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 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: 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

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

Exam PL-200: Microsoft Power Platform Functional Consultant

Configure Microsoft Dataverse (25-30%)

Manage an existing 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 manage processes

- 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  
• 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 profiles  
• configure hierarchy security  
• configure Conditional Access settings

**Create apps by using Power Apps (20-25%)**

**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  
• test, monitor, and share apps

**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

Create and Manage Power Automate (15-20%)

Create flows

• describe types of flows and flow components
• trigger a flow by using Dataverse connectors
• run actions by using the Dataverse connector
• implement logic control
• implement dynamic content and expressions
• interpret and act on Flow Checker results
• activate and deactivate flows
• interpret flow analytic data

Create and manage business process flows

• configure a business process flow
• add business rules, workflows, 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
• differentiate between attended and unattended desktop flows
• record business process tasks

Implement Power Virtual Agents chatbots (10-15%)

Create chatbot

• assign a chatbot to an environment
• publish a chatbot
• share a chatbot
• add chatbots to Teams and other channels
• monitor and diagnose bot performance, usage, and topic usage

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 entities

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

Integrate Power Apps with other apps and services (15-20%)

Integrate Power BI with Power Apps

• create Power BI visualizations
• create data flows and schedule data flow runs
• filter data
• build reports and dashboards
• publish and share 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

Integrate Power Apps with Microsoft 365

• add apps to Microsoft Teams
• create a Teams app from a Power Apps app
• create an app directly in Teams
• configure app policies
• create a Teams channel by using Power Automate
• configure and use Microsoft Word and Microsoft Excel templates