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

Perform discovery, planning, and analysis

Create and validate documentation

- create high-level entity relationship diagram
- create and document mock-ups
- identify document data for migration and integration
- determine out of the box (OOB) functionality
- validate functional requirements
- select artifacts necessary for a proof of concepts (POC) of functional solution designs

Perform continuous collaboration with customer

- identify collaboration tools
- perform an audit
- identify artifacts to be recorded in change logs
- select between managed and unmanaged solutions
- identify components for entities

Manage user experience design

Create and configure apps

- configure settings to meet minimal capabilities
- configure out of the box and custom items to meet minimal capabilities specified
- create and configure dashboards
- create and configure forms
- create and configure charts
- create and manage reports
- create and configure views
- design site map
- export or import field translation
- configure mobile settings
- implement App Designer

Create and configure templates

- identify available templates in Dynamics 365
- create email templates
• create Excel templates
• create Word templates
• create and configure article and campaign templates

Create and manage processes

• configure a business rule
• configure a business process flow
• configure a workflow

Manage entities and data

Modify an existing data model

• create new or an modify existing entity(s)
• create new or modify existing relationships
• create new or modify existing fields
• manage accounts and contacts

Import and export data

• import data by using the import data wizard
• export data from Dynamics 365
• create data templates
• choose file types to upload into system
• identify source fields to Dynamics 365 Fields mapping
• save mappings to template

Manage data

• perform data cleanup
• mitigate data loading risks
• mitigate excessive database growth
• configure bulk record deletion
• configure duplicate detection setting

Implement security

Configure security in Office 365

• identify Dynamics 365 Admin role assignments
• add users to security group administration

Configure security settings
• manage security roles
• manage users
• manage teams
• create and manage field security profiles
• configure hierarchy security

**Implement integration**

**Configure App for Outlook**

• identify required client software requirements
• identify required server software requirements
• configure server-side sync
• develop a plan to deploy Outlook App to users
• perform unit testing
• identify minimum application and operation system environments

**Configure email integration**

• configure email mailboxes
• configure email protocols
• configure email settings
• enable server-side synchronization
• enable Dynamics 365 App for Outlook

**Integrate with Office 365**

• determine enabled Office 365 capabilities
• design SharePoint online folder configuration architecture
• create SharePoint sites and document locations
• integrate OneNote
• integrate OneDrive for Business
• configure integration with the Office 365 toolset
• validate integrity of data in SharePoint
• integrate data by using Excel data online

**Create, configure, and maintain Power Automate flows**

• create service connections
• configure source and target fields
• create, validate, and execute Power Automate logic
• share flows with other users

**Perform solutions deployment and testing**
Manage environments

- determine whether to use managed or unmanaged solution
- determine subcomponents to include in a solution
- create or use a custom publisher
- migrate from sandbox environments
- administer environments
- configure environments

Manage applications

- manage applications using the Dynamics 365 Administration Center
- manage Dynamics 365 applications using solutions

Perform system administration

- configure connection roles
- configure language and locales
- configure currencies
- configure subjects
- configure custom help
- configure session and inactivity timeouts
- manage global audit settings
- configure audit user access
- manage audit logs
- manage entity and field auditing
- configure relevant search
- configure QuickFind settings
- configure categorized search

Perform quality assurance

- create system, performance, unit, and regression testing scripts
- perform performance tuning
- perform optimization testing
- verify network capacity and throughput by using the Dynamics 365 Diagnostics Tool
- perform data query performance

Manage solutions

- create solutions
- export solutions
- import solutions
- distribute solutions and patches
Perform configuration

Configure sales settings

- configure sales territories
- configure default revenue type
- configure auto number settings
- configure business closures
- configure fiscal year
- configure currencies
- configure sales team roles
- configure sales security roles
- configure goal management components
- create and manage sales collateral
- configure relationship cards
- configure playbook management

Configure processes

- configure record creation rules
- configure out of the box sales business process flows

Create and configure sales visualizations

- configure sales content pack for Power BI
- configure sales dashboards
- design and create sales charts
- execute and analyze sales reports

Configure integration with external sales applications

- implement Dynamics 365 AI for sales
- configure and enable embedded intelligence
- implement social selling assistant
- implement LinkedIn Sales Navigator

Manage core sales entities

Create and manage leads

- create and search for leads
- convert activities to leads
- perform lead qualification
- configure status reasons
• scan business card

Create and manage opportunities

• create and search for opportunities
• close opportunity as won or lost
• track stakeholders and sales team
• add product line items to opportunity
• customize the Opportunity Close form
• configure status reasons

Manage sales entities

Create and manage quotes

• add quotes to opportunities
• edit quotes in various stages
• send quotes to customers
• convert quotes to orders
• create a template from a quote

Create and manage sales order processing

• create and manage orders
• create and manage invoices
• create and manage competitors

Create and manage product and product catalog

• configure product families, bundles, and products
• configure price lists
• configure discount lists
• configure unit groups
• configure product lifecycle