

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

This exam was updated on May 1, 2020. Following the current exam guide, we have included a version of the exam guide with Track Changes set to “On,” showing the changes that were made to the exam on that date.

Audience Profile

Candidates for this exam are Dynamics 365 functional consultants with sales expertise. Candidates are responsible for implementing solutions that support a sales life cycle to 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 company. 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 preferably first-person experience in the sales world in one or more sales roles.

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: In most cases, exams do NOT cover preview features, and some features will only be added to an exam when they are GA (General Availability).

Perform configuration (40-45%)

Configure sales settings

- configure sales territories and hierarchical sales territories
- configure default revenue type
- configure auto number settings
- configure business closures
- configure fiscal year
- configure currencies
- configure sales team roles
- configure sales security roles

- configure goal management components
- create and manage sales collateral
- configure relationship cards
- configure playbook management
- configure softphone dialer
- configure forecast management

Configure processes

- configure record creation rules
- configure out of the box sales business process flows

Create and configure sales visualizations

- configure sales content pack for Power BI
- configure sales dashboards
- design and create sales charts
- execute and analyze sales reports

Configure integration with external sales applications

- implement Dynamics 365 AI for sales insights
- configure and enable embedded intelligence
- implement social selling assistant
- implement LinkedIn Sales Navigator

Manage core sales entities (20-25%)

Create and manage leads

- create and search for leads
- convert activities to leads
- perform lead qualification
- configure status reasons
- scan business cards

Create and manage opportunities

- create and search for opportunities
- close opportunity as won or lost
- track stakeholders and sales team
- add product line items to opportunity
- customize the Opportunity Close form

- configure status reasons
- configure views

Manage sales entities (35-40%)

Create and manage quotes

- add quotes to opportunities
- edit quotes in various stages
- send quotes to customers
- convert quotes to orders
- create a template from a quote

Create and manage sales order processing

- create and manage orders
- create and manage invoices
- create and manage competitors

Create and manage product and product catalog

- configure product families, bundles, and products
- configure price lists
- configure discount lists
- configure unit groups
- configure product lifecycle

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