

MB2-716

Microsoft Dynamics 365 Customization and Configuration

Exam number: MB2-716

Exam title: Microsoft Dynamics 365 Customization and Configuration

Publish date:

Language(s) this exam will be available in:

Audience: (Sales and Presales Roles, IT professionals, Developers, Information workers, etc.):

Technology:

Credit type (example: MCSA):

Exam provider (VUE, Certiport, or both):

The content of this exam was updated on February 4, 2020. Please continue scrolling to the red line section below to view the changes.

Exam Design

Audience Profile

Candidates for this exam configure and customize Microsoft Dynamics 365 by using the tools available in Microsoft Dynamics 365. Candidates include developers, implementation consultants, technical support personnel, and system administrators. Candidates need a working knowledge of Microsoft Dynamics 365 features and functionality, as well as a working knowledge of development, implementation, and data structures.

Skills measured

Configure Microsoft Dynamics 365 (20-25%)

Configure Microsoft Dynamics 365 Settings

May include but is not limited to:

- Configure auditing, document management, and collaboration
- Configure administration settings
- Perform data management tasks
- Perform user management
- Implement themes

Manage Microsoft Dynamics 365 Security

May include but is not limited to:

- Identify security roles
- Define permissions and privileges
- Configure access levels
- Configure security roles
- Assign security roles
- Implement multiple security roles
- Manage access
- Implement the standard security model and hierarchy security
- Configure business units
- Manage teams

Configure email Services

May include but is not limited to:

- Identify integration options
- Configure email server profiles and default organization email settings
- Enable server-side email synchronization
- Enable folder tracking
- Map exchange folders
- Set up and configure the Dynamics 365 App for Outlook

Integrate Microsoft Dynamics 365 with other Office 365 Offerings

May include but is not limited to:

- Select the appropriate Office 365 group integration
- Create and configure Office 365 groups
- Integrate Microsoft Dynamics 365 and SharePoint
- Enable linking to OneNote files
- Set up and configure OneNote integration
- Configure OneDrive for Business integration

Implement Microsoft Dynamics 365 entities, entity relationships, and fields (20-25%)

Manage Microsoft Dynamics 365 Entities

May include but is not limited to:

- Manage entity ownership
- Manage entity properties
- Configure system entities
- Describe activity entities
- Configure entity ownership and entity properties
- Implement managed properties
- Configure custom entities and security roles
- Delete entities

Implement entity relationships

May include but is not limited to:

- Define relationship types
- Create relationships
- Configure cascading rules
- Identify types of cascading behavior
- Work with hierarchical data
- Configure entity mapping
- Create connections and connection roles

Define and Configure Microsoft Dynamics 365 Fields

May include but is not limited to:

- Identify field types
- Define field naming requirements
- Configure field properties and field display formats
- Implement option sets and two option fields
- Configure lookup fields and customer fields

Configure Field Customizations

May include but is not limited to:

- Configure fields
- Configure field properties
- Use calculated fields
- Use rollup fields

- Configure global option sets
- Create alternate keys
- Configure field-level security and security roles
- Use status and status reasons
- Identify status reason transitions

Create and Manage Microsoft Dynamics 365 Solutions, Forms, Views, and Visualizations (25-30%)

Create and Manage Microsoft Dynamics 365 Solutions

May include but is not limited to:

- Recommend usage patterns for Microsoft Dynamics 365 solutions
- Identify solution components
- Identify solution types
- Create managed and unmanaged solutions
- Configure publishers and versions
- Manage multiple solutions
- Import and export solutions
- Patch and clone solutions

Customize Microsoft Dynamics 365 Forms

May include but is not limited to:

- Identify Microsoft Dynamics 365 form types
- Build a form
- Use specialized form components
- Implement access teams and sub-grids
- Create editable grids
- Work with navigation
- Use multiple forms

Implement Microsoft Dynamics 365 Views and Visualizations

May include but is not limited to:

- Identify view types
- Create, modify, manage, and delete views
- Customize views
- Create system and personal charts
- Identify chart types that can be combined
- Use available series aggregation types
- Customize charts
- Import and export charts

- Create dashboards and dashboard components
- Customize dashboards
- Control access to dashboards

Configure Microsoft Dynamics 365 for Mobile Devices

May include but is not limited to:

- Deploy the mobile client
- Identify available entities for the mobile client
- Configure mobile navigation
- Design mobile form layout
- Create custom controls
- Hide mobile form content
- Create multiple forms
- Create mobile views and activity lists

Implement Business Rules, Workflows, and Business Process Flows (20-25%)

Implement and Manage Business Rules

May include but is not limited to:

- Determine when to use business rules
- Describe business rule scopes
- Identify actions that trigger business rules
- Configure business rules, conditions, and actions

Implement and Manage Workflows and Custom Actions

May include but is not limited to:

- Implement workflows
- Identify workflow types
- Implement custom actions
- Identify when to use business process flows, workflows, and custom actions

Implement and Manage Business Process Flows

May include but is not limited to:

- Identify business flow components
- Enable business process flows
- Implement steps, stages, and categories
- Implement flows that use multiple entities
- Use conditional branching
- Implement role-driven business process flows

- Run workflows

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- Identify workflow types
- Implement ~~dialogs and~~ custom actions
- Identify when to use business process flows, workflow~~s~~ ~~dialogs~~, and custom actions

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