

Microsoft Certified: Dynamics 365 for Customer Service Functional Consultant Associate – Skills Measured

This document contains the skills measured on the exams associated with this certification. It does not include any upcoming or recent changes that have been made to those skills. For more information about upcoming or recent changes, see the associated exam details page(s).

Exam MB-200: Microsoft Power Platform + Dynamics 365 Core

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).

Perform Discovery, Planning, and Analysis (5-10%)

Create and Validate Documentation

- create high-level entity relationship diagram
- create and document mock-ups
- identify document data for migration and integration
- determine out of the box (OOB) functionality
- validate functional requirements
- select artifacts necessary for a proof of concepts (POC) of functional solution designs

Perform continuous collaboration with customers

- identify collaboration tools
- perform an audit
- identify artifacts to be recorded in change logs
- select between managed and unmanaged solutions
- identify components for entities

Manage user experience design (20-25%)

Create and configure apps

- configure settings to meet minimal capabilities
- configure out of the box and custom items to meet minimal capabilities specified
- create and configure dashboards
- create and configure forms
- create and configure charts
- create and manage reports
- create and configure views
- design site map
- export or import Field Translation
- configure apps by using App Designer
- create model-driven apps
- create canvas apps
- create Power Apps portals

Create and configure templates

- identify available templates in Dynamics 365
- create email templates
- create Excel templates
- create Word templates
- create and configure article and campaign templates
- create contact templates
- create article templates

Create and manage processes

- configure a business rule
- configure a business process flow
- configure a workflow

Manage entities and data (15-20%)

Modify an existing data model

- create new or modify existing entity(s)
- create new or modify existing relationships
- create new or modify existing fields
- create new or modify existing views
- manage accounts and contacts

- create and configure Common Data Services

Import and export data

- import data by using the import data wizard
- export data from Dynamics 365
- create data templates
- choose file types to upload into system
- identify source fields to Dynamics 365 Fields mapping
- save mappings to template
- import field translations

Manage data

- perform data cleanup
- mitigate data loading risks
- mitigate excessive database growth
- configure bulk record deletion
- configure duplicate detection setting
- implement data encryption

Implement security (5-10%)

Configure security in Office 365

- identify Office 365 Admin role assignments
- add Users to security group administration

Configure security settings

- manage security roles
- manage users
- manage teams
- create and manage field security profiles
- configure hierarchy security

Implement integration (15-20%)

Configure App for Outlook

- identify required client software requirements
- identify required server software requirements
- configure server-side sync

- develop a plan to deploy Outlook App to users
- identify minimum application and operating system environments

Configure email integration

- configure email mailboxes
- configure email protocols
- configure email settings
- enable server-side synchronization
- enable Dynamics 365 App for Outlook

Integrate with Office 365

- determine enabled Office 365 capabilities
- design SharePoint online folder configuration architecture
- create SharePoint sites and document locations
- integrate OneNote
- integrate OneDrive for Business
- configure integration with the Office 365 toolset
- validate integrity of data in SharePoint
- integrate data by using Excel data online
- integrate Teams

Create, configure, and maintain Power Automate flows

- create service connections
- configure source and target fields
- create, validate, and execute Power Automate logic
- share flows with other users

Perform solutions deployment and testing (25-30%)

Manage environments

- determine whether to use managed or unmanaged solution
- determine subcomponents to include in a solution
- create or use a custom publisher
- migrate from sandbox environments
- administer environments
- configure environments
- manage plug-in trace logs

Manage apps

- manage applications using the Dynamics 365 Admin center
- manage Dynamics 365 applications using solutions
- share apps

Perform system administration

- configure connection roles
- configure language and locales
- configure currencies
- configure subjects
- configure custom help
- configure session and inactivity timeouts
- manage global audit settings
- configure audit user access
- manage audit logs
- manage entity and field auditing
- configure Relevance Search
- configure QuickFind settings
- configure Categorized Search
- configure Microsoft Social Engagement

Perform quality assurance

- create system, performance, unit, and regression testing scripts
- perform performance tuning
- perform optimization testing
- verify network capacity and throughput by using the Dynamics 365 Diagnostics Tool
- perform data query performance

Manage solutions

- create solutions
- export solutions
- import solutions
- distribute solutions and patches

Exam MB-230: Microsoft Dynamics 365 Customer Service

Skills Measured

Perform configuration (25-30%)

Configure Service Management settings

- describe process of record creation and update rules
- configure queues
- configure holiday schedule
- configure customer service schedule
- configure user work hours
- configure categories and subjects
- configure cases
- configure customer service security roles
- configure goal management components
- create routing rules
- configure services
- configure timelines
- configure Customer Service Insights
- configure Omnichannel chat and SMS
- configure service scheduling

Configure processes

- configure custom business process flows
- implement business process flows from Microsoft AppSource
- configure Connected Customer Services

Create and configure customer service visualizations

- configure customer service content pack for Power BI
- configure customer service dashboards
- design and create customer service charts
- execute and analyze customer service reports
- configure enhanced customer service admin settings by using Service Management

Manage cases and the knowledge base (30-35%)

Create and manage cases

- manage case list
- create and search for case records
- convert activities to cases
- perform case resolution
- implement case routing rules
- implement parent/child cases
- merge cases
- configure status reason transitions
- implement advanced similarity rules
- customize the case resolution form

Create and manage the knowledge base

- configure entities for knowledge management
- link an article with a case
- use the knowledge base to resolve cases
- create and manage knowledge base article lifecycle
- create and manage knowledge base articles
- search for articles
- enable and manage relevance search

Manage queues, entitlements, and SLAs (25-30%)

Create and manage queues

- differentiate queue types
- add cases and activities to queues
- implement case routing
- configure entities for queues
- configure queue email settings
- configure record creation and update rules

Create and manage entitlements

- define and create entitlements
- manage entitlement templates
- activate and deactivate entitlements
- renew or cancel an entitlement
- assign an entitlement to a case

Create and manage SLAs

- determine SLA conditions
- define and create SLAs
- implement actions and details
- use SLAs on-demand
- manage cases with SLAs
- create and manage SLA items

Configure Forms Pro (15-20%)

Create surveys

- create a theme and upload images
- add pages to a survey and personalize data

- identify survey question types
- add survey questions
- identify respondent types
- configure response routing
- configure survey scoring
- configure survey unsubscription options

Preview, test, and publish surveys

- distribute survey link using email
- embed a survey in a web page
- clone, import, and translate surveys

Manage survey responses

- summarize survey results
- determine report types
- implement workflow conditional logic for survey actions
- create business actions based upon survey responses