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

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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.

⛶ **Expand table**

Useful links	Description
Review the skills measured as of June 18, 2024	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 June 18, 2024	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 Microsoft Learn allows you to schedule and renew exams and share and print certificates.
Exam scoring and score reports	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 free Practice Assessment	Test your skills with practice questions to help you prepare for the exam.

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 June 18, 2024

Audience profile

As a candidate for this exam, you aspire to understand how customer engagement apps for Dynamics 365 can be used to:

- Unify profiles and tailor targeted, personalized customer journeys by using Dynamics 365 Customer Insights apps.

- Efficiently assist users through the complete sales order lifecycle by using Dynamics 365 Sales.

- Assist agents with case management through the complete customer support lifecycle by using Dynamics 365 Customer Service.

- Schedule and complete work orders by using Dynamics 365 Field Service.

- Evaluate how Copilot can assist with each of these.

The exam is intended for you if you're seeking to start your journey using Dynamics 365 customer engagement solutions.

You can use this exam to prepare for role-based or specialty certifications, but it's not a prerequisite for any of them.

Skills at a glance

- Describe Dynamics 365 Customer Insights (15–20%)

- Describe Dynamics 365 Sales (20–25%)

- Describe Dynamics 365 Customer Service (20–25%)

- Describe Dynamics 365 Field Service (15–20%)

- Explore the core capabilities of customer engagement apps in Dynamics 365 (15–20%)

Describe Dynamics 365 Customer Insights (15–20%)

Explore Customer Insights - Journeys

- Describe use cases for Customer Insights - Journeys

- Describe lead generation and qualification

- Describe use cases for marketing forms

- Describe how to target customers by using segments

- Describe email marketing

- Describe customer journeys

- Describe event management features and capabilities

- Describe how to use Copilot with Customer Insights - Journeys

Describe Customer Insights - Data

- Describe use cases of and capabilities for Customer Insights – Data

- Describe unified customer profiles

- Describe measures, segments, and predictions

Describe Dynamics 365 Sales (20–25%)

Explore Sales

- Describe use cases for 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 use cases for guided selling including business process flows and assistant

- Describe the product catalog, prices list, and unit groups

- Describe Copilot in Sales

- Describe the Sales accelerator

Describe Sales capabilities and related apps

- Describe sales pipeline and forecasting concepts

- Describe use cases for and capabilities of Sales Insights features

- Describe use cases for and capabilities of LinkedIn Sales Insights

- Describe use cases for the Dynamics 365 Sales mobile app

- Describe Microsoft Copilot for Sales

Describe Dynamics 365 Customer Service (20–25%)

Explore Customer Service

- Describe use cases for Customer Service

- Describe the functionality for workload management, including cases, basic routing (basic queues), Unified Routing, and the inbox for agents

- Describe knowledge management in Customer Service

- Describe the case lifecycle including service-level agreements (SLAs) and entitlements

- Describe use cases for Copilot in Customer Service

Describe Customer Service capabilities and related apps

- Describe Omnichannel for Customer Service

- Describe reporting and data visualization options in Customer Service

- Describe use cases for agent productivity tools

Describe Dynamics 365 Field Service (15–20%)

Explore Field Service

- Describe use cases for Field Service

- Describe the work order lifecycle

- Describe inspections in Field Service

- Describe the Field Service mobile app

- Describe use cases of Copilot in Field Service

Describe capabilities related to Field Service

- Describe resource management and scheduling processes

- Describe asset management and customer assets

- Describe Connected Field Service for Dynamics 365

Explore the core capabilities of customer engagement apps in Dynamics 365 (15–20%)

Describe the foundations of customer engagement apps

- Describe customer engagement apps

- Describe Microsoft Power Platform as it relates to customer engagement apps

- Describe Microsoft Dataverse as the foundation for customer engagement apps

- Navigate to and within customer engagement apps

- Describe Copilot for Dynamics 365 apps

Describe shared activities and integration options in customer engagement apps

- Describe customers and activities

- Describe search options and filter criteria

- Describe reporting capabilities including dashboards, charts, and views

- Describe Microsoft Teams integration

- Describe Microsoft Outlook integration

- Describe Microsoft Excel and Word integration

- Describe Microsoft SharePoint 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.

⊡ Expand table

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 Dynamics 365 Customer Insights - Journeys documentation Dynamics 365 Sales documentation Microsoft Dynamics 365 Customer Service documentation User guide for Dynamics 365 Field Service (contains video)
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.

⊡ Expand table

Skill area prior to June 18, 2024	Skill area as of June 18, 2024	Change
Audience profile		Minor
Describe Dynamics 365 Customer Insights	**Describe Dynamics 365 Customer Insights**	No % change

Skill area prior to June 18, 2024	Skill area as of June 18, 2024	Change
Explore Customer Insights - Journeys	Explore Customer Insights - Journeys	Minor
Describe Customer Insights - Data	Describe Customer Insights - Data	No change
Describe Dynamics 365 Sales	**Describe Dynamics 365 Sales**	No % change
Explore Sales	Explore Sales	Minor
Describe Sales capabilities and related apps	Describe Sales capabilities and related apps	Minor
Describe Dynamics 365 Customer Service	**Describe Dynamics 365 Customer Service**	No % change
Explore Customer Service	Explore Customer Service	Minor
Describe Customer Service capabilities and related apps	Describe Customer Service capabilities and related apps	Minor
Describe Dynamics 365 Field Service	**Describe Dynamics 365 Field Service**	No % change
Explore Field Service	Explore Field Service	Minor
Describe capabilities related to Field Service	Describe capabilities related to Field Service	Minor
Explore the core capabilities of customer engagement apps in Dynamics 365	**Explore the core capabilities of customer engagement apps in Dynamics 365**	No % change
Describe the foundations of customer engagement apps	Describe the foundations of customer engagement apps	Minor
Describe shared activities and integration options in customer engagement apps	Describe shared activities and integration options in customer engagement apps	Minor

Skills measured prior to June 18, 2024

Audience profile

As a candidate for this exam, you aspire to understand how customer engagement apps (CRM) for Dynamics 365 can be used to:

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- Describe Dynamics 365 Sales (20–25%)

- Describe Dynamics 365 Customer Service (20–25%)

- Describe Dynamics 365 Field Service (15–20%)

- Explore the core capabilities of customer engagement apps in Dynamics 365 (15–20%)

Describe Dynamics 365 Customer Insights (15–20%)

Explore Customer Insights - Journeys

- Describe use cases for Customer Insights - Journeys

- 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 how to use Copilot with Customer Insights - Journeys

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- Describe the quote lifecycle

- Describe the order management and invoice management processes

- Describe use cases for business process flows

- Describe the product catalog, prices list, and unit groups

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Describe 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 use cases for the Dynamics 365 Sales mobile app

- Describe Microsoft Sales Copilot

Describe Dynamics 365 Customer Service (20–25%)

Explore Customer Service

- Describe use cases for Dynamics 365 Customer Service

- Describe the functionality for workload management, including basic routing (basic queues), Unified Routing, and Agent Inbox

- Describe knowledge management in Dynamics 365 Customer Service

- Describe the case lifecycle including service-level agreements (SLAs) and entitlements

- Describe use cases for Copilot in Customer Service

Describe Customer Service capabilities and related apps

- Describe Omnichannel for Customer Service

- Describe reporting and data visualization options in Customer Service

- Describe use cases for agent productivity tools

- Describe the Omnichannel Supervisor experience

Describe Dynamics 365 Field Service (15–20%)

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- Describe use cases for and capabilities of Dynamics 365 Customer Voice