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

Purpose of this document

This study guide should help you understand what to expect on the exam and includes a summary of the topics the exam might cover and links to additional resources. The information and materials in this document should help you focus your studies as you prepare for the exam.

Useful links	Description
Review the skills measured as of September 23, 2022	This list represents the skills measured AFTER the date provided. Study this list if you plan to take the exam AFTER that date.
Review the skills measured prior to September 23, 2022	Study this list of skills if you take your exam PRIOR to the date provided.
Change log	You can go directly to the change log if you want to see the changes that will be made on the date provided.
How to earn the certification	Some certifications only require passing one exam, while others require passing multiple exams.
Certification renewal	Microsoft associate, expert, and specialty certifications expire annually. You can renew by passing a free online assessment on Microsoft Learn.
Your Microsoft Learn profile	Connecting your certification profile to Learn allows you to schedule and renew exams and share and print certificates.
Passing score	A score of 700 or greater is required to pass.
Exam sandbox	You can explore the exam environment by visiting our exam sandbox

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Useful links	Description
Request accommodations	If you use assistive devices, require extra time, or need modification to any part of the exam experience, you can request an accommodation.
Take a practice test	Are you ready to take the exam or do you need to study a bit more?

Updates to the exam

Our exams are updated periodically to reflect skills that are required to perform a role. We have included two versions of the Skills Measured objectives depending on when you are taking the exam.

We always update the English language version of the exam first. Some exams are localized into other languages, and those are updated approximately eight weeks after the English version is updated. Other available languages are listed in the **Schedule Exam** section of the **Exam Details** webpage. If the exam isn't available in your preferred language, you can request an additional 30 minutes to complete the exam.

Note

The bullets that follow each of the skills measured are intended to illustrate how we are assessing that skill. Related topics may be covered in the exam.

Note

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

Skills measured as of September 23, 2022

Audience profile

Candidates for this exam are functional consultants with customer service expertise. They are responsible for implementing solutions that focus upon customer service, quality, reliability, efficiency, and customer satisfaction.

Candidates design and implement service management processes and automation in collaboration with solution architects. Candidates coordinate with customer engagement administrators to implement and upgrade customer service components including omnichannel, collaboration, knowledge management, customer feedback, and connected services.

Candidates must have strong applied knowledge of customer service including in-depth understanding of cases, knowledge management, queues, entitlements, resource scheduling, service- level agreements (SLAs), visualizations, connected services, Power Virtual Agents, Customer Service workspaces, Customer Voice, basic and unified routing, and Omnichannel for Customer Service. The functional consultant's knowledge should include a comprehensive understanding of the customer service application's role in

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relationship to the Dynamics 365 suite of apps along with a basic understanding of the solution architecture and quality assurance.

- Manage cases and Knowledge Management (25-30%)
- Manage entitlements and SLAs (5-10%)
- Implement scheduling (5-10%)
- Implement multi-session experiences for Customer Service (20-25%)
- Manage analytics and insights (10-15%)
- Implement Microsoft Power Platform (5-10%)
- Implement Connected Customer Service (5-10%)
- Implement routing (5-10%)

Manage cases and Knowledge Management (25–30%)

Create and manage cases

- Configure cases
- Manage cases
- 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

Define and configure foundational Customer Service components

- Implement Advanced Similarity rules
- Implement record creation and update rules
- Configure the Case Resolution form
- Configure Status Reason transitions
- Configure business process flows
- Configure categories and subjects
- Configure document management
- Configure basic and enhanced Teams integration

Create and administer Knowledge Management

- Configure the Knowledge Search capabilities
- Use Knowledge articles to resolve cases
- Manage the Knowledge article lifecycle
- Manage Knowledge article content and templates
- Configure tables for Knowledge management
- Convert cases to knowledge articles

Microsoft

- Enable AI suggested Descriptions and Keywords

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 CSAT and Net Promoter Score (NPS)

Manage entitlements and SLAs (5–10%)

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 service-level agreements (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 KPIs, warning actions, success actions, and applicability

Implement scheduling (5–10%)

Manage resources

- Define business closures
- Configure organizational units
- Configure resources
- Configure work hours
- Configure facilities and equipment
- Configure resource categories and characteristics

Manage services

- Define services
- Schedule a service activity

Microsoft

- Configure fulfillment preferences

Implement multi-session experiences for Customer Service (20–25%)

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
- Implement security roles for omnichannel

Manage channels

- Configure channels
- Enable the chat widget on websites
- Configure pre-chat surveys
- Configure proactive chat
- Configure the voice channel

Configure agent productivity tools

- Configure quick replies
- Configure agent scripts
- Enable Smart Assist
- Create macros

Configure agent workspaces

- Configure notifications
- Configure session templates
- Create app profiles
- Configure Agent Inbox

Manage analytics and insights (10–15%)

Configure insights

- Configure Customer Service historical analytics
- Configure topic clustering
- Configure Knowledge search analytics

Create and configure visualizations and reports

- Configure tier 1 and tier 2 interactive dashboards
- Design and create customer service charts

Microsoft

- Design reports by using the Report wizard

Configure Omnichannel Insights

- Configure Omnichannel Insights dashboard
- Configure intraday insights
- Customize KPIs for intraday insights
- Enable sentiment analysis

Implement Microsoft Power Platform (5–10%)

Configure model-driven apps

- Create and configure forms
- Create and configure views
- Configure site maps

Create custom apps

- Create task-specific canvas apps and custom pages
- Embed apps in Dynamics 365 Customer Service
- Create a custom portal to support customer service processes

Implement Power Virtual Agents 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
- Create and manage bots including chat and voice
- Implement Power Virtual Agents as a post-call survey

Implement Connected Customer Service (5–10%)

Describe Connected Customer Service

- Describe IoT components
- Identify use cases for Connected Customer Service
- Configure Power Automate rules to create IoT Alerts from IoT Central
- Configure security roles for Connected Customer Service

Describe device management options

- Manage IoT devices
- Interact with IoT devices

Implement routing (5–10%)

Configure routing

- Configure work classification and assignments including rules

- Configure user attributes including capacity profiles
- Implement Basic Case Routing rules
- Configure Routing Rulesets
- Describe different unified routing options
- Configure skills-based routing and Skills Finder
- Configure diagnostics

Create and manage queues

- Differentiate queue types
- Configure queues
- Add records to queues
- Configure tables for queues
- Perform queue operations including pick, release, remove, and delete operations

Study resources

We recommend that you train and get hands-on experience before you take the exam. We offer self-study options and classroom training as well as links to documentation, community sites, and videos.

Study resources	Links to learning and documentation
Get trained	[Choose from self-paced learning paths and modules or take an instructor led course](#)
Find documentation	[Dynamics 365 documentation and learning modules](#)
	[Microsoft Dynamics 365 Customer Service documentation](#)
	[Dynamics 365 Customer Voice documentation](#)
	[Dynamics 365 Customer Insights documentation](#)
Ask a question	[Microsoft Q&A	Microsoft Docs](#)
Get community support	[Microsoft Dynamics Community](#)
Follow Microsoft Learn	[Microsoft Learn - Microsoft Tech Community](#)

Change log

Key to understanding the table: The topic groups (also known as functional groups) are in bold typeface followed by the objectives within each group. The table is a comparison between the two versions of the exam skills measured and the third column describes the extent of the changes.

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Skill area prior to September 30, 2022	Skill area as of September 30, 2022	Changes
Audience profile		Minor
Manage cases and Knowledge Management	**Manage cases and Knowledge Management**	% of exam increased
Create and manage cases	Create and manage cases	Minor
Configure and automate cases	Define and configure foundational Customer Service components	Major
Implement Knowledge management	Create and administer Knowledge Management	Major
Capture customer feedback by using Customer Voice	Capture customer feedback by using Customer Voice	No Change
Manage queues, entitlements, and SLAs	**Manage entitlements and SLAs**	% of exam decreased
Create and manage queues		Removed
Create and manage entitlements	Create and manage entitlements	No change
Create and manage SLAs	Create and manage SLAs	No change
Implement unified routing		Removed
Implement scheduling	**Implement scheduling**	No change
Manage resources	Manage resources	Minor
Manage services	Manage services	No change
Implement Omnichannel for Customer Service	**Implement multi-session experiences for Customer Service**	% of exam increased
Deploy Omnichannel for Customer Service	Deploy Omnichannel for Customer Service	Minor
Manage channels	Manage channels	Minor
Configure the supervisor experience		Removed
	Configure agent productivity tools	Added
	Configure agent workspaces	Added
Manage analytics and insights	**Manage analytics and insights**	% of exam increased
Configure insights	Configure insights	Minor
Create and configure visualizations	Create and configure visualizations and reports	Minor

Microsoft

	Configure Omnichannel Insights	Added
Implement Customer Service workspaces		Removed
Describe Customer Service workspaces		Removed
Implement App Profile Manager		Removed
Implement Microsoft Power Platform	**Implement Microsoft Power Platform**	% of exam decreased
Configure model-driven apps	Configure model-driven apps	No change
Create custom apps	Create custom apps	Minor
Integrate Power Virtual Agents chatbots with Dynamics 365 Customer Service	Implement Power Virtual Agents with Dynamics 365 Customer Service	Minor
Implement Connected Customer Service	**Implement Connected Customer Service**	No change
Describe Connected Customer Service	Describe Connected Customer Service	Minor
Implement Connected Customer Service with IoT Hub	Describe device management options	Minor
	Implement routing	Added
	Configure routing	Added
	Create and manage queues	Added

Skills measured prior to September 23, 2022

Audience Profile

Candidates for this exam are functional consultants with customer service expertise. They are responsible for implementing omnichannel solutions that focus upon service, quality, reliability, efficiency, and customer satisfaction.

Candidates design and implement service management processes in collaboration with solution architects. Candidates collaborate with customer engagement administrators to implement and upgrade customer service components including knowledge management, customer feedback, and connected services.

Candidates must have strong applied knowledge of customer service including in-depth understanding of cases, knowledge management, unified routing and queues, entitlements, resource scheduling, service- level agreements (SLAs), visualizations, connected services, Customer Service Insights, Power Virtual Agents, Customer Service workspaces, Customer Voice, and Omnichannel for Customer Service. The functional consultant's knowledge should include a comprehensive understanding of the customer

service application's role in relationship to the Dynamics 365 suite of apps along with a basic understanding of the solution architecture and quality assurance.

- Manage cases and Knowledge Management (15–20%)
- Manage queues, entitlements, and SLAs (10–15%)
- Implement scheduling (5–10%)
- Implement Omnichannel for Customer Service (10–15%)
- Manage analytics and insights (5–10%)
- Implement Customer Service workspaces (10–15%)
- Implement Microsoft Power Platform (15–20%)
- Implement Connected Customer Service (5–10%)

Manage cases and Knowledge Management (15–20%)

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

Microsoft

- 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 CSAT and Net Promoter Score (NPS)

Manage queues, entitlements, and SLAs (10–15%)

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 service-level agreements (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 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 voice channel

Configure the supervisor experience

- Configure Omnichannel Insights dashboard
- Configure intraday insights

Microsoft

- Customize KPIs for intraday insights
- Enable sentiment analysis

Manage analytics and insights (5–10%)

Configure insights

- 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 (10–15%)

Describe Customer Service workspaces

- Configure session management
- Configure administration features
- Describe navigation and sessions

Implement App Profile Manager

- Implement app profiles
- Configure session, application, and notification templates
- Configure macros and agent scripts
- Configure Smart Assist

Implement Microsoft Power Platform (15–20%)

Configure model-driven apps

- Create and configure forms
- Create and configure views
- Configure site maps

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