

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

The English language version of this exam was updated on March 11, 2022.

Following the current exam guide, we have included a version of the exam guide with Track Changes set to "On," showing the changes that were made to the exam on that date.

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

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 Dynamics 365 Field Service 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. 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.

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
- enable Microsoft Teams Integration
- enable Microsoft Outlook Calendar integration
- 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
- enable technician time tracking
- create Customer Experience homepages

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 (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
- 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
- collaborate on work orders using Microsoft Teams
- prepare work order summary reports

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 entitlements

Manage inspections

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

Schedule and dispatch work orders (15–20%)

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”)
- configure the portal for self-scheduling
- enable self-scheduling for customers

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 Dynamics 365 Field Service mobile app (5–10%)

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)
- create return to vendor (RTV) transactions
- 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 Dynamics 365 Field Service mobile app

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

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[Field Service \(Dynamics 365\) mobile app](#) ~~AppDynamics 365 Field Service mobile app~~. They must also know how to customize components of the Field Service app.

Skills Measured

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- enable schedule board geocoding
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Configure product and service pricing

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Manage work orders ([20–25–30%](#))

Describe the work order lifecycle

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- associate a work order and a price list
- close a work order
- configure the functional location for an asset on a work order
- [collaborate on work orders using Microsoft Teams](#)
- [prepare work order summary reports](#)

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Manage inspections

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- associate inspections with work orders and assets
- perform inspections by using the [Field Service \(Dynamics 365\) mobile app](#)[Dynamics 365 Field Service mobile app](#)
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Schedule and dispatch work orders ([15–20–25%](#))

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