

# Business App Customer Engagement

## MB-910T00: Microsoft Dynamics 365 Fundamentals (CRM)

### Course outline

#### Module 1: Learn the Fundamentals of Dynamics 365 Marketing

This module covers the basic concepts of customer engagement and what the customer engagement apps have in common before diving into Dynamics 365 Marketing. We begin with the standard marketing business processes and how Marketing addresses those. Then we examine the product capabilities. Finally, we cover additional marketing apps such as LinkedIn Campaign Manager, Dynamics 365 Customer Voice and Dynamics 365 Customer Insights.

#### Lessons

- Get introduced to the Dynamics 365 customer engagement apps
- Examine Dynamics 365 Marketing
- Describe Dynamics 365 Marketing capabilities
- Review Additional Marketing Apps

#### Lab : Working with customer engagement apps

#### Lab : Manage Customers and Activities

#### Lab : Search and filter data

#### Lab : Dynamics 365 Marketing Capstone Lab

- Create a marketing email
- Create a Segment in Dynamics 365 Marketing
- Create a Customer Journey

After completing this module, students will be able to:

- Describe the customer engagement apps and what they have in common
- Describe the standard marketing processes and how Dynamics 365 Marketing addresses them

- Describe Dynamics 365 Marketing features and capabilities
- Describe additional marketing apps

## **Module 2: Learn the Fundamentals of Dynamics 365 Sales**

This module provides an introduction to Dynamics 365 Sales. We begin with the standard sales business processes and how Sales addresses those. Then we examine the product capabilities. Finally, we cover additional sales apps such as Sales Insights and Sales Navigator.

### **Lessons**

- Explore Dynamics 365 Sales
- Manage the sales lifecycle with Dynamics 365 Sales
- Review additional sales apps

### **Lab : Dynamics 365 Sales Capstone Lab**

- Create and qualify a Lead
- Manage a sales Opportunity

After completing this module, students will be able to:

- Describe the standard sales processes and how Dynamics 365 Sales addresses them
- Describe Dynamics 365 Sales capabilities
- Describe additional sales apps such as Sales Insights and Sales Navigator

## **Module 3: Learn the Fundamentals of Dynamics 365 Customer Service**

This module provides an introduction to Dynamics 365 Customer Service. We begin with the standard customer service business processes and how Customer Service addresses those. Then we examine the product capabilities. Finally, we cover additional customer service apps such as Omnichannel for Customer Service, Dynamics 365 Customer Service Insights, Customer Service Scheduling and Connected Customer Service.

### **Lessons**

- Examine Dynamics 365 Customer Service
- Describe Dynamics Customer Service capabilities
- Review additional customer service apps

### **Lab : Dynamics 365 Capstone Lab**

- Create and publish a Knowledge Article

- Manage a support Case through its life cycle

After completing this module, students will be able to:

- Describe the standard customer service processes and how Dynamics 365 Customer Service addresses them
- Describe Dynamics Customer Service capabilities
- Describe additional sales apps such as Sales Insights and Sales Navigator

## **Module 4: Learn the Fundamentals of Dynamics 365 Field Service**

This module provides an introduction to Dynamics 365 Field Service. We begin with the standard field service business processes and how Field Service addresses those. Then we examine the product capabilities, including work order generation, scheduling, inventory management and asset management.

### **Lessons**

- Examine Dynamics Field Service
- Generate Work Orders in Dynamics 365 Field Service
- Describe the scheduling capabilities of Dynamics 365 Field Service
- Examine the inventory management capabilities of Dynamics 365 Field Service
- Review the asset management capabilities of Dynamics 365 Field Service

### **Lab : Dynamics 365 Capstone Lab**

- Create a Case and escalate to a Work Order
- Schedule items with Dynamics 365 Field Service

After completing this module, students will be able to:

- Describe the standard field service business processes and how Dynamics 365 Field Service addresses
- Describe how to generate Work Orders
- Describe the scheduling capabilities of Dynamics 365 Field Service
- Describe the inventory management capabilities of Dynamics 365 Field Service
- Describe the asset management capabilities of Dynamics 365 Field Service

## **Module 5: Learn the Fundamentals of Dynamics 365 Project Operations (CRM)**

This module provides an introduction to the customer engagement aspects of Dynamics 365 Project Operations. We begin with the standard project-based business processes and how Project Operations addresses those. Then we examine the product capabilities, including sales, project management, and resource utilization.

## Lessons

- Examine Dynamics 365 Project Operations
- Describe the sales capabilities of Dynamics 365 Project Operations
- Plan projects with Dynamics 365 Project Operations
- Review the resource utilization capabilities of Dynamics 365 Project Operations

## Lab : Dynamics 365 Project Operations Capstone Lab

- Create a project-based Lead
- Manage a project-based Opportunity
- Create a Project Quote and Project Estimate

After completing this module, students will be able to:

- Describe project-based customer engagement processes addressed by Dynamics 365 Project Operations
- Describe the sales capabilities of Dynamics 365 Project Operations
- Describe the project management capabilities of Dynamics 365 Project Operations
- Describe the resource utilization capabilities of Dynamics 365 Project Operations

# PL-200T00: Microsoft Power Platform Functional Consultant

## Course outline

### Module 1: Introduction to Microsoft Power Platform

This module will provide the learner with background about Microsoft Power Platform and its 4 key components: Power Apps, Power Automate, Power BI, and Power Virtual Agents.

#### Lessons

- Microsoft Power Platform overview

#### Lab : Validate lab environment

After completing this module, students will be able to:

- Identify the key components of Microsoft Power Platform

## **Module 2: Work with Dataverse**

In this module, students will learn about creating a data model in Microsoft Dataverse, including importing data, using tabular reporting options, and configuring security. They will also learn about creating easy AI with AI Builder.

### **Lessons**

- Work with tables
- Understand data types and behavior
- Configure security settings

### **Lab : Create an app**

### **Lab : Create tables and columns**

### **Lab : Create relationships**

### **Lab : Additional table settings**

After completing this module, students will be able to:

- Understand tables, columns, rows, and relationships
- Configure a data model in Dataverse
- Work in an environment within the Microsoft Power Platform admin center

## **Module 3: Make model-driven apps with Power Apps**

In this module, students will learn the business value of Power Apps model-driven apps. They will then learn to how to configure and design them, including user experience considerations.

### **Lessons**

- Building blocks of model-driven apps
- Design model-driven apps
- Forms and views

## **Lab : Modify views**

## **Lab : Modify forms**

## **Lab : App designer**

After completing this module, students will be able to:

- Connect to data in Power Apps
- Build a Power Apps model-driven app
- Design an application user experience

## **Module 4: Make canvas apps with Power Apps**

In this module, students will learn the business value of Power Apps canvas apps. They will then learn to how to configure and design them, including user experience considerations.

### **Lessons**

- Power Apps studio
- Canvas apps capabilities
- User experience

## **Lab : Build a canvas app**

## **Lab : Work with data and services**

## **Lab : User experience**

After completing this module, students will be able to:

- Build a Power Apps canvas app
- Configure user experience in a canvas app
- Understand the building blocks of a canvas app

## **Module 5: Make portals with Power Apps**

In this module, students will learn the business value of Power Apps portals. They will then learn to how to access Dataverse data in a portal and how portal authentication works.

## Lessons

- Power Apps portals architecture
- Access Microsoft Dataverse in your portal
- Authentication and user management

After completing this module, students will be able to:

- Understand how to use Dataverse data in a portal
- Recognize types of Power Apps portals for different audiences
- Register users for portal access

## Module 6: Introduction to automation

In this module, students will learn about business rules and when they can be used. Students will also get an overview of Power Automate.

## Lessons

- Business rules
- Power Automate overview

### Lab : Configure a new business rule

### Lab : Create security roles

### Lab : Create users

### Lab : Advanced business rules

After completing this module, students will be able to:

- Create users and grant security roles
- Create and configure security roles
- Create and configure advanced business rules

## Module 7: Build Power Automate cloud flows

In this module, students will learn the fundamentals of cloud flows, including triggers and flows. They will create two flows, including an approval flow.

## **Lessons**

- Fundamentals of cloud flows
- Triggers
- Actions

### **Lab : Create a flow**

### **Lab : Build an approval flow**

After completing this module, students will be able to:

- Create cloud flows
- Understand the fundamentals of cloud flows
- Use triggers and actions

## **Module 8: Build Power Automate desktop flows**

In this module, students will learn what desktop flows are and how they are created. Students will also learn how desktop flows are used and how to use process advisor to better understand places to streamline workflows.

## **Lessons**

- Build desktop flows
- Use desktop flows
- Process advisor

After completing this module, students will be able to:

- Understand the value of desktop flows
- Identify when to use desktop flows and how process advisor can help

## **Module 9: Build business process flows**

In this module, students will learn the value of business process flows and how to use the business process flow designer. They will also practice building business process flows and learn how they can be automated.

## Lessons

- Why use business process flows
- Using business process flow designer
- Automating your business process flow

### Lab : Build a branching business process flow

### Lab : Build a business process flow

After completing this module, students will be able to:

- Create business process flows
- Use the business process flow designer
- Know how to add automation to a business process flow

## Module 10: Build chatbots with Power Virtual Agents

In this module, students will learn how to automate customer interactions with a chatbot using Power Virtual Agents.

## Lessons

- Create a chatbot
- Configure topics
- Automate and integrate
- Configure entities
- Test and publish chatbots

### Lab : Build a chatbot

After completing this module, students will be able to:

- Create a chatbot
- Include a flow in a chatbot
- Create topics and entities

## Module 11: Analyze data with Power Bi

In this module, students will learn how to work with Power BI Desktop and Power BI Service to analyze data and create visualizations.

## Lessons

- Use tabular reporting options in Dataverse
- Use charts and dashboards in Dataverse
- Get started with Power BI
- Model data in Power BI
- Create visualizations and dashboards
- Publish and share in Power BI

After completing this module, students will be able to:

- Create visualizations
- Consume data in Power BI
- Export data visualizations for stakeholders

## Module 12: Putting it all together

In this module, students will learn how the concepts of this course pull together and how to use functional consultant skills on Microsoft Power Platform engagements. They will also learn how solutions are used in Microsoft Power Platform and will be introduced to AI Builder.

## Lessons

- Using solutions
- AI Builder
- Consultant skills
- Lab : Build charts
- Lab : Build dashboards
- Lab : Build delete data
- Lab : Build a Word template
- Lab : Build an Excel template
- Lab : Duplicate detection
- Lab : Import data
- Lab : Export data

After completing this module, students will be able to:

- Understand how the concepts of this course work together
- Manage solutions in Microsoft Power Platform
- Use AI Builder to create and manage models
- Apply functional consultant skills

