

# CONFIGURE A DYNAMICS 365 CUSTOMER EXPERIENCE SOLUTION (MB-280T04)

Course Code: 834079

This learning path prepares you to complete the Dynamics 365 customer experience analyst challenge project and validate your skills.

Students should have already completed the following modules as part of the MB-280: Dynamics 365 Customer Experience Analyst course series. If they haven't, it's recommended that they take some time to complete these modules before beginning the challenge project.

## What You'll Learn

Students will learn to,

- Manage leads with Dynamics 365 Sales
- Manage opportunities with Dynamics 365 Sales
- Manage and organize your product catalog with Dynamics 365 Sales
- Create emails in Dynamics 365 Customer Insights - Journeys
- Build journeys with Dynamics 365 Customer Insights - Journeys
- Challenge project - Configure a Dynamics 365 customer experience solution

## Who Needs to Attend

Students who already completed the following modules as part of the MB-280: Dynamics 365 Customer Experience Analyst course series. If they haven't, it's recommended that they 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.

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CLASSROOM LIVE

\$675 CAD

1 Day

## Classroom Live Outline

### **Module 1: Manage leads with Dynamics 365 Sales**

- Examine the lead qualification process in Dynamics 365 from beginning to end
- Identify the different options that are available for creating and defining leads
- Use business process flows to manage the lead lifecycle
- Qualify and disqualify leads

### **Module 2: Manage opportunities with Dynamics 365 Sales**

- Identify scenarios where opportunities can be used.
- Create and define opportunities.
- Work with related opportunity records
- Manage an opportunity throughout its lifecycle.

### **Module 3: Manage and organize your product catalog with Dynamics 365 Sales**

- Set up unit groups to help control how products are sold
- Create product family hierarchies that include product bundles and individual products
- Set up product pricing data by creating price lists and price list items
- Use discount lists to provide volume discount pricing

### **Module 4: Create emails in Dynamics 365 Customer Insights - Journeys**

- Upload images to the file library and use images in marketing content.
- Create and publish an email.
- Enhance your emails by using personalization, content blocks, content ideas, and more.
- Upload images to the file library and use images in marketing content.
- Add personalization to emails.

## **Module 5: Build journeys with Dynamics 365 Customer Insights - Journeys**

- Manage segments in real-time journeys.
- Work with triggers in real-time journeys.
- Create a journey.
- Set a business goal and measure progress through a journey.
- Determine when to use attribute versus if/then branches.
- Use an A/B test within the customer journey.
- Use AI-driven, run-time channel optimization.
- Raise triggers from a journey to run another journey or Power Automate flow.

## **Module 6: Challenge project - Configure a Dynamics 365 customer experience solution**

- Evaluate requirements.
- Perform gap analysis of existing assets.
- Create needed assets from the stated requirements.
- Use Dynamics 365 Sales and Dynamics 365 Customer Insights to create a customer solution.

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VIRTUAL CLASSROOM LIVE

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1 Day

## Virtual Classroom Live Outline

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PRIVATE GROUP TRAINING

1 Day

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Date created: 12/15/2025 8:22:17 PM

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