

Dynamics 365 Certification Landscape: Two Sides of the House

Welcome to your comprehensive guide to Microsoft Dynamics 365 certifications. This presentation maps out the certification paths across both the Customer Engagement (CRM) and Finance & Operations (ERP) domains, helping you strategically plan your certification journey and career growth in the Dynamics 365 ecosystem.

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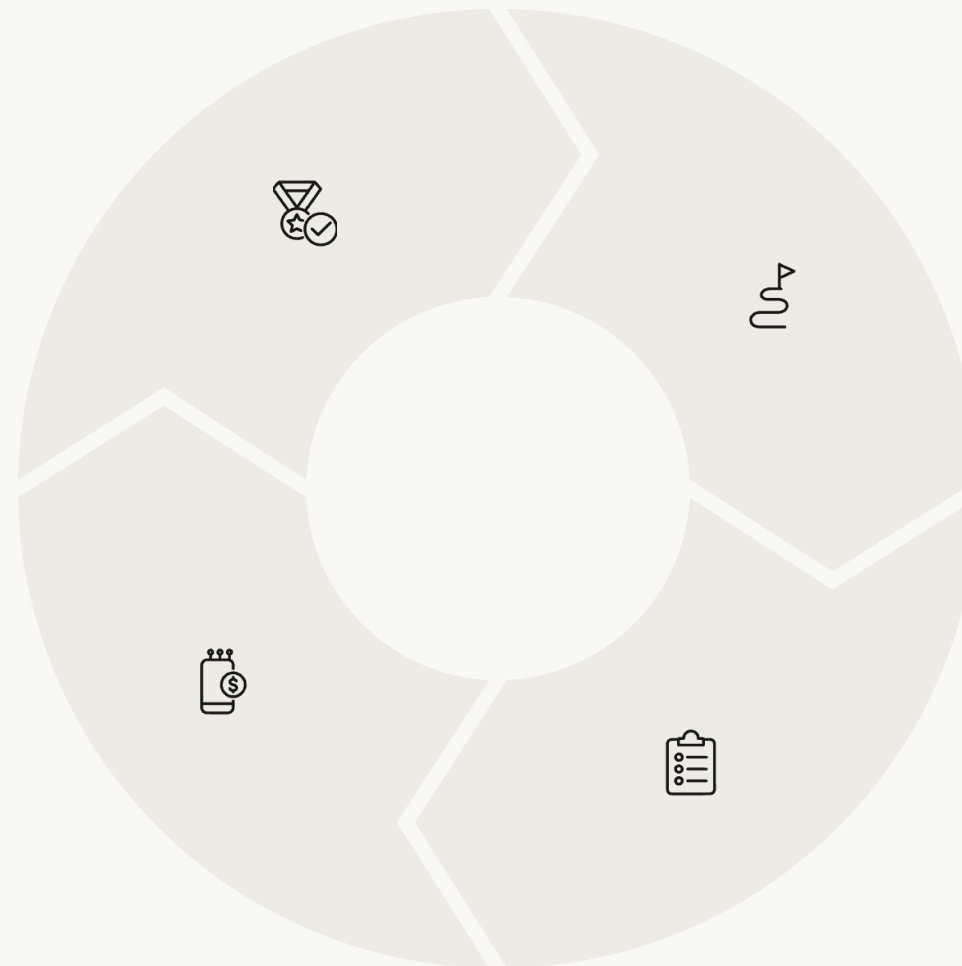
The Complete Dynamics 365 Certification Ecosystem

Understand the Landscape
Recognize how certifications are organized into "two sides of the house"

Map Your Path
Identify which certifications align with your career goals and existing skills

Advance Your Career
Leverage certifications to demonstrate expertise and open new opportunities

Plan Your Preparation
Create a structured approach to exam readiness based on certification requirements



This presentation will guide you through the entire Dynamics 365 certification structure, highlighting recent changes, prerequisites, and how different certifications relate to one another. By the end, you'll have a clear roadmap for navigating Microsoft's certification program regardless of which side of the Dynamics house you're focused on.

The Two Sides of Dynamics 365

Customer Engagement (CRM)

The Front Office

Customer-facing business processes focused on relationship management, lead generation, service delivery, and marketing campaigns.

Handles the acquisition, retention, and servicing of customers throughout their lifecycle.

Finance & Operations (ERP)

The Back Office

Internal business processes focused on financial management, supply chain optimization, manufacturing, and operational excellence.

Manages the resources, finances, and operational infrastructure that power the business.

While presented as separate domains, real-world implementations often integrate both sides to create a unified business platform. Understanding both sides provides the most comprehensive view of the Dynamics 365 ecosystem.

Customer Engagement (CRM) Certification Path

Entry Point: Fundamentals

MB-910: Dynamics 365 Fundamentals (CRM)

This foundational exam validates your understanding of Customer Engagement applications, basic functionality, and use cases across Sales, Customer Service, Marketing, and Field Service.

Ideal for: Business users, stakeholders, IT professionals new to Dynamics 365

Difficulty: Beginner

Specialization: Role-Based Associate Certifications

Choose one or more specializations based on your role and career goals:

- **MB-210:** Dynamics 365 Sales Functional Consultant Associate
- **MB-220:** Dynamics 365 Marketing Functional Consultant Associate
- **MB-230:** Dynamics 365 Customer Service Functional Consultant Associate
- **MB-240:** Dynamics 365 Field Service Functional Consultant Associate

Each exam focuses on implementing, configuring, and customizing specific Customer Engagement applications.

New Path (Launching September 2024)

Customer Experience Analyst Associate

This new certification will integrate customer experience analytics across the Customer Engagement applications, focusing on deriving insights from customer data.

The CRM certification path focuses on validating your ability to implement and optimize customer-facing processes. Microsoft recommends starting with MB-910 before pursuing specialized role-based certifications.

CRM Role-Based Certifications: Detailed View

MB-210: Dynamics 365 Sales

Focus Areas:

- Lead and opportunity management
- Sales automation and forecasting
- Product catalog configuration
- Quote-to-order processes
- Sales insights and analytics

Key Skills Validated: Implementing sales processes, configuring product catalogs, setting up forecasts, enabling sales intelligence tools

MB-220: Dynamics 365 Marketing

Focus Areas:

- Customer journey orchestration
- Marketing email creation
- Lead management and scoring
- Event management
- Marketing analytics

Key Skills Validated: Configuring marketing settings, creating segments, building customer journeys, implementing event management

MB-230: Dynamics 365 Customer Service

Focus Areas:

- Case management
- Knowledge base setup
- Service-level agreements
- Queue configuration
- Customer service insights

Key Skills Validated: Implementing case management, configuring SLAs, setting up knowledge articles, enabling service analytics

MB-240: Dynamics 365 Field Service

Focus Areas:

- Resource scheduling
- Work order management
- Inventory and purchasing
- Mobile app configuration
- Asset management

Key Skills Validated: Configuring field service settings, implementing resource scheduling, managing inventory, setting up mobile solutions

Each CRM role-based certification validates specialized knowledge in implementing and configuring a specific Dynamics 365 application. Professionals often start with the application most relevant to their role, but obtaining multiple certifications demonstrates broader expertise across the Customer Engagement suite.

Finance & Operations (ERP) Certification Path

- **Entry Point: Fundamentals**

- MB-920: Dynamics 365 Fundamentals (Finance & Operations)**

- This foundational exam validates your understanding of ERP concepts and applications, including Finance, Supply Chain Management, Commerce, and Human Resources.

- Ideal for: Business users, stakeholders, IT professionals new to Dynamics 365 F&O

- Difficulty: Beginner

- **Specialization: Role-Based Associate Certifications**

- Choose one or more specializations based on your role and career goals:

- **MB-310:** Dynamics 365 Finance Functional Consultant Associate
 - **MB-330:** Dynamics 365 Supply Chain Management Functional Consultant Associate
 - **MB-340:** Dynamics 365 Commerce Functional Consultant Associate
 - **MB-500:** Dynamics 365 Finance and Operations Apps Developer Associate

- Each exam focuses on implementing, configuring, and customizing specific Finance & Operations applications.

Important Update: Previously, the MB-300 (Core Finance & Operations) exam was required in addition to a specialization exam. As of February 29, 2024, MB-300 has been retired. Now candidates only need to pass the specialized exam (MB-310, MB-330, etc.) to earn the associated certification.

F&O Certification: MB-310 Finance Functional Consultant



Certification Focus

The MB-310 certification validates your ability to implement and configure Dynamics 365 Finance, focusing on core financial management processes and capabilities.

Key Focus Areas

General Ledger Configuration Chart of accounts, fiscal calendars, dimensions, financial reporting	Accounts Payable Vendor management, invoice processing, payment setup, vendor collaboration
Accounts Receivable Customer setup, credit management, invoicing, collections, customer payment processing	Cash & Bank Management Bank reconciliation, cash flow forecasting, advanced bank reconciliation
Fixed Assets Asset acquisition, depreciation, disposal, financial reporting	Budgeting Budget planning, control, register maintenance, budget workflows

The MB-310 exam evaluates your ability to configure the Finance module and implement solutions that address complex financial requirements for organizations. It focuses heavily on practical implementation scenarios rather than theoretical knowledge.

F&O Certification: MB-330 Supply Chain Management

Key Focus Areas

Inventory Management

Item setup, inventory transactions, inventory valuation, inventory dimensions

Warehouse Management

Warehouse configurations, location directives, mobile device setup, wave processing

Manufacturing Processes

Production control, discrete manufacturing, lean manufacturing, process manufacturing

Master Planning

Demand forecasting, safety stock, planning optimization, material requirements planning

Procurement

Purchase requisitions, RFQs, purchase orders, vendor collaboration, procurement catalogs

Certification Focus

The MB-330 certification validates your ability to implement and configure Dynamics 365 Supply Chain Management, focusing on end-to-end supply chain processes from procurement to manufacturing and distribution.

This certification is particularly valuable for consultants working with manufacturing, distribution, or retail organizations with complex supply chain requirements.

The MB-330 exam evaluates your ability to optimize supply chain processes, improve operational efficiency, and implement solutions that address complex supply chain challenges. It requires understanding the interrelationships between different supply chain components.

F&O Certification: MB-340 Commerce Functional Consultant

Retail Channel Management

Configure and manage retail stores, call centers, and online channels within Dynamics 365 Commerce. Implement channel-specific pricing, assortments, and fulfillment options.

- Store operations and configuration
- Channel-specific pricing and promotions
- Channel inventory visibility
- Omnichannel order management

Point of Sale (POS) Config

Set up and customize the in-store experience including register functionality, payment methods, and store operations processes.

- Register and hardware station setup
- Payment configurations
- Store operations management
- Returns and exchanges handling

E-Commerce Platform

Implement and configure the online storefront, digital asset management, and online customer experience.

- Online storefront configuration
- Content management
- Product recommendations
- Online checkout process

The MB-340 certification is ideal for consultants specializing in retail and commerce implementations. It validates your ability to configure and implement unified commerce solutions that integrate physical stores, e-commerce, and call center operations.

F&O Certification: MB-500 Developer Associate

Certification Focus

The MB-500 certification validates your ability to extend and customize Dynamics 365 Finance and Operations applications using development tools and programming techniques specific to the platform.

Unlike the functional consultant certifications, which focus on configuration, this exam evaluates your ability to write code, create customizations, and integrate with other systems.

Key Technical Areas

- **X++ Programming:** Develop using the proprietary X++ language, including classes, methods, and data types
- **Development Environment:** Work with Visual Studio and other development tools in the Dynamics ecosystem
- **Data Entities:** Create and extend data entities for data management and integration
- **Forms and Reports:** Design and modify user interfaces and reporting solutions
- **Extensions:** Develop using the extensions framework rather than overlayering
- **Integration:** Implement integrations using various technologies (OData, data entities, event frameworks)
- **Performance Optimization:** Optimize code and queries for performance
- **Application Lifecycle Management:** Manage code, deployments, and environments

The MB-500 certification is targeted at developers who need to customize and extend the standard functionality of Dynamics 365 Finance and Operations applications. It requires programming experience and technical knowledge beyond configuration and setup.

Human Resources Certification Path

Important Change in Human Resources Certification

Microsoft has made significant changes to the Human Resources certification path, consolidating it into the broader Finance & Operations fundamentals certification:

Previous Structure (Before 2024)

Dedicated Human Resources Functional Consultant certification with specialized exams focused exclusively on HR capabilities.

Current Structure (2024 Onward)

HR capabilities are now covered within the **MB-920: Dynamics 365 Fundamentals (Finance & Operations)** exam.

The HR module is treated as an integrated component of the broader F&O suite rather than as a standalone certification track.

Human Resources Capabilities in MB-920

The MB-920 exam now includes HR-focused content such as:

- Personnel management and organization structures
- Benefits administration
- Compensation management
- Employee self-service
- Leave and absence management
- Performance management

For professionals specializing in HR implementations, the MB-920 exam now serves as the primary certification path, reflecting Microsoft's strategy of tighter integration between HR and other F&O modules.

Important Certification Path Changes

Retirement of MB-300 (February 29, 2024)

Previous Requirement: Candidates needed to pass both MB-300 (Core Finance & Operations) AND a specialization exam (MB-310, MB-330, etc.) to earn a certification.

Current Requirement: Candidates only need to pass the specialization exam (MB-310, MB-330, MB-340) to earn the associated certification.

Impact: Simplified certification path with reduced exam requirements, focusing on specialized knowledge rather than core concepts that overlapped between exams.

Human Resources Certification Consolidation

Previous Path: Dedicated Human Resources Functional Consultant certification with specialized exams.

Current Path: HR capabilities now covered within MB-920 (Dynamics 365 Fundamentals - Finance & Operations).

Impact: HR specialists now align with the broader F&O certification path, reflecting tighter integration of HR with other F&O modules.

New CX Analyst Associate Certification (Coming September 2024)

New Addition: Customer Experience Analyst Associate certification launching soon.

Focus: Will likely concentrate on analytics across Customer Engagement applications, enabling professionals to extract and interpret customer data across the CE suite.

Impact: Creates a new career path focusing on data-driven customer insights rather than implementation or configuration.

Microsoft regularly updates its certification paths to align with product changes and industry needs. Always check the official Microsoft Learn certification pages for the most current requirements and exam content.

How CRM and F&O Work Together in Real-World Implementations

Integration Points

- **Customer Master Data:** Shared customer records between CRM and F&O
- **Quote-to-Cash:** Sales opportunities in CRM convert to orders in F&O
- **Product Catalog:** Products managed in F&O surfaced in CRM for sales
- **Inventory Visibility:** Real-time inventory from F&O available in CRM
- **Service Management:** Service cases linked to financial transactions
- **Financial Reporting:** Sales performance from CRM combined with financial data from F&O

Implementation Considerations

Most enterprise implementations involve both sides of the Dynamics 365 house, requiring professionals to understand how the systems interact:

- **Data Synchronization:** Defining master data strategy across systems
- **Process Handoffs:** Designing seamless transitions between front and back office
- **Integration Technologies:** Using Power Platform, dual-write, or custom integrations
- **User Experience:** Creating a unified experience across applications
- **Security Model:** Managing permissions across the ecosystem

While certifications focus on specific applications, the most valuable professionals understand both sides of the Dynamics 365 house and how they interact. Consider pursuing certifications in both domains to maximize your expertise and marketability in enterprise implementations.

Your Certification Journey: Next Steps

1 Assess Your Current Role and Career Goals

Determine which side of the Dynamics 365 house aligns with your current role or desired career path:

- Customer-facing roles → Customer Engagement (CRM) path
- Financial or operational roles → Finance & Operations (ERP) path
- Technical/developer roles → Developer certifications (Power Platform or MB-500)

3 Specialize Based on Your Focus Area

Pursue role-based certifications that align with your specialization:

- **CRM Path:** MB-210 (Sales), MB-220 (Marketing), MB-230 (Customer Service), or MB-240 (Field Service)
- **F&O Path:** MB-310 (Finance), MB-330 (Supply Chain), MB-340 (Commerce), or MB-500 (Developer)

2 Start with Fundamentals

Begin with the appropriate fundamentals certification to establish a solid foundation:

- MB-910 for Customer Engagement
- MB-920 for Finance & Operations

These exams provide the essential knowledge needed before specializing.

4 Expand Your Expertise Across Domains

Consider certifications from both sides of the house to become a more versatile Dynamics 365 professional capable of working on integrated implementations.

The most valuable consultants understand how both CRM and F&O work together in real-world scenarios.

Remember that certifications validate your knowledge, but real-world experience remains equally important. Combine certification preparation with hands-on practice in demonstration environments to maximize both your exam success and practical skills.