MB-280T04: Configure a Dynamics 365 customer experience solution

Course ID #: 7000-1081-ZZ-Z

Hours: 7

Course Content

Description:

This course prepares you to complete the Dynamics 365 customer experience analyst challenge project and validate your skills. You should have already completed the following modules as part of the MB-280: Dynamics 365 Customer Experience Analyst course series. If you haven't, it's recommended that you take some time to complete these modules before beginning the challenge project.

Prerequisites:

You should be familiar with the basic features of Dynamics 365 Sales and Dynamics 365 Customer Insights and how to configure them.

Target Audience:

Business Analyst, Functional Consultant

Topics:

Lesson 1: Manage leads with Dynamics 365 Sales
- Dynamics 365 leads overview
- Create Dynamics 365 leads
- Lead management lifecycle
- Lead qualification
- Use Copilot with leads
- Lab - Work with Dynamics 365 leads
- Lead data management tools
- Module assessment
- Summary

Lesson 2: Manage opportunities with Dynamics 365 Sales
- Dynamics 365 opportunity overview
- Create Dynamics 365 opportunities
- Account and team selling
- Opportunity management lifecycle
- Use Copilot with opportunities
- Lab - Manage opportunities in Dynamics 365
- Module assessment
- Summary

MB-280T04: Configure a Dynamics 365 customer experience solution

Course ID #: 7000-1081-ZZ-Z

Hours: 7

Lesson 3: Manage and organize your product catalog with Dynamics 365 Sales
- Dynamics 365 product catalog overview
- Currencies and currency management
- Define products
- Product families
- Price lists
- Product catalog settings
- Exercise - Set up the product catalog
- Module assessment
- Summary

Lesson 4: Create emails in Dynamics 365 Customer Insights – Journeys
- Introduction
- Manage assets
- Create marketing emails
- Personalize content
- Use brand profiles
- Use Copilot to generate email content ideas
- Style emails with AI-assisted themes
- Create content blocks
- Preview and test emails
- Check your message for errors and publish
- Send emails without building a journey
- Edit a live email
- Prevent sending emails to duplicated email addresses
- Check your knowledge
- Summary

Lesson 5: Build journeys with Dynamics 365 Customer Insights – Journeys
- Introduction
- Create and manage segments
- Work with triggers
- Create a journey
- Add messages to the journey
- Add AI powered action to the journey
- Add conditions to the journey
- Add activities to the journey
- Add connectors to the journey
- Publish journeys
- Check your knowledge
- Summary

Lesson 6: Challenge project - Configure a Dynamics 365 customer experience solution
- Introduction
- Get to know your customer experience scenario
- Exercise - Customize the sales process
- Exercise - Configure the product catalog
- Exercise - Design a campaign
- Module assessment
- Summary

Register for this class by visiting us at:
www.tcworkshop.com or by calling us at 800-639-3535

NASBA Information

Attendance Requirement: To be awarded the full credit hours, you must sign in and attend the entire course.
Recommended Field(s) of Study:
Recommended CPEs: 7.80

Policies: Course Registration, Cancellation, Refund, and Complaint Resolution
For more information regarding administrative policies such as complaint and program cancellation policies, please contact our offices at 800-639-3535 or visit us at: **www.tcworkshop.com**

Official National Registry Statement:
The Computer Workshop is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credits. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: www.nasbaregistry.org

NOTE: Since our information is in multiple places on our website or in PDF format that is sent to clients, we have provided our normal course content with the NASBA Information added along with links to our policy page on the web. We will add our name to the Official National Registry Statement after we are approved.