Study guide for Exam MB-800: Microsoft Dynamics 365 Business Central 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 March 24, 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 March 24, 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.

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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 noted, there may be times when the localized versions of an exam are not updated 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 March 24, 2023

Audience profile

Candidates for this exam are functional consultants who implement core application setup processes for small and medium businesses. They configure the application in collaboration with the implementation team to provide the business with manageability and ease of use.

Candidates implement and configure Microsoft Dynamics 365 Business Central including setting up core functionality and modules and migrating data to Business Central. They have applied knowledge of meeting business needs by specializing in one or more feature sets of Business Central.

Candidates may configure role centers including adapting insights, cues, action tiles, reports, and charts. This includes a basic understanding of financial management, sales, purchasing, and inventory. They also understand how Business Central connects to Microsoft 365, Power Platform, and Dynamics 365.

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- Set up Business Central (20–25%)
- Configure financials (30–35%)
- Configure sales and purchasing (15–20%)
- Perform Business Central operations (25–30%)

Set up Business Central (20–25%)

Create and configure a company

- Create a company in the on-premises and cloud-based versions of Business Central
- Create a company by using Assisted Setup to copy data from an existing company
- Describe the use cases and capabilities of RapidStart Services
- Create a configuration worksheet
- Create and use a configuration package
- Create journal opening balances

Manage security

- Create and manage user profiles
- Set up a new user and user groups
- Create and assign permission sets and permissions
- Apply security filters

Set up core functionality

- Set up company information
- Set up printers for on-premises and cloud-based installations
- Set up reports and custom report layouts
- Set up and use job queues
- Set up email accounts
- Set up number series

Set up dimensions

- Set up dimensions and dimension values
- Set up global dimensions and shortcut dimensions
- Set up dimensions to master data
- Set up blocking combinations of dimensions and dimension values
- Describe the Dimension Correction Tool

Manage approvals by using workflows

- Set up native workflows
- Set up a notification system
- Set up approvals

Configure financials (30–35%)

Set up Finance Management

- Configure General Ledger setup
- Configure accounting periods

Manage the chart of accounts

- Set up G/L Account Card
- Create account categories and subcategories
- Describe filtering on Chart of Accounts for finance reporting

Set up posting groups

- Create specific posting groups including bank, customer, vendor, and inventory posting groups
- Create general posting groups
- Configure General Posting Setup

Set up journals and bank accounts

- Set up bank accounts
- Create journal templates
- Create batches
- Implement recurring journals

Set up accounts payables

- Create vendor accounts including payment terms, vendor bank accounts, and related records
- Set up payment information for vendors
- Configure Purchases & Payables Setup
- Set up payment journals
- Describe the relationship between vendors, vendor ledger entries, and detailed vendor ledger entries

Set up accounts receivables

- Create customer accounts
- Configure Sales & Receivables Setup
- Set up cash receipt journals
- Set up payment registration
- Configure customer payment methods
- Describe the relationship between customers, customer ledger entries, and detailed customer ledger entries
- Consolidate customer and vendor balances

Configure sales and purchasing (15–20%)

Set up inventory
- Configure inventory set up
- Manage items
- Create locations
- Describe the relationship between items, item ledger entries, and value entries
- Differentiate between costing methods

Configure master data for sales and purchasing
- Configure core customer settings including shipping agents, locations, and shipping addresses
- Configure core vendor settings including order address, lead time, and locations

Configure pricing and discounts
- Manage vendor purchase prices
- Manage purchase line and invoice discounts
- Manage customer sales prices
- Manage sales line and invoice discounts

Perform Business Central operations (25–30%)

Perform basic tasks in Business Central
- Differentiate between designing, customizing, and personalizing pages
- Customize pages
- Apply and save filters
- Find documents and related entries
- Use the Inspect pages and data feature
- Perform data updates by using the Edit in Excel feature
- Attach and share files by using OneDrive

Process purchases
- Manage quotations
- Create a purchase order
- Receive items for a purchase order
- Describe the over-receipt feature
- Undo a receipt
- Create a posted invoice from a purchase order
- Configure recurring purchase lines

Process sales
- Manage quotation

- Convert a sales quote into a sales order or sales invoice
- Analyze item availability
- Ship items for a sales order
- Undo shipments
- Create a sales invoice from a sales order
- Configure recurring sales lines

Process financial documents

- Process purchase invoices
- Process purchase credit memos
- Process sales invoices
- Process sales credit memos
- Combine sales shipments into a single sales invoiceCombine purchase receipts into a single purchase invoice
- Correct a posted purchase invoice
- Correct a posted sales invoice
- Release and reopen documents
- Process prepayment invoices for purchases and sales

Process payments and journals

- Process payments by using payment journals
- Process receipts by using the cash receipts journal
- Create bank deposits
- Process payment registrations
- Apply ledger entries and undo applied entries
- Reverse posted journals

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
	Microsoft Dynamics 365 Business Central

Microsoft

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 March 24, 2023	Skill area as of March 24, 2023	Change
Audience profile		Minor
Set up Business Central	**Set up Business Central**	No % change
Create and configure a new company	Create and configure a company	Minor
Manage security	Manage security	No change
Set up core app functionality	Set up core functionality	Minor
Set up dimensions	Set up dimensions	Major
Set up and manage approvals by using workflows	Manage approvals by using workflows	Major
Configure financials	**Configure financials**	No % change
Set up the Finance module	Set up Finance Management	Minor
Configure the chart of accounts	Manage the chart of accounts	Major
Set up posting groups	Set up posting groups	No change
Set up journals and bank accounts	Set up journals and bank accounts	Major
Set up accounts payables	Set up accounts payables	Minor
Set up accounts receivables	Set up accounts receivables	Minor
Configure sales and purchasing	**Configure sales and purchasing**	No % change

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Skill area prior to March 24, 2023	Skill area as of March 24, 2023	Change
Set up inventory	Set up inventory	Major
Configure master data for sales and purchasing	Configure master data for sales and purchasing	No change
Configure pricing and discounts	Configure pricing and discounts	Minor
Perform Business Central operations	**Perform Business Central operations**	No % change
Perform basic tasks in Business Central	Perform basic tasks in Business Central	No change
Purchase items	Process purchases	Major
Sell items	Process sales	Minor
Process financial documents	Process financial documents	Minor
Process payments and journals	Process payments and journals	Minor

Skills measured prior to March 24, 2023

Audience profile

Candidates for this exam are functional consultants who implement core application setup processes for small and medium businesses. They implement and configure Microsoft Dynamics 365 Business Central including setting up core functionality and modules and migrating data to Business Central.

Candidates configure the application in collaboration with the implementation team to provide the business with manageability and ease of use. They may configure role centers including adapting insights, cues, action tiles, reports, charts, and extend Business Central by using Microsoft Power Platform components.

Candidates have applied knowledge of meeting business needs by using Business Central, including basic understanding of financial management, sales, purchasing, and inventory.

Candidates for this exam typically specialize in one or more feature sets of Business Central. They understand the role of Business Central in relationship to the Microsoft 365 and Dynamics 365 suites of applications.

- Set up Business Central (20-25%)
- Configure financials (30-35%)
- Configure sales and purchasing (15-20%)
- Perform Business Central operations (25-30%)

Set up Business Central (20–25%)

Create and configure a new company

- Create a new company in the on-premises and cloud-based versions of Business Central
- Create a new company from scratch by using Assisted Setup to copy data from an existing company
- Describe the use cases and capabilities of RapidStart Services
- Create a configuration worksheet
- Create and export a configuration package
- Import and apply a configuration package
- Create journal opening balances

Manage security

- Create and manage user profiles
- Set up a new user and user groups
- Create and assign permission sets and permissions
- Apply security filters

Set up core app functionality

- Set up company information
- Set up printers for on-premises and cloud-based installations
- Set up report selections
- Set up and use job queues
- Set up email
- Set up number series

Set up dimensions

- Set up dimensions and dimension values
- Set up global dimensions and shortcut dimensions
- Set up default dimension for a single account and for multiple accounts
- Set up default dimensions for an account type or location
- Block combinations of dimensions or dimension values

Set up and manage approvals by using workflows

- Set up a purchase document approval system
- Set up a sales document approval system
- Set up document approvals
- Set up a notification system
- Set up an approval hierarchy

Configure financials (30–35%)

Set up the Finance module

- Create a fiscal year
- Define General Ledger Setup options
- Create accounting periods

Configure the chart of accounts

- Create and configure general ledger accounts, including blocking deletion of general ledger accounts
- Configure direct posting
- Create account categories and subcategories

Set up posting groups

- Create specific posting groups including bank, customer, vendor, and inventory posting groups
- Create general posting groups
- Configure General Posting Setup

Set up journals and bank accounts

- Create journal templates
- Create batches
- Implement number series in journals
- Implement recurring journals
- Set up bank accounts
- Update currency exchange rates

Set up accounts payables

- Create payment terms
- Create vendor accounts including payment terms, vendor bank accounts, and related records
- Set up payment information for vendors
- Configure Purchases & Payables Setup options
- Set up payment journals
- Describe the relationship between vendors, vendor ledger entries, and detailed vendor ledger entries

Set up accounts receivables

- Create customer accounts
- Configure Sales & Receivables Setup options
- Set up cash receipt journals
- Set up payment registration
- Configure customer payment methods

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- Describe the relationship between customers, customer ledger entries, and detailed customer ledger entries

Configure sales and purchasing (15–20%)

Set up inventory

- Create items
- Configure item categories and item attributes
- Set up units of measure
- Create locations
- Describe the relationship between items, item ledger entries, and value entries
- Differentiate between costing methods

Configure master data for sales and purchasing

- Configure core customer settings including shipping agents, locations, and shipping addresses
- Configure core vendor settings including order address, lead time, and locations

Configure pricing and discounts

- Create vendor-specific purchase prices
- Configure purchase line and invoice discounts
- Create customer-specific sales prices
- Configure sales line and invoice discounts

Perform Business Central operations (25–30%)

Perform basic tasks in Business Central

- Differentiate between designing, customizing, and personalizing pages
- Customize pages
- Apply and save filters
- Find documents and related entries
- Use the Inspect pages and data feature
- Perform data updates by using the Edit in Excel feature
- Attach and share files by using OneDrive

Purchase items

- Create a purchase order
- Receive items for a purchase order
- Describe the over-receipt feature
- Undo a receipt
- Create a posted invoice from a purchase order
- Create a purchase credit memo
- Configure recurring purchase lines

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Sell items

- Create a sales quote
- Convert a sales quote into a sales order or sales invoice
- Analyze item availability
- Ship items for a sales order
- Undo shipments
- Create a sales invoice from a sales order
- Create sales credit memos
- Configure recurring sales lines

Process financial documents

- Process purchase invoices
- Process purchase credit memos
- Process sales invoices
- Process sales credit memos
- Combine sales shipments into a single sales invoiceCombine purchase receipts into a single purchase invoice
- Correct a posted purchase invoice
- Correct a posted sales invoice
- Release and reopen documents

Process payments and journals

- Process payments by using payment journals
- Run the Suggest Vendor Payments action
- Process receipts by using the cash receipts journal
- Process payment registrations
- Apply ledger entries and undo applied entries
- Reverse posted journals
- Create bank deposits
- Consolidate customer and vendor balances

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