

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

This exam was updated on August 09, 2021. Following the current exam guide, we have included a version of the exam guide with Track Changes set to “On,” showing the changes that were made to the exam on that date.

Audience Profile

Consultants (functional and technical) gather and analyze business requirements and translate those requirements into fully realized business processes and solutions that implement industry recommended practices. They serve as a key resource in implementing and configuring apps to meet business requirements.

Consultants should be able to implement core components and features of Dynamics 365 Finance and Operations apps. They should also have awareness of how Dynamics 365 Finance and Operations apps integrate with external systems and tools including Power Platform. The consultant uses Lifecycle Services (LCS), Azure DevOps, and other Microsoft tools and platforms to facilitate the application lifecycle management (ALM) process.

Consultants pursue continuous education by reading the product release notes, reviewing product roadmaps, participating in conferences, or continue learning by using Microsoft Learn, Microsoft Docs, instructor-led training, blogs, and user communities. They should also pursue role-based certifications and assessments to ensure their knowledge is recognized.

Skills Measured

NOTE: The bullets that follow each of the skills measured are intended to illustrate how we are assessing that skill. This list is not definitive or exhaustive.

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

Describe finance and operations apps, and extend apps by using Microsoft Power Platform technologies (20-25%)

Identify and use common apps, features, and functionality

- describe apps in the finance and operations portfolio
- describe the main components of Dynamics 365 Commerce
- describe uses cases for and capabilities of workspaces and mobile 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 searches, save queries and views, create and use, record templates, and create filters

Extend app functionality by using Microsoft Power Platform technologies

- identify use cases for Microsoft Dataverse
- 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

Configure administrative features and workflows (30-35%)

Implement security

- distinguish between roles, duties, privileges, and permissions
- assign security roles to users based on requirements
- describe segregation of duties
- describe and use the security diagnostics tool

Design and create workflows and business events

- describe use cases for workflows
- design and create workflows
- configure workflow properties, tasks, approvals, and elements
- configure queues, workflow assignment hierarchies, workflow parameters, and troubleshoot workflows
- troubleshoot workflows
- manage workflow versions
- Trigger Power Automate flows by using business events

Configure organization administration features

- set up and configure legal entities and operating units
- configure and troubleshoot number sequences
- create organization hierarchies
- describe and apply user options
- 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
- describe use cases for Entity store
- create, export, and import personalization
- publish saved views
- set up and monitor batch jobs
- set up alerts

Manage finance and operations data (25-30%)

Manage data

- describe use cases for the Data Management framework
- describe use cases for projects, data entities, and templates
- copy configuration data between companies or legal entities by using the data management framework
- describe use cases for the dual-write feature

Describe the migration process

- identify common migration scenarios and tools in finance and operations apps
- identify relevant data entities and elements based on given scenarios
- identify data migration requirements

Prepare data for migration and migrate data to finance and operations apps

- identify types of data including master, transactional, reference, and parametric
- 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 solutions (20-25%)

Test solutions

- describe types of testing, including unit, regression, functional, and end-to-end
- describe capabilities of available testing tools
- track work items through a project implementation by using Azure DevOps
- create test cases and test plans by using Azure DevOps
- automate and manage test cases by using the Regression Suite Automation Tool (RSAT)
- create test scripts by using Task recorder and upload scripts to Business process modeler or Azure DevOps

Describe and use Lifecycle Services tools

- identify use cases for project asset libraries and shared asset libraries
- describe environment purposes and topologies
- differentiate between Tier 1 environment and other tiers
- describe use cases for Business process modeler libraries
- describe the types of environments including sandbox, test, and production
- report production outages
- create and save trace files to troubleshoot performance issues
- describe the impacts of Dynamics 365 One Version service updates on projects

The following exam guide shows the changes that were implemented on August 9, 2021. Note that the audience profile has been updated.

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.

Skills Measured

NOTE: The bullets that follow each of the skills measured are intended to illustrate how we are assessing that skill. This list is NOT definitive or exhaustive.

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

Use common functionality and implementation tools Describe finance and operations apps, and extend apps by using Microsoft Power Platform technologies (1520-2025%)

Identify and use common **Finance and Operations** apps, features, and functionality

- describe apps in the finance and operations portfolio
- describe the main components of Dynamics 365 Commerce
- describe uses cases for and capabilities of workspaces and mobile 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 save queries and views, ~~creating create and use~~, and using record templates, and ~~creating create~~ filters

Extend app functionality by using Microsoft Power Platform technologies Describe use cases for Power Platform apps and services

- identify use cases for Microsoft Dataverse
- 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~~ administrative features and workflows (30-35%)

Implement security

- distinguish between roles, duties, privileges, and permissions
- assign ~~users to~~ security roles to users based on given scenarios requirements
- describe segregation of duties
- describe and use the security diagnostics tool

Design and create workflows and business events

- describe use cases for workflows
- design and create workflows
- configure workflow properties, tasks, approvals, and elements
- configure queues, workflow assignment hierarchies, ~~and~~ workflow parameters, and troubleshoot workflows
- troubleshoot workflows
- manage workflow versions
- ~~use Trigger~~ Power Automate ~~to extend workflows~~ flows by using business events

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~~ Describe use cases for Entity store
- create, export, and import personalization'
- ~~Ps and~~ publish saved views
- set up and monitor batch jobs
- set up alerts

Manage finance and operations data (25-30%)

Manage data

- describe use cases for the data management ~~workspace and templates~~ framework
- describe use cases for projects, and types of data entities, and templates
- copy configuration data between companies or legal entities by using the data management framework
- describe use cases for the dual-write feature

~~Plan~~ Describe the migration ~~strategy~~ process

- 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~~ Identify data migration requirements

Prepare data for migration and migrate data **to Finance and Operations apps**

- Identify types of data including master, transactional, reference, and parametric ~~identify and extract source~~
- 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 solutions** (~~1520-2025~~%)

Test solutions

- describe types of testing, ~~tools including unit, regression, functional, and end-to-end testing~~
- describe capabilities of available testing tools
- track work items through a project implementation by using Azure DevOps
- create test cases and test plans by using Azure DevOps
- 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 Business process modeler or Azure DevOps

~~Implement~~ Describe and use Lifecycle Services (LCS) tools

- ~~differentiate between LCS roles including Owner and Environment Manager~~
- identify ~~opportunities to re-use existing assets~~ use cases for project asset libraries and shared asset libraries
- ~~analyze Business Process Modeler (BPM) results and identify gaps in functionality~~
- ~~create an acceptance testing BPM library and analyze results.~~
- describe environment purposes and topologies
- differentiate between Tier 1 environment and other tiers
- describe use cases for Business Process Modeler libraries
- describe the types of environments, including sandbox, test, and production
- ~~implement the LCS tools including Issue Search and analyze results~~
- ~~implement performance monitoring~~
- report production outages

- create and save trace files to troubleshoot performance issues
- describe the impacts of Dynamics 365 One Version service updates on projects
- ~~use LCS tools to identify, report, and resolve issues~~
- ~~manage Dynamics 365 One Version~~