Microsoft Certified: Dynamics 365 Marketing 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-220: Microsoft Dynamics 365 Marketing Functional Consultant

Configure marketing applications (20-25%)

Configure organization settings

- configure administration settings including LinkedIn Lead Gen and quota limits
- configure data sources for synchronization
- create and manage templates
- configure portal integration
- configure landing page settings
- configure domain authentication
- configure data protection tools
- configure social media
- configure webinar providers

Configure marketing settings

- configure matching strategies
- configure marketing email settings
- configure customer journey settings
- configure opt-in settings
- configure email deduplication settings
- configure lead scoring settings
- configure required options for publishing journeys
- create and configure marketing calendars
- manage assets and content settings

Manage insights

- analyze contact insights
- analyze lead insights
- analyze segment insights
- analyze customer journey insights
- analyze email insights
- analyze lead scoring model insights
- analyze marketing page insights
- analyze marketing form insights
- analyze website insights
- analyze redirect URL insights

Manage segments and lists (10-15%)

Create and manage segments

- determine segment type
- create market segments
- create segments using Natural Language Query
- configure dynamic segments using Designer
- combine segments using union, exclude, or intersect logic
- create segments from external sources using customer insights

Create and manage subscription centers and lists

- determine usage scenarios for subscription lists
- create a subscription list
- add a subscription list or lists to a form
- create a segment based on a subscription list
- create a subscription center marketing page
- understand how and where to publish subscription centers

Create and manage marketing forms and pages (10-15%)

Create marketing forms

- determine which marketing form type to use
- determine form requirements and limitations
- create a marketing form using a template
- create landing forms and pages

Create and manage marketing pages

- create marketing pages
- add content to marketing pages
- add forms to content blocks
- apply a style to marketing pages
- integrate marketing pages with marketing emails
- preview and validate marketing pages
- publish marketing pages
- monitor visitors to marketing pages

Manage leads, contacts, and accounts (5-10%)

Create and manage leads

- create leads
- synchronize leads from LinkedIn

Create and manage accounts and contacts

- create and manage accounts
- create and manage contacts
- manage activities

Create and manage marketing emails (5-10%)

Create email messages

- create an email message by using a template
- define mandatory fields for email messages
- add dynamic content to email messages

Manage email messages

- define message requirements
- preview messages by using the Basic and Inbox options
- check Spam Scores
- design and run A/B tests on email messages
- validate and publish messages

Manage customer journeys (10-15%)

Create customer journeys

- determine content types required for a customer journey
- create a customer journey by using a template

- implement actions
- implement targets
- implement flow control for customer journeys

Publish and manage customer journeys

- configure required options for publishing journeys
- check customer journeys for errors
- publish a customer journey

Manage events and webinars (10-15%)

Create and configure events and webinars

- create an event team
- set up venues and sessions including internal and external tracks
- set up speakers
- configure webinar options
- configure event website
- create and manage event forms
- create stream events on Microsoft Teams
- set up event agenda

Manage events and webinars

- create event invitations, banners, and social media posts
- manage event registrations, including attendee check-in
- manage speakers, registration, waitlists, and attendees
- manage sponsors, vendors, logistics, and accommodations
- record and view financial information for events

Configure Dynamics 365 Customer Voice (10-15%)

Create surveys

- create a theme and upload images
- add pages to a survey and personalize data
- identify survey question types
- add survey questions
- determine respondent types
- determine submission options

Preview, test, and publish surveys

- add surveys to emails
- add surveys to a webpage
- add surveys to customer journeys
- clone, import, and translate surveys

Manage survey responses

- view a summary of survey results
- analyze survey responses
- implement conditional logic for survey actions

Exam PL-200: Microsoft Power Platform Functional Consultant

Configure Microsoft Dataverse (20-25%)

Manage a 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 configure views

Create and manage logic

- 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 including import, export, and bulk detection
- 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
- configure hierarchy security
- configure Azure AD group teams

Create apps by using Microsoft Power Apps (15-20%)

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 including accessibility issues
- manage apps
- monitor app analytics data

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
- configure portal details and actions
- configure portal authentication

Create and manage Microsoft Power Automate (15-20%)

Create flows

- recommend types of flows and flow components including when to use a classic workflow
- trigger a flow by using Dataverse connectors
- run actions by using the Dataverse connector
- implement logic control including branches, loops, conditions, error handling, and variables
- implement dynamic content and expressions
- test and troubleshoot flows

Create and manage business process flows

- configure a business process flow
- add business rules, workflows, flow steps, 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 including differentiating between attended and unattended desktop flows
- build web and user interface automations by using Power Automate Desktop
- implement variables, loops, and conditionals in Power Automate Desktop flows
- trigger desktop flows from cloud flows
- monitor automation runs
- analyze processes by using Process Advisor

Implement Microsoft Power Virtual Agents chatbots (10-15%)

Create chatbots

- create a standalone chatbot
- add standalone chatbots to Teams and other channels
- create a chatbot within a Microsoft Teams channel
- publish a chatbot
- share a chatbot
- monitor and diagnose bot performance, usage, and topic usage
- authenticate end users for a chatbot

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 a fallback topic

Configure entities

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

Integrate Microsoft Power Apps with other apps and services (10-15%)

Integrate Microsoft Power BI with Microsoft Power Platform components

- create Power BI visualizations, 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

Configure and use templates

- configure and use Microsoft Excel templates
- configure and use Microsoft Word templates
- configure and use email templates

Manage solutions (15-20%)

Create a solution in a development environment
- create solutions to contain solution assets
- create a publisher
- add assets to a solution
- build solution-aware components
- manage solution component dependencies

Transport solutions between environments

- resolve connection references
- set environment variables
- export solutions
- import solutions
- update solutions
- configure managed properties
- run Solution Checker and interpret results

Localize solutions

- configure currencies
- enable language packs
- export and import translations