

MB-200: Dynamics 365 Customer Engagement Core



Days: 5

Description: The Microsoft Power Platform helps organizations optimize their operations by automating routine tasks and standardizing best practices. This training provides a high-level overview of the capabilities of Microsoft Dynamics 365 and the Power Platform and provides a foundation for other Microsoft Dynamics 365 and Power Platform training offerings.

Prerequisites:

- Completion or relevant knowledge of Microsoft Office 365 Work Load Administration
- Familiarity of business applications and the desire to customize and implement them for your business.

Module 1: Platform Overview

In this module you will learn the basics of the Power Platform. You will tour the various administrator portals and options as well as install applications.

Lessons

- Overview
- Configure Power Platform environments
- Creating applications
- Discovery and planning
- Module summary

After completing this module, you will be able to:

- Identify common platform components and their uses.

Module 2: Data Modeling

In this module you will learn how to model data effectively using the platform's entities, attributes and relationships.

Lessons

- Data model fundamentals
- Relationships
- Other entity options
- Other field options
- Internationalizing
- Module summary

After completing this module, you will be able to:

- Create and use relationships and entities.

Module 3: Model Driven Apps

In this module you will learn about model driven applications and how to configure and use them.

Lessons

- Configure model-driven apps
- Configure model-driven forms
- Configure views
- Configure model-driven charts
- Configure model-driven dashboards
- Configure reports
- Module summary

After completing this module, you will be able to:

- Create and modify forms, views, dashboards and other user experience components.

Module 4: Canvas Apps

In this module you will learn how to create and use canvas apps, as well as learn the differences between canvas apps and model-driven.

Lessons

- Application fundamentals
- Working with data and services
- Customizing the user experience
- Integration with model-driven apps
- Module summary

After completing this module, you will be able to:

- Create a canvas app.
- Work with CDS data.

Module 5: Security

In this module you will learn how the platform's security model manages users' experiences and access to both data and functionality

Lessons

- Security overview
- Business units
- Manage security roles
- Manage teams
- Configure hierarchy security
- Module summary

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After completing this module, you will be able to:

- Create and use Business Units.
- Create, modify and use Security Roles.

Module 6: Platform Automation Overview

In this module you will learn the basics of the Power Platform automation capabilities. You will learn the need for automation and how you can map the needs to the capabilities.

Lessons

- Platform automation overview
- Module summary

After completing this module, you will be able to:

- Identify common platform automation and their uses.

Module 7: Business Rules

In this module you will learn how to build and use business rules and how they work alongside other platform automations.

Lessons

- Introduction to business rules
- Additional business rule details
- Module summary

After completing this module, you will be able to:

- Create and use business rules.

Module 8: Workflows

In this module you will learn how to build and use workflows and how they work alongside other platform automations.

Lessons

- Introduction to workflows
- Building workflows
- Advanced workflow
- Module summary

After completing this module, you will be able to:

- Create and use workflows.

Module 9: Microsoft Flows

In this module you will learn how to build and use Microsoft Flows and how they work alongside other platform automations.

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Lessons

- Introduction to Microsoft Flow
- Other flow concepts
- Working with CDS
- Building approval flows
- Starting from apps
- Flow deployment considerations
- Module summary

After completing this module, you will be able to:

- Create and use Microsoft Flows.

Module 10: Business Process Flows

In this module you will learn how to build and use business process flows and how they work alongside other platform automations.

Lessons

- Introduction to business process flows
- Configure business process flows
- Additional business process flows details
- Module summary

After completing this module, you will be able to:

- Create and use business process flows.

Module 11: Introduction to Integrations

In this module you will learn the basics of the Power Platform integration capabilities. You will learn how to configure and use email integrations.

Lessons

- Overview of common scenarios
- Email integration
- Outlook integration
- Module summary

After completing this module, you will be able to:

- Identify common integrations.
- Configure and use email integration.

Module 12: Integration with Office

In this module you will learn how to integrate with common Office products to include OneNote, Word and Excel.

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Lessons

- Templates
- SharePoint
- Microsoft Teams
- Additional Integrations
- Module summary

After completing this module, you will be able to:

- Configure and use integrations with Office products.

Module 13: Managing Data

In this module you will learn how to import and export data for the Power Platform and create and use data maps.

Lessons

- Managing data overview
- Duplicate detection
- Importing data
- Exporting data
- Bulk delete
- Module summary

After completing this module, you will be able to:

- Import and export data.
- Create and use data maps.
- Perform bulk delete.

Module 14: Manage Instances and Applications

In this module you will learn how to enable and update first-party applications; install third-party apps and configure using admin portals.

Lessons

- Overview
- Manage applications
- Module summary

After completing this module, you will be able to:

- Enable and update first-party apps.
- Install third-party apps.

Module 15: Manage Solutions

In this module you will learn how to create manage and deploy solutions.

Lessons

- Solution concepts
- Planning and creating solutions
- Working with solution components
- Distributing solutions
- Working with managed solutions
- Module summary

After completing this module, you will be able to:

- Create, manage and deploy customizations with solutions.

Module 16: Additional Deployment Considerations

In this module you will learn how to configure for mobile and deploy components such as Microsoft Flow.

Lessons

- Configure
- Mobile configuration settings
- Mobile configuration
- Module summary

After completing this module, you will be able to:

- Configure for mobile.
- Deploy components.

Module 17: Documentation and Testing

In this module you will learn how to design test plans and perform performance tuning.

Lessons

- Creating test plans
- User interface testing
- Performance optimization and tuning
- Documentation
- Engage with the customer
- Module summary

After completing this module, you will be able to:

- Create and use test plans.
- Locate performance tuning tools.