

# **Exam MB-300: Microsoft Dynamics 365: Core Finance and 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: 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).

## **Use common functionality and implementation tools (20-25%)**

### **Identify common Microsoft Dynamics 365 Finance features and functionality**

- determine when to use workspaces
- identify use cases for Power Platform apps including Power Apps, Power BI and Microsoft Flow
- identify and differentiate between the global address book and other address books
- demonstrate Work Items functionality
- demonstrate Microsoft Dynamics 365 Finance navigation techniques
- identify Inquiry and Report types available in a default installation

### **Implement Lifecycle Services (LCS) tools**

- identify opportunities to re-use existing assets
- analyze Business Process Modeler results and identify gaps in functionality
- including creating an Acceptance Testing BPM library and analyzing the results
- use the LCS tools including Issue Search and analyze results

## **Configure security, processes, and options (45-50%)**

### **Implement security**

- identify and distinguish between the various standard security roles in Finance and Operations
- distinguish between duties, privileges, and permissions
- assign users to security roles based on given scenarios

### **Design and create workflows**

- identify opportunities for automation and controls based on customer workflows
- configure workflow properties and elements

- troubleshoot workflows

### **Configure options**

- set up and configure legal entities
- configure base number sequences
- import or create all necessary startup data including Zip/Postal Code data, customers, vendors, and products
- configure the calendars and date intervals
- configure units of measure and conversions
- configure posting profiles and definitions
- create organization hierarchies
- apply purposes and policies
- describe and apply user options

### **Implement Microsoft Dynamics 365 Finance common features**

- configure Microsoft Office integration with Microsoft Dynamics 365 Finance
- configure email (SMTP/Exchange)
- create and maintain email and record templates
- integrate Power BI with Entity store
- create, export, and import personalizations
- set up network printing

### **Implement business processes for the solution**

- define use case scenarios
- participate in phase-based planning processes and the solution design
- design and create workflows
- set up batch Jobs and alerts
- use business process workspaces

## **Perform data migration (15-20%)**

### **Plan a migration strategy**

- identify common migration scenarios and tools in Microsoft Dynamics 365 Finance
- determine migration scope
- identify relevant data entities and elements based on given scenarios
- establish migration strategy processes including migration scope

### **Prepare data for migration and migrate data**

- identify and extract source data

- generate field mapping between source and target data structures
- support the transition between the existing and migrated systems
- perform a test migration and validate output from the process

## **Validate and support the solution (15-20%)**

### **Implement and validate the solution within Microsoft Dynamics 365 Finance**

- perform user acceptance testing (UAT)
- prepare and validate to Go live
- build test scripts to test business functionality
- automate test case automation by using the Regression Suite Automation Tool (RSAT)
- demonstrate the correlation between test scripts and business requirements
- monitor validation test progress and make ad hoc changes during validation testing to correct identified issues

### **Support Application Lifecycle Management (ALM) by using LCS**

- perform a solution gap analysis
- use LCS tools to identify, report, and resolve issues
- manage Microsoft Dynamics 365 One Version