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Microsoft Power Platform Functional Consultant Study Guide

Exam PL-200

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Preface

Welcome to this guide to the Microsoft Power Platform Functional Consultant Exam, PL-200.

This guide will help you understand and prepare for the PL-200 exam; probably the most important exam for those involved in implementing solutions in the Power Platform and Dynamics 365 solutions. By reading this book, you will become familiar with the most important elements of the low-code aspects of the Power Platform and you will be well placed to take—and pass—this exam.

Passing the exam demonstrates that you have the skills required to customize solutions based on Dynamics 365 Customer Engagement and the Power Platform.

As I have been writing this book, the Power Platform has seen many changes, reflecting the investment Microsoft is making in business applications and the importance of the Power Platform to Microsoft. The impact of the Power Platform is making itself felt across the whole of the Microsoft product portfolio, with Power Apps now embedded in Microsoft Teams.

At the time of publishing, Microsoft Dataverse (formerly known as the Common Data Service) was undergoing a branding change. This branding change has not been completed and some screenshots in this book may reflect the former branding. Along with the name change, there are several changes to terminology such as tables (formerly entities), columns (formerly fields), rows (formerly records), choices (formerly option sets), and yes/no (formerly two options). These terminology changes will be applied to the user interface, documentation, and exam over time. You should be aware that the terms used in the book may not match the tools and documentation.

The book starts off with Dataverse (formerly known as the Common Data Service), where you create the data model that you will build your apps on. You will learn about business logic, security, automation, and other features that make Dataverse a great platform for building apps. Next, you will learn about creating and deploying apps, how to automate flows, and to build your own chatbots. The book then looks at using the Power Platform with other tools such as Power BI and Microsoft 365 services.

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Each chapter concludes with a *Further reading* section, which is a very important part of the book because it will give you extra and sometimes crucial information for passing the PL-200 exam. As the questions of the exam will change slightly over time and this book will eventually become outdated, the *Further reading* sections will be the place that provides access to all the updates.

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What this book covers

Chapter 1, *PL-200 Exam*, introduces the exam contents, the purpose of the exam, the skills measured, and who the exam is aimed at. This chapter will also look at how the PL-200 exam fits with the Dynamics 365 and Power Platform role-based certifications.

Chapter 2, *Power Platform*, provides a high-level overview of the Power Platform and its components, examines the different Power Platform environments, and explains how to configure and administer environments.

Chapter 3, *Data Modeling*, covers modifying the data model to meet business requirements, extending the schema for Dataverse with entities, relationships, and fields, and how to use solutions to manage your changes.

Chapter 4, *Business Rules*, explains how to validate data, perform calculations, and manipulate fields on forms, all without the need to write JavaScript.

Chapter 5, *Classic Workflows*, covers using classic workflow processes to automate data changes and communications using triggers, conditions, and action steps.

Chapter 6, *Managing Data*, discusses the features for importing data into, and exporting data from, the Dataverse.

Chapter 7, *Dataverse Settings*, covers the features for managing data once it is in Dataverse, including finding duplicates, cleansing data, how to remove stale data, and how to monitor and control data volumes.

Chapter 8, *Security*, provides an overview of the available security features in the Power Platform and then examines the security features used most frequently in Power Platform solutions.

Chapter 9, *Model-Driven Apps*, explains the components in model-driven apps and looks at how to configure forms, views, charts, and dashboards, before

bringing the components together to create an app for business users.

Chapter 10, *Canvas Apps*, explains how to create canvas apps for web and mobile users, add controls to apps, use multiple data sources, and deploy apps.

Chapter 11, *Portal Apps*, covers the building of Portal apps to expose data in Dataverse to external users, customize the pages and layout, and add content.

Chapter 12, *Power Automate Flows*, covers automating steps within the Power Platform and across cloud systems including Office 365, Azure, and third-party services, creating flows, using connectors, adding steps, using expressions, and using logic to control the actions a flow performs.

Chapter 13, *Business Process Flows*, explains how to create business process flows to guide users through an end-to-end business process by adding stages, steps, and conditions, using branching, applying security, and using business process flows with other components of the Power Platform.

Chapter 14, *UI Flows*, explains how you can automate user activities on legacy applications when there isn't an API available, by creating and running UI Flows.

Chapter 15, *Creating Chatbots*, describes how to create, publish, and monitor Power Virtual Agents bots, and explains the key concepts involved in building chatbots.

Chapter 16, *Configuring Chatbots*, describes how to configure and author your own chatbots using topics, entities, and variables, along with adding questions and responses to tailor your chatbot to your business scenario.

Chapter 17, *Power BI*, describes how to create powerful visualizations, reports, and dashboards using the data captured in the Common Data Service (Dataverse).

Chapter 18, *AI Builder*, explains to add **Artificial Intelligence** (**AI**) to your apps and flows with no code, explains the AI model types, shows how to

build your own AI models, and demonstrates how to use prebuilt and custom models in Power Apps and Power Automate.

Chapter 19, *Microsoft 365 Integration*, explains how to configure and use the integration with Microsoft 365, Word, and Excel, along with how to create templates and how to use the Power Platform with Microsoft Teams.

Chapter 20, *Application Life Cycle Management*, describes the tools and processes around moving changes from development through testing to production environments using solutions.

Chapter 21, *Tips and Tricks* covers tried and tested strategies that will help improve the reader's capabilities to solve and manage the exam questions on D day. These tips and tricks will help readers prepare mentally to have a relatively less stressful exam.

Chapters 22-25, cover practice tests and their answers. It will enhance your understanding of the concepts by testing your knowledge and to help prepare yourself for the certification exam.

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To get the most out of this book

A Power Platform environment is required to get the most out of this book. You can start a free 30-day trial at https://www.microsoft.com/evalcenter/evaluate-power-platform, or you can utilize the Power Platform Community Plan at https://powerapps.microsoft.com/communityplan

All you need is a modern browser, except for in Chapter 14, *UI Flows*, where you will need a computer running Windows 10 Pro if you want to explore desktop UI flows.

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Conventions used

There are a number of text conventions used throughout this book.

`CodeInText`: Indicates code words in text, database table names, folder names, filenames, file extensions, pathnames, dummy URLs, user input, and Twitter handles. Here is an example: "You should download the app as a `.zip` file."

Bold: Indicates a new term, an important word, or words that you see onscreen. For example, words in menus or dialog boxes appear in the text like this. Here is an example: "This specification is the **Common Data Model** (**CDM**)."

Warnings or important notes appear like this.

Tips and tricks appear like this.