

# 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).**

## Exam MB-200: Microsoft Power Platform + Dynamics 365 Core

### Skills Measured

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

NOTE: In most cases, exams do NOT cover preview features, and some features will only be added to an exam when they are GA (General Availability).

### Perform Discovery, Planning, and Analysis (5-10%)

#### 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 customers

- 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 (20-25%)

#### 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 apps by using App Designer
- create model-driven apps
- create canvas apps
- create Power Apps portals

### **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 contact templates
- create article templates

### **Create and manage processes**

- configure a business rule
- configure a business process flow
- configure a workflow

## **Manage entities and data (15-20%)**

### **Modify an existing data model**

- create new or modify existing entity(s)
- create new or modify existing relationships
- create new or modify existing fields
- create new or modify existing views
- manage accounts and contacts
- create and configure Common Data Services

### **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
- import field translations

### **Manage data**

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

## **Implement security (5-10%)**

### **Configure security in Office 365**

- identify Office 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 (15-20%)**

### **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
- identify minimum application and operating 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
- integrate Teams

### **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 (25-30%)**

### **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 plug-in trace logs

### **Manage apps**

- manage applications using the Dynamics 365 Admin center
- manage Dynamics 365 applications using solutions
- share apps

## **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 Relevance Search
- configure QuickFind settings
- configure Categorized Search
- configure Microsoft Social Engagement

## **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

# **Exam MB-210: Microsoft Dynamics 365 Sales**

## **Skills Measured**

### **Perform configuration (25-30%)**

#### **Configure sales settings**

- configure sales territories and hierarchical sales territories
- configure auto number settings
- configure business settings

- configure sales security roles
- configure goal management components
- create and manage sales collateral

### **Configure processes**

- configure duplicate detection rules
- configure record creation rules
- configure sales business process flows

### **Create and configure sales visualizations**

- configure template apps for Power BI
- configure sales dashboards
- design and create sales charts
- design sales reports

## **Manage core sales entities (50-55%)**

### **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
- configure status reasons

### **Create and manage opportunities**

- manage opportunities
- track stakeholders
- add product line items to opportunities
- customize the Opportunity Close form
- configure status reasons

### **Create and manage quotes**

- add quotes to opportunities

- edit quotes in various stages
- send quotes to customers
- convert quotes to orders

### **Create and manage sales order processing**

- manage orders
- manage invoices
- manage competitors

### **Create and manage products and product catalogs**

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

## **Configure additional tools and services (15-20%)**

### **Configure integration with external sales applications**

- implement Dynamics 365 Sales Insights
- implement Relationship Sales
- describe use cases for Customer Insights
- describe use cases for Power Virtual Agents
- describe use cases for AI Builder

### **Manage forecasting**

- configure forecasts
- define properties and scheduling
- select a template

### **Create and configure playbooks**

- define playbook categories
- manage playbook templates