# QUICKSTART

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**Learning Style: Virtual Classroom**

**Technology: Microsoft**

**Difficulty: Intermediate**

**Course Duration: 1 Day**

# Configure Dynamics 365 Customer Experience Model-Driven Apps (MB-280)

## About This Course:

The Course Configure Dynamics 365 Customer Experience Model-Driven Apps course covers essential skills for using Microsoft Dataverse to manage and customize data-driven apps. Participants will learn how to create and manage

environments, tables, columns, business rules, and relationships, along with advanced techniques like command bar customization, data visualization, and integration with external tools like Power Query and Azure Synapse Link.

## Course Objectives:

- Environments in Microsoft Dataverse

- Developer environments

- Create and manage an environment

- Create an instance of a Microsoft Dataverse database

- Add users and roles within an environment

- Manage settings in an environment

- Environment operations

- Table characteristics

- Table relationships

- Dataverse logic and security

- Dataverse auditing

- Dual-write vs. virtual tables

- Identify tables and table types in Dataverse

- Create a custom table

- Enable attachments within a table

- Licensing requirements for each table type

- Define columns in Microsoft Dataverse

- Column types in Microsoft Dataverse

- Add a column to a table

- Primary column

- Restrictions that apply to columns in a table

- Create an auto numbering column

- Create an alternate key

- Define choice column

- Choice columns

- Standard choices column

- View data in a table

- Create or edit views of data in a table

- Dataverse data import options

- Load data into a table

- Dataverse data export options

- Export

- Add, update, or delete data in a table by using Excel

- Import data using Power Query

- Overview of the different data sources

- Work with action data

- Power Automate is a companion to Power Apps

- Relate one or more tables - Introduction

- Relationship types that are available in Microsoft Dataverse

- Create a one-to-many relationship between tables

- Create a many-to-many relationship between tables

- Edit or delete relationships

- Define business rules - Introduction

- Define the components of a business rule

- Create a business rule

- Create a rollup column

- Create a calculation column

- Create or edit modern commands

- Work with classic commands

- Use Power Fx

- Scenario - Duplicate a row

- Scenario - Use multiple data sources

- Scenario - Use data source and record information

- Scenario - Notify and confirm

- Command bar application lifecycle management

- Understand AutoSave

- Using JavaScript for commands

- Command scope

- Create and edit views in Power Apps maker portal

- Filter and sort data for Dataverse views

- Import static data by using Power Query

- Import dynamic data by using Power Query

- Create a dynamic Word template

- Create a dynamic Excel template

- Export data to Excel

- Edit and update data in Excel

- Use Dataverse community tools for data manipulation

- Review Power BI integration with Dataverse

## Audience:

This course is designed for IT or marketing professionals who want to learn how to leverage model-driven applications, Dynamics 365 Sales, Dynamics 365 Customer Insights, and Microsoft 365 Copilot for Sales for their organizations. Students should be familiar with Microsoft Power Apps and basic data modeling principles. Students should be familiar with the Dynamics 365 customer experience suite,

including Dynamics 365 Sales and Dynamics 365 Customer Insights.

## Prerequisites:

- Basic Understanding of Microsoft Dynamics 365: Familiarity with Dynamics 365 applications, particularly customer experience and sales functionalities, is beneficial.

- Experience with Microsoft Power Platform

- Basic knowledge of Power Apps, Power Automate, and Power BI will be helpful for understanding integrations and customization within Dynamics 365.

- Understanding of Data and Business Processes: Having an understanding of common data modeling and business process concepts will help you in configuring and optimizing solutions within Dynamics 365.

## Course Outline:

- Create and manage environments in Dataverse
    - Identify the different environments that are in Dataverse.
    - Create and manage environments in Dataverse.
    - Create an instance of a database in Dataverse.
    - Add users and security roles within an environment in Dataverse.
    - Determine where to manage settings for an environment.
- Create tables in Dataverse
    - Create tables with Dataverse
    - Import data into a Dataverse database
- Manage tables in Dataverse
    - Tables in Dataverse.
    - Types of tables that are available in Dataverse.
    - Creating a custom table.
    - Enabling attachments within a table.
    - Which licensing requirements to apply to use each type of table.
- Create and manage columns within a table in Dataverse
    - What a column is in Dataverse.
    - The types of columns that are available in Dataverse.
    - How to add a column to a table.
    - What a primary name column is in Dataverse.
    - How to identify restrictions that are associated with columns.
    - How to create an auto-numbering column.
    - How to create an alternate key.
- Working with choices in Dataverse
    - Learn about choices.
    - Explore the standard choices.
    - Create a new choice or modify an existing one.

- Load/export data and create data views in Dataverse
  - View data within a table.
  - Create or edit views of data in a table.
  - Load data into a table.
  - Export data from a table.
  - Add, update, or delete data in a table by using Excel.
  - Import data using Power Query in Maker Portal
  - Generate a new dataflow from an Excel Template.
  - Learn about dataflows.
- Connect to other data in a Power Apps canvas app
  - Understand and use action-based connectors.
  - Integrate user information and user-profile information into a canvas app.
  - Use Power Automate with Power Apps.

- Create a relationship between tables in Dataverse
  - Why you should segment data that is used by your solutions into many tables.
  - Why you need to relate one table to another.
  - How to build relationships between tables.
  - How to select the proper relationship type when you're building solutions with Dataverse.
- Define and create business rules in Dataverse
  - Define business rules in Dataverse.
  - Create and manage business rules in Dataverse.
- Create and define calculation or rollup columns in Dataverse
  - Define a rollup column.
  - Create a rollup column.
  - Identify a calculation column.
  - Create a calculation column.
  - Define a formula column.

- Customize the command bar
  - Create or edit modern commands
  - Work with classic commands
  - Use Power Fx
  - Customize commands
- Common command bar scenarios
  - Implement a copy/clone of a data row from a command bar
  - Dynamically use table permissions and definitions from command bar logic
  - Improve the user experience using command bar commands using the Notify and Confirm functions
  - Navigate to internal and external app content from command bar commands
- Advanced command bar concepts
  - Understand how application life cycle management works when customizing command bars.
  - Discover how AutoSave works with commands and how to provide your users with the best experience.

https://sales.quickstart.com/mb-280t01-configure-dynamics-365-customer-experience-model-driven-apps.html

- Explore scenarios where using JavaScript to implement the command action would be beneficial and learn how to configure JavaScript for the command action.
- Configure command scope to make your command bar command available broader than a single app.
- Learn how to use Power Apps custom pages as dialog boxes launched from a command bar command.

- Visualize data with Dataverse views
  - Discover the different types of Dataverse views.
  - Learn how to create and edit views.
  - Work with filters and sorting criteria.
- Use Power Query to load data in Dataverse
  - Understand the different data source categories available when using Power Query.
  - Know how to import data into a Dataverse table by using Power Query.
  - Understand the different refresh options available.
- Use Microsoft Word and Excel templates with Dataverse
  - Learn how to use Word templates with Dataverse data.
  - Learn how to use Excel templates with Dataverse data.
- Export data from Dataverse and use Microsoft Excel to edit records
  - Learn how to export data from Dataverse into Excel files.
  - Discover the different exported file types.
  - Learn about the security concepts for the exported data.
- Use Azure and external tools to manipulate data
  - Discover the features of Azure Synapse Link for Dataverse.
  - Learn how Dataverse community tools can help with data manipulation.
  - Discover how Power BI services and tools relate to Dataverse.