Microsoft Certified: Dynamics 365 Sales Functional Consultant Associate – Skills Measured

This document contains the skills measured on the exams associated with this certification. It does not include any upcoming or recent changes that have been made to those skills. For more information about upcoming or recent changes, see the associated exam details page(s).

NOTE: The bullets that follow each of the skills measured are intended to illustrate how we are assessing that skill. This list is NOT definitive or exhaustive.

NOTE: Most questions cover features that are general availability (GA). The exam may contain questions on Preview features if those features are commonly used.

Exam MB-210: Microsoft Dynamics 365 Sales Functional Consultant

Perform configuration (25-30%)

Configure sales settings

- configure sales territories and hierarchical sales territories
- configure auto number settings for cases, orders, and quotes
- configure business settings, including business closures, currencies, and fiscal years
- configure sales security roles and access team templates
- create and manage sales collateral

Configure processes

- configure duplicate detection rules
- configure record creation rules
- configure sales business process flows
- create and manage playbooks

Create and configure sales visualizations

- configure template apps for Power BI
- configure sales dashboards
- design and create sales charts
- design sales Advanced Find, Power BI, FetchXML, and Kanban reports, views, and visualizations

Manage core sales tables (45-50%)

Create and manage accounts and contacts

- create and manage accounts
- create and manage contacts
- create and manage activities

Create and manage leads

- create and search for leads
- convert activities to leads
- perform lead qualification

Create and manage opportunities

- manage opportunities
- track stakeholders, sales team members, and competitors
- add product line items to opportunities
- customize the Opportunity Close form

Create and manage sales order processes

- add quotes to opportunities
- edit quotes in various stages
- manage revisions to quotes
- send quotes to customers
- convert quotes to orders
- manage orders
- manage invoices

Create and manage products and product catalogs

- create and manage products, product bundles, and product families
- create and manage pricing lists
- create and manage discount lists
- create and manage unit groups

Configure additional tools and services (20-25%)

Configure integration with external sales applications

- implement Relationship Sales

- describe use cases for Customer Insights
- implement Power BI template apps

Create and manage goals and forecasts
- configure and use forecasts
- configure and use goals

Implement Sales Insights
- configure standard Sales Insights features
- configure premium features, including Notes analysis, who knows whom, and Conversation Intelligence
- implement Sales accelerator
- implement premium forecasting
- configure predictive scoring models

Exam PL-200: Microsoft Power Platform Functional Consultant

Configure Microsoft Dataverse (20-25%)

Manage a data model

- assign a type for a table including standard, activity, or virtual
- configure tables ownership
- create new tables or modify existing tables
- determine which type of relationships to implement including 1: N and N: N
- configure table relationship behaviors including cascading rules
- create new relationships or modify existing relationships
- create new columns or modify existing columns
- create alternate keys for tables
- configure table properties
- configure connection roles
- create and configure views

Create and manage logic

- define requirements for business rules
- define and implement business rule logic
- define the scope for business rules
- configure and test business rules
- configure a synchronous classic workflow

Configure Dataverse

- configure Relevance Search
- configure auditing
- perform data management tasks including import, export, and bulk detection
- configure duplicate detection settings
- configure privacy preferences

Configure security settings

- create and manage business units
- create and manage security roles
- create and manage users and teams
- create and manage column security
- configure hierarchy security
- configure Azure AD group teams

Create apps by using Microsoft Power Apps (15-20%)

Create model-driven apps

- create and configure forms
- create and configure views
- create and configure charts
- create and configure dashboards
- configure site maps
- select applicable assets for an app including tables, forms, views, business process flows, dashboards, and charts
- share a model-drive app
- apply organizational branding by using themes

Create canvas apps

- create a canvas app
- configure Dataverse as a data source for an app
- create canvas app screens
- implement form navigation, formulas, variables and collections, and error handling
- build reusable components and component libraries
- configure offline capabilities for apps
- run Power Automate flows based on actions that occur in a canvas app
- interpret App Checker results and resolve identified issues including accessibility issues
- manage apps
- monitor app analytics data

Create portal apps

- create a portal app
- expose Dataverse data

- configure portal web pages, forms, and navigation
- configure portal security including web roles and page access
- configure portal details and actions
- configure portal authentication

Create and manage Microsoft Power Automate (15-20%)

Create flows

- recommend types of flows and flow components including when to use a classic workflow
- trigger a flow by using Dataverse connectors
- run actions by using the Dataverse connector
- implement logic control including branches, loops, conditions, error handling, and variables
- implement dynamic content and expressions
- test and troubleshoot flows

Create and manage business process flows

- configure a business process flow
- add business rules, workflows, flow steps, and action steps to a business process flow
- define stages and steps
- configure parallel branches
- manage the business process flow table for a business process flow

Build desktop flows

- describe types of desktop flows
- identify use cases for desktop flows including differentiating between attended and unattended desktop flows
- build web and user interface automations by using Power Automate Desktop
- implement variables, loops, and conditionals in Power Automate Desktop flows
- trigger desktop flows from cloud flows
- monitor automation runs
- analyze processes by using Process Advisor

Implement Microsoft Power Virtual Agents chatbots (10-15%)

Create chatbots

- create a standalone chatbot
- add standalone chatbots to Teams and other channels
- create a chatbot within a Microsoft Teams channel
- publish a chatbot
- share a chatbot

- monitor and diagnose bot performance, usage, and topic usage
- authenticate end users for a chatbot

Configure topics

- define topic conversation triggers
- create questions, messages, and conditions
- extract topics from a web page
- implement greetings, escalations, error messages, and statuses
- call a Power Automate flow to run an action
- configure a fallback topic

Configure entities

- create custom entities
- implement entities in conversations
- implement variables to store data

Integrate Microsoft Power Apps with other apps and services (10-15%)

Integrate Microsoft Power BI with Microsoft Power Platform components

- create Power BI visualizations, reports, and dashboards
- add Power BI tiles to model-driven apps and canvas apps
- add canvas apps to a Power BI dashboard
- trigger Power Automate flows from Power BI alerts

Implement AI Builder

- determine which AI Builder model type to use
- create an AI Builder model
- prepare source data for use by models
- train, test, and publish a model
- consume a model by using Power Apps
- consume a model by using Power Automate

Configure and use templates

- configure and use Microsoft Excel templates
- configure and use Microsoft Word templates
- configure and use email templates

Manage solutions (15-20%)

Create a solution in a development environment
- create solutions to contain solution assets

- create a publisher
- add assets to a solution
- build solution-aware components
- manage solution component dependencies

Transport solutions between environments
- resolve connection references
- set environment variables
- export solutions
- import solutions
- update solutions
- configure managed properties
- run Solution Checker and interpret results

Localize solutions
- configure currencies
- enable language packs
- export and import translations