

Exam MB-300: Microsoft Dynamics 365: Core Finance and Operations – Skills Measured

Audience Profile

Candidates for this exam analyze business requirements and translate those requirements into fully realized business processes and solutions that implement industry best practices.

Candidates serve as a key resource in implementing and configuring applications to meet business requirements.

Candidates understand common features and capabilities of Finance and Operations apps and how to configure and use each. They should also have awareness of how Finance and Operations apps integrate with external systems and tools including Power Platform. The candidate actively manages application lifecycles by using Lifecycle Services (LCS) and other Microsoft tools and platforms.

Candidates for this exam typically specialize in one or more feature sets of Finance and Operations apps including finance, manufacturing, and supply chain management.

Use common functionality and implementation tools (15-20%)

Identify and use common Finance and Operations apps features and functionality

- describe use cases for and capabilities of workspaces
- describe case management
- describe global address book features and their use cases
- identify inquiry and report types available in a default installation
- describe use cases for the Business Document Management and electronic reporting features
- perform common actions including performing searches, saving queries, creating, and using record templates, and creating filters

Describe use cases for Power Platform apps and services

- identify use cases for Common Data Service
- identify use cases for Power Apps
- identify use cases for Power Automate
- identify use cases for Power BI
- identify use cases for Power Virtual Agents
- differentiate between pinned and embedded Power BI reports

Configure security, processes, and options (30-35%)

Implement security

- distinguish between roles, duties, privileges, and permissions
- assign users to security roles based on given scenarios
- describe segregation of duties

Design and create workflows

- describe use cases for workflows

- design and create workflows
- configure workflow properties and elements
- configure queues, workflow assignment hierarchies, and workflow parameters
- troubleshoot workflows
- manage workflow versions
- use Power Automate to extend workflows

Configure Organization administration features

- set up and configure legal entities and operating units
- configure and troubleshoot number sequences
- import or create all necessary startup data including postal code data, customers, vendors, and products
- create organization hierarchies
- describe and apply user options including time zones, language, and email settings
- configure document handling for attachments
- configure print management and form setup features

Configure system administration features

- describe use cases for the Microsoft Excel Workbook Designer and the Microsoft Dynamics Office add-in
- configure email (SMTP/Exchange)
- create and maintain email templates
- integrate Power BI with Entity store
- create, export, and import personalizations and publish saved views
- set up and monitor batch jobs and alerts

Manage Finance and Operations data (25-30%)

Manage data

- describe use cases for the Data Management workspace and templates
- describe use cases for and types of data entities
- copy configuration data between companies or legal entities by using the Data Management framework
- describe use cases for the Dual Write feature

Plan a migration strategy

- identify common migration scenarios and tools in Finance and Operations apps
- determine the scope for a migration
- 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

- import or export data by using the Data Management framework
- support the transition between the existing and migrated systems
- perform a test migration and validate output from the process
- implement data task automation

Validate and support the solution (15-20%)

Test solutions

- describe the testing types/tools
- automate and manage test cases by using the Regression Suite Automation Tool (RSAT)
- create test scripts by using Task Recorder and upload scripts to BPM or Azure DevOps

Implement Lifecycle Services (LCS) tools

- differentiate between LCS roles including Owner and Environment Manager
- identify opportunities to re-use existing assets
- analyze Business Process Modeler (BPM) results and identify gaps in functionality
- create an acceptance testing BPM library and analyze results.
- describe the types of environments including sandbox, test, and production
- implement the LCS tools including Issue Search and analyze results
- implement performance monitoring
- use LCS tools to identify, report, and resolve issues
- manage Dynamics 365 OneVersion