



MB-910 Study Guide

Microsoft Dynamics 365 Fundamentals (CRM)



PURPOSE

The following resources have been assembled to help you prepare for the MB-910 Microsoft Dynamics 365 Fundamentals (CRM) learning track during Microsoft Certification Week.

Use this guide to understand what knowledge is needed to complete the exam and as a learning tool to help you understand areas where you feel you need additional training. It is not required that you leverage all the resources in this guide to participate in Microsoft Certification Week.



AUDIENCE

All Pax8 Partners

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MB-910: Exam Resources

Audience Profile for the Exam

Candidates for this exam should have general knowledge of or relevant working experience in an Information Technology (IT) environment. They should also have a fundamental understanding of customer engagement principles and business operations

Preparing for the Exam

It is highly recommended when preparing for a Microsoft exam, that you have had some level of hands-on experience with the services within the objectives. Microsoft courses have a GitHub repository for labs that are recommended and available to the public.

- Suggested Lab Guides: <https://github.com/MicrosoftLearning/MB-910T00A-Microsoft-Dynamics-365-Fundamentals-Customer-Engagement-Apps>

All lab guides can be found at this link: <https://github.com/MicrosoftLearning>

Exam Objectives

The following are the learning objectives for the exam. In line with each objective are links to Microsoft documentation around the specific concept or service. In addition to the documentation, there are also online courses from Microsoft Learn and the Microsoft Partner virtual training series available for additional learning resources.

Objective: Describe Dynamics 365 Marketing (10-15%)

Identify Dynamics 365 Marketing Capabilities

- Describe how to target customers by using segments and subscription lists
 - [Working with segments](#)
 - [Create a dynamic segment](#)
 - [Create and manage segments](#)
 - [Set up subscription lists and subscription centers](#)
- Describe the lead generation and qualification process including lead scoring
 - [Set up automatic lead generation and scoring](#)
 - [Configure lead scoring options](#)
 - [Lead lifecycle](#)
 - [Design lead-scoring models](#)
- Describe customer journeys
 - [Create a simple customer journey with email messaging](#)
 - [Create an interactive customer journey with conditions and signup](#)
- Describe event management features and capabilities
 - [Event planning and management](#)
 - [Set up an event](#)
 - [Event management web application overview](#)

Describe Related Marketing Apps

- Describe the capabilities of LinkedIn Campaign Manager
 - [Marketing on LinkedIn with Dynamics 365 Marketing](#)
- Describe the capabilities of Dynamics 365 Customer Voice
 - [Overview of Dynamics 365 Customer Voice](#)
 - [What's new and planned for Dynamics 365 Customer Voice](#)
- Describe the capabilities of Dynamics 365 Customer Insights including audience insights and experience insights

[Audience insights for Dynamics 365 Customer Insights](#)
[Customer Insights \(audience insights\) 2020 release wave 1](#)
[Overview of audience insights in Dynamics 365 Customer Insights 2020 release wave 2](#)

Objective: Describe Dynamics 365 Sales (15-20%)

Describe the Dynamics 365 Sales Lifecycle

- Describe leads and the process for qualifying leads
[Manage leads with Dynamics 365 Sales](#)
[Manage leads, Qualify or convert leads \(Sales Hub\)](#)
- Describe the opportunity management process
[Manage opportunities with Dynamics 365 Sales](#)
[Managing Sales Opportunities](#)
- Describe the quote lifecycle
[Create and manage quotes in Dynamics 365 Sales Professional](#)
[Sales capabilities of Dynamics 365 Project Operations](#)
[Manage the sales lifecycle with Dynamics 365 Sales](#)
- Describe use cases for orders and invoices
[Invoice Sales](#)
- Describe processes and tools used for forecasting sales
[Forecasting](#)
[Cash flow forecasting](#)
[Predict revenue accurately and make informed decisions](#)

Describe Related Sales Apps

- Describe capabilities of Dynamics 365 Sales Insights
[Overview of Sales Insights Add-in for Dynamics 365 Sales](#)
[Dynamics 365 Sales Insights 2020 release wave 1](#)
[Dynamics 365 Sales Insights 2020 release wave 2](#)
- Describe capabilities of LinkedIn Sales Navigator
[Integrate LinkedIn Sales Navigator solutions for Dynamics 365 Sales](#)

Objective: Describe Dynamics 365 Customer Service (15-20%)

Describe Dynamics 365 Customer Service components

- Describe cases, queues, and entitlements
[Create and manage queues](#)
[Create entitlements to define support terms](#)
[Define service-level agreements](#)
- Describe Knowledge Management
[Create and manage knowledge articles](#)
- Describe service-level agreements (SLAs)
[Define service-level agreements](#)

Describe Related Customer Service Apps

- Describe Omnichannel for Customer Service
[Provision Omnichannel for Customer Service](#)
[Introduction to Omnichannel for Customer Service](#)
- Describe Connected Customer Service
[Connected Customer Service – Overview](#)
[Extend Connected Customer Service solutions](#)
- Describe Customer Service Insights
[Customer Service Insights overview](#)
[Improve supervisor coaching and agent experience with call insights](#)

Objective: Describe Dynamics 365 Field Service (15-20%)

Describe the Work Order Lifecycle

- Describe the lifecycle of a work order including work order creation
[Work order lifecycle states](#)
[Create a work order to coordinate and schedule resources and activities](#)
- Describe sources for work orders including cases, opportunities, IoT device sensor alerts, and agreements
[Create IoT alerts and convert IoT alerts into work orders](#)
[Set up and test IoT alerts from a real device](#)
[Asset servicing in Dynamics 365 Field Service](#)
- Describe capabilities for the Inspections feature
[Add inspections to work orders in Dynamics 365 Field Service](#)

Describe Scheduling Capabilities

- Describe resource management capabilities including skills, and proficiency models
[Set up bookable resources in Dynamics 365 Field Service](#)
[Skills and certifications](#)
[Skills and proficiency models](#)
- Identify available Universal Resource Scheduling (URS) scheduling options including Schedule Assistant, Resource Schedule Optimization (RSO), and geolocation for technicians
[Universal Resource Scheduling for Dynamics 365 Field Service](#)
[Overview of resource scheduling optimization](#)
[Location auditing for the Dynamics 365 Field Service mobile app](#)
- Describe how Dynamics 365 Field Service uses artificial intelligence (AI) to help organizations become more efficient
[Microsoft Dynamics 365 AI](#)

Describe Inventory and Asset Management Capabilities

- Describe inventory management transaction types
[Overview of inventory, purchasing, and returns](#)
- Describe customer asset management and preventive maintenance processes
[Preventive maintenance overview, Asset management overview](#)
- Describe options for performing proactive customer asset maintenance by implementing IoT
[Asset servicing in Dynamics 365 Field Service](#)

Objective: 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
[Project management and accounting overview](#)
[Concepts unique to Project-based Contracts](#)
[Project sales enhancements](#)
- Identify views and reports that aid a project service company in making decisions
[Overview: Dynamics 365 Project Operations](#)

Describe Project Sales Capabilities

- Describe the process for converting leads into projects
[Manage leads](#)
- Describe opportunity management and quote management for project-based and product-based quotes
[Header details for project-based quotes](#)
[Project-based quote lines overview](#)
[Project quotations](#)
[Create project quotes from opportunities](#)
- Describe use cases for project contracts
[Project contracts](#)

Describe Project Planning and Resource Management Capabilities

- Describe allocation methods, tasks, subtasks, and assignments
[Create resource assignments](#)
[Schedule a project with a work breakdown structure](#)
[Assign a resource to a task](#)
- Describe time and expenses entry, and entry approvals
[Approve time and expenses \(Project Service\)](#)
[Expense management parameters](#)
[Recall approved time or expense entries](#)
- Describe resource skills and proficiency models
[Skills and proficiency models](#)
- Identify Interactive Gantt charts, Kanban boards, Resource Utilization boards, and Schedule boards
[Propose project resources](#)
[Resource utilization overview](#)
[Plan your work in Microsoft Project with the Project Service add-in](#)

Objective: Describe Shared Features (15-20%)

Identify Common Customer Engagement Features

- Describe customers and activities
[Customer activities](#)
- Describe the product catalog
[Set up a product catalog](#)
[Product catalog entities](#)
- Describe price lists, discounts, and currencies
[Define product pricing with price lists and price list items](#)
[Set up discount lists](#)
- Describe cases
[Managing cases with Dynamics 365 Customer Service](#)
[Dynamics 365 Customer Service components](#)
- Describe resources

Describe Reporting Capabilities

- Describe built-in reporting capabilities including dashboards, charts, views, and Report Wizard
[Create or edit a report using the Report Wizard](#)
[Report writing guide for Dynamics 365 Customer Engagement](#)
- Describe options for exporting data to Microsoft Excel
[Export data to Excel](#)
[Export to an Excel dynamic worksheet](#)
- Describe options for analyzing data by using Power BI
[Prepare for analytic reporting with Power BI](#)

Describe Integration Options

- Describe Microsoft Teams integration capabilities

[Microsoft Teams integration with customer engagement apps in Dynamics 365](#)

[Install and set up Microsoft Teams integration](#)

- Describe use cases for integrating with Microsoft Excel and Microsoft Word
[Office integration overview](#)
- Describe options for managing documents by using SharePoint Online
[Manage your documents using SharePoint](#)
[Introduction to SharePoint in Microsoft 365](#)
- Describe email integration capabilities
[Integrate \(synchronize\) your email system](#)
[Configure and send email](#)

On-Demand Training from Microsoft Learn

New to Dynamics 365? The learning path will provide foundational level knowledge of how Dynamics 365 apps are used. Learn about cloud concepts, Microsoft Power Platform, and how to get started with Dynamics 365 apps.

[Microsoft Dynamics 365 Fundamentals](#)

Virtual Training Series

In this online course, we will introduce you to the basic concepts of customer engagement and what they share. We will cover the basics of each of the Microsoft Dynamics 365 customer engagement apps, including Marketing, Sales Customer Service, Field Service, and Project Operations, and their common features and integration.

All Virtual Training Series <http://aka.ms/vts>