Study guide for Exam MB-910: Microsoft Dynamics 365 Fundamentals (CRM)

Purpose of this document

This study guide should help you understand what to expect on the exam and includes a summary of the topics the exam might cover and links to additional resources. The information and materials in this document should help you focus your studies as you prepare for the exam.

Useful links	Description
Review the skills measured as of March 24, 2023	This list represents the skills measured AFTER the date provided. Study this list if you plan to take the exam AFTER that date.
Review the skills measured prior to March 24, 2023	Study this list of skills if you take your exam PRIOR to the date provided.
Change log	You can go directly to the change log if you want to see the changes that will be made on the date provided.
How to earn the certification	Some certifications only require passing one exam, while others require passing multiple exams.
Your Microsoft Learn profile	Connecting your certification profile to Learn allows you to schedule and renew exams and share and print certificates.
Passing score	A score of 700 or greater is required to pass.
Exam sandbox	You can explore the exam environment by visiting our exam sandbox.
Request accommodations	If you use assistive devices, require extra time, or need modification to any part of the exam experience, you can request an accommodation.
Take a practice test	Are you ready to take the exam or do you need to study a bit more?

Updates to the exam

Our exams are updated periodically to reflect skills that are required to perform a role. We have included two versions of the Skills Measured objectives depending on when you are taking the exam.

We always update the English language version of the exam first. Some exams are localized into other languages, and those are updated approximately eight weeks after the English version is updated. While Microsoft makes every effort to update localized versions as noted, there may be times when the localized versions of an exam are not updated on this schedule. Other available languages are listed in the **Schedule Exam** section of the **Exam Details** webpage. If the exam isn't available in your preferred language, you can request an additional 30 minutes to complete the exam.

Note

The bullets that follow each of the skills measured are intended to illustrate how we are assessing that skill. Related topics may be covered in the exam.

Note

Most questions cover features that are general availability (GA). The exam may contain questions on Preview features if those features are commonly used.

Skills measured as of March 24, 2023

Audience profile

This exam covers the features and capabilities of Microsoft Dynamics 365 Marketing, Dynamics 365 Sales, Dynamics 365 Customer Service, and Dynamics 365 Field Service. A basic understanding of business processes and computer skills is helpful for candidates of this exam.

- Describe Microsoft Dynamics 365 Marketing (15–20%)
- Describe Dynamics 365 Sales (15–20%)
- Describe Dynamics 365 Customer Service (20–25%)
- Describe Dynamics 365 Field Service (15–20%)
- Explore the core capabilities of Dynamics 365 customer engagement apps (20–25%)

Describe Microsoft Dynamics 365 Marketing (15–20%)

Explore Dynamics 365 Marketing

- Describe use cases for Dynamics 365 Marketing
- Describe lead generation and qualification
- Describe use cases for marketing forms
- Describe how to target customers by using segments and subscription lists
- Describe email marketing
- Describe customer journeys
- Describe event management features and capabilities

Describe Dynamics 365 Marketing related apps

- Describe use cases of and capabilities for Customer Insights
- Describe use cases of Customer Voice for Marketing

Describe Dynamics 365 Sales (15–20%)

Explore Dynamics 365 Sales

- Describe use cases for Dynamics 365 Sales
- Describe leads and the process for qualifying leads
- Describe the opportunity management process
- Describe the quote lifecycle
- Describe the order management and invoice management processes
- Describe business process flows

Describe Dynamics 365 Sales capabilities and related apps

- Describe sales pipeline and forecasting concepts
- Describe use cases for and capabilities of Sales Insights
- Describe use cases for and capabilities of LinkedIn Sales Navigator
- Describe the Dynamics 365 Sales mobile app

Describe Dynamics 365 Customer Service (20–25%)

Explore Dynamics 365 Customer Service

- Describe use cases for Dynamics 365 Customer Service
- Describe the functionality for workload management
- Describe Knowledge Management in Dynamics 365 Customer Service
- Describe the case lifecycle including service-level agreements (SLAs) and entitlements

Describe Dynamics 365 Customer Service capabilities and related apps

- Describe Omnichannel for Customer Service
- Describe reporting and data visualization options in Dynamics 365 Customer Service
- Describe Dynamics 365 Customer Voice use cases

Describe Dynamics 365 Field Service (15–20%)

Explore Dynamics 365 Field Service

- Describe common field service processes
- Describe use cases for Dynamics 365 Field Service
- Describe the work order lifecycle
- Describe inspections in Dynamics 365 Field Service
- Describe the Field Service mobile app

Describe the scheduling capabilities of Dynamics 365 Field Service

- Describe resource and scheduling processes
- Describe asset management and customer assets
- Describe Connected Field Service for Dynamics 365

Explore the core capabilities of Dynamics 365 customer engagement apps (20–25%)

Describe the foundations of Dynamics 365 customer engagement apps

- Describe use cases for Dynamics 365 customer engagement apps
- Describe Microsoft Power Platform as it relates to Dynamics 365 customer engagement apps
- Describe Microsoft Dataverse as the foundation for Dynamics 365 customer engagement apps
- Navigate to and within Dynamics 365 customer engagement apps

Describe shared activities and integration options in Dynamics 365 customer engagement apps

- Describe customers and activities
- Describe search criteria and filters
- Describe reporting capabilities including dashboards, charts, and views
- Describe Microsoft Teams integration
- Describe Microsoft Outlook integration
- Describe Microsoft Excel integration

Study resources

We recommend that you train and get hands-on experience before you take the exam. We offer self-study options and classroom training as well as links to documentation, community sites, and videos.

Study resources	Links to learning and documentation
Get trained	Choose from self-paced learning paths and modules or take an instructor led course
Find documentation	Dynamics 365 documentation and learning modules Help resources for Dynamics 365 Marketing Dynamics 365 Sales documentation Microsoft Dynamics 365 Customer Service documentation User guide for Dynamics 365 Field Service (contains video)

Study resources	Links to learning and documentation
Ask a question	Microsoft Q&A | Microsoft Docs
Get community support	Microsoft Dynamics Community
Follow Microsoft Learn	Microsoft Learn - Microsoft Tech Community
Find a video	What to expect on your Microsoft Fundamentals exam

Change log

Key to understanding the table: The topic groups (also known as functional groups) are in bold typeface followed by the objectives within each group. The table is a comparison between the two versions of the exam skills measured and the third column describes the extent of the changes.

Skill area prior to March 24, 2023	Skill area as of March 24, 2023	Change
Audience profile		Minor
Describe Dynamics 365 Marketing	**Describe Dynamics 365 Marketing**	No change
Describe Dynamics 365 Marketing capabilities	Explore Dynamics 365 Marketing	Major
Describe marketing-related apps	Describe Dynamics 365 Marketing related apps	Minor
Describe Dynamics 365 Sales	**Describe Dynamics 365 Sales**	No change
Describe the Dynamics 365 Sales lifecycle	Explore Dynamics 365 Sales	Major
Describe sales-related apps	Describe Dynamics 365 Sales capabilities and related apps	Minor
Describe Dynamics 365 Customer Service	**Describe Dynamics 365 Customer Service**	% increased
Describe Dynamics 365 Customer Service components	Explore Dynamics 365 Customer Service	Major
	Describe Dynamics 365 Customer Service capabilities and related apps	Added
Describe Dynamics 365 Field Service	**Describe Dynamics 365 Field Service**	No change

Skill area prior to March 24, 2023	Skill area as of March 24, 2023	Change
Describe Field Service capabilities	Explore Dynamics 365 Field Service	Major
Describe scheduling capabilities	Describe the scheduling capabilities of Dynamics 365 Field Service	Minor
Describe shared features	**Explore the core capabilities of Microsoft Dynamics 365 customer engagement apps**	No change
Identify common customer engagement features	Describe the foundations of Dynamics 365 customer engagement apps	Major
Describe integration options	Describe shared activities and integration options in Dynamics 365 customer engagement apps	Minor

Skills measured prior to March 24, 2023

Audience profile

This exam covers the customer engagement features and capabilities of Dynamics 365 apps. Candidates of this exam should have a fundamental understanding of customer engagement principles, business operations, and general computer skills.

- Describe Dynamics 365 Marketing (15–20%)
- Describe Dynamics 365 Sales (15–20%)
- Describe Dynamics 365 Customer Service (15–20%)
- Describe Dynamics 365 Field Service (15–20%)
- Describe shared features (20–25%)

Describe Dynamics 365 Marketing (15–20%)

Describe Dynamics 365 Marketing capabilities

- Describe the process for generating and scoring leads by using marketing forms and pages
- Describe how to target customers by using segments and subscription lists
- Describe email marketing concepts and processes
- Describe the process of automating marketing activities by using customer journeys
- Describe event management features and capabilities
- Describe real-time marketing concepts and processes

Describe marketing-related apps

- Describe the capabilities of Dynamics 365 Customer Insights

- Describe the capabilities of Dynamics 365 Customer Voice

Describe Dynamics 365 Sales (15–20%)

Describe the Dynamics 365 Sales lifecycle

- Describe the lead management process
- Describe the opportunity management process
- Describe the quote lifecycle
- Describe order and invoice management
- Describe sales pipeline and forecasting concepts

Describe sales-related apps

- Describe capabilities of Dynamics 365 Sales Insights
- Describe capabilities of LinkedIn Sales Navigator

Describe Dynamics 365 Customer Service (15–20%)

Describe Dynamics 365 Customer Service components

- Describe knowledge management
- Describe the case lifecycle including service-level agreements (SLAs) and entitlements
- Describe how to use queues to manage work
- Describe Omnichannel for Customer Service
- Describe historical analytics

Describe Dynamics 365 Field Service (15–20%)

Describe Field Service capabilities

- Describe the work order lifecycle
- Describe capabilities of the inspections feature

Describe scheduling capabilities

- Describe resource and scheduling processes
- Describe scheduling options including Schedule Assistant and Resource Schedule Optimization (RSO)
- Describe customer assets and how to enable proactive customer asset maintenance by using Connected Field Service

Describe shared features (20–25%)

Identify common customer engagement features

- Describe Microsoft Dataverse as the foundation for Dynamics 365 apps
- Describe the Dynamics 365 customer engagement apps
- Describe customers and activities

Describe integration options

- Describe built-in reporting capabilities including dashboards, charts and views
- Describe Microsoft Teams integration capabilities
- Describe email capabilities including App for Outlook
- Describe how Microsoft Excel and Microsoft Word can be used with Dynamics 365 apps
- Describe options for analyzing data by using Power BI