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

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