Exam MB-800: Microsoft Dynamics 365 Business Central Functional Consultant – Skills Measured

Audience Profile

Candidates for this exam are functional consultants who implement core application setup processes for small and medium businesses. They implement and configure the Microsoft Dynamics 365 Business Central app, including setting up core app functionality and modules and migrating data to Business Central.

Candidates run the user interface in collaboration with the implementation team to provide the business with manageability and ease of navigation. They configure role centers, including adapting insights, cues, action tiles, reports, charts, and extending Business Central by using Microsoft Power Platform components.

Candidates have applied knowledge of meeting user needs through the Business Central app, including basic understanding of financial management, sales, purchasing, and inventory.

Candidates for this exam typically specialize in one or more feature sets of Business Central. They understand the role of Business Central in relationship to the Dynamics 365 suite of applications.

Skills Measured

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

NOTE: In most cases, exams do NOT cover preview features, and some features will only be added to an exam when they are GA (General Availability).

Set up Business Central (20-25%)

Create and configure a new company

- create a new company in the on-premises version of Business Central
- create a new company in the cloud-based version of Business Central by using Assisted Setup
- create a new company by copying data from an existing company
- describe the use cases and capabilities of RapidStart Services

- create a configuration worksheet
- describe the process for migrating data
- create and export a configuration package
- import and apply a configuration package
- create journal opening balances
- migrate on-premises data to a cloud-based version of Business Central
- validate migrated data by using trial balances

Manage security

- create and manage user profiles
- set up a new user and user groups
- create and assign permission sets and permissions
- apply security filters

Set up core app functionality

- set up company information
- set up printers for on-premises and cloud-based installations
- set up report selections
- set up and use job queues
- set up email
- set up number series

Set up dimensions

- set up dimensions and dimension values
- set up global dimensions and shortcut dimensions
- set up default dimension for a single account and for multiple accounts
- set up default dimensions for an account type
- block combinations of dimensions or dimension values

Set up and manage approvals by using workflows

- set up a purchase document approval system
- set up a sales document approval system
- set up document approvals
- set up a notification system
- set up an approval hierarchy

Configure financials (25-30%)

Set up the Finance module

- create a fiscal year
- define General Ledger Setup options
- create accounting periods
- create payment terms

Configure the chart of accounts

- create general ledger accounts
- configure direct posting
- create account categories and subcategories

Set up posting groups

- create specific posting groups including bank, customer, vendor, and inventory posting groups
- create general posting groups
- configure General Posting Setup

Set up journals and bank accounts

- create journal templates
- create batches
- implement number series in journals
- set up bank accounts

Set up accounts payables

- describe the relationship between vendors, vendor ledger entries, and detailed vendor ledger entries
- create vendor accounts
- define Purchases & Payables Setup
- set up payment journals
- set up payment information for vendors

Set up accounts receivables

- describe the relationship between customers, customer ledger entries, and detailed customer ledger entries
- create customer accounts
- define Sales & Receivables Setup
- set up cash receipt journals

- set up payment registration
- set up payment information for customers
- enable customer payments through payment services
- create document sending profiles

Configure sales and purchasing (10-15%)

Set up inventory

- create items
- set up units of measure
- create locations

Configure master data for sales and purchasing

- configure core customer settings including lead time, shipping agents, locations, and shipping addresses
- configure core vendor settings including order address, lead time, locations, and delivery terms
- configure core item settings

Configure pricing and discounts

- create vendor-specific purchase prices
- configure purchase line and invoice discounts
- create customer-specific sales prices
- configure sales line and invoice discounts
- configure best price calculations

Perform Business Central operations (30-35%)

Perform basic tasks in Business Central

- differentiate between designing pages, customizing roles, and personalizing users
- customize roles
- apply and save filters
- find all related entries by using the Navigate action
- use the Inspect pages and data feature
- perform data updates by using the Edit in Excel feature

Purchase items

- create a purchase order
- receive items associated with a purchase order
- describe the over-receipt feature
- undo a receipt
- create a posted invoice from a purchase order
- create purchase returns
- use the Navigate action to view a posted purchase transaction

Sell items

- create quotations
- convert a quotation into an order or invoice
- analyze item availability
- ship items associated with a sales order
- undo shipments
- create an invoice from a sales order
- create sales returns
- configure recurring sales lines
- use the Navigate action to view a posted sales transaction

Process financial documents

- process purchase invoices
- process purchase credit memos
- process sales invoices
- process sales credit memos
- combine order shipments into a single invoiceCorrect a posted purchase invoice
- correct a posted sales invoice

Process payments and journals

- process payment journals
- process cash receipt journals
- process payment registrations
- reverse posted journals
- run the Suggest Vendor Payments action
- remove customer ledger entries
- remove vendor ledger entries
- complete a bank reconciliation
- create and process general journal entries

Manage inventory costing

- create and manage inventory periods
- describe the adjust cost item entries posting process
- set up automatic cost posting
- set up expected cost posting
- describe the relationship between items, item ledger entries, and value entries