

# **Microsoft Certified: Dynamics 365 Fundamentals (CRM) – 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.

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

### **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