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.

<table>
<thead>
<tr>
<th>Useful links</th>
<th>Description</th>
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</thead>
<tbody>
<tr>
<td><strong>How to earn the certification</strong></td>
<td>Some certifications only require one exam, while others require more. On the details page, you’ll find information about what skills are measured and links to registration. Each exam also has its own details page covering exam specifics.</td>
</tr>
<tr>
<td><strong>Certification renewal</strong></td>
<td>Once you earn your certification, don't let it expire. When you have an active certification that’s expiring within six months, you should renew it—at no cost—by passing a renewal assessment on Microsoft Learn. Remember to renew your certification annually if you want to retain it.</td>
</tr>
<tr>
<td><strong>Your Microsoft Learn profile</strong></td>
<td>Connecting your certification profile to Learn brings all your learning activities together. You’ll be able to schedule and renew exams, share and print certificates, badges and transcripts, and review your learning statistics inside your Learn profile.</td>
</tr>
<tr>
<td><strong>Passing score</strong></td>
<td>All technical exam scores are reported on a scale of 1 to 1,000. A passing score is 700 or greater. As this is a scaled score, it may not equal 70% of the points. A passing score is based on the knowledge and skills needed to demonstrate competence as well as the difficulty of the questions.</td>
</tr>
<tr>
<td><strong>Exam sandbox</strong></td>
<td>Are you new to Microsoft certification exams? You can explore the exam environment by visiting our exam sandbox. We created the sandbox as an opportunity for you to experience an exam before you take it. In the sandbox,</td>
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### Useful links

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<td>you can interact with different question types, such as build list, case studies, and others that you might encounter in the user interface when you take an exam. Additionally, it includes the introductory screens, instructions, and help topics related to the different types of questions that your exam might include. It also includes the non-disclosure agreement that you must accept before you can launch the exam.</td>
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</tbody>
</table>

### Request accommodations

We’re committed to ensuring all learners are set up for success. 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

Taking a practice test is a great way to know whether you’re ready to take the exam or if you need to study a bit more. Subject-matter experts write the Microsoft Official Practice Tests, which are designed to assess all exam objectives.

## Objective domain: skills the exam measures

The English language version of this exam was updated on September 23, 2022.

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

- Configure field service applications (20-25%)
- Manage work orders (20-25%)
- Schedule and dispatch work orders (20-25%)
- Manage the Dynamics 365 Field Service mobile app (5-10%)
- Manage inventory and purchasing (1-5%)
• Managed Connected Field Service and customer assets (5–10%)
• Implement Microsoft Power Platform (5–10%)
• Manage customer experiences (5–10%)

Functional groups

Configure field service applications (20–25%)

Define and configure core field service components
• Define and configure key required security roles
• Configure territories, postal codes, and organizational units
• Configure characteristics and proficiency models
• Implement resource roles and categories
• Enable conditional Field Service settings
• Enable Microsoft Teams Integration

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

Configure bookable resources
• Manage bookable resources
• 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
• Enable technician time tracking

Schedule multiple resources
• Determine the types of resources required
• Describe use cases for resource pools, crews, and Requirement groups
• Define Requirement groups and Requirement group templates
• Set up resource pools and crews

Integrate other tools with Dynamics 365 Field Service
• 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

Create and configure field service visualizations
• Configure dashboards
• Design and create field service charts
• Design reports by using the Report wizard.
• Design, create, and share Power BI reports and dashboards
• Understand the key Field Service Analytics and Insights work order summary metrics

Manage work orders (20–25%)

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

Create and manage work orders
• Create a work order
• Add status and sub-status information to a work order
• Organize work orders and resources by geography
• Associate a work order with a price list, Service Level Agreement, and entitlement
• Close a work order
• Collaborate on work orders by using Microsoft Teams
• Prepare work order summary reports
• Configure work order resolutions

Manage incidents
• Configure incident types and suggestions
• 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 work orders
• Configure booking preferences
• Configure agreement invoicing
• Create entitlements for agreements
Manage inspections
- Create inspections and ad hoc inspections
- Associate inspections with work orders and customer assets
- Describe use cases for analyzing results of inspections
- Create inspection templates

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

Manage schedule boards
- Describe use cases for multiple schedule boards
- Configure schedule boards
- Customize a 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
- Describe the role of resource requirements in scheduling
- Enable scheduling for a table
- Configure geocoding for a custom table
- Manage work hours calendar for requirements
- Describe booking timestamps, booking journals, and actuals
Manage the Dynamics 365 Field Service mobile app (5–10%)

Describe the capabilities of the mobile app
- Deploy the mobile app
- Complete work orders
- Service and maintain customer assets

Set up the mobile app
- Configure security roles
  - Customize the mobile app including forms, views, pages, and site maps
- Enable and configure location tracking and geofencing
- Configure offline profiles and synchronization features
- Configure deep linking
- Configure push notification
- Configure barcode features

Manage inventory and purchasing (1–5%)

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)
- Create return to vendor (RTV) transactions
- Finalize returns

Managed Connected Field Service and customer assets (5–10%)

Implement Connected Field Service
- Describe IoT deployment options
- Identify use cases for Connected Field Service
- Manage and associate IoT devices
- Configure security roles for Connected Field Service
Define and configure customer assets

- Describe uses for customer assets
- Create and manage customer assets
- Configure products to enable automatic creation of customer assets
- Associate work orders with customer assets
- Create child assets
- Configure 3D asset models
- Define functional locations

Implement Microsoft Power Platform (5–10%)

Configure model-driven apps

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

Create custom apps and automation

- Create task-specific canvas apps and custom pages
- Embed apps in Dynamics 365 Field Service
- Use custom Power Automate cloud flows to automate tasks and enhance Field Service

Manage customer experiences (5–10%)

Configure Microsoft Power Pages

- Configure Field Service customer experience portal
- Configure self-service scheduling
- Configure pre-built Power Automate flows
- Track technician location

Capture customer feedback by using Customer Voice

- Create a survey
- Trigger distribution of a survey
- Apply formatting and branding to a survey
- Describe and analyze survey results including CSAT and Net Promoter Score (NPS)
- Describe survey elements including question types

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

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<th>Study resources</th>
<th>Links to learning and documentation</th>
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<td><strong>Get trained</strong></td>
<td>Choose from self-paced learning paths and modules or take an instructor led course</td>
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<tr>
<td><strong>Find documentation</strong></td>
<td>Dynamics 365 documentation and learning modules</td>
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<tr>
<td></td>
<td>User guide for Dynamics 365 Field Service (contains video)</td>
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<tr>
<td><strong>Ask a question</strong></td>
<td>Microsoft Q&amp;A</td>
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<td><strong>Get community support</strong></td>
<td>Microsoft Dynamics Community</td>
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<td><strong>Follow Microsoft Learn</strong></td>
<td>Microsoft Learn - Microsoft Tech Community</td>
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