

KOENIG SOLUTIONS • COURSE OUTLINE

MB-280: Microsoft Dynamics 365 Customer Experience Analyst

Learn to configure Dataverse and Dynamics 365 Sales, use the sales accelerator, and apply Customer Insights for journeys and data.

10

MODULES

36

TOPICS

COURSE OVERVIEW

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.

WHO THIS COURSE IS FOR

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.

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.

What You Will Learn

Upon completing this course, participants will be able to:

- Configure and manage Dynamics 365 Sales standard and premium features
- Implement collaboration features within Dynamics 365 Sales
- Customize and extend Dynamics 365 Sales using Microsoft Power Platform
- Configure and manage Dataverse components including tables, columns, and relationships
- Visualize and manage data within Dataverse using various tools and templates
- Set up and use sales accelerator capabilities in Dynamics 365 Sales
- Implement and manage goal tracking in Dynamics 365 Sales and Customer Service
- Enhance Dynamics 365 Sales with Microsoft 365 services and mobile apps
- Utilize Dynamics 365 Customer Insights - Journeys for real-time customer engagement
- Unlock customer intent using Dynamics 365 Customer Insights - Data

COURSE SYLLABUS

10 Modules, 36 Topics

01

Get Started Using Dataverse

TOPICS

- 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

02

Create Relationships, Business Rules, Calculations, and Rollups in Dataverse

TOPICS

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

03

Customize the Command Bar in Power Apps

TOPICS

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

04

Visualize, Import, and Export Microsoft Dataverse Data

TOPICS

- 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

05

Work with Dynamics 365 Sales

TOPICS

- 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

06

Set Up and Use the Sales Accelerator Capabilities in Dynamics 365 Sales

TOPICS

- 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

07

Implement Goal Management in Dynamics 365 Sales and Customer Service

TOPICS

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

08

Enhance Dynamics 365 Sales with Tools and Apps

TOPICS

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

10

Work with Real-Time Features in Dynamics 365 Customer Insights - Journeys

TOPICS

- 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

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Unlock Customer Intent with Dynamics 365 Customer Insights - Data

TOPICS

- 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

WHAT IS INCLUDED

Everything You Need to Succeed

- Koenig course material for every module
- Delivery by certified instructors and subject matter experts
- Hands-on exercises throughout the course
- Course completion certificate from Koenig

ABOUT KOENIG

Who We Are

Established in 1993, Koenig Solutions is a globally recognised training provider with 35+ technology partnerships, 5,000+ training programmes and a network of certified instructors and subject matter experts, supporting individuals and enterprise teams worldwide.

FLEXIBLE DELIVERY

Learn the Way That Suits You

Classroom Training

Live Online Classes (ILO)

Fly-Me-A-Trainer (FMAT)

Flexi (Self-Paced)

1-on-1 Training

Ready to Get Started?

Talk to a learning advisor about schedules, group training and customised delivery.

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