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 (40-45%)**

**Configure sales settings**

- configure sales territories and hierarchical 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 softphone dialer
• configure forecast management
• configure Sales apps including Sales Hub and Sales Team Member apps

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 insights
• configure and enable embedded intelligence
• implement social selling assistant
• implement LinkedIn Sales Navigator

Manage core sales entities (20-25%)

Create and manage leads

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

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
• configure views

Manage sales entities (35-40%)

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