Exam MB-210: Microsoft Dynamics 365 Sales Functional Consultant – Skills Measured

The English language version of this exam was updated on July 23, 2021.

Following the current exam guide, we have included a version of the exam guide with changes tracked, showing the updates that will be made to the exam on that date.

NOTE: Passing score: 700. Learn more about exam scores.

Audience Profile

Candidates for this exam are Microsoft Dynamics 365 functional consultants with sales expertise. Candidates responsible for implementing solutions that support a sales life cycle so that it can run efficiently and effectively to meet revenue targets, business strategies, and company objectives.

Candidates are responsible for configuring and expanding the core functionality of leads, contacts, accounts, opportunities, and supporting entities to map to the sales processes in place at the organization. They identify opportunities to use Power Apps to develop unified experiences for all devices, Power Automate for application integration, business process flows, and other automation tools to construct an application that supports and accelerates the "lead to cash" journey.

Candidates must have strong business knowledge and should have first-person experience in one or more sales roles.

Skills Measured

NOTE: The bullets that follow 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.

Perform configuration (25-30%)

Configure sales settings

- configure sales territories and hierarchical sales territories
- configure auto number settings for cases, orders, and quotes
- configure business settings, including business closures, currencies, and fiscal years
- configure sales security roles and access team templates
- create and manage sales collateral

Configure processes

- configure duplicate detection rules
- configure record creation rules
- configure sales business process flows
- create and manage playbooks

Create and configure sales visualizations

- configure template apps for Power BI
- configure sales dashboards
- design and create sales charts
- design sales Advanced Find, Power BI, FetchXML, and Kanban reports, views, and visualizations

Manage core sales tables (45-50%)

Create and manage accounts and contacts

- create and manage accounts
- create and manage contacts
- create and manage activities

Create and manage leads

- create and search for leads
- convert activities to leads
- perform lead qualification

Create and manage opportunities

- manage opportunities
- track stakeholders, sales team members, and competitors
- add product line items to opportunities
- customize the Opportunity Close form

Create and manage sales order processes

- add quotes to opportunities
- edit quotes in various stages
- manage revisions to quotes
- send quotes to customers
- convert quotes to orders
- manage orders
- manage invoices

Create and manage products and product catalogs

- create and manage products, product bundles, and product families
- create and manage pricing lists
- create and manage discount lists
- create and manage unit groups

Configure additional tools and services (20-25%)

Configure integration with external sales applications

- implement Relationship Sales
- describe use cases for Customer Insights
- implement Power BI template apps

Create and manage goals and forecasts

- configure and use forecasts
- configure and use goals

Implement Sales Insights

- configure standard Sales Insights features
- configure premium features, including Notes analysis, who knows whom, and Conversation Intelligence
- implement Sales accelerator
- implement premium forecasting
- configure predictive scoring models

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Perform configuration (25-30%)

Configure sales settings

- configure sales territories and hierarchical sales territories
- configure auto number settings for cases, orders, and quotes
- configure business settings including business closures, currencies, and fiscal years
- configure sales security roles and access team templates
- ~~configure goal management components~~
- create and manage sales collateral

Configure processes

- configure duplicate detection rules
- configure record creation rules
- configure sales business process flows
- create and manage playbooks

Create and configure sales visualizations

- configure template apps for Power BI
- configure sales dashboards
- design and create sales charts
- design sales Advanced Find, Power BI, FetchXML, and Kanban reports, views, and visualizations~~reports~~

Manage core sales ~~entities~~ tables (45-50%)

Create and manage accounts and contacts

- create and manage accounts
- create and manage contacts
- create and manage activities

Create and manage leads

- create and search for leads
- convert activities to leads
- perform lead qualification
- ~~configure status reasons~~

Create and manage opportunities

- manage opportunities
- track ~~stakeholders~~ stakeholders, sales team members, and competitors
- add product line items to opportunities
- customize the Opportunity Close form
- ~~configure status reasons~~

Create and manage ~~quotes~~sales order processes

- add quotes to opportunities
- edit quotes in various stages
- manage revisions to quotes
- send quotes to customers
- convert quotes to orders
- manage orders
- manage invoices

~~Create and manage sales order processing~~

- ~~manage orders~~
- ~~manage invoices~~
- ~~manage competitors~~

Create and manage products and product catalogs

- create and manage products, product bundles, and product families
- create and manage ~~price~~ pricing lists
- create and manage discount lists
- create and manage unit groups
- ~~create and manage product lifecycles~~

Configure additional tools and services (20-25%)

Configure integration with external sales applications

- ~~implement Dynamics 365 Sales Insights~~
- implement Relationship Sales
- describe use cases for Customer Insights
- ~~describe use cases for Power Virtual Agents~~
- ~~describe use cases for AI Builder~~
- implement Power BI template apps

~~Mange forecasting~~Create and manage goals and forecasts

- configure and use forecasts
- configure and use goals
- ~~define properties and scheduling~~
- ~~select a template~~

~~Create and configure playbooks~~

- ~~define playbook categories~~

~~Manage playbook templates~~Implement Sales Insights

- configure standard Sales Insights features
- configure premium features including Notes Analysis, Who Knows Whom, and Conversation Intelligence
- implement Sales Accelerator
- implement premium forecasting
- configure predictive scoring models