stores a file with a record. Use integrated **SharePoint document management** when teams need shared documents, version history and coauthoring.
- **Stakeholders** identify customer-side participants. **Sales team** connections identify internal collaborators; the Opportunity Sales Access Team template can grant them access to the opportunity.

Customer Service

Microsoft Dynamics 365 Fundamentals (CRM)

KNOWLEDGE CHEATSHEET

CUSTOMER SUPPORT

Case Capture issue → **Queue** Route work → **Agent** Resolve → **Knowledge** Reuse

03 Dynamics 365 Customer Service

Cases and service processes

- A **case** tracks a customer issue from intake through resolution. Relate the customer, subject, priority, activities and resolution details to preserve the service history.
- **Automatic record creation and update rules** turn supported incoming activities, such as emails, into cases. Website submissions can create cases through a configured portal or integration.
- **Parent and child cases** group related issues; **merging cases** consolidates duplicates. **Similar cases** help agents reuse experience from comparable problems.
- **Business process flows** guide agents through stages and required steps. They provide consistent process guidance; routing determines where the work goes.

Queues and routing

- A **queue** organizes pending work. A **queue item** references the case or activity being worked; queue membership identifies the agents who handle that workload.
- **Pick** a queue item to work on it. **Release** clears the working agent so another agent can pick it; releasing work does not resolve or delete the case.
- **Routing rules** send matching cases to the appropriate queue or user. Use case attributes such as category to separate sales, service and escalation workloads.
- **Unified routing** classifies work and routes it to queues, then assigns it using rules such as skills, capacity and presence. Queue routing and agent assignment are separate decisions.

SLAs and entitlements

- A **service-level agreement (SLA)** defines time-based commitments, such as first response or resolution. **SLA KPIs** measure them; conditions determine applicability, success, warnings and failure actions.
- **Business hours** and **holiday schedules** define working time used by SLA calculations. Configure eligible pause and resume behavior for periods when the SLA clock should stop.
- An **entitlement** specifies the support a customer can consume, measured by **number of cases** or **hours**. Validity dates, covered products and channels can restrict its application.
- **SLA = how quickly** service must occur; **entitlement = how much** support is available. Entitlements can be renewed for another term; activation and consumption rules control enforcement.

Customer Service / Field Service

Microsoft Dynamics 365 Fundamentals (CRM)

KNOWLEDGE CHEATSHEET

CUSTOMER SUPPORT

Case Capture issue → **Queue** Route work → **Agent** Resolve → **Knowledge** Reuse

Knowledge and agent productivity

- **Knowledge management** captures reusable solutions for consistent service. Articles support rich text, versions, translations, review and approval before publication.
- **Knowledge search** finds relevant text using keywords and context. Agents can link articles to cases or share article content in email; configured external search expands available knowledge.
- **Agent scripts** guide the conversation with consistent steps and wording. **Macros** automate repetitive actions, such as opening a record or preparing an email.
- **Connected Customer Service** uses IoT alerts to help detect equipment problems before customers report them. Rules and automation can create cases and initiate service action.

Omnichannel and supervision

- **Omnichannel for Customer Service** supports conversations across configured channels such as chat, SMS, voice and messaging. A unified agent workspace retains customer and conversation context.
- **Sessions** group work around a conversation or case; **application tabs** expose related information. **Presence** and **capacity** help determine which agents can accept work.
- **Copilot Studio** conversational agents, called **Power Virtual Agents** in older terminology, can answer routine questions and transfer context to a human agent when needed.
- **Sentiment analysis** helps supervisors detect difficult conversations. Service insights dashboards analyze agents, cases, conversations, resolution and workload; filters narrow the view for investigation.

04 Dynamics 365 Field Service

Work orders and service delivery

- A **work order** defines on-site service: location, customer asset, products, services and tasks. It can originate from a case, agreement or IoT-driven process.
- The work-order lifecycle is **create** → **schedule** → **dispatch** → **service** → **review** → **invoice**. Scheduling assigns suitable resources; dispatch communicates the assignment to technicians.
- **Work order system statuses** include Unscheduled, Scheduled, In Progress, Completed, Posted and Canceled. **Booking statuses** describe resource progress, such as Traveling, In Progress or On Break.
- Booking status changes can update the related work order and record service timing. A technician booking and the work order are related records with different status meanings.

Field Service

Microsoft Dynamics 365 Fundamentals (CRM)

KNOWLEDGE CHEATSHEET

FIELD SERVICE DELIVERY

Work order Define → **Scheduling** Assign → **Mobile** Perform → **Review** Invoice

Resources and scheduling

- **Bookable resources** include people, equipment and facilities. **Crews** group resources working together. Work hours, territories, location and availability constrain scheduling.
- **Characteristics** capture skills and certifications; **proficiency ratings** express skill level. **Resource requirements** state what a job needs, including specialized equipment.
- The **schedule board** displays resources, bookings and unscheduled requirements, with filters and map views. Dispatchers can inspect work details and manually book resources.
- The **schedule assistant** proposes suitable resources and times for a requirement. **Resource Scheduling Optimization** automatically schedules multiple jobs against objectives such as reduced travel.
- **Universal Resource Scheduling** supplies shared scheduling capabilities. Consider travel time, promised service windows, resource calendars and equipment availability when assigning work.

Mobile work and inspections

- The **Field Service mobile app** gives technicians bookings, work orders, customer details and tasks. Configured **offline profiles** provide local data that synchronizes after connectivity returns.
- Technicians record time, products used, service completion, notes and photos. **Push notifications** alert mobile users to relevant changes when configured.
- **Service tasks** list work to perform. **Inspections** attach structured checklists or questionnaires to work orders through service tasks and capture consistent results.
- **Location tracking** records technician position when enabled and permitted. Maps help dispatchers understand resource location; tracking does not itself optimize the schedule.
- **Remote Assist** terminology describes remote visual collaboration with an expert. Distinguish remote guidance from job scheduling and from automated IoT monitoring.

Field Service / Project Operations

Microsoft Dynamics 365 Fundamentals (CRM)

KNOWLEDGE CHEATSHEET

PROJECT DELIVERY

Contract Agree → **Tasks** Plan → **Resources** Book → **Actuals** Track

Assets, inventory and connected service

- A **customer asset** is installed equipment maintained for a customer, with service history. The service site is a location; the spare part consumed during repair is inventory.
- **Warehouses** represent stock locations, including technician trucks. Inventory adjustments correct quantities; transfers move stock, and work-order consumption records parts used.
- **Return merchandise authorizations (RMAs)** manage customer returns. Receipt, replacement and supplier-return processes handle faulty equipment and parts.
- **Agreements** define recurring service and can generate work orders or invoices on a schedule. They differ from support entitlements and individual work orders.
- **Connected Field Service** uses device telemetry and IoT alerts to enable proactive maintenance and remote commands. Azure IoT integration connects devices; automation can create service work.

05 Dynamics 365 Project Operations

Project sales and billing

- **Project Operations** connects project-based selling, planning, resource management, time, expenses and financial processes. Project opportunities and quotes describe the proposed professional services.
- **Project contracts** record agreed scope, commercial terms and contract lines. Estimates and line details capture effort, rates and expenses; invoice schedules define billing timing.
- **Time and material** billing uses approved chargeable time and expenses. **Fixed-price** billing uses agreed amounts, commonly invoiced against milestones.
- A **project task** specifies work, dates and duration. A **work breakdown structure** organizes tasks and dependencies; estimates describe effort and cost rather than just elapsed time.

Project resources and utilization

- **Skills** describe capabilities, licenses and certifications. **Proficiency models** grade capability levels; **roles** describe project responsibilities such as consultant or project manager.
- The **schedule board** helps find and book suitable available resources. The **utilization view** compares booked time with capacity to reveal overbooking or unused availability.

Project Operations / Shared Platform

Microsoft Dynamics 365 Fundamentals (CRM)

KNOWLEDGE CHEATSHEET

PROJECT DELIVERY

Contract Agree → **Tasks** Plan → **Resources** Book → **Actuals** Track

- **Bookings** reserve resource capacity; **task assignments** allocate project work. **Resource reconciliation** compares them and helps resolve differences.
- **Full capacity** books all working hours; **percentage capacity** books a share. Both ignore existing bookings and can overbook. **Remaining capacity** books uncommitted time.
- **Front-load hours** consumes the earliest available capacity. **Evenly distribute hours** spreads requested effort across working days and can overbook existing commitments.

Time, expense and approval

- **Time entries** capture work against projects and tasks; **expense entries** capture project costs. Team members submit entries and approvers review them before downstream processing.
- **Recall** requests withdrawal of submitted time so it can be corrected when allowed. **Rejection** returns an entry to the submitter; approval and invoicing status affect available correction actions.
- **Actuals** record approved business events such as time and expense costs and sales values. Compare planned work, resource capacity and actual results to monitor project performance.

06 Shared platform, collaboration and reporting

Dataverse and application access

- **Microsoft Dataverse** stores business data in tables, rows and columns. Relationships connect records, and shared account, contact and activity data supports customer engagement apps.
- **Power Apps** builds and extends applications. **Model-driven apps** use Dataverse forms, views and business processes; **canvas apps** offer tailored screen layouts.
- **Security roles** grant table privileges and access depth. Business units, ownership, teams and sharing determine which rows are available; column security protects selected sensitive fields.
- An application license and **security permissions** are separate requirements. Microsoft 365 access alone does not grant unrestricted Dynamics 365 Sales use; users also need app and environment access.
- **App designer** changes model-driven navigation and included pages. **Business rules** validate or set data; **business process flows** guide stages; **Power Automate** performs event-driven automation.

Shared Platform

Microsoft Dynamics 365 Fundamentals (CRM)

KNOWLEDGE CHEATSHEET

SHARED CAPABILITIES

- **Dataverse** — Store
- **Power Apps** — Extend
- **Power Automate** — Act
- **Power BI** — Analyze

Views, search and dashboards

- A **view** is a filtered list of rows with selected columns and sorting. A **form** displays or edits one record. A **dashboard** combines lists, charts and other components.
- **Quick Find** searches within a table; **categorized search** groups matches by table. **Dataverse search**, previously called relevance search, provides a broader ranked search experience.
- **Advanced filters** express conditions and related-table criteria, such as accounts with disqualified leads. Save a view when the same result set will be needed again.
- **Charts** aggregate data visually; drill-down explores a subset, while saving or editing a chart preserves a changed grouping. **Report Wizard** creates supported tabular and chart reports.
- **Power BI** models and analyzes data across sources with interactive reports. Embedded visuals retain their own access requirements; a dashboard can present components from different tables.

Excel and Microsoft 365 integration

- **Static Excel worksheets** capture a snapshot. **Dynamic worksheets** and **dynamic PivotTables** can refresh data; refresh does not make ordinary cell edits write back to Dataverse.
- **Open in Excel Online** supports editing and saving supported record data back to the app. **CSV import** creates or updates data through a mapped import process.
- **Dynamics 365 App for Outlook** tracks email and links it to business records. Configured synchronization handles supported email, appointment and contact data.
- **SharePoint** supports document libraries, permissions and versioning. **OneDrive for Business** supports personal working files and sharing; access to a CRM record does not automatically grant document access.
- **Teams** supports chat, meetings, calls and collaboration around records and files. **OneNote** integration supports shared notes; **Word templates** produce consistently formatted business documents.

Shared Platform

Microsoft Dynamics 365 Fundamentals (CRM)

KNOWLEDGE CHEATSHEET

SHARED CAPABILITIES

- **Dataverse** — Store
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Automation and self-service

- **Power Automate** connects services and automates actions from triggers, such as sending a survey when a case closes. Connectors provide access to supported systems.
- **Power Pages** provides external-facing websites backed by Dataverse, such as customer self-service case submission. Web roles and table permissions govern external access.
- **Copilot Studio** builds conversational experiences; **Power BI** supplies analytics; **Power Apps** supplies applications. Match the tool to the business outcome and required data access.

Adjacent business applications

- **Supply Chain Management** covers procurement, inventory and manufacturing. Product types distinguish items and services; product dimensions such as size and color define variants.
- **Finance** manages financial accounting. A **chart of accounts** classifies transactions; a legal entity's **ledger** specifies accounting settings. **Posting layers** separate accounting bases.
- In finance and operations apps, **batch groups** organize batch processing workloads; task dependencies control sequence. **Commerce** supports retail channels, customers, orders and quotations.
- **Word templates** suit repeatable document layouts; **Power BI** suits interactive analysis; **SSRS** suits paginated operational reports. **PDF** is an output format rather than a report designer.