Study guide for Exam MB-700: Microsoft Dynamics 365: Finance and Operations Apps Solution Architect

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 April 3, 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 April 3, 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	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.

Microsoft

Useful links	Description
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 needed, there may be times when the localized versions of an exam are not completed 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 April 3, 2023

Audience profile

Candidates for this exam are Microsoft Dynamics 365 professionals who advise stakeholders and translate business requirements into secure, scalable, and reliable solutions.

Candidates should have knowledge of the Dynamics 365 ecosystem and Microsoft Power Platform. They must have deep understanding of Dynamics 365 Finance, Dynamics 365 Supply Chain Management, Dynamics 365 Commerce, and Dynamics 365 Project Operations. In addition, they must have extensive domain knowledge in one or more industry verticals. This role requires understanding how decisions affect the overall solution.

- Architect solutions (20–25%)
- Define solution strategies (35–40%)
- Manage implementations (20–25%)

Microsoft

- Manage testing (10–15%)

Architect solutions (20–25%)

Gather requirements

- Identify operational and organizational challenges that may affect a business
- Identify existing business processes and opportunities to optimize business processes
- Gather information about expected transaction volume
- Categorize business requirements and perform gap fit analyses
- Review and validate business requirements throughout the solution lifecycle

Define the solution architecture

- Map business requirements to functional components
- Evaluate whether to build versus buy for selected business requirements
- Identify opportunities to implement supplemental Microsoft technologies
- Use the appropriate implementation tools including Lifecycle Services (LCS) and Azure DevOps
- Describe the Success by Design framework
- Create solution architecture diagrams

Describe and document the solution blueprint

- Define an organization including company information, locations, and structure
- Document the implementation timeline including roll-out strategies
- Define the business process catalog and document solution gaps
- Define instances, environments, and solution components
- Identify required security roles

Define solution strategies (35–40%)

Select a deployment strategy

- Develop a process to manage solution code and deployment
- Select a deployment model and identify instances and environments required for the selected deployment model
- Describe the One Version strategy for Dynamics 365 and the effects of One Version on solutions
- Segment solution development and delivery into logical phases
- Provide alternative methodologies and approaches for deploying modifications
- Determine solution maintenance cadence and timelines
- Identify upgrade scenarios and select appropriate tools

Define an application lifecycle management (ALM) strategy

- Define a code management and data flow strategy
- Define a Microsoft Power Platform solution management strategy
- Determine which build automation capabilities to implement

Microsoft

- Define a roll-back strategy for solution code and data

Determine a data management strategy

- Differentiate between transactional and historical data
- Define data quality and data validation process
- Define data cleansing and transformation strategies
- Define data dependencies
- Develop a data migration strategy for master, transactional, reference, parameter, and document data entities
- Develop data cut-over, verification and data retention plans

Define the security architecture

- Differentiate between Azure, Dynamics 365, and infrastructure security
- Describe Azure and infrastructure security-related elements
- Describe use cases for and capabilities of record-level and role-based security in Dynamics 365

Define the integration architecture

- Select an integration pattern including OData, Microsoft Power Platform integration, Batch Data API, customer service, external web services, and office integrations.
- Identify required integration and interface details
- Design integrations
- Define an integration testing strategy

Define the business intelligence and reporting architecture

- Gather business intelligence and reporting requirements
- Define data sources required to meet business intelligence and reporting requirements
- Select appropriate business intelligence and reporting tools including Power BI, organizational workspaces, financial reports, SQL Server Reporting Services (SSRS), and the Electronic Reporting tool
- Define printing requirements including, Document Routing Agent (DRA), modern report design layout templates, check printing, and label printing

Manage implementations (20–25%)

Describe Lifecycle Services (LCS) tools

- Understand the use cases and capabilities of different LCS tools
- Understand the use cases and capabilities of Business Process Modeler (BPM)
- Understand the use cases and capabilities of LCS Methodologies
- Create a usage profile to describe current or projected usage

Manage interactions with FastTrack

- Identify the value proposition for FastTrack

■■ Microsoft

- Identify FastTrack engagement types and personnel roles
- Describe typical types of FastTrack workshops and the inputs for each workshop
- Describe go-live checklist elements

Determine support options

- Develop a support plan and strategy
- Define post-go-live support plans including response times and service-level agreements (SLAs)
- Describe use cases and capabilities for the LCS Support tool

Determine licensing requirements

- Determine the types of licenses required
- Estimate the number of licenses required by using the License Sizing estimator
- Describe the process for estimating ongoing software licensing costs

Manage testing (10–15%)

Define a testing strategy

- Define a testing strategy that includes all required types of testing
- Define a regression testing strategy
- Identify opportunities for automated testing
- Review use cases and test coverage for business scenarios
- Determine when to use RSAT, SysTest, Postman, ATL, Azure DevOps Test Plans, and other tools

Define a performance testing strategy

- Define performance goals and requirements
- Identify performance monitoring and testing tools
- Define performance benchmarks and success criteria
- Design a performance and load testing strategy
- Troubleshoot performance issues

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

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
Find a video	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 April 3, 2023	Skill area as of April 3, 2023	Change
Audience profile		No change
Architect solutions	**Architect solutions**	No % change
Gather requirements	Gather requirements	No change
Define the solution architecture	Define the solution architecture	Minor
Describe and document the solution blueprint	Describe and document the solution blueprint	Minor
Define solution strategies	**Define solution strategies**	No % change
Select a deployment strategy	Select a deployment strategy	No change
Define an application lifecycle management (ALM) strategy	Define an application lifecycle management (ALM) strategy	No change
Determine a data management strategy	Determine a data management strategy	Minor
Define the security architecture	Define the security architecture	No change
Define the integration architecture	Define the integration architecture	Minor
Define the business intelligence and reporting architecture	Define the business intelligence and reporting architecture	Minor
Manage implementations	**Manage implementations**	No % change

Microsoft

Skill area prior to April 3, 2023	Skill area as of April 3, 2023	Change
Describe Lifecycle Services (LCS) tools	Describe Lifecycle Services (LCS) tools	No change
Manage interactions with FastTrack	Manage interactions with FastTrack	No change
Determine support options	Determine support options	No change
Determine licensing requirements	Determine licensing requirements	No change
Manage testing	**Manage testing**	No % change
Define a testing strategy	Define a testing strategy	No change
Define a performance testing strategy	Define a performance testing strategy	No change

Skills measured prior to April 3, 2023

Audience profile

Candidates for this exam are Microsoft Dynamics 365 professionals who advise stakeholders and translate business requirements into secure, scalable, and reliable solutions.

Candidates should have knowledge of the Dynamics 365 ecosystem and Microsoft Power Platform. They must have deep understanding of Dynamics 365 Finance, Dynamics 365 Supply Chain Management, Dynamics 365 Commerce, and Dynamics 365 Project Operations. In addition, they have extensive domain knowledge in one or more industry verticals. This role requires understanding how decisions affect the overall solution.

- Architect solutions (20–25%)
- Define solution strategies (35–40%)
- Manage implementations (20–25%)
- Manage testing (10–15%)

Architect solutions (20–25%)

Gather requirements

- Identify operational and organizational challenges that may affect a business
- Identify existing business processes and opportunities to optimize business processes
- Gather information about expected transaction volume
- Categorize business requirements and perform gap fit analyses
- Review and validate business requirements throughout the solution lifecycle

Define the solution architecture

- Map business requirements to functional components
- Evaluate whether to build versus buy for selected business requirements

Microsoft

- Identify opportunities to integrate other Microsoft technologies
- Select the appropriate implementation tools including LCS and Azure DevOps
- Describe the Success by Design process
- Create solution architecture diagrams

Describe and document the solution blueprint

- Define an organization including company information, locations, and structure
- Document the implementation timeline including roll-out strategies
- Define the business process catalog and document solution gaps
- Define instances, environments, and solution components
- Develop a disaster recovery strategy
- Identify required security roles

Define solution strategies (35–40%)

Select a deployment strategy

- Develop a process to manage solution code and deployment
- Select a deployment model and identify instances and environments required for the selected deployment model
- Describe the One Version strategy for Dynamics 365 and the effects of One Version on solutions
- Segment solution development and delivery into logical phases
- Provide alternative methodologies and approaches for deploying modifications
- Determine solution maintenance cadence and timelines
- Identify upgrade scenarios and select appropriate tools

Define an application lifecycle management (ALM) strategy

- Define a code management and data flow strategy
- Define a Microsoft Power Platform solution management strategy
- Determine which build automation capabilities to implement
- Define a roll-back strategy for solution code and data

Determine a data management strategy

- Differentiate between transactional and historical data
- Define data quality and data validation process
- Define data cleansing and transformation strategies
- Define data dependencies
- Develop a data migration strategy for master, transactional, reference, parameter, and document data entities
- Develop data cut-over and data retention plans

Microsoft

Define the security architecture

- Differentiate between Azure, Dynamics 365, and infrastructure security
- Describe Azure and infrastructure security-related elements
- Describe use cases for and capabilities of record-level and role-based security in Dynamics 365

Define the integration architecture

- Select an integration pattern including OData, Microsoft Power Platform, Batch Data API, Azure Data Lake, Business events, and Dual-write
- Identify required integration and interface details
- Design integrations
- Define an integration testing strategy

Define the business intelligence and reporting architecture

- Gather business intelligence and reporting requirements
- Define data sources required to meet business intelligence and reporting requirements
- Select appropriate business intelligence and reporting tools including Power BI, organizational workspaces, financial reports, SQL Server Reporting Services (SSRS), and the Electronic Reporting tool
- Define printing requirements including Print management, Document Routing Agent (DRA), modern report design layout templates, check printing, and label printing

Manage implementations (20–25%)

Describe Lifecycle Services (LCS) tools

- Understand the use cases and capabilities of different LCS tools
- Understand the use cases and capabilities of Business Process Modeler (BPM)
- Understand the use cases and capabilities of LCS Methodologies
- Create a usage profile to describe current or projected usage

Manage interactions with FastTrack

- Identify the value proposition for FastTrack
- Identify FastTrack engagement types and personnel roles
- Describe typical types of FastTrack workshops and the inputs for each workshop
- Describe go-live checklist elements

Determine support options

- Develop a support plan and strategy
- Define post-go-live support plans including response times and service-level agreements (SLAs)
- Describe use cases and capabilities for the LCS Support tool

Determine licensing requirements

- Determine the types of licenses required

- Estimate the number of licenses required by using the License Sizing estimator
- Describe the process for estimating ongoing software licensing costs

Manage testing (10–15%)

Define a testing strategy

- Define a testing strategy that includes all required types of testing
- Define a regression testing strategy
- Identify opportunities for automated testing
- Review use cases and test coverage for business scenarios
- Determine when to use RSAT, SysTest, Postman, ATL, Azure DevOps Test Plans, and other tools

Define a performance testing strategy

- Define performance goals and requirements
- Identify performance monitoring and testing tools
- Define performance benchmarks and success criteria
- Design a performance and load testing strategy
- Troubleshoot performance issues