

# MB-280: Microsoft Dynamics 365 Customer Experience Analyst

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**Course Description:** This course is designed to equip participants with the skills and knowledge necessary to become proficient in configuring, customizing, and expanding the functionality of Dynamics 365 Sales to support and optimize an organization's sales process. The course covers key areas such as Dynamics 365 Customer Insights, the Microsoft Power Platform, and advanced Dynamics 365 Sales features. Participants will gain hands-on experience in model-driven apps, data management, security configuration, and integration with Microsoft 365 services, ensuring they are well-prepared to enhance the customer experience within their organization.

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**Audience Profile:** This course is intended for Microsoft Dynamics 365 customer experience analysts who are involved in or planning to participate in Dynamics 365 Sales implementations. It is also suitable for professionals responsible for configuring and customizing Dynamics 365 Sales to streamline and enhance the sales process. Ideal candidates have a foundational understanding of sales processes, user experience, and customer relationship management systems, along with a working knowledge of Dynamics 365 and the Microsoft Power Platform.

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## Prerequisites:

- Experience in configuring model-driven apps within Microsoft Power Apps.
  - Basic understanding of accounts, contacts, leads, opportunities, and activities within Dynamics 365 Sales.
  - Familiarity with Dataverse, including tables, columns, relationships, and the security model.
  - Basic knowledge of Power Automate, including connectors, triggers, and actions.
  - Prior experience working with Dataverse solutions.
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**Course Objectives:** Upon completing this course, participants will be able to:

1. Configure and manage Dynamics 365 Sales standard and premium features.
2. Implement collaboration features within Dynamics 365 Sales.
3. Customize and extend Dynamics 365 Sales using Microsoft Power Platform.
4. Configure and manage Dataverse components including tables, columns, and relationships.
5. Visualize and manage data within Dataverse using various tools and templates.

6. Set up and use sales accelerator capabilities in Dynamics 365 Sales.
  7. Implement and manage goal tracking in Dynamics 365 Sales and Customer Service.
  8. Enhance Dynamics 365 Sales with Microsoft 365 services and mobile apps.
  9. Utilize Dynamics 365 Customer Insights - Journeys for real-time customer engagement.
  10. Unlock customer intent using Dynamics 365 Customer Insights - Data.
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## **Table of Contents:**

### **Learning Path 1 - Get started using Dataverse**

- Create and manage environments in Dataverse
- Create and manage tables and columns in Dataverse
- Load/export data and create data views in Dataverse
- Connect to other data in a Power Apps canvas app

### **Learning Path 2 - Create relationships, business rules, calculations, and rollups in Dataverse**

- Create relationships between tables in Dataverse
- Define and create business rules in Dataverse
- Create and define calculation or rollup columns in Dataverse

### **Learning Path 3 - Customize the command bar in Power Apps**

- Customize the command bar
- Common command bar scenarios
- Advanced command bar concepts

### **Learning Path 4 - Visualize, import, and export Microsoft Dataverse data**

- Visualize data with Dataverse views
- Use Power Query to load data in Dataverse
- Use Microsoft Word and Excel templates with Dataverse
- Export data from Dataverse and use Microsoft Excel to edit records
- Use Azure and external tools to manipulate data

### **Learning Path 5 - Work with Dynamics 365 Sales**

- Get started with Dynamics 365 Sales
- Set up and configure Dynamics 365 Sales

- Manage leads, opportunities, and product catalogs
- Process sales orders and manage relationships
- Analyze Dynamics 365 sales data

#### **Learning Path 6 - Set up and use the sales accelerator capabilities in Dynamics 365 Sales**

- Set up Sales accelerator in Dynamics 365 Sales
- Create sales sequences with Sales Insights
- Work with segments and assignment rules in Sales accelerator
- Engage with customers through text messages in Dynamics 365 Sales

#### **Learning Path 7 - Implement goal management in Dynamics 365 Sales and Customer Service**

- Define and track individual goals in Dynamics 365 Sales and Customer Service
- Use goal metrics in Dynamics 365 Sales and Customer Service

#### **Learning Path 8 - Enhance Dynamics 365 Sales with tools and apps**

- Use Microsoft 365 services with model-driven apps and Microsoft Dataverse
- Get started with the Dynamics 365 Sales mobile app

#### **Learning Path 10 - Work with real-time features in Dynamics 365 Customer Insights - Journeys**

- Create emails, text messages, and forms in Dynamics 365 Customer Insights - Journeys
- Manage consent and build journeys with Dynamics 365 Customer Insights - Journeys
- Manage leads and scoring in Customer Insights - Journeys
- Extend real-time marketing capabilities

#### **Learning Path 11 - Unlock customer intent with Dynamics 365 Customer Insights - Data**

- Get started with Dynamics 365 Customer Insights - Data
- Ingest and enrich data in Customer Insights - Data
- Create unified customer profiles and manage external connections
- Configure and administer Customer Insights - Data