

2 Days

80715: Office 365 Integration with CRM

This course describes the techniques required to customise Microsoft Dynamics CRM to meet the specialised needs of businesses. The topics covered include security, creation and configuration of entities, design of forms views and charts, auditing and solutions. The course describes how each topic relates to the other topics to produce a fully configured, effective solution.

Course Details

Course Outline

Module 01: Introduction and Overview of Integration with Office 365 and Dynamics CRM

Module 02: Email Server Integration

Module 03: Email Client Integration with CRM

Module 04: SharePoint and CRM

Module 05: Working with Excel

Module 06: Power BI with Dynamics CRM

Module 07: OneNote Integration with Dynamics CRM

Module 08: Team Collaboration

Who Should Attend

Individuals wishing to obtain a certification in Dynamics CRM 2016 Sales should take this exam. The primary audience is a partner who sells and implements sales modules in Microsoft Dynamics CRM 2016. This audience typically includes sales operation managers, customer service managers, service schedulers, administrators, office managers, executives and consultants who want to demonstrate a foundational understanding of the application functionality. The exam is appropriate for those who are new to Dynamics CRM, yet have a background in the business process as well as Microsoft Office.

Exams

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