

Microsoft Certified: Dynamics 365 Field Service Functional Consultant Associate – 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

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 concept (POC) of functional solution designs

Perform continuous collaboration with customer

- 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

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 mobile settings

Create and configure templates

- identify available templates in Dynamics 365
- create email templates
- create Excel templates
- create Word templates

Create and manage processes

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

Manage entities and data

Modify an existing data model

- create new or an modify existing entity
- create new or modify existing relationships
- create new or modify existing fields
- manage accounts and contacts

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

Manage data

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

Implement security

Configure security in Office 365

- identify Dynamics 365 security 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

Configure Outlook add-in

- identify required client software requirements
- identify required server software requirements
- configure server-side sync
- develop a plan to deploy Outlook App to users
- perform unit testing
- identify minimum application and operation 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

Create, configure, and maintain Microsoft Flows

- create service connections

- configure source and target fields
- create, validate, and execute Microsoft Flow logic
- share flows with other users

Perform solutions deployment and testing

Manage environments

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

Manage applications

- manage applications using the Dynamics 365 Administration Center
- manage Dynamics 365 applications using solutions

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 relevant search
- configure QuickFind settings
- configure categorized search

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

Configure field service applications

Configure general settings

- determine and configure field service security roles
- determine and configure resource scheduling options
- identify and configure field service entities
- determine and configure product and service categories
- configure territories, postal codes and organizational units
- determine and configure skill types
- configure characteristics and skills
- configure proficiency models
- implement resource roles and categories
- set defaults for work orders, bookings, the schedule board, and agreements

Configure product and service pricing

- create a product or service
- configure minimum charge amount and duration
- add products and services to incidents
- determine when a product has a default list price and a work order price list
- associate products and services with price lists
- define tax codes
- set up price list validity dates

Configure bookable resources

- manage bookable resources
- enable mapping functionality
- configure geocoding
- define start and end locations for resources
- define work hours for resources
- set up bookable resource categories, characteristics, and resource pay types
- set up bookable resource territories
- set up resource pools and crews

Integrate other tools with Field Service

- determine uses for Remote Assist
- benefits of using Resource Scheduling Optimization
- benefits of Connected Field Service
- using Push Notifications on the mobile app

Manage work orders

Describe the work order lifecycle

- configure work orders, work order types, and priority
- configure work order lifecycle stages
- configure booking status and work order status values
- configure uses and capabilities for billing accounts, service accounts, and sub-accounts

Create and manage work orders

- create a work order from an incident 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
- identify processes to close a work order

Manage incidents

- configure incident types
- configure service task types
- add service tasks, products, and services
- configure Requirement Groups
- attach Guides to Service Tasks

Schedule and dispatch work orders

Manage scheduling options

- schedule work orders using Schedule Board and Schedule Assistant
- determine when to use each scheduling option
- enable scheduling board geocoding
- manually schedule work orders
- reassign and reschedule work orders
- move incomplete work orders
- understand resource utilization

Implement the Schedule Board

- identify features and uses for Booking Requirements view
- implement the integrated map feature
- create additional schedule boards
- configure schedule boards
- customize the schedule board
- define booking rules
- facility Scheduling

Implement the Schedule Assistant

- apply constraints to resource queries
- filter data
- specify a search radius

Configure Resource Scheduling Optimization (RSO)

- create optimizing profiles
- define objectives and constraints
- configure optimization of resources
- geocoding for travel time

Configure Universal Resource Scheduling

- determine Universal Resource Scheduling use scenarios
- components of Universal Resource Scheduling
- configure URS for field service
- fields passed from work order to requirements
- create requirement views
- configure an entity to be schedulable

Manage field service mobility

Install and configure the mobile app

- configure actions that field agents can perform
- configure the mobile app
- configure display customizations
- assign security roles
- administer connected devices
- integrate with Dynamics 365 Guides
- add Guides to HoloLens app

Manage mobile projects

- identify project artifacts that can be modified or edited
- modify configuration settings
- publish a mobile project
- Mobile Device Management, security and synchronization

Manage inventory and purchasing

Manage inventory

- set up inventory and warehouses
- view product inventory
- adjust inventory levels
- transfer inventory
- determine when to integrate inventory with Enterprise Resource Planning application

Manage purchasing and product returns

- determine 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) and return to vendor (RTV)
- finalize returns

Manage assets and agreements

Create and manage agreements

- determine when to use agreements
- define and configure agreement preferences and settings
- configure automatic generation of bookings
- configure automatic generation of invoices
- define Service Level Agreements (SLAs)
- enable SLAs
- add an SLA to a Work Order
- using Entitlements

Manage customer assets

- create and register customer assets
- configure products to auto-create customer assets
- associate work orders with customer assets
- create child assets
- determine opportunities for Internet of Things (IoT)

- configure Connected Field Service
- manage IoT devices