Microsoft Certified: Dynamics 365 Field 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-240: Microsoft Dynamics 365 Field Service Functional Consultant

Configure field service applications (20–25%)

Configure settings

- define and configure key required security roles
- define and configure resource required scheduling options
- define required entities
- customize entities to meet requirements
- configure territories, postal codes, and organizational units
- determine and configure required skill types
- configure characteristics and skills
- configure proficiency models
- implement resource roles and categories
- enable schedule board geocoding
- configure technician time tracking

Configure product and service pricing

- define required product and service types
- configure minimum charge amounts and durations
- determine how pricing rules affect the price that is applied to a product on a work order
- associate products and services with price lists
- define tax codes

Manage bookable resources

- enable mapping functionality
- configure geocoding
- define start and end locations for resources
- determine the types of addresses to use
- configure pay types and rates
- configure working hours and working hour templates
- manage time off requests

Configure resource types

- determine the types of resources required
- describe use cases for resource pools, crews, and resource groups
- define resource groups and resource group templates
- set up resource pools and crews

Integrate other tools with Dynamics 365 Field Service

- describe use cases for collecting customer feedback by using Dynamics 365 Customer Voice
- implement Dynamics 365 Remote Assist for use with Dynamics 365 Field Service
- configure and use Dynamics 365 Remote Assist one-time call
- use Dynamics 365 Guides with work orders
- integrate with Dynamics 365 Supply Chain Management

Manage work orders (25–30%)

Describe the work order lifecycle

- configure work orders, including work order types and work order resolutions
- configure work order lifecycle stages
- configure booking status and work order status values
- configure uses and capabilities for billing accounts, service accounts, and functional locations
- understand the key Field Service Analytics and Insights work order summary metrics

Create and manage work orders

- create a work order from an incident type, a case, an IoT alert, or an opportunity
- add status and sub-status information to a work order
- organize work orders and resources by geography
- associate a work order and a price list
- close a work order
- configure the functional location for an asset on a work order

Manage incidents

- configure incident types
- assign requirement group templates to incident types
- add service tasks to incidents
- add products and services to incidents

Create and manage agreements

- determine when to use agreements
- define and configure agreement preferences and settings
- configure automatic generation of bookings
- create bookings
- create invoices

Manage inspections

- create inspections and ad hoc inspections
- associate inspections with work orders and assets
- perform inspections by using the Field Service (Dynamics 365) mobile app
- describe use cases for analyzing results of inspections

Schedule and dispatch work orders (20–25%)

Manage scheduling options

- schedule work orders by using the schedule board and schedule assistant
- determine when to use each scheduling option
- configure fulfillment preferences
- configure quick scheduling ("quick book")

Implement schedule boards

- identify features and uses for Booking Requirements view
- implement the integrated map feature
- manually schedule work orders
- reassign and reschedule work orders
- move incomplete work orders
- generate driving instructions for field agents
- configure schedule boards
- customize the schedule board

Implement the schedule assistant

- apply constraints to resource queries
- filter data
- specify a search radius
- troubleshoot the schedule assistant

Configure Universal Resource Scheduling

- describe use cases for Universal Resource Scheduling
- create Power Automate flows to populate data in requirements records
- create requirement views
- enable scheduling for a table
- restrict booking status values for a table by using a choice
- configure geocoding for a custom table
- manage work hours calendar for requirements
- configure booking timestamps and booking journals

Manage the Field Service (Dynamics 365) mobile app (10-15%)

Describe the capabilities of the mobile app

- deploy the mobile app
- complete work orders
- service customer assets

Install and set up the mobile app

- configure security roles
- update mobile app forms, views, pages, and site maps
- configure location tracking and geofencing
- configure offline profiles and synchronization features
- configure deep linking
- configure push notification
- configure barcode features

Manage inventory and purchasing (5-10%)

Manage inventory and warehouses

- set up inventory and warehouses
- view product inventory
- adjust inventory levels
- transfer inventory between warehouses
- manually update inventory by using inventory journals

Manage purchasing and product returns

- describe the purchase order process
- create purchase orders
- create a list of receivable products for a purchase order
- determine product return options
- create return merchandise authorizations (RMAs)
- finalize returns

Implement assets and connected devices (10-15%)

Describe use cases for Internet of Things (IoT)

- describe IoT components
- identify use cases for Connected Field Service on Field Service (Dynamics 365) mobile application

Implement Connected Field Service with Azure IoT Hub

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

Manage customer assets

- configure uses for customer assets
- create and register customer assets
- configure products to enable automatic creation of customer assets
- associate work orders with customer assets
- create child assets
- configure 3D asset models
- use functional locations

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-drive 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