Exam MB-210: Microsoft Dynamics 365 Sales – Skills Measured

This exam was updated on October 2, 2020. Following the current exam guide, we have included the previous version of the exam guide with a change log below it.

Audience Profile

Candidates for this exam are Microsoft Dynamics 365 Functional Consultants with sales expertise. Candidates are responsible for implementing solutions that support a sales life cycle to 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 company. 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 preferably first-person experience in the sales world in one or more sales roles.

Skills Measured

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 configuration (25-30%)

Configure sales settings

- configure sales territories and hierarchical sales territories
- configure auto number settings
- configure business settings
- configure sales security roles
- configure goal management components
- create and manage sales collateral

Configure processes

- configure duplicate detection rules
- configure record creation rules
- configure sales business process flows

Create and configure sales visualizations

- configure template apps for Power BI
- configure sales dashboards
- design and create sales charts
- design sales reports

Manage core sales entities (50-55%)

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
- configure status reasons

Create and manage opportunities

- manage opportunities
- track stakeholders
- add product line items to opportunities
- customize the Opportunity Close form
- configure status reasons

Create and manage quotes

- add quotes to opportunities
- edit quotes in various stages
- send quotes to customers
- convert quotes to orders

Create and manage sales order processing

- manage orders
- manage invoices
- manage competitors

Create and manage products and product catalogs

- create and manage products, product bundles, and product families
- create and manage price lists
- create and manage discount lists
- create and manage unit groups
- create and manage product lifecycles

Configure additional tools and services (15-20%)

Configure integration with external sales applications

- implement Dynamics 365 Sales Insights
- implement Relationship Sales
- describe use cases for Customer Insights
- describe use cases for Power Virtual Agents
- describe use cases for AI Builder

Mange forecasting

- configure forecasts
- define properties and scheduling
- select a template

Create and configure playbooks

- define playbook categories
- manage playbook templates

The exam guide below is the previous guide and the change log is below. The new exam guide above went into effect on October 2, 2020.

Skills Measured

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Perform configuration (40-45%)

Configure sales settings

- configure sales territories and hierarchical sales territories
- configure default revenue type
- configure auto number settings
- configure business closures
- configure fiscal year
- configure currencies
- configure sales team roles
- configure sales security roles
- configure goal management components
- create and manage sales collateral
- configure relationship cards
- configure playbook management
- configure softphone dialer
- configure forecast management
- configure Sales apps including Sales Hub and Sales Team Member apps

Configure processes

- configure record creation rules
- configure out of the box sales business process flows

Create and configure sales visualizations

- configure sales content pack for Power BI
- configure sales dashboards
- design and create sales charts
- execute and analyze sales reports

Configure integration with external sales applications

- implement Dynamics 365 AI for sales insights
- configure and enable embedded intelligence
- implement social selling assistant
- implement LinkedIn Sales Navigator

Manage core sales entities (20-25%)

Create and manage leads

- create and search for leads
- convert activities to leads
- perform lead qualification
- configure status reasons
- scan business cards

Create and manage opportunities

- create and search for opportunities
- close opportunity as won or lost
- track stakeholders and sales team
- add product line items to opportunity
- customize the Opportunity Close form
- configure status reasons
- configure views

Manage sales entities (35-40%)

Create and manage quotes

- add quotes to opportunities
- edit quotes in various stages
- send quotes to customers
- convert quotes to orders
- create a template from a quote

Create and manage sales order processing

- create and manage orders
- create and manage invoices
- create and manage competitors

Create and manage product and product catalog

- configure product families, bundles, and products
- configure price lists
- configure discount lists
- configure unit groups
- configure product lifecycle

Change Log

- Prior to the OD refresh, the exam had 9 objectives and 3 functional groups.
- The refreshed OD has 12 objectives and 3 functional groups.

OD Prior to Refresh	Change	Refreshed OD
1. Perform configuration (40-45%)		1. Perform configuration (40-45%)
1.1. Configure sales settings		1.1. Configure sales settings
· Configure sales territories and hierarchical sales territories		• Configure sales territories and hierarchical sales territories
• Configure default revenue type	Removed	
• Configure auto number settings		• Configure auto number settings
• Configure business closures	Removed	
• Configure fiscal year	Modified	• Configure business settings
• Configure currencies	Removed	
• Configure sales team roles	Removed	
• Configure sales security roles		• Configure sales security roles
• Configure goal management components		• Configure goal management components
• Create and manage sales collateral		• Create and manage sales collateral
• Configure relationship cards	Removed	
• Configure Playbook Management	Removed	
• Configure softphone dialer	Removed	
• Configure forecast management	Removed	
• Configure Sales apps including Sales Hub and Sales Team Member apps	Removed	
1.2. Configure processes		1.2. Configure processes
	Added	• Configure duplicate detection rules
• Configure record creation rules		• Configure record creation rules
• Configure out of the box sales business process flows	Modified	• Configure out of the box sales business process flows
1.3. Create and configure sales visualizations		1.3. Create and configure sales visualizations
• Configure sales content pack for Power BI	Modified	• Configure template apps for Power BI
• Configure sales dashboards		• Configure sales dashboards
• Design and create sales charts		• Design and create sales charts
• Execute and analyze sales reports	Modified	• Design sales reports
2. Manage core sales entities (20-25%)		2. Manage core sales entities (20-25%)
	Added	
	Added	• Create and manage accounts
	Added	• Create and manage contacts

	Added	• Create and manage activities
	Modified	
• Create and search for leads		• Create and search for leads
• Convert activities to leads		• Convert activities to leads
• Perform lead qualification		• Perform lead qualification
• Configure status reasons		• Configure status reasons
• Scan business cards	Removed	
2.2. Create and manage opportunities	Modified	2.3. Create and manage opportunities
	Added	• Manage opportunities
• Create and search for opportunities	Removed	
• Close opportunity as won or lost	Removed	
• Track stakeholders and sales team	Modified	• Track stakeholders
• Add product line items to opportunities		• Add product line items to opportunities
• Customize the Opportunity Close form		• Customize the Opportunity Close form
• Configure status reasons		• Configure status reasons
• Configure views	Removed	
3.1. Create and manage quotes	Modified	
• Add quotes to opportunities		• Add quotes to opportunities
• Edit quotes in various stages		• Edit quotes in various stages
• Send quotes to customers		• Send quotes to customers
• Convert quotes to orders		• Convert quotes to orders
• Create a template from a quote	Removed	
3.2. Create and manage sales order processing	Modified	
• Create and manage orders		• Create and manage orders
• Create and manage invoices		• Create and manage invoices
• Create and manage competitors		• Create and manage competitors
3.3. Create and manage product and product catalog	Modified	
• Create and manage products, product bundles, and product families		• Create and manage products, product bundles, and product families
• Create and manage price lists		• Create and manage price lists
• Create and manage discount lists		• Create and manage discount lists
• Create and manage unit groups		• Create and manage unit groups
• Create and manage product lifecycles		• Create and manage product lifecycles
3. Manage sales entities	Modified	3. Configure additional tools and services
1.4. Configure integration with external sales applications	Modified	3.1. Configure integration with external sales applications
• Implement Dynamics 365 AI for Sales Insights		• Implement Dynamics 365 AI for Sales Insights
	Added	• Implement Relationship Sales

• Configure and enable embedded intelligence		
• Implement social selling assistant		
• Implement LinkedIn Sales Navigator		
	Added	• Describe use cases for Customer Insights
	Added	• Describe use cases for Power Virtual Agents
	Added	• Describe use cases for AI Builder
	Added	3.2. Mange forecasting
	Added	• Configure forecasts
	Added	• Define properties and scheduling
	Added	• Select a template
	Added	3.3. Create and configure playbooks
	Added	• Define playbook categories
	Added	• Manage playbook templates