

Study Guide for Exam MB-240: Microsoft Dynamics 365 Field 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 March 23, 2023	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 March 23, 2023	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

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. While Microsoft makes every effort to update localized versions as noted, there may be times when the localized versions of an exam are not updated on this schedule. 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 March 23, 2023

Audience profile

Candidates for this exam are Microsoft Dynamics 365 Field Service functional consultants. They are responsible for implementing solutions that manage and optimize 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 Dynamics 365 Field Service mobile app. They must also know how to customize components of the Field Service app.

- 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%)
- Manage Connected Field Service and customer assets (5–10%)
- Implement Microsoft Power Platform (5–10%)
- Manage customer experiences (5–10%)

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 work order costs using not-to-exceed

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
- Run reports on 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

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

Manage 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	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 User guide for Dynamics 365 Field Service (contains video)
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.

Skill area prior to March 23, 2023	Skill area as of March 23, 2023	Changes
Audience profile		No change
Configure field service applications	Configure field service applications	No change
Define and configure core field service components	Define and configure core field service components	No change
Configure product and service pricing	Configure product and service pricing	No change
Configure bookable resources	Configure bookable resources	No change
Schedule multiple resources	Schedule multiple resources	No change
Integrate other tools with Dynamics 365 Field Service	Integrate other tools with Dynamics 365 Field Service	No change

Skill area prior to March 23, 2023	Skill area as of March 23, 2023	Changes
Create and configure field service visualizations	Create and configure field service visualizations	No change
Manage work orders	Manage work orders	No change
Describe the work order lifecycle	Describe the work order lifecycle	No change
Create and manage work orders	Create and manage work orders	Minor
Manage incidents	Manage incidents	No change
Create and manage agreements	Create and manage agreements	No change
Manage inspections	Manage inspections	Minor
Schedule and dispatch work orders	Schedule and dispatch work orders	No change
Manage scheduling options	Manage scheduling options	No change
Implement schedule boards	Implement schedule boards	No change
Manage schedule boards	Manage schedule boards	No change
Implement the schedule assistant	Implement the schedule assistant	No change
Configure Universal Resource Scheduling	Configure Universal Resource Scheduling	No change
Manage the Dynamics 365 Field Service mobile app	Manage the Dynamics 365 Field Service mobile app	No change
Describe the capabilities of the mobile app	Describe the capabilities of the mobile app	No change
Set up the mobile app	Set up the mobile app	No change
Manage inventory and purchasing	Manage inventory and purchasing	No change
Manage inventory and warehouses	Manage inventory and warehouses	No change
Manage purchasing and product returns	Manage purchasing and product returns	No change
Manage Connected Field Service and customer assets	Manage Connected Field Service and customer assets	No change
Implement Connected Field Service	Implement Connected Field Service	No change
Define and configure customer assets	Define and configure customer assets	No change

Skill area prior to March 23, 2023	Skill area as of March 23, 2023	Changes
Implement Microsoft Power Platform	Implement Microsoft Power Platform	No change
Configure model-driven apps	Configure model-driven apps	No change
Create custom apps and automation	Create custom apps and automation	No change
Manage customer experiences	Manage customer experiences	No change
Configure Microsoft Power Pages	Configure Microsoft Power Pages	No change
Capture customer feedback by using Customer Voice	Capture customer feedback by using Customer Voice	No change

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