Study guide for Exam MB-210: Microsoft Dynamics 365 Sales Functional Consultant

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 September 30, 2022	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 September 30, 2022	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	Some certifications only require passing one exam, while others require passing multiple exams.
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.

Useful links	Description
[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. 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 September 30, 2022

Audience profile

Candidates for this exam are Microsoft Dynamics 365 functional consultants with sales expertise. They are responsible for implementing solutions that meet the business requirements of an organization, large or small. Candidates are also responsible for identifying potential process efficiencies and improvements that could be achieved by using Dynamics 365 Sales and wider Microsoft Power Platform features. This may include supporting a sales lifecycle to run effectively, and assisting the sales team to achieve revenue targets, execute business strategies, and meet an organization's objectives.

Candidates are responsible for configuring and expanding the core sales functionality to create scalable customer solutions which support, automate, and accelerate the company's sales process. Where integrations, business process flows, visualizations, and custom applications are required, the candidate will use their knowledge of the Microsoft Power Platform and common Dynamics 365 customer engagement capabilities to complete the solution design.

Candidates should have strong business knowledge and first-person industry experience. They should understand the sales process of the customer as well as core functionality of Dynamics 365 Sales to be able to identify where the two align and differ. Candidates should also be proficient in the Microsoft Power Platform and model-driven app configuration and have knowledge of Microsoft 365 services.

- Configure Dynamics 365 Sales (35–40%)
- Manage core sales tables (40–45%)
- Configure additional tools and services (10–15%)

Configure Dynamics 365 Sales (35–40%)

Configure the user interfaces of the Sales apps

- Configure model-driven apps
- Create and configure forms
- Create and configure views

Configure sales settings

- Configure sales territories and hierarchical sales territories
- Configure auto number settings for quotes, orders, and invoices
- Configure currencies and fiscal years
- Configure sales security roles and access team templates
- Manage sales literature
- Configure hierarchy security
- Configure and utilize the Assistant
- Configure the business card scanner control

Configure processes

- Configure duplicate detection rules
- Configure email to lead processing
- Configure sales business process flows
- Create and manage playbooks

Configure sales visualizations

- Implement Power BI apps for Sales
- Configure sales dashboards
- Describe options for sales reports

Configure the sales accelerator

- Configure and utilize the sales accelerator
- Configure the seller workspace
- Manage sequences
- Manage segments
- Configure lead and opportunity assignment rules for routing

Evaluate Sales licensing

- Compare and contrast Sales Professional, Enterprise, and Premium capabilities
- Compare and contrast Sales Professional and Enterprise configuration

- Describe use cases for Team member licensing

Manage core sales tables (40–45%)

Create and manage accounts and contacts

- Create and manage accounts
- Create and manage contacts
- Create and manage activities
- Describe use cases for auto capture
- Describe use cases for email engagement
- Describe use cases for talking points, who knows whom, and relationship analytics and health
- Describe how to interpret and improve relationship health
- Describe use cases for notes analysis

Create and manage leads and opportunities

- Create and manage leads
- Perform lead qualification and disqualification
- Configure lead qualification
- Manage opportunities
- Track stakeholders, sales team members, and competitors
- Manage product line items on opportunities
- Customize the Opportunity Close form
- Configure and utilize lead and opportunity scoring
- Manage sales by using the work list

Create and manage quotes, orders, and invoices

- Add quotes to opportunities
- Edit quotes in various stages
- Send quotes to customers
- Convert quotes to orders
- Describe integration options with Microsoft ERP apps
- Manage orders and invoices

Create and manage the product catalog

- Create and manage products, product bundles, and product families
- Describe the product lifecycle
- Create and manage price lists
- Create and manage unit groups
- Describe the behavior of price changes and currency exchange rates

Create and manage forecasts

- Configure and use forecasts
- Describe the forecast templates
- Configure and utilize premium forecasting

Manage in-app campaigns

- Manage marketing lists
- Create quick campaigns

Configure additional tools and services (10–15%)

Integrate sales applications

- Describe LinkedIn Sales Navigator integration with Dynamics 365 Sales
- Configure LinkedIn Sales Navigator controls on Dynamics 365 Sales forms
- Describe Dynamics 365 Sales mobile app capabilities
- Customize quick view forms for Sales mobile app
- Create push notifications for the Dynamics 365 Sales mobile app
- Describe the partner portal

Integrate with Microsoft 365 services

- Configure mailboxes
- Describe Server-Side Synchronization
- Configure document management
- Deploy the Dynamics 365 App for Outlook
- Configure the Dynamics 365 App for Outlook
- Configure auto capture and email engagement

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 Dynamics 365 Sales documentation

Study resources	Links to learning and documentation
Ask a question	[Microsoft Q&A | Microsoft Docs]
Get community support	Microsoft Dynamics Community
Follow Microsoft Learn	Microsoft Learn - Microsoft Tech Community

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 September 30, 2022	Skill area as of September 30, 2022	Changes
Audience profile		Minor
Perform configuration	**Configure Dynamics 365 Sales**	% of exam increased
Configure model-driven apps	Configure the user interfaces of the Sales apps	Minor
Configure sales settings	Configure sales settings	Major
Configure processes	Configure processes	Minor
Create and configure sales visualizations	Configure sales visualizations	Minor
	Configure the sales accelerator	Added
	Evaluate Sales licensing	Added
Manage core sales tables	**Manage core sales tables**	% of exam decreased
Create and manage accounts and contacts	Create and manage accounts and contacts	Major

Create and manage leads	Create and manage leads and opportunities	Major
Create and manage opportunities		Removed
Create and manage sales order processes	Create and manage quotes, orders, and invoices	Minor
Create and manage products and product catalogs	Create and manage the product catalog	Major
	Create and manage forecasts	Added
	Manage in-app campaigns	Added
Configure additional tools and services	**Configure additional tools and services**	% of exam decreased
Configure integration with external sales applications	Integrate sales applications	Major
Create and manage goals and forecasts		Removed
Implement Sales Insights		Removed
Integrate with Microsoft 365 services	Integrate with Microsoft 365 services	Added

Skills measured prior to September 30, 2022

Audience Profile

Candidates for this exam are Microsoft Dynamics 365 functional consultants with sales expertise. They're responsible for implementing solutions that support a sales life cycle so that it can run efficiently and effectively to meet revenue targets, business strategies, and company objectives.

Candidates are responsible for configuring and expanding the core functionality of leads, contacts, accounts, opportunities, and supporting entities to map to the sales processes in place at the organization. They identify opportunities to use Power Apps to develop unified experiences for all devices, Power Automate for application integration, business process flows, and other automation tools to construct an application that supports and accelerates the "lead to cash" journey.

Candidates must have strong business knowledge and should have first-person experience in one or more sales roles.

- Perform configuration (30–35%)
- Manage core sales tables (45–50%)
- Configure additional tools and services (20–25%)

Perform configuration (30–35%)

Configure model-driven apps

- Create and configure forms
- Create and configure views
- Configure site maps

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