

Microsoft Certified: Dynamics 365 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).

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.

Exam MB-230: Microsoft Dynamics 365 Customer Service Functional Consultant

Manage cases and knowledge management (20-25%)

Create and manage cases

- configure cases
- manage case lists
- create and search for case records
- convert activities to cases
- perform case resolution
- implement parent/child cases
- merge cases
- set autonumbering for customer service entities

Configure and automate cases

- implement advanced similarity rules
- implement record creation and update rules
- route cases using basic routing rulesets
- customize the case resolution form
- configure status reason transitions
- configure business process flows

Implement knowledge management

- configure the knowledge search control

- configure knowledge article search filters and search providers
- link an article with a case
- use knowledge management to resolve cases
- manage the knowledge management article lifecycle
- manage knowledge management articles
- configure tables for knowledge management
- manage knowledge article templates
- implement knowledge search
- configure categories and subjects
- convert cases to knowledge articles

Capture customer feedback by using Customer Voice

- create a survey
- describe survey elements including question types
- apply formatting and branding to a survey
- trigger distribution of a survey
- describe and analyze survey results, including customer satisfaction (CSAT) and Net Promoter Score (NPS)

Manage queues, entitlements, and service-level agreements (15-20%)

Create and manage queues

- describe use cases for each queue type
- configure queues
- add cases and activities to queues
- configure tables for queues
- perform queue operations, including pick, release, remove, and delete operations

Create and manage entitlements

- configure and apply entitlements
- define and create entitlements, including products, channels, contacts, allocations, and service-level agreements
- manage entitlement templates
- activate and deactivate entitlements
- renew or cancel an entitlement

Create and manage SLAs

- define and create SLAs
- configure SLA settings
- configure a holiday schedule

- configure a customer service schedule
- implement actions by using Power Automate
- manage cases that are associated with SLAs
- manually apply an SLA
- create and manage SLA items, including key performance indicators (KPIs), warning actions, success actions, and applicability

Implement unified routing

- describe unified routing stages
- configure work classification and assignments
- configure assignment rules
- configure workstreams
- configure queues
- configure user attributes, including capacity profiles
- configure skills-based routing
- configure unified record routing

Implement scheduling (5–10%)

Manage resources

- configure business closures
- configure organizational units
- configure resources
- configure work hours
- configure facilities and equipment

Manage services

- define services
- schedule a service activity
- configure fulfillment preferences

Implement Omnichannel for Customer Service (10–15%)

Deploy Omnichannel for Customer Service

- provision Omnichannel for Customer Service
- configure application settings, including data masking, operating hours, authentication settings, self-service settings, and sentiment analysis
- configure work streams
- configure routing values

- implement context variables

Manage channels

- configure channels
- enable the chat widget on websites
- configure pre-chat surveys
- configure proactive chat
- configure Short Message Service (SMS)

Configure the supervisor experience

- configure Omnichannel Insights dashboard
- configure intraday insights
- customize KPIs for intraday insights
- enable sentiment analysis

Manage analytics and insights (5–10%)

Configure Customer Service Insights for Dynamics 365 Customer Service

- configure Customer Service historical analytics
- configure topic clustering
- configure knowledge search analytics

Create and configure visualizations

- configure tier 1 and tier 2 interactive dashboards
- design and create customer service charts
- design reports by using the Report Wizard
- design and create Power BI reports and dashboards

Implement Customer Service workspaces (5–10%)

Describe Customer Service workspaces

- configure session management
- configure administration features
- describe navigation and sessions

Implement the app profile manager

- implement app profiles

- configure session, application, and notification templates
- configure macros and agent scripts
- configure smart assist

Implement Microsoft Power Platform (5–10%)

Create custom apps

- create task-specific canvas or model apps
- embed apps in Dynamics 365 Customer Service
- create a custom portal to support customer service processes

Integrate Power Virtual Agents chatbots with Dynamics 365 Customer Service

- describe Power Virtual Agents components and concepts
- integrate Power Virtual Agents with Dynamics 365 Customer Service
- escalate conversations to a live agent
- manage chatbots

Implement Connected Customer Service (5–10%)

Describe Connected Customer Service

- describe IoT components
- identify use cases for Connected Customer Service

Implement Connected Customer Service with IoT Hub

- manage IoT devices
- manage security roles for Connected Customer Service

Exam PL-200: Microsoft Power Platform Functional Consultant

Configure Microsoft Dataverse (20-25%)

Manage a data model

- assign a type for a table including standard, activity, or virtual
- configure tables ownership
- create new tables or modify existing tables
- determine which type of relationships to implement including 1: N and N: N
- configure table relationship behaviors including cascading rules
- create new relationships or modify existing relationships

- create new columns or modify existing columns
- create alternate keys for tables
- configure table properties
- configure connection roles
- create and configure views

Create and manage logic

- define requirements for business rules
- define and implement business rule logic
- define the scope for business rules
- configure and test business rules
- configure a synchronous classic workflow

Configure Dataverse

- configure Relevance Search
- configure auditing
- perform data management tasks including import, export, and bulk detection
- configure duplicate detection settings
- configure privacy preferences

Configure security settings

- create and manage business units
- create and manage security roles
- create and manage users and teams
- create and manage column_security
- configure hierarchy security
- configure Azure AD group teams

Create apps by using Microsoft Power Apps (15-20%)

Create model-driven apps

- create and configure forms
- create and configure views
- create and configure charts
- create and configure dashboards
- configure site maps
- select applicable assets for an app including tables, forms, views, business process flows, dashboards, and charts
- share a model-driven app
- apply organizational branding by using themes

Create canvas apps

- create a canvas app
- configure Dataverse as a data source for an app
- create canvas app screens
- implement form navigation, formulas, variables and collections, and error handling
- build reusable components and component libraries
- configure offline capabilities for apps
- run Power Automate flows based on actions that occur in a canvas app
- interpret App Checker results and resolve identified issues including accessibility issues
- manage apps
- monitor app analytics data

Create portal apps

- create a portal app
- expose Dataverse data
- configure portal web pages, forms, and navigation
- configure portal security including web roles and page access
- configure portal details and actions
- configure portal authentication

Create and manage Microsoft Power Automate (15-20%)

Create flows

- recommend types of flows and flow components including when to use a classic workflow
- trigger a flow by using Dataverse connectors
- run actions by using the Dataverse connector
- implement logic control including branches, loops, conditions, error handling, and variables
- implement dynamic content and expressions
- test and troubleshoot flows

Create and manage business process flows

- configure a business process flow
- add business rules, workflows, flow steps, and action steps to a business process flow
- define stages and steps
- configure parallel branches
- manage the business process flow table for a business process flow

Build desktop flows

- describe types of desktop flows
- identify use cases for desktop flows including differentiating between attended and unattended desktop flows

- build web and user interface automations by using Power Automate Desktop
- implement variables, loops, and conditionals in Power Automate Desktop flows
- trigger desktop flows from cloud flows
- monitor automation runs
- analyze processes by using Process Advisor

Implement Microsoft Power Virtual Agents chatbots (10-15%)

Create chatbots

- create a standalone chatbot
- add standalone chatbots to Teams and other channels
- create a chatbot within a Microsoft Teams channel
- publish a chatbot
- share a chatbot
- monitor and diagnose bot performance, usage, and topic usage
- authenticate end users for a chatbot

Configure topics

- define topic conversation triggers
- create questions, messages, and conditions
- extract topics from a web page
- implement greetings, escalations, error messages, and statuses
- call a Power Automate flow to run an action
- configure a fallback topic

Configure entities

- create custom entities
- implement entities in conversations
- implement variables to store data

Integrate Microsoft Power Apps with other apps and services (10-15%)

Integrate Microsoft Power BI with Microsoft Power Platform components

- create Power BI visualizations, reports, and dashboards
- add Power BI tiles to model-driven apps and canvas apps
- add canvas apps to a Power BI dashboard
- trigger Power Automate flows from Power BI alerts

Implement AI Builder

- determine which AI Builder model type to use
- create an AI Builder model

- prepare source data for use by models
- train, test, and publish a model
- consume a model by using Power Apps
- consume a model by using Power Automate

Configure and use templates

- configure and use Microsoft Excel templates
- configure and use Microsoft Word templates
- configure and use email templates

Manage solutions (15-20%)

Create a solution in a development environment

- create solutions to contain solution assets
- create a publisher
- add assets to a solution
- build solution-aware components
- manage solution component dependencies

Transport solutions between environments

- resolve connection references
- set environment variables
- export solutions
- import solutions
- update solutions
- configure managed properties
- run Solution Checker and interpret results

Localize solutions

- configure currencies
- enable language packs
- export and import translations