

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

This exam was updated on May 19, 2020. 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.

Audience Profile

Candidates for this exam are Dynamics 365 Customer Engagement functional consultants with Field Service expertise. Candidates are responsible for implementing solutions that manage resources that 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 needed customizations. 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 app.

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).

Configure field service applications (20-25%)

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
- set up time entry and time capture precision

Integrate other tools with Field Service

- determine uses for Remote Assist
- benefits of using Resource Scheduling Optimization
- using the RSO Analytics Dashboard
- benefits of Connected Field Service
- using Push Notifications on the mobile app
- configure the system to use 3D Models
- configure Intune app functionality

Manage work orders (15-20%)

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 (20-25%)

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 (10-15%)

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 (10-15%)

Manage inventory

- set up inventory and warehouses

- view product inventory
- adjust inventory levels
- transfer inventory
- create an Inventory Adjustment
- 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)
- add Work Order Products to an RMA
- finalize returns

Manage assets and agreements (10-15%)

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 Devices
- manage IoT devices
- associate Customer Assets with 3D Models

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