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step forward

Gold
**Microsoft
Partner**

■■ Microsoft

Business App skilling program

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

MB-210: Microsoft Dynamics 365 Sales

Course outline

Module 1: Configure Dynamics 365 Sales

In this module, we will learn about configuring the sales application to fit an organization's unique requirements.

Lessons
Configure organization and management settings
Create and configure sales visualizations
After completing this module, you will be able to:
Install and configure the sales application.
Identify common sales scenarios.

Module 2: Manage customers, leads, and opportunities
In this module, you will learn how to manage customer data records, use built-in sales tools, and take a lead through the lead lifecycle.
Lessons
Manage customers using accounts and contacts
Manage leads
Manage opportunities
After completing this module, you will be able to:
Create customer records.
Use sales tooling.
Create leads and opportunities.

Module 3: Process sales orders
In this module, we will learn how to use quotes and orders to further use Dynamics 365 Sales to manage your sales opportunities and turn them into closed deals.
Lessons
Manage quotes, orders, and invoices
Manage and organize the product catalog
Manage forecasting
Configure playbooks
After completing this module, you will be able to:
Create and use the product catalog.
Add quotes to opportunities.
Complete a sale with an order.

Module 4: Integrate components with Dynamics 365 Sales
In this module, we will learn how to use sales analytics tools to empower the sales team.
Lessons
Leverage Embedded Intelligence in Dynamics 365 Sales
Manage relationships with social selling
After completing this module, you will be able to:
Use Embedded Intelligence tools.
Manage relationships using social selling tools.

Microsoft Dynamics 365 Marketing

Module 1: Marketing Application Configuration
In this module, you will learn about advanced settings, marketing content, templates and integrations in Dynamics 365 for Marketing.
Lessons
Configure advanced settings
Manage marketing content and templates
Manage LinkedIn and Power BI integrations
After completing this module you will be able to:
Configure advanced settings such as organization, business management, and content.
Manage marketing content and templates.

Module 2: Leads
This module will review how to create, manage and score leads.
Lessons
Create and manage leads
Assess sales readiness
After completing this module you will be able to:
Create and manage leads.
Synchronize leads from LinkedIn.
Assess sales readiness using lead scoring models.

Module 3: Marketing Forms and Pages

This module will cover how to create marketing forms and pages.

Lessons

Create marketing forms

Create marketing pages

Manage internet marketing

After completing this module you will be able to:

Create marketing forms and embed them on marketing pages.

Create a marketing page.

Preview, validate and go live with a marketing page.

Create marketing form and page templates.

Module 4: Segments and Lists

This module will cover how to manage segments, subscription centers, lists and double optin.

Lessons

Create and manage segments

Create and manage subscription centers

Double opt-in

After completing this module you will be able to:

Configure static and dynamic segments.

Create a subscription list.

Set up a subscription center page.

Set up and enable a double opt-in process.

Module 5: Marketing Emails

This module will cover how to create email messages in Dynamics 365 Marketing.

Lessons

Create Email Message

After completing this module you will be able to:

Create and design email messages.

Preview, validate and go live with email messages.

Save an email message as a template.

Module 6: Customer Journeys

This module will review the customer journey creation process.

Lessons

Create customer journeys

After completing this module you will be able to:

Create a customer journey from a template.

Identify customer journey tiles and properties.

Validate and go live with a customer journey.

Create an account-based customer journey.

Understand the marketing calendar features.

Module 7: Insights

This module will demonstrate how to view, understand and manage customer insights.

Lessons

Marketing insights

Customer insights

Marketing execution insights

Lead management insights

Internet marketing insights

After completing this module you will be able to:

Locate insights.

Understand marketing insights such as contact, segment, customer journey, marketing email,and leads.

Module 8: Events

In this module you will learn how to manage event planning and execution in Dynamics 365 for Marketing.

Lessons

Manage event planning

Manage event execution

After completing this module you will be able to:

Create in-person and webinar events.

Set up event planning features such as sessions, speakers, event passes, waitlists, and venues.

Create and manage recurring events.

Module 9: Surveys

In this module you will review how to configure, design and distribute surveys in Dynamics 365 for Marketing.

Lessons

Create surveys

After completing this module you will be able to:

Create a reusable survey theme.

Create, design, preview and publish a survey.

Module 10: Results

In the Results module, you will review marketing event and survey insights.

Lessons

Review event and survey results

After completing this module you will be able to:

Utilize the event dashboard to assess the outcome of your events.

MB-230T01: Microsoft Dynamics 365 Customer Service

Contents:

Module 1: Work with Cases

Get started with Cases
Managing Case
Use queues to manage case workloads
Create or update records automatically
Unified routing

Module 2: Work with entitlements and service level agreements

SLA and entitlement overview
Create and manage entitlements
Create and manage SLAs

Module 3: Work with Knowledge Management

Knowledge management overview
Authoring and organizing
Use knowledge content
Manage knowledge content

Module 4: Create surveys with Customer Voice

Create a survey project
Create surveys
Send surveys
Automate surveys

Module 5: Schedule Services

Configure Customer Service Scheduling
Schedule Services

Module 6: Work with Dynamics 365 Customer Service workspaces

Enhance agent productivity
App profile manager

Module 7: Omnichannel for Dynamics 365 Customer Service

Routing and work distribution
Deploy an SMS channel
Deploy chat widgets
Create smart assist

Module 8: Manage analytics and insights

Get started with Customer Service Insights
Create Visualizations

Module 9: Connected Customer Service

Work with Connected Customer Service
Registering and Managing Devices

Module 10: Implement Power Platform
Create custom apps in Microsoft Power Platform for your Customer Service
solution
Integrate a Power Virtual Agents Bot