

# **Exam MB-910: Microsoft Dynamics 365 Fundamentals (CRM) – Skills Measured**

## **Audience Profile**

This exam covers the features and capabilities of Microsoft Dynamics 365 customer engagement apps.

Candidates of this exam should have general knowledge of or relevant working experience in an Information Technology (IT) environment. They should also have a fundamental understanding of customer engagement principles and business operations.

## **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: Most questions cover features that are General Availability (GA). The exam may contain questions on Preview features if those features are commonly used.

## **Describe Dynamics 365 Marketing (10-15%)**

### **Identify Dynamics 365 Marketing capabilities**

- describe how to target customers by using segments and subscription lists
- describe the lead generation and qualification process including lead scoring
- describe customer journeys
- describe event management features and capabilities

### **Describe related marketing apps**

- describe the capabilities of LinkedIn Campaign Manager
- describe the capabilities of Dynamics 365 Customer Voice
- describe the capabilities of Dynamics 365 Customer Insights including audience insights and experience insights

## **Describe Dynamics 365 Sales (15-20%)**

### **Describe the Dynamics 365 Sales lifecycle**

- describe leads and the process for qualifying leads
- describe the opportunity management process
- describe the quote lifecycle
- describe use cases for orders and invoices
- describe processes and tools used for forecasting sales

### **Describe related sales apps**

- describe capabilities of Dynamics 365 Sales Insights
- describe capabilities of LinkedIn Sales Navigator

## **Describe Dynamics 365 Customer Service (15-20%)**

### **Describe Dynamics 365 Customer Service components**

- describe cases, queues, and entitlements
- describe Knowledge Management
- describe service-level agreements (SLAs)

### **Describe related customer service apps**

- describe Omnichannel for Customer Service
- describe Connected Customer Service
- describe Customer Service Insights

## **Describe Dynamics 365 Field Service (15-20%)**

### **Describe the work order lifecycle**

- describe the lifecycle of a work order including work order creation
- describe sources for work orders including cases, opportunities, IoT device sensor alerts, and agreements
- describe capabilities for the Inspections feature

### **Describe scheduling capabilities**

- describe resource management capabilities including skills, and proficiency models
- identify available Universal Resource Scheduling (URS) scheduling options including Schedule Assistant, Resource Schedule Optimization (RSO), and geolocation for technicians
- describe how Dynamics 365 Field Service uses artificial intelligence (AI) to help organizations become more efficient

## **Describe inventory and asset management capabilities**

- describe inventory management transaction types
- describe customer asset management and preventive maintenance processes
- describe options for performing proactive customer asset maintenance by implementing IoT

## **Describe Project Operations (15-20%)**

### **Identify Project Operations capabilities**

- describe project components including contracts, stages, assignments, and fixed price versus time and material estimates versus retainer contracts
- identify views and reports that aid a project service company in making decisions

### **Describe project sales capabilities**

- describe the process for converting leads into projects
- describe opportunity management and quote management for project-based and product-based quotes
- describe use cases for project contracts

### **Describe project planning and resource management capabilities**

- describe allocation methods, tasks, subtasks, and assignments
- describe time and expenses entry, and entry approvals
- describe resource skills and proficiency models
- identify Interactive Gantt charts, Kanban boards, Resource Utilization boards, and Schedule boards

## **Describe shared features (15-20%)**

### **Identify common customer engagement features**

- describe customers and activities
- describe the product catalog
- describe price lists, discounts, and currencies
- describe cases
- describe resources

### **Describe reporting capabilities**

- describe built-in reporting capabilities including dashboards, charts, views, and Report Wizard
- describe options for exporting data to Microsoft Excel
- describe options for analyzing data by using Power BI

### **Describe integration options**

- describe Microsoft Teams integration capabilities
- describe use cases for integrating with Microsoft Excel and Microsoft Word
- describe options for managing documents by using SharePoint Online
- describe email integration capabilities