

Exam MB-240: Microsoft Dynamics 365 Field Service – Skills Measured

This exam will be updated on November 12, 2021. Following the current exam guide, we have included a version of the exam guide with Track Changes set to “On,” showing the changes that will be made to the exam on that date.

NOTE: Passing score: 700. Learn more about exam scores [here](#).

Audience Profile

Candidates for this exam are Microsoft Dynamics 365 Customer Engagement Functional Consultants with Field Service expertise. Candidates are responsible for implementing solutions that manage resources which complete the field service lifecycle.

Candidates implement the field service processes designed in collaboration with internal and external teams. This collaboration includes configuring the default administration areas of the Field Service application, deploying the Connected Field Service (IoT) solution and the mobile application, and implementing any additional customizations needed. Candidates are responsible for the configuration and deployment of the Field Service application in conjunction with the core customer service application.

Candidates must have knowledge of how to configure and customize components of the Field Service application, including configuring services, resources, characteristics, incidents, inventory integration, service agreements, resource scheduling, work orders, service tasks, field service user roles, field service settings, the Connected Field Service (IoT) solution, and configuration of the Field Service Mobile application. Candidates must be familiar with the Power Apps-based mobile application. The Xamarin-based mobile application will not be covered on this exam.

Skills Measured

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.

Configure field service applications (15-20%)

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 when a product has a default list price and a work order price list
- associate products and services with price lists
- define tax codes

Configure bookable resources

- 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
- describe use cases for resource pools, crews, and resource groups
- define resource groups and resource group templates
- set up resource pools and crews
- configure technician location tracking

Integrate other tools with Field Service

- use Power Automate flows to automate tasks and enhance 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 Remote Assist one-time call
- use Guides with work orders
- integrate with Dynamics 365 Supply Chain Management

Manage work orders (15-20%)

Describe the work order lifecycle

- configure work orders
- 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 work order summary metrics on the Field Service Insights Dashboard

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 required to close a work order
- close a work order
- use key field service metrics dashboard
- configure asset hierarchy and location on a work order
- configure and add work order resolutions

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
- create service-level agreements (SLAs) and entitlements for agreements

Create and use inspections

- create inspections
- associate inspections to work orders
- complete inspections through Field Service Mobile

- describe use cases for analyzing results of inspections

Schedule and dispatch work orders (25-30%)

Manage scheduling options

- schedule work orders using Schedule Board and Schedule Assistant
- determine when to use each scheduling option
- configure fulfillment preferences
- configure Quick book
- describe use cases for predictive work duration
- describe use cases for predictive travel time
- describe scenarios to modify and use the enhance work hours calendar for requirements
- describe use cases for implementing the technician locator functionality
- describe use cases for implementing travel outside of working hours
- describe use cases for appointment scheduling on Microsoft Outlook

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
- describe use cases for travel outside of working hours

Implement the Schedule Assistant

- apply constraints to resource queries
- filter data
- specify a search radius
- troubleshoot the Schedule Assistant

Optimize resource scheduling

- describe the resource optimization process
- define objectives and constraints
- create optimization profiles
- describe uses for embedded optimizer within the schedule board

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 an entity
- restrict booking status values for an entity by using an option set
- configure geocoding for a custom entity
- manage work hours calendar for requirements
- enable Outlook appointment scheduling

Manage field service mobility (10-15%)

NOTE: The current exam only covers the new Power Apps-based mobile application.

Install the mobile application

- identify pre-requisites and supported platforms
- install and sign into the Field Service Mobile application
- work offline
- use Dynamics 365 Field Service Mobile app and Connected Field Service
- use Dynamics 365 Field Service Mobile app and Dynamics 365 Remote Assist

Configure the mobile application

- configure actions that field agents can perform
- configure steps for Field Service Mobile application
- configure Field Service Mobile application functions for technicians
- configure the Booking and Work Order forms
- configure offline data and sync filters
- customize global search and enable scan to search
- customizing Mobile Offline capabilities
- set up and configure technician push notifications
- use and capture technician time tracking on Dynamics 365 Field Service Mobile app
- set up knowledge articles to work on mobile
- configure knowledge articles for offline

Manage inventory and purchasing (5-10%)

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
- configure asset properties

Manage inventory and warehouses

- set up inventory and warehouses
- view product inventory
- adjust inventory levels
- transfer inventory between warehouses
- determine when to integrate inventory with Enterprise Resource Planning application
- 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 Connected Field Service (10-15%)

Describe use cases for Internet of Things (IoT)

- identify use cases for IoT
- describe IoT components
- identify user cases for Connected Field Service on Field Service Mobile application

Implement Connected Field Service with IoT Hub

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

The exam guide below shows the changes that will be implemented on November 12, 2021. Note that the audience profile has been updated.

Audience Profile

Candidates for this exam are Microsoft Dynamics 365 Field Service Functional Consultants. They are responsible for implementing solutions that manage resources which complete the field service lifecycle.

These professionals implement field service processes designed in collaboration with internal and external teams. This collaboration includes configuring the default administration areas of the Field Service application, deploying the Connected Field Service (IoT) solution and the mobile app, and implementing any additional customizations needed. They are responsible for the configuration and deployment of the Field Service app in conjunction with the core customer service application.

Candidates must know how to configure resources, characteristics, incident types, inventory integration, service agreements, resource scheduling, work orders, inspections, service tasks, field service user roles, field service settings, the Connected Field Service (IoT) solution, and the Field Service (Dynamics 365) mobile app. They must also know how to customize components of the Field Service app.

Skills Measured

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.

Configure field service applications (15–20–25%)

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 ~~when a product has a default list price and a work order price list~~ 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-Manage bookable resources

- ~~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
- ~~describe use cases for resource pools, crews, and resource groups~~
- ~~define resource groups and resource group templates~~
- ~~set up resource pools and crews~~
- ~~configure technician location tracking~~

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

- ~~use Power Automate flows to automate tasks and enhance 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 (~~15-2025-30%~~)

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 ~~on the Field Service Insights Dashboard~~

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
- ~~• Identify processes required to close a work order~~
- close a work order
- ~~• use key field service metrics dashboard~~
- configure ~~asset hierarchy and the functional~~ location [for an asset](#) on a work order
- ~~• configure and add work order resolutions~~

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
- ~~• create service level agreements (SLAs) and entitlements for agreements~~

~~Create and use~~ **Manage** inspections

- create inspections [and ad hoc inspections](#)
- associate inspections ~~with~~ work orders [and assets](#)
- ~~Complete-Perform~~ inspections [through by using the](#) Field Service [\(Dynamics 365\) Mobile app](#)
- describe use cases for analyzing results of inspections

Schedule and dispatch work orders (20-25-~~30~~%)

Manage scheduling options

- schedule work orders by using the Sschedule_Bboard and Sschedule Aassistant
- determine when to use each scheduling option
- configure fulfillment preferences
- ~~configure quick scheduling ("Qquick book~~
- ~~Describe use cases for predictive work duration~~
- ~~Describe use cases for predictive travel time~~
- ~~Describe scenarios to modify and use the enhance work hours calendar for requirements~~
- ~~Describe use cases for implementing the technician locator functionality~~
- ~~Describe use cases for implementing travel outside of working hours~~
- ~~Describe use cases for appointment scheduling on Microsoft Outlook")~~

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
- ~~describe use cases for travel outside of working hours~~

Implement the sSchedule Aassistant

- apply constraints to resource queries
- filter data
- specify a search radius
- troubleshoot the Sschedule Aassistant

~~Optimize resource scheduling~~

- ~~describe the resource optimization process~~
- ~~define objectives and constraints~~
- ~~create optimization profiles~~
- ~~describe uses for embedded optimizer within the schedule board~~

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 an entity table

- restrict booking status values for an entity table by using and option set a choice
- configure geocoding for a custom entity table
- manage work hours calendar for requirements
- Enable Outlook appointment scheduling Configure booking timestamps and booking journals

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

NOTE: ~~The current exam only covers the new Power Apps-based mobile application.~~

Install Describe the capabilities of the mobile application

- ~~Identify pre-requisites and supported platforms~~
- ~~Install and sign into the Field Service Mobile application~~
- ~~Work offline~~
- ~~Use Dynamics 365 Field Service Mobile app and Connected Field Service~~
- Use Dynamics 365 Field Service Mobile app and Dynamics 365 Remote Assis Deploy the mobile app
- complete work orders
- service customer assets

Configure Install and set up the mobile application

- ~~Configure actions that field agents can perform~~
- ~~Configure steps for Field Service Mobile application~~
- ~~Configure Field Service Mobile application functions for technicians~~
- ~~Configure the Booking and Work Order forms~~
- ~~Configure offline data and sync filters~~
- ~~Customize global search and enable scan to search~~
- ~~Customizing Mobile Offline capabilities~~
- ~~Set up and configure technician push notifications~~
- ~~Use and capture technician time tracking on Dynamics 365 Field Service Mobile app~~
- ~~Set up knowledge articles to work on mobile~~
- Configure knowledge articles for offline 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 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~~
- ~~• configure asset properties~~

Manage inventory and warehouses

- set up inventory and warehouses
- view product inventory
- adjust inventory levels
- transfer inventory between warehouses
- ~~• determine when to integrate inventory with Enterprise Resource Planning application~~
- 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 Field Service devices (10-15%)

Describe use cases for Internet of Things (IoT)

- ~~• identify use cases for IoT~~
- describe IoT components
- identify use cases for Connected Field Service on Field Service (Dynamics 365) Mmobile 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
- ~~configure asset properties~~