

Study guide for Exam MB-300: Microsoft Dynamics 365: Core Finance and Operations

Purpose of this document

This study guide should help you understand what to expect on the exam and includes a summary of the topics the exam might cover and links to additional resources. The information and materials in this document should help you focus your studies as you prepare for the exam.

Useful links	Description
Review the skills measured as of March 15, 2023	This list represents the skills measured AFTER the date provided. Study this list if you plan to take the exam AFTER that date.
Review the skills measured prior to March 15, 2023	Study this list of skills if you take your exam PRIOR to the date provided.
Change log	You can go directly to the change log if you want to see the changes that will be made on the date provided.
How to earn the certification	Passing MB-300 is part of the requirements to earn any of the following certifications: Microsoft Certified: Dynamics 365 Finance Functional Consultant Associate Microsoft Certified: Dynamics 365 Supply Chain Management, Manufacturing Functional Consultant Associate Microsoft Certified: Dynamics 365 Supply Chain Management Functional Consultant Associate Microsoft Certified: Dynamics 365 Commerce Functional Consultant Associate Microsoft Certified: Dynamics 365: Finance and Operations Apps Developer Associate

Useful links	Description
Certification renewal	Microsoft associate, expert, and specialty certifications expire annually. You can renew by passing a free online assessment on Microsoft Learn.
Your Microsoft Learn profile	Connecting your certification profile to Learn allows you to schedule and renew exams and share and print certificates.
Passing score	A score of 700 or greater is required to pass.
Exam sandbox	You can explore the exam environment by visiting our exam sandbox.
Request accommodations	If you use assistive devices, require extra time, or need modification to any part of the exam experience, you can request an accommodation.
Take a practice test	Are you ready to take the exam or do you need to study a bit more?

Updates to the exam

Our exams are updated periodically to reflect skills that are required to perform a role. We have included two versions of the Skills Measured objectives depending on when you are taking the exam.

We always update the English language version of the exam first. Some exams are localized into other languages, and those are updated approximately eight weeks after the English version is updated. While Microsoft makes every effort to update localized versions as noted, there may be times when the localized versions of an exam are not updated on this schedule. Other available languages are listed in the **Schedule Exam** section of the **Exam Details** webpage. If the exam isn't available in your preferred language, you can request an additional 30 minutes to complete the exam.

Note

The bullets that follow each of the skills measured are intended to illustrate how we are assessing that skill. Related topics may be covered in the exam.

Note

Most questions cover features that are general availability (GA). The exam may contain questions on Preview features if those features are commonly used.

Skills measured as of March 15, 2023

Audience profile

Candidates for this exam gather and analyze business requirements and translate those requirements into fully realized business processes and solutions that implement industry recommended practices. They serve as a key resource in implementing and configuring applications to meet business requirements.

Candidates should be able to implement shared features used by finance and operations apps. The candidate should be able to use Lifecycle Services (LCS), Azure DevOps, and other Microsoft tools and platforms to manage the application lifecycle management (ALM) process. They should also have awareness that finance and operations apps integrate with Microsoft Power Platform solutions, external systems, and tools.

Candidates for this exam typically specialize in one or more feature sets of finance and operations apps including Microsoft Dynamics 365 Finance, Supply Chain Management (which also contains manufacturing modules) Commerce, Project Operations, and Human Resources.

- Describe finance and operations apps and extend apps by using Microsoft Power Platform technologies (20–25%)
- Configure administrative features and workflows (30–35%)
- Manage finance and operations data (20–25%)
- Validate and support solutions (15–20%)

Describe finance and operations apps and extend apps by using Microsoft Power Platform technologies (20–25%)

Identify common apps, features, and functionality

- Describe apps in the finance and operations portfolio
- Describe core components of Dynamics 365 Commerce
- Describe use cases for and capabilities of workspaces and mobile workspaces
- Describe case management
- Describe global address book features and their use cases
- Identify available inquiry and report types
- Describe use cases for the Business Document Management and electronic reporting features
- Perform searches, save queries and views, create and use record templates, and implement filters

Extend app functionality by using Microsoft Power Platform technologies

- Identify use cases for Microsoft Dataverse
- Identify use cases for Microsoft Power Apps
- Identify use cases for Microsoft Power Automate
- Identify use cases for Microsoft Power BI

- Identify use cases for Microsoft Power Virtual Agents

Configure administrative features and workflows (30–35%)

Implement security

- Distinguish between roles, duties, privileges, and permissions
- Manage security roles and users
- Describe segregation of duties
- Describe record-level security
- Describe and use the security diagnostics for task recordings tool

Design and create workflows and describe business events

- Describe use cases for workflows
- Design and create workflows
- Configure workflow properties, tasks, approvals, and elements
- Configure queues and workflow parameters
- Troubleshoot workflows
- Manage workflow versions
- Describe use cases and capabilities for business events

Configure organization administration features

- Set up and configure legal entities and operating units
- Configure number sequences
- Configure organization hierarchies
- Describe and apply user options
- Configure document handling for attachments
- Configure document printing

Configure system administration features

- Describe use cases for the Microsoft Excel Workbook Designer and the Microsoft Dynamics Office add-in
- Configure email (SMTP/Exchange)
- Create and maintain email templates
- Describe use cases for Entity store
- Create, export, and import personalizations
- Publish saved views
- Set up and monitor batch jobs
- Set up alerts

Manage finance and operations data (20–25%)

Manage data

- Describe use cases for the data management framework
- Describe use cases for projects, data entities, and templates
- Copy configuration data between legal entities by using the data management framework
- Describe use cases for the dual-write feature

Describe the data migration process

- Identify common migration scenarios and tools in finance and operations apps
- Identify relevant data entities and elements based on given scenarios
- Identify data migration requirements

Prepare data for migration and migrate data to finance and operations apps

- Identify types of data including master, transactional, reference, parameter, and document data entities
- Identify and extract source data
- Generate field mapping between source and target data structures
- Import or export data by using the data management framework
- Support the transition between the existing and migrated systems
- Perform a test migration and validate output from the process
- Implement data task automation

Validate and support solutions (15–20%)

Test solutions

- Describe types of testing including unit, regression, functional, and end-to-end testing
- Describe capabilities of available testing tools
- Track work items throughout a project implementation by using Azure DevOps
- Create test cases and test plans by using Azure DevOps
- Create test scripts by using Task Recorder and upload scripts to Business Process Modeler (BPM) or Azure DevOps
- Automate and manage test cases by using the Regression Suite Automation Tool (RSAT)

Describe and use Lifecycle Services (LCS) tools

- Identify use cases for project asset libraries and shared asset libraries
- Describe environment purposes and topologies
- Differentiate between Tier 1 environments and other tiers
- Describe use cases for BPM libraries
- Describe the types of environments including sandbox, test, and production
- Identify, report, and resolve issues by using Issue Search and creating support tickets

- Report production outages
- Describe use cases for Trace parser
- Describe the impacts of Dynamics 365 One Version service updates on projects

Study resources

We recommend that you train and get hands-on experience before you take the exam. We offer self-study options and classroom training as well as links to documentation, community sites, and videos.

Study resources	Links to learning and documentation
Get trained	Choose from self-paced learning paths and modules or take an instructor led course
Find documentation	Dynamics 365 documentation and learning modules Finance home page
Ask a question	Microsoft Q&A Microsoft Docs
Get community support	Microsoft Dynamics Community
Follow Microsoft Learn	Microsoft Learn - Microsoft Tech Community
Find videos	Exam Readiness Zone

Change log

Key to understanding the table: The topic groups (also known as functional groups) are in bold typeface followed by the objectives within each group. The table is a comparison between the two versions of the exam skills measured and the third column describes the extent of the changes.

Skill area prior to March 15, 2023	Skill area as of March 15, 2023	Change
Audience profile		Minor
Describe finance and operations apps and extend apps by using Microsoft Power Platform technologies	Describe finance and operations apps and extend apps by using Microsoft Power Platform technologies	No % change
Identify common apps, features, and functionality	Identify common apps, features, and functionality	No change

Skill area prior to March 15, 2023	Skill area as of March 15, 2023	Change
Extend app functionality by using Microsoft Power Platform technologies	Extend app functionality by using Microsoft Power Platform technologies	Minor
Configure administrative features and workflows	Configure administrative features and workflows	No % change
Implement security	Implement security	Minor
Design and create workflows and describe business events	Design and create workflows and describe business events	No change
Configure organization administration features	Configure organization administration features	Minor
Configure system administration features	Configure system administration features	No change
Manage finance and operations data	Manage finance and operations data	No % change
Manage data	Manage data	Minor
Describe the data migration process	Describe the data migration process	No change
Prepare data for migration and migrate data to finance and operations apps	Prepare data for migration and migrate data to finance and operations apps	Minor
Validate and support solutions	Validate and support solutions	No % change
Test solutions	Test solutions	No change
Describe and use Lifecycle Services (LCS) tools	Describe and use Lifecycle Services (LCS) tools	Minor

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