

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 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

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 concept (POC) of functional solution designs

Perform continuous collaboration with customer

- 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

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 mobile settings

Create and configure templates

- identify available templates in Dynamics 365
- create email templates
- create Excel templates
- create Word templates

Create and manage processes

- configure a business rule
- configure a business process flow
- configure a workflow

Manage entities and data

Modify an existing data model

- create new or an modify existing entity
- create new or modify existing relationships
- create new or modify existing fields
- manage accounts and contacts

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

Manage data

- perform data cleanup
- mitigate data loading risks
- mitigate excessive database growth
- configure bulk record deletion
- configure duplicate detection setting

Implement security

Configure security in Office 365

- identify Dynamics 365 security 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

Configure Outlook add-in

- identify required client software requirements
- identify required server software requirements
- configure server-side sync
- develop a plan to deploy Outlook App to users
- perform unit testing
- identify minimum application and operation 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

Create, configure, and maintain Microsoft Flows

- create service connections
- configure source and target fields
- create, validate, and execute Microsoft Flow logic
- share flows with other users

Perform solutions deployment and testing

Manage environments

- determine whether to use managed or unmanaged solution
- determine subcomponents to include in solution
- create or use a custom publisher
- migrate from sandbox environments
- administer environments
- configure environments

Manage applications

- manage applications using the Dynamics 365 Administration Center
- manage Dynamics 365 applications using solutions

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 relevant search
- configure QuickFind settings
- configure categorized search

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

Configure marketing applications

Configure marketing settings

- verify organization and business management settings
- define default matching strategies
- configure quota limits
- configure event settings
- configure Customer Insights synchronization
- manage keywords for images for an organization
- create templates
- configure the privacy banner
- configure settings for landing pages
- configure data protection tools
- configure Campaign & Materials Approval Workflow
- configure Marketing Business Units

Manage segments and lists

Create and manage segments

- determine segment type
- create market segments
- configure dynamic segments using Designer, Flow, or Query
- combine segments using union, exclude, or intersect logic

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 and manage Subscription Center

Create and manage marketing forms and pages

Create marketing forms

- determine which marketing form type to use
- determine form requirements and limitations
- create a marketing form using a template
- enable prefilling for forms
- embed a form on an external website
- create new fields to add to marketing forms

Create and manage marketing pages

- determine which marketing page type to use
- create a marketing page using a template
- add form blocks to marketing pages
- customize a marketing page
- create and use dynamic test links
- implement dedicated marketing page blocks
- preview and validate marketing pages
- publish a marketing page
- configure Personalized Landing Pages

Manage leads

Create and manage leads

- create leads manually or automatically
- synchronize leads from LinkedIn by using the LinkedIn connector
- create and manage leads and lead segments through parent contacts/accounts
- create and manage leads through social content

Create and assess sales readiness

- create and manage Lead Scoring Models
- create explicit and implicit scoring conditions
- create compound conditions
- set up condition models
- configure thresholds

Create and manage marketing emails

Create email messages

- create an email message

- define mandatory fields
- add dynamic content to email messages
- integrate marketing pages with marketing emails
- create A/B Emails

Publish and manage email messages

- preview and test messages
- validate and publish messages
- edit Go live emails

Manage customer journeys

Create customer journeys

- determine template types
- implement content types
- set up a customer journey
- implement activity and launch workflow options
- implement targets
- implement flow control for customer journeys

Publish and manage customer journeys

- validate and publish a customer journey
- edit live customer journeys

Manage events and webinars

Create and manage events

- create an event team
- set up agendas, including internal and external tracks
- manage speakers, registration, waitlists, and attendees
- manage vendors, logistics, and accommodations

Create and manage webinars

- determine webinar types
- configure webinar options

Configure and analyze customer responses

Notice of planned skills update: In April 2020, Voice of the Customer skills and exam questions will be replaced with Forms Pro skills and questions. Please prepare for your exam accordingly.

Create and manage surveys and survey responses

- identify survey question types
- determine respondent types
- configure response routing
- preview and test surveys
- publish surveys for customer journeys
- implement workflow conditional logic for survey actions

Manage Customer Insights

- determine report types
- 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
- gather and summarize survey results