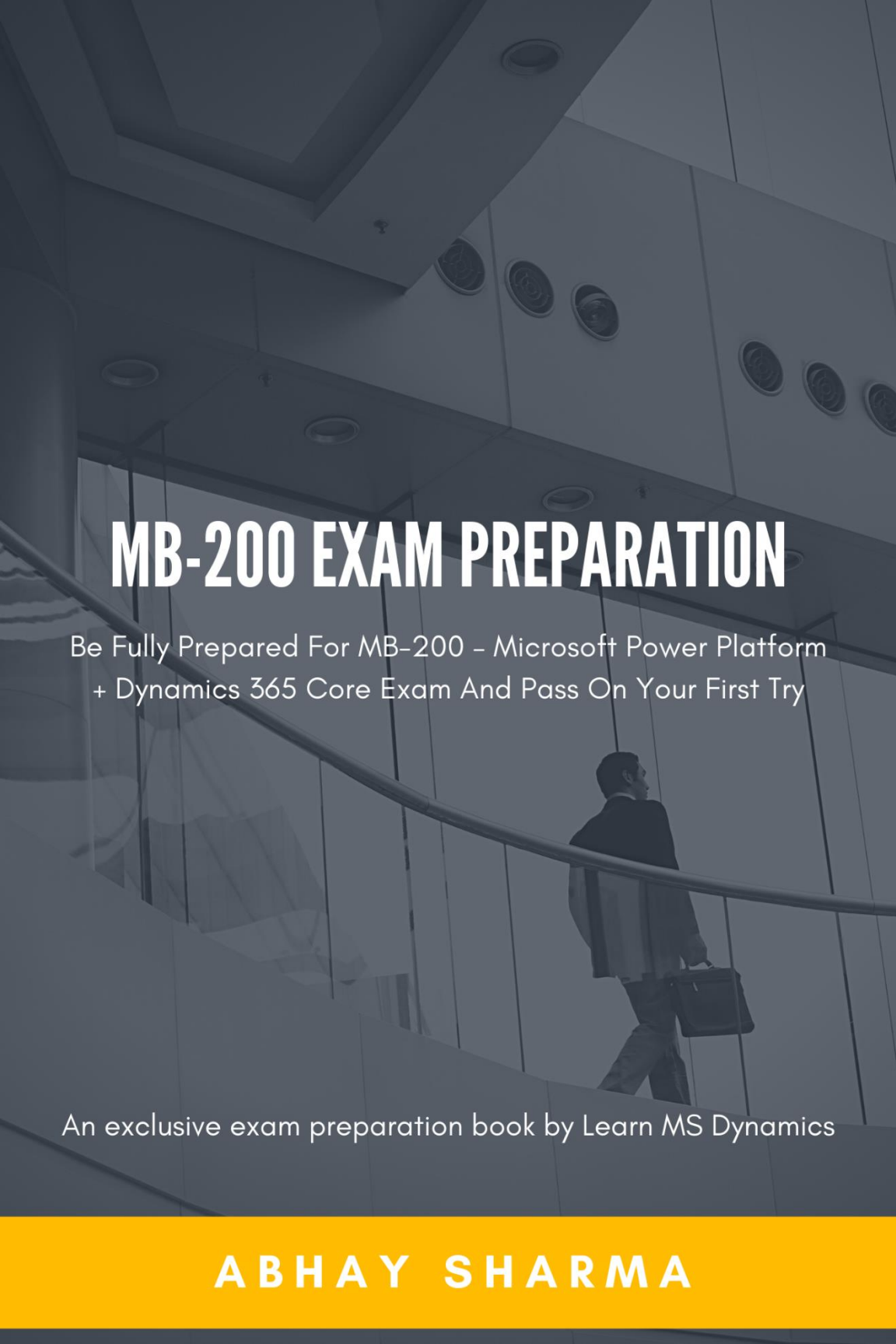

MB-200 EXAM PREPARATION

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MB-200 Exam Preparation

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Abhay Sharma

www.LearnMsDynamics.com

To all Microsoft Dynamics 365 Consultants and Aspiring Consultants who want to boost their career growth by passing MB-200: Microsoft Power Platform + Dynamics 365 Core Exam.

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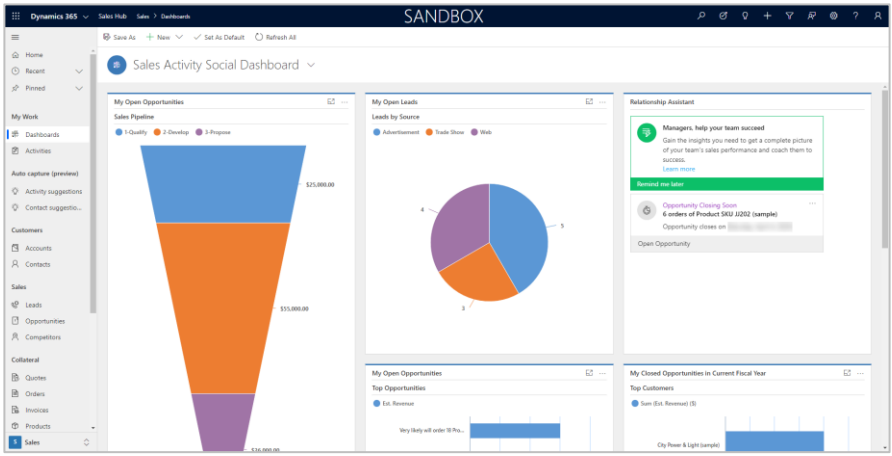
Microsoft Dynamics 365 Customer Engagement Apps

Microsoft Dynamics 365 Customer Engagement allows an organization to build and sustain customer relationships. The available apps are:

Microsoft Dynamics 365 Sales



Microsoft Dynamics 365 Sales is a model-driven app that is built on the Common Data Service (CDS) platform. It allows companies to build strong relationships with their customers by understanding their needs and suggest solutions.

You can store and manage the client's information and activities. Organizations can be stored and managed as Accounts and individuals are stored in Contacts.

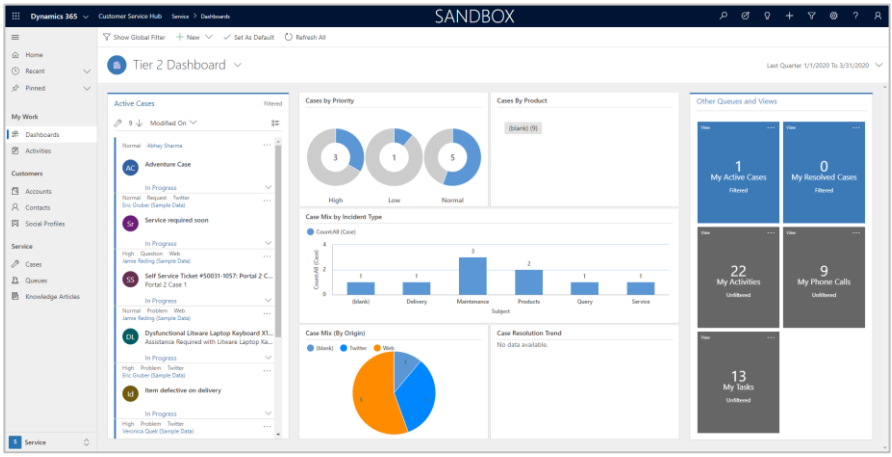
Dynamics 365 Sales helps in managing an organization's sales lifecycle from leads to invoicing. You can manage business development activities like lead management and qualification, opportunity management, quote generation, order management, and invoicing.

Dynamics 365 Sales makes it easy to track the progress of clients and potential sales.

You can create and manage products, bundles, and product families to create the right offers as per your industry and business needs.

You can manage sales literature to help salespeople and managers in the sales process and many important features to increase an organization's revenue.

Microsoft Dynamics 365 Customer Service



Microsoft Dynamics 365 Customer Service (Customer Service Hub App) is also a model-driven app like Sales that is built on the Common Data Service (CDS) platform. It allows companies to support their customers and resolve their cases.

Dynamics 365 Customer Service allows taking support requests from their clients via phone call, email, web, social media, and capture using a case form.

Support requests (cases) can be categorized based on their source, nature of the case, and priority. It's possible to assign cases to a service agent or a team/group of specialists for timely resolution. A case can be assigned to a service agent manually or automatically with the help of rules.

The Customer Service Hub App allows managing parent/child cases for a similar type of cases combined or cases from the same company combined.

You can manage knowledge base articles to help service agents find the right solution quickly. The same can be shared with the client. It allows scheduling resources based on their availability and skillset.

You can also keep track of contracts for each client using entitlements. These entitlements can be based on the number of hours or number of cases. Entitlements, along with Service Level Agreements (SLAs), ensure timely service delivery and improves customer satisfaction level.

Service agents and managers can work on the web application as well as on a mobile device or tablet.

Microsoft Dynamics 365 Field Service

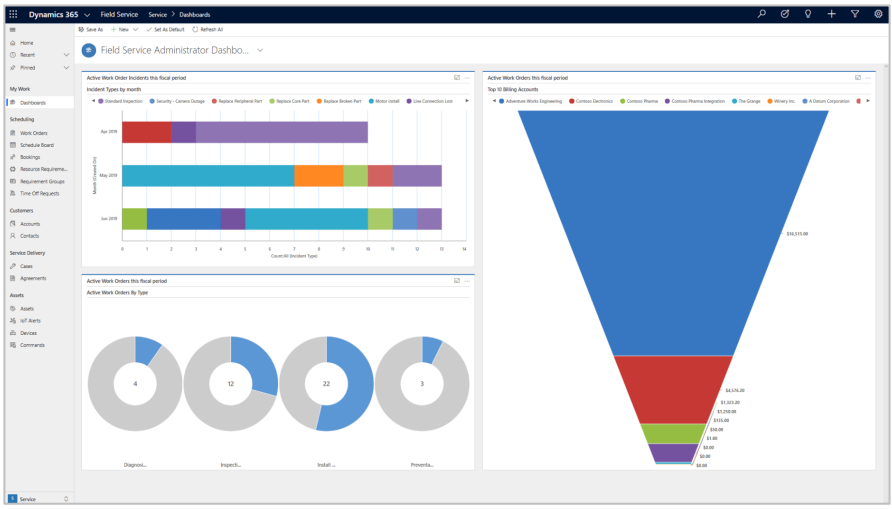


image source: microsoft.com

Microsoft Dynamics 365 Field Service (Field Service App) is a model-driven app that is built on the Common Data Service (CDS) platform. It allows companies to manage their mobile workforces to facilitate, manage, and deliver onsite services to customer locations.

With the Field Service app, you can generate work orders with required products and services to be delivered. Also, it allows you to keep track of supplies (serviceable assets) and their inventory in locations like warehouses, field service vehicles, etc.

You can schedule resources on work orders based on their availability and skillset.

Make technicians more effective and productive with Field Service mobile app.

With IoT (Internet of Things), companies can achieve operational efficiency by monitoring devices, preventive maintenance, and breakdown fixes.

Microsoft Dynamics 365 Project Service Automation

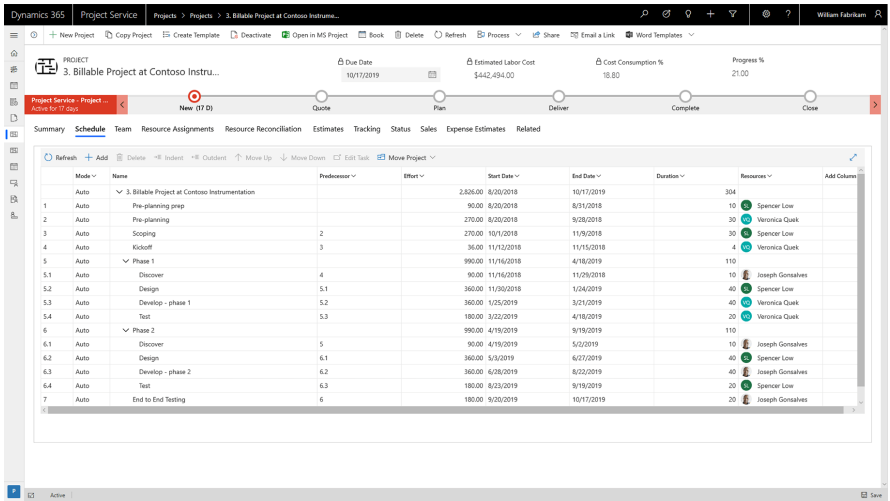


image source: microsoft.com

Microsoft Dynamics 365 Project Service Automation (Project Service App) is a model-driven app that is built on the Common Data Service (CDS) platform. It allows companies to plan, execute, monitor, and deliver project-based services.

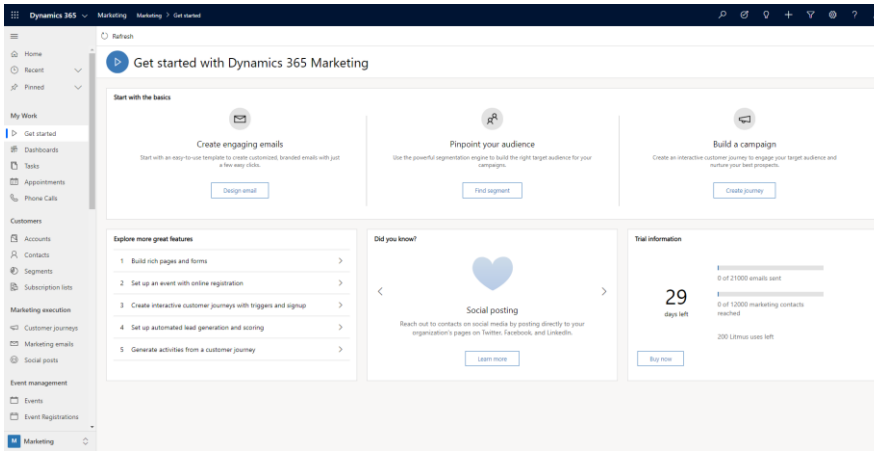
It helps you understand and document customer needs and quote projects with Schedule, Scope, and Cost. You can plan resources required based on their skillset and assign them to projects.

You can also create teams to group resources and easily manage them.

Build a detailed Work Breakdown Structure (WBS) / Schedule to provide a thorough project timeline to project managers, teams, and clients. You can keep track of project status and decide the next move towards project success.

It allows capturing time and expenses against a project to be billed and a lot of features to manage successfully and deliver projects.

Microsoft Dynamics 365 Marketing



Microsoft Dynamics 365 Marketing (Marketing App) is a model-driven app that is built on the Common Data Service (CDS) platform. It allows companies to create and manage marketing campaigns for different objects like lead generation, brand awareness, etc.

You can define a customer journey that helps in developing and nurturing leads through a personalized experience.

It integrates with Dynamics 365 Sales so organizations can leverage automated follow-up sales activities based on marketing activities.

With the rich editor, you can create graphical email messages. It allows you to send personalized emails based on customer's journey or product-related literature to prospects and customers. You can perform events based on triggers.

With in-built event management capabilities, organizations can organize and publicize events. You can manage events, participants, venues, logistics, sponsorships, and post-event activities.

It also allows you to create marketing pages and distribute surveys to gather feedback and improve products/services and improve customer experience.

Dynamics 365 Voice of the Customer (now Microsoft Forms Pro – VOC is being depreciated by 1 July 2020 and replaced with Microsoft Forms Pro) allow you to create and send surveys to your customers to receive their valuable feedback about your products and services. *Learn more here*

Performing Discovery, Planning, And Analysis

High-Level Entity Relationship Diagram (ERD)

Entity Relationship Diagram (ERD) is a structural diagram that is useful in database design.

ERD shows how two entities relate or connect.

In a typical ER diagram, you can find shapes (e.g., rectangles) and connectors (lines with different styles of their ends. They represent one-to-one, one-to-many, or many-to-many relationships.

With Dynamics 365 implementation and development, ERD can be very useful, especially when designing new functionalities.

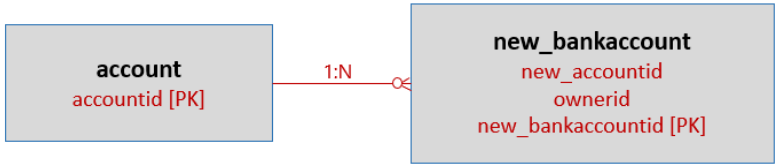
First ERD, then actual design and development: This strategy will always help you identify relationships, derive scenarios, and even find limitations of the design.

ERD is not only helpful in creation but also management and maintenance of the feature/functionality.

Some important terms in ERD:

- ✓ **Entity**: Helps you model and manage business data (same as tables in a database)
- ✓ **Attributes**: Holds a single value in an entity (also known as a field)
- ✓ **Primary Key**: Uniquely identifies a record in an entity (GUID in Dynamics 365 entity)
- ✓ **Relationship**: Signifies that two entities are related to each other (1:1, 1:N, N:N)

Simple Example: New **Bank Account** entity and how it relates to the **Account** entity.



You can use the metadata diagram tool to generate entity-relationship diagrams. Click to learn more about the metadata diagram tool.

Create and Document Mock-ups

Mock-ups can be easily understood as Proof of Concept (POC) or prototype with minimal/no functionality.

It allows you to visualize a rough sketch of how the actual screen may look and feel.

With Dynamics 365 model-driven apps, it won't make much sense to create mock-ups because the navigation (sitemap) is standard.

For other apps where the UI/UX is critical and dynamic, creating mock-up will help like Canvas App, Portal based solutions, or a Custom App.

You can use Microsoft Visio to build mock-ups.

Click here to download Visio (direct link)

Compare Visio Plans and Pricing

Document Data Migration and Integration

Data is everything in business, and it's critical to manage it well.

Let's understand two important activities related to Data:

- ✓ **Data Migration:** It's a process of moving data from one system to another (usually one-time activity or less frequent). Example: Data from a legacy CRM system to Dynamics 365 Sales.
- ✓ **Data Integration:** It's a process of synchronizing data between the two systems. It can be one-way or two-way integration (continuous / more frequent). Example: Integrating Dynamics 365 Sales and Dynamics 365 Finance for Customer data.

There are different ways to plan and prepare systems for data migration and data integration. Both activities are different; however, you will find similarities in terms of processes and resource requirements.

Choose the Right Tool:

- ✓ **Import Wizard** is one of the fastest ways to get data migrated into Dynamics 365. It's useful and beneficial for the small amount of data transfer. The supported file formats are .xml, .csv, .xls. You can also import a text file using delimiters. You can insert new records or update existing records (cannot be used for integration as not synchronous).
- ✓ **Scribe (3rd party)**: If you want to migrate complex data, then Scribe can be your best choice. You can integrate Dynamics 365 with cloud, hybrid, and on-premise applications. Has easy to use UI.
- ✓ **SSIS**: SSIS packages are useful when you want to migrate a large amount of data. Unlike Scribe, you will need a C# developer with good SQL knowledge. It's code-based and may not have a friendly UI.
- ✓ **Power Automate**: Power Automate (previously Microsoft Flow) can help you integrate Microsoft Dynamics 365 with hundreds of apps and services. It does much more than just integration like notifications, approve

requests, synchronize files, event-based actions, and much more. Helps in automation and built for no-code

Implementation Steps:

- ✓ **Data Source & Format:** It's important to understand the source of data and in which format you will receive that Data. You must analyze, cleanse, and transform data in the format that Dynamics 365 accepts. Junk data can be complicated to handle once migrated/integrated.
- ✓ **Data Mapping:** Mapping existing data source entities and records is the key planning activity. You might want to drop or add new information once you have defined a structured mapping.
- ✓ **Frequency & Trigger Points:** How frequently the data will be pushed from one system to another and what will be the trigger point. Will it be a one-time activity or continuous data integration? It's a key component and must be documented.
- ✓ **Testing Data Transfer:** Once you have finalized the tool, mapping, cleansed the data, trigger, and frequency, it's critical to run it on the test environment before using it on production. This activity helps you document and fix the bugs for successful data migration and integration.
- ✓ **Finalize & Deploy:** It's time to deploy.

Determine Out-of-the-Box Functionality

Dynamics 365 has a ton of out-of-the-box features that are readily available to use. One of the biggest challenges when it comes to development & configuration is Perspective. (*learn in-depth in the MB-200 main course*)

Impact of OOB Vs. Custom development:

- ✓ Configuration Time Vs. Development Time
- ✓ Configuration Cost Vs. Development Cost
- ✓ Support for future functionalities by Microsoft
- ✓ Time & cost involved in applying updates
- ✓ Custom development: continuous dependency on partner
- ✓ Custom development: With time, your customized solution becomes heavy
- ✓ Getting out of custom development sometimes difficult (major changes).

Choosing The Right Approach

- ✓ Finalizing Dynamics 365 solution as per business needs.
- ✓ Identify an internal core team and an implementation leader.
- ✓ Find a training partner to train your internal core team.
- ✓ Let your core team get trained and practice on Dynamics 365 solution trial.
- ✓ Find an implementation partner / check if the training partner implements Dynamics 365 solution.
- ✓ Align your core team & implementation leader with the Implementation partner.
- ✓ Conduct a thorough requirements mapping workshop (implementation partner & core team).
- ✓ Finalize as-is and to-be & configuration checklist.

- ✓ Finalize gaps and customization/development pointers.
- ✓ Implement project in phases followed by reviews & sign-offs.

Validate Functional Requirements

Gathering, documenting, and validating functional requirements is one of the most important activities of implementation.

There are two approaches to finalizing functional requirements:

- ✓ As-is with basic to-be implementation
- ✓ As-is with enhanced to-be implementation – way to go approach.

It depends on the awareness and experience of the implementation partner/consultant because sometimes users are not sure what they need.

Keeping users on track and within the business objective of implementation is challenging, but it must for any successful implementation.

Use and follow templates provided by Microsoft to document.

Artifacts for a Proof of Concept (POC)

Usually, Proof of Concept (POC) falls under the pre-sales phase of the sales lifecycle.

However, POC is also used to test and demonstrate how new functionalities will work under project implementation.

It's a quick and cost-effective way better than spending countless hours and money just to know the functionality/feature will work or won't work.

Key artifacts may include an interface, triggers, and functions, process flow, data flow/exchange, integration, security, notifications, etc.

You take a subset of an entire business function that fulfills most of the scenarios; then, you create a POC for it.

It doesn't need to be perfect, but for a quick demonstration of key components.

For Dynamics 365, use Trial/developer instance for POC.

Dynamics 365 Collaboration Tools

When it comes to managing projects by a group of people working in different parts of the world or different working environments, effective collaboration becomes essential.

Dynamics 365 integrates with office 365 tools to create a top-notch collaboration environment.

Some of these collaboration tools are:

Outlook: You can access features and work on Dynamics 365 from within Outlook using Dynamics 365 App for Outlook. Dynamics 365 For Outlook can also be installed and work offline. Read more about software requirements here & hardware requirements here

You can use Outlook in Dynamics 365 For Outlook feature for incoming emails, outgoing emails, and synchronizing Appointments, Contacts, and Tasks, including any attachments.

Office 365 Groups: You can use Office 365 Groups to collaborate with people across your company, even if they don't have access to Dynamics 365 Customer Engagement model-driven apps. You can share documents, have conversations, and capture meeting notes and OneNote notebooks to specific accounts or other entities.

Microsoft Teams: Dynamics 365 and Microsoft Teams integration enables users to work with model-driven apps, customer information easily, and share files directly from Microsoft Teams. Microsoft Teams is becoming the core communication client for Office 365.

Please note: It is not supported on Dynamics 365 Customer Engagement (on-premises) and CDS with model-driven apps only.

Skype of Business Online (Retiring on 31 July 2021)**:** Skype for Business allows you to communicate effectively with your clients. It integrates with Dynamics 365 and allows you to call clients directly using the click-to-call feature without memorizing their phone numbers.

SharePoint: You can use SharePoint rich document management capabilities with Dynamics 365. After you enable server-side integration, you can directly upload documents to SharePoint from the Dynamics 365 interface.

OneDrive for Business: While SharePoint allows you to upload documents from Dynamics 365 interface, OneDrive for Business extends its capability by allowing users to start and work on a document privately or upload documents only they can see.

Yammer: Yammer gives colleagues at your organization a central place to have conversations, create and edit documents, and share information without sending a single email or attending any meetings.

Office tools like Word and Excel: Dynamics 365 model-driven apps integrate with Microsoft Word and Excel for templates and export/import/analyze data, respectively.

Perform An Audit

Organization audit is an activity to help organizations improve their operations at all levels.

An audit consists of (but not limited to) identifying strengths and weaknesses to cut costs, increase productivity, improve efficiency, manage cash flow, forecasting, upgrades, etc.

One of the major areas of an audit is IT infrastructure:

- ✓ Listing existing infrastructure components.
- ✓ List of hardware components.
- ✓ List of software components: with versions and licensing.
- ✓ List of subscriptions.

Document processes involving any IT related components.

It's crucial to have audit so organizations can plan their future requirements with accuracy.

Along with an audit at the IT infrastructure level, you may want to consider an audit at the software application level.

Dynamics 365 and most of the other Microsoft applications support audit logs.

For example, an information log that contains changed made, the user name (who made changes), and date and time can be very helpful in maintaining consistency and have control over business processes.

Such reports can be generated and shared with an internal or external auditor to meet compliances at different levels.

An example of an external audit can be Microsoft audits where Microsoft audit team requires detailed information on software installed with versions, licensed or unlicensed software, etc.

The audit must be an integral part and process of every organization.

Artifacts to be recorded in Change Logs

Change log refers to all notable changes made to a specific entity, record, or project. At a project level, changelog may include:

- ✓ Bug fixes
- ✓ New features or new software version
- ✓ Approved change requests
- ✓ Depreciated features

At an application level, changelog may include:

- ✓ Record changes (create, update, delete)
- ✓ Record table changes
- ✓ Sessions logs, etc.

Select Between Managed and Unmanaged Solutions

(In-depth training on Solutions in MB-200 main course, learn more there)

Dynamics 365 solutions allow you to package technical components and move from one environment to another.

For example: Moving all customizations of a new module "expense management" from a development environment to testing or production environment.

A solution can include entities, forms, views, dashboards, sitemap, web resources, processes, plugins, templates, security roles, etc.

There are two types of solutions:

- ✓ Managed
- ✓ Unmanaged

Managed solution: Used for distributing customizations for production or as ISV solution because it doesn't allow making changes to its components. Once deleted, all the customization components imported with a managed solution are also deleted. A managed solution cannot be exported.

Use a managed solution if you want to import customizations in a production environment or to distribute ISV packages for clients to use in their environment.

Unmanaged solution: When you create a solution, it is unmanaged. You can make changes to unmanaged solution components. Customizations remain in the system if you delete the unmanaged solution.

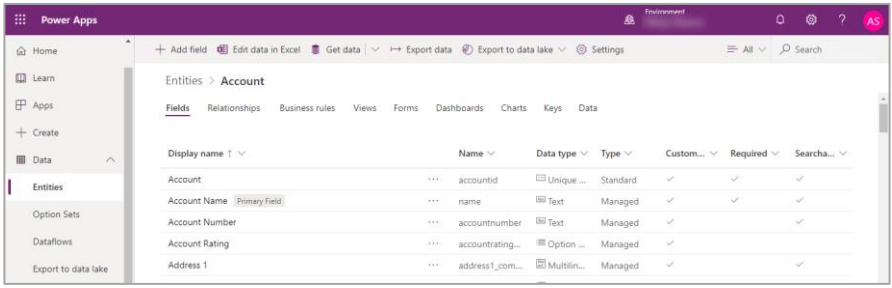
Export unmanaged solutions as managed or unmanaged.

Use unmanaged solutions if you want your team, client, or anyone makes changes to its components and change functionalities.

Identify Components of Entities

In simple terms, entities in Dynamics 365 are like tables in a database.

There are many out of the box entities available in Dynamics 365. Some of them are Accounts, Contacts, Cases, Activity, etc.



The components of an entity are:

- ✓ Fields
- ✓ Forms
- ✓ Views
- ✓ Charts
- ✓ Keys
- ✓ Relationships
- ✓ Business Rules
- ✓ Dashboards

---- end of the sample content ---

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