Exam MB-230: Microsoft Dynamics 365 Customer Service Functional Consultant – Skills Measured

The English language version of this exam will be updated on April 12, 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 will be made to the exam on that date.

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

Audience Profile

A Microsoft Dynamics 365 Customer Service functional consultant is responsible for implementing omnichannel solutions that focus upon service, quality, reliability, efficiency, and customer satisfaction.

A Dynamics 365 Customer Service functional consultant implements and designs service management visualizations and reports provided by and in collaboration with the solution architect. The functional consultant collaborates with the customer engagement administrator to implement and upgrade Power Platform components, including knowledge management, customer feedback, and connected services.

A Dynamics 365 Customer Service functional consultant must have strong applied knowledge of customer service: understanding industry terminology, priorities, standards, methodologies, customer service operations, and best practices. The functional consultant with customer service expertise must have strong applied knowledge of meeting user needs through Dynamics 365 Customer Service, including in-depth understanding of cases, knowledge management, queues, entitlements, resource scheduling, Service Level Agreements (SLAs), visualizations, connected services, Customer Service Insights, Power Virtual Agents, and Omnichannel for Customer Service. The functional consultant's knowledge should include a comprehensive understanding of the customer service application's role in relationship to the Dynamics 365 suite of applications along with a basic understanding of the solution architecture and quality assurance.

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.

Manage cases and knowledge management (20-25%)

Create and manage cases

- configure cases
- manage case lists
- create and search for case records
- convert activities to cases
- perform case resolution
- implement parent/child cases
- merge cases
- set autonumbering for customer service entities

Configure and automate cases

- implement advanced similarity rules
- implement record creation and update rules
- route cases using basic routing rulesets
- customize the case resolution form
- configure status reason transitions
- configure business process flows

Implement knowledge management

- configure the knowledge search control
- configure knowledge article search filters and search providers
- link an article with a case
- use knowledge management to resolve cases
- manage the knowledge management article lifecycle
- manage knowledge management articles
- configure tables for knowledge management
- manage knowledge article templates
- implement knowledge search
- configure categories and subjects
- convert cases to knowledge articles

Capture customer feedback by using Customer Voice

- create a survey
- describe survey elements including question types
- apply formatting and branding to a survey
- trigger distribution of a survey
- describe and analyze survey results, including customer satisfaction (CSAT) and Net Promoter Score (NPS)

Manage queues, entitlements, and service-level agreements (15-20%)

Create and manage queues

- describe use cases for each queue type
- configure queues
- add cases and activities to queues
- configure tables for queues
- perform queue operations, including pick, release, remove, and delete operations

Create and manage entitlements

- configure and apply entitlements
- define and create entitlements, including products, channels, contacts, allocations, and service-level agreements
- manage entitlement templates
- activate and deactivate entitlements
- renew or cancel an entitlement

Create and manage SLAs

- define and create SLAs
- configure SLA settings
- configure a holiday schedule
- configure a customer service schedule
- implement actions by using Power Automate
- manage cases that are associated with SLAs
- manually apply an SLA
- create and manage SLA items, including key performance indicators (KPIs), warning actions, success actions, and applicability

Implement unified routing

- describe unified routing stages
- configure work classification and assignments
- configure assignment rules
- configure workstreams
- configure queues
- configure user attributes, including capacity profiles
- configure skills-based routing
- configure unified record routing

Implement scheduling (5–10%)

Manage resources

- configure business closures
- configure organizational units
- configure resources
- configure work hours
- configure facilities and equipment

Manage services

- define services
- schedule a service activity
- configure fulfillment preferences

Implement Omnichannel for Customer Service (10–15%)

Deploy Omnichannel for Customer Service

- provision Omnichannel for Customer Service
- configure application settings, including data masking, operating hours, authentication settings, self-service settings, and sentiment analysis
- configure work streams
- configure routing values
- implement context variables

Manage channels

- configure channels
- enable the chat widget on websites
- configure pre-chat surveys
- configure proactive chat
- configure Short Message Service (SMS)

Configure the supervisor experience

- configure Omnichannel Insights dashboard
- configure intraday insights
- customize KPIs for intraday insights
- enable sentiment analysis

Manage analytics and insights (5–10%)

Configure Customer Service Insights for Dynamics 365 Customer Service

- configure Customer Service historical analytics
- configure topic clustering
- configure knowledge search analytics

Create and configure visualizations

- configure tier 1 and tier 2 interactive dashboards
- design and create customer service charts
- design reports by using the Report Wizard
- design and create Power BI reports and dashboards

Implement Customer Service workspaces (5–10%)

Describe Customer Service workspaces

- configure session management
- configure administration features
- describe navigation and sessions

Implement the app profile manager

- implement app profiles
- configure session, application, and notification templates
- configure macros and agent scripts
- configure smart assist

Implement Microsoft Power Platform (5–10%)

Create custom apps

- create task-specific canvas or model apps
- embed apps in Dynamics 365 Customer Service
- create a custom portal to support customer service processes

Integrate Power Virtual Agents chatbots with Dynamics 365 Customer Service

- describe Power Virtual Agents components and concepts
- integrate Power Virtual Agents with Dynamics 365 Customer Service
- escalate conversations to a live agent
- manage chatbots

Implement Connected Customer Service (5–10%)

Describe Connected Customer Service
- describe IoT components
- identify use cases for Connected Customer Service

Implement Connected Customer Service with IoT Hub
- manage IoT devices
- manage security roles for Connected Customer Service

The following exam guide shows the changes that will be implemented on April 12, 2022 to the English language version of the exam. Note that the audience profile has been updated.

Audience Profile

Candidates for this exam are functional consultants with customer service expertise. They are responsible for implementing omnichannel solutions that focus upon service, quality, reliability, efficiency, and customer satisfaction.

Candidates design and implement service management processes in collaboration with solution architects. Candidates collaborate with customer engagement administrators to implement and upgrade customer service components including knowledge management, customer feedback, and connected services.

Candidates must have strong applied knowledge of customer service including in-depth understanding of cases, knowledge management, unified routing and queues, entitlements, resource scheduling, service- level agreements (SLAs), visualizations, connected services, Customer Service Insights, Power Virtual Agents, Customer Service workspaces, Customer Voice, and Omnichannel for Customer Service. The functional consultant's knowledge should include a comprehensive understanding of the customer service application's role in relationship to the Dynamics 365 suite of apps along with a basic understanding of the solution architecture and quality assurance.

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- configure work hours
- configure facilities and equipment

Manage services

- define services
- schedule a service activity
- configure fulfillment preferences

Implement Omnichannel for Customer Service (10–15%)

Deploy Omnichannel for Customer Service

- provision Omnichannel for Customer Service
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- configure work streams
- configure routing values
- implement context variables

Manage channels

- configure channels
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- configure proactive chat
- configure Short Message Service (SMS)
- [Configure the voice channel](#)

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