

# **Microsoft Dynamics Qualification exam documentation**

## 1. Business scenario 1

Kam krijuar entitetin Skills dhe e kemi lidhur me entitetin User ne nje marrdhenie many-to-many. Ne formen e entitetit User shtojme nje subgride e cila na tregon gjithë skills qe ka ky user dhe nivelin e njohurive per secilen skill. Gjithashtu mund te shtojme skills te tjera per kete user direkt nga subgrida.

The screenshot shows the 'User' form for a user named '# AIBuilder\_StructuredML\_Prod\_CDS'. The form has tabs for 'Summary', 'Details', 'Administration', and 'Related'. The 'Summary' tab is active, showing fields for Title, Primary Email, Mobile Phone, and Main Phone. The 'Details' tab is also visible, showing a subgrid for 'User skills'. The subgrid has columns for Skill and Proficiency. A context menu is open over the subgrid, showing options: 'Add Existing Skill', 'Refresh', 'Flow', 'Run Report', 'Excel Templates', 'Export Skills', and 'See associated records'.

Field	Value
Title	---
Primary Email	* AIBuilder_StructuredML_Prod_...
Mobile Phone	---
Main Phone	---

Skill	Proficiency
C#	Intermedi...
Java	Intermedi...

Ne formen e entitetit Skill shtojme nje subgride e cila na tregon gjithë userat te cilet e zoterojne kete skill specifik. Gjithashtu mund te shtojme dhe usera te tjere ekzistues.

The screenshot shows the 'Skill' form for a skill named 'C#'. The form has tabs for 'General' and 'Related'. The 'General' tab is active, showing fields for Skill and Proficiency. The 'Users' subgrid is visible, showing a list of users who have this skill. The subgrid has columns for Full Name, Site, Business Unit, Title, Position, and Main Phone. A context menu is open over the subgrid, showing options: 'Add Existing User', 'Refresh', 'Flow', and 'See associated records'.

Field	Value
Skill	* C#
Proficiency	Intermediate

Full Name	Site	Business Unit	Title	Position	Main Phone
# AIBuilder_StructuredML_Prod_CDS		org0e7510f1			
# BAP		org0e7510f1			
# CatalogServiceEur		org0e7510f1			
Euglen Bregu		org0e7510f1			0676897936

Ne formen e entitetit Opportunity kam shtuar nje tab te ri Select User dhe 2 fusha lookup, Skill dhe User. Qellimi eshte qe nese per nje opportunity te caktuar na duhet nje person qe zoteron skill C#, e zgjedhim kete skill dhe me ane te nje web resource, ne fushen User filtrohen dhe shfaqen vetem ata usera qe e zoterojne kete skill.

5 Café BG-1 Pro Grinders for Northwind Traders - Unsaved

Opportunity · Sales Trial

4/9/2024 Est. close date | Lekë24,995.00 Est. revenue | In Progress Status | Euglen Bregu Owner

Sales Process Active for 6 days

Qualify Develop Propose Contracting (4 D) Close

Summary Relationship analytics Product line items **User selection** Quotes Related

Details

Skill	---
User	---

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Summary Relationship analytics Product line items **User selection** Quotes Related

Details

Skill	
User	Look for User

Users

- # AIBuilder\_StructuredML\_Prod\_CDS
- # BAP
- # CatalogServiceEur
- Euglen Bregu

Advanced lookup

Rregjistrojme një event “On Change” në fushën Skill duke thirrur funksionin në JavaScript “filterUsers”.

```
0 references
function filterUsers(executionContext) {
    var formContext = executionContext.getFormContext();
    var skill = formContext.getAttribute("exam_skill");

    if (skill != null && skill.getValue() != null) {
        var skillId = skill.getValue()[0].id;
        fetchUsers(skillId, formContext);
    }
}

1 reference
function fetchUsers(skillId, formContext) {
    var viewId = "e88ca999-0b16-4ae9-b6a9-9edc840d42d8";
    var entity = "systemuser";
    var viewDisplayName = "User Lookup View";

    var fetchUsers = "<fetch version='1.0' output-format='xml-platform' mapping='logical' distinct='false'>" +
        "<entity name='systemuser'>" +
        "<link-entity name='exam_systemuser_exam_skill' from='systemuserid' to='systemuserid' link-type='inner' alias='aa' intersect='true'>" +
        "<filter type='and'>" +
        "<condition attribute='exam_skillid' operator='eq' uitype='exam_skill' value='" + skillId + "' />" +
        "</filter>" +
        "</link-entity>" +
        "</entity>" +
        "</fetch>";

    var layout = "<grid name='resultset' jump='fullname' select='1' icon='1' preview='1'>" +
        "<row name='result' id='contactid'>" +
        "<cell name='fullname' width='300' />" +
        "</row>" +
        "</grid>";

    formContext.getControl("exam_user").addCustomView(viewId, entity, viewDisplayName, fetchUsers, layout, true);
}
```

## 2. Business scenario 2

Nese perdoruesi provon te krijojte nje Agreement te ri Onboarding per nje account specific, me ane te nje Plugini ne stage Pre Operation (CreateAgreementPlugin) behet nje kontroll nese ekziston ose jo nje agreement onboarding per kete account. Nese po, atehere perdoruesit i shfaqet nje njoftim si ne figure. Nese jo, atehere agreement-i krijohet normalisht. E njejta logjike perdoret edhe per tipin e agreement-it NDA.

New Agreement - Unsaved

General

Agreement Name

TEST


Agreement Start Date

4/9/2024

Agreement End Date

4/10/2024

Account

 A. Datum Corporation

Agreement Type

Onboarding

! Business Process Error

×

There already is an agreement of type Onboarding associated with this Account

[Show Details](#)

OK

Ne rastin kur agreement-i Onboarding krijohet (pra nuk ka nje agreement onboarding aktiv per nje account specifik), atehere per cdo opportunity te lidhur me accountin e perzgjedhur ndryshohet automatikisht vlera e fushes T&C's ne 'Yes' ne stage-in Contracting qe kemi shtuar ne business process flow. Kjo ndodh vetem ne rastin kur fushat Agreement Start Date dhe Agreement End Date jane te populluara me vlera

New Agreement - Saved

Agreement


General Related ▾

Agreement Name

TEST


Agreement Start Date

4/9/2024


 8:00 AM

Agreement End Date

4/10/2024

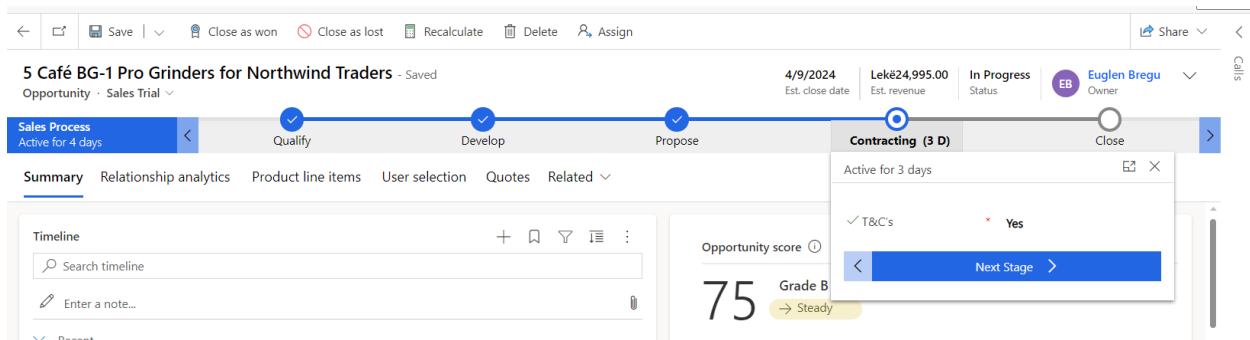
 8:00 AM

Account

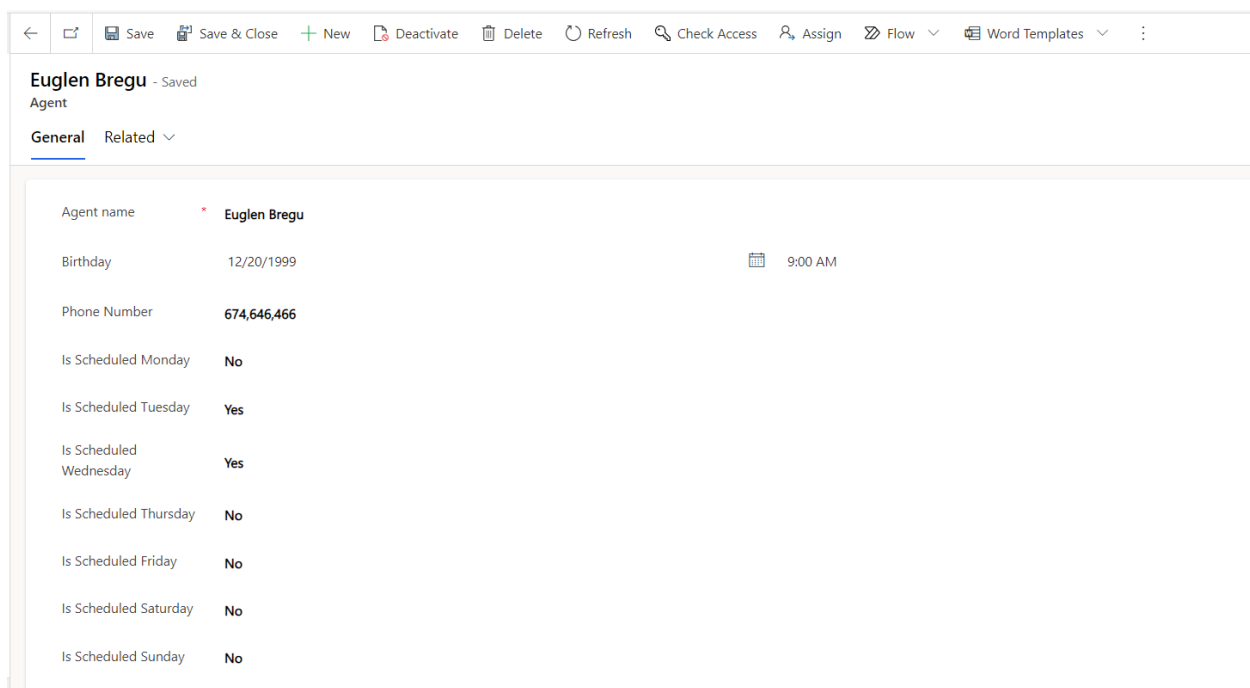
 Northwind Traders

Agreement Type

Onboarding



### 3. Business scenario 3



Ne entitetin Agent krijojme rekorde dhe mund te shohim ne cilat dite nje agent eshte i skeduar ose jo. Ne rastin kur duam te krijojme nje Work Order te ri duhet te zgjedhim dhe agentin qe do ti asenjohe ky work order.

Ndertojme nje Plugin ne stage Pre Operation(CreateWorkOrderPlugin) me ane te te cilit behet nje kontroll nese dita qe duam te zdhedhim per skedulim perputhet me ditet e lira te agentit. Nese jo, na shfaqet nje njoftim si ne foto.


New Work Order - Unsav

General

Work Order Number

1,123

Assigned Agent

 Euglen Bregu

Duration

1

Scheduled On

Tuesday

Start time

4/9/2024

End time

4/9/2024

Description

work

!

Business Process Error

×

Agent Euglen Bregu is not available on that day

Show Details

OK

## 4. Business scenario 4

4.1 Kur krijohet nje Lead i ri, fusha Topic e ketij lead-i popullohet me vleren qe perdoruesi vendos ne krijim + daten e krijimit. (CreateLeadPlugin)

```
0 references
public class CreateLeadPlugin : IPlugin
{
    0 references
    public void Execute(IServiceProvider serviceProvider)
    {
        ITracingService tracingService = (ITracingService)serviceProvider.GetService(typeof(ITracingService));
        IPluginExecutionContext context = (IPluginExecutionContext)serviceProvider.GetService(typeof(IPluginExecutionContext));
        IOrganizationServiceFactory serviceFactory = (IOrganizationServiceFactory)serviceProvider.GetService(typeof(IOrganizationServiceFactory));
        IOrganizationService service = serviceFactory.CreateOrganizationService(context.UserId);
        Entity Target = (Entity)context.InputParameters["Target"];

        try
        {
            string topic = Target.GetAttributeValue<string>("subject");
            Target["subject"] = topic + " " + DateTime.UtcNow.ToString("dd/MM/yyyy");
        }

        catch (FaultException<OrganizationServiceFault> ex)
        {
            throw new InvalidPluginExecutionException("An error occurred in FollowUpPlugin.", ex);
        }

        catch (Exception ex)
        {
            tracingService.Trace("FollowUpPlugin: {0}", ex.ToString());
            throw;
        }
    }
}
```

**Euglen Bregu** - Saved  
Lead · Sales Insights

Other Lead Source | Warm Rating | New Status | **Euglen Bregu** Owner

Lead to Opportunity Sal... Active for less than one mi... | Qualify (< 1 Min) | Develop | Propose | Contracting | Close

Summary | Relationship Analytics | Details | Related

**CONTACT**

Topic \* TEST 09/04/2024

First Name + Euglen

Last Name \* Bregu

Job Title Developer

Business Phone ---

Mobile Phone ---

Email \* euglenbregu1@gmail.com

**Up next**

**Manage your activities**  
See upcoming activities by connecting the lead to a sequence or by creating an activity. [Learn more](#)

Connect sequence | Create activity

**Timeline**

Search timeline

Enter a note...

**Who Knows Whom**

Loading...

**Lead score**

Prioritize smarter with lead scores

4.2 Per validimin e numrit te telefonit perdorim nje web resource dhe eventet “On Save” te formes dhe “On Change” te fushes Business Phone. Ne rastin kur prefiksi i numrit te vendosur nuk eshte +355 marrim nje njoftim.

← | Save | Delete | Qualify | Connect sequence | Disqualify | Assign

**Euglen Bregu** - Unsaved  
Lead · Sales Insights

Lead to Opportunity Sal... Active for 31 hours | Qualify (31 Hrs) | Develop | Propose | Co

Summary | Relationship Analytics | Details | Related

**CONTACT**

Topic \* TEST 09/04/2024

First Name + Euglen

Last Name \* Bregu

Job Title Developer

Business Phone +0039774854687

Mobile Phone ---

Email \* euglenbregu1@gmail.com

**Warning!**

Please check the phone number format

OK

**Timeline**

Search timeline

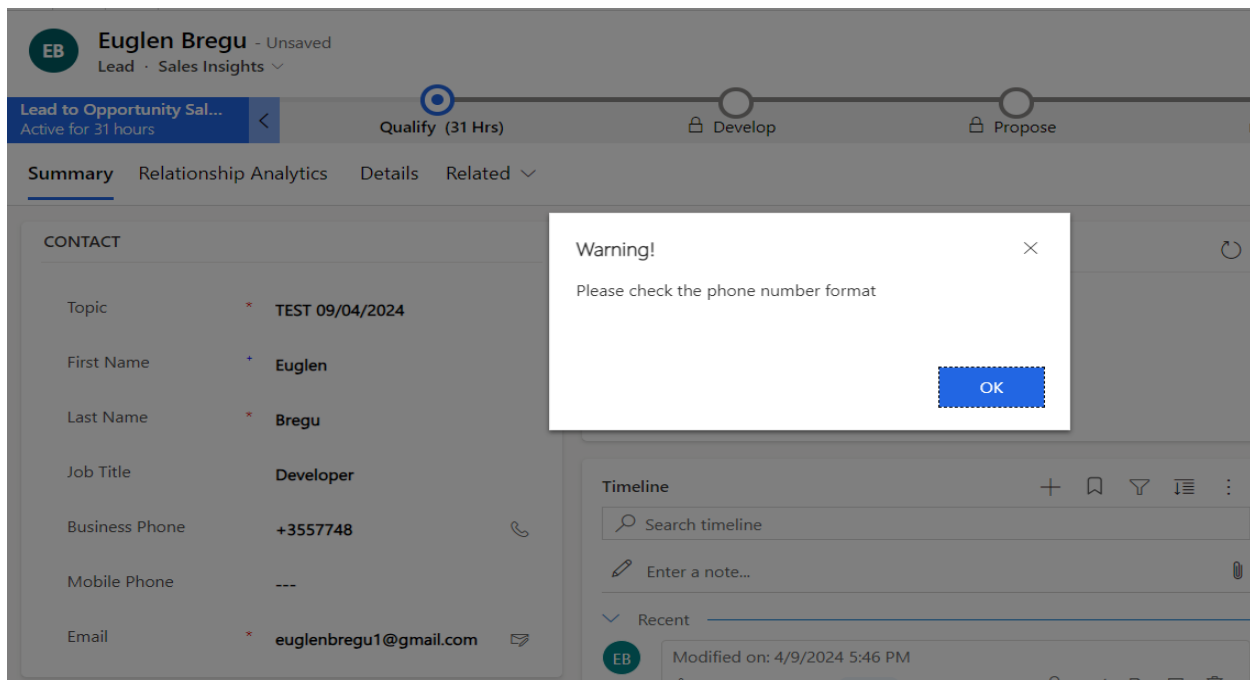
Enter a note...

Recent

Modified on: 4/9/2024 5:46 PM

Ne rastin kur prefiksi eshte i sakte por gjatesia e numrit mbas prefiksit nuk permban ekzaktesisht 9 shifra, marrim serish te njejtin njoftim.





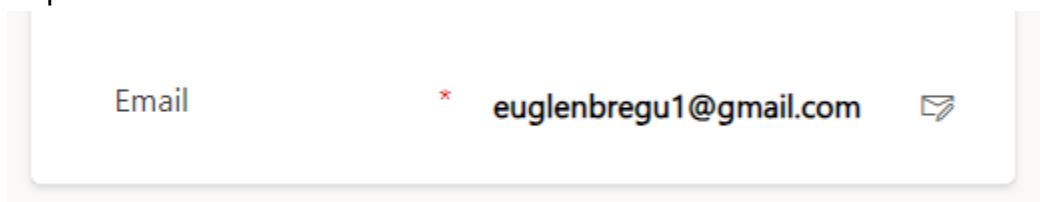
Web-resource i ndertuar ne JavaScript.

```

0 references
1 function checkFormat(executionContext) {
2
3     var formContext = executionContext.getFormContext();
4     var phoneNumber = formContext.getAttribute("telephone1").getValue();
5     const regex = /^\\+355\\d{9}$\\;/;
6
7     if (phoneNumber !== null) {
8         if (regex.test(phoneNumber)) {
9
10        } else {
11            const notification = {
12                text: "Please check the business phone number format",
13                title: 'Warning!',
14            };
15            Xrm.Navigation.openAlertDialog(notification);
16        }
17    }
18 }

```

4.3 Per te ndaluar krijimin e nje Lead-i te ri nese nuk vendoset nje adrese emaili, bejme required fushen Email.



4.4 Nese perdoruesi ne krijim ten je Lead-i te ri vendos nje numer telefoni te njejte me ate ten je Lead-i tjetër atehere me ane te nje Duplicate Detection Rule e parandalojme kete.

Duplicate Detection Rule: Business Phone number duplicate detection rule - Microsoft Dynamics 365 - Google Chrome

org0e7510f1.crm4.dynamics.com/tools/duplicatedetection/duplicatedetectionrules/edit.aspx?id=%7b3C199FC4-DAF4-EE11-A1FD-000D3ABA...

File Close Unpublish Actions Help

Duplicate Detection Rule: Business Phone number duplicate detection rule Working on solution: Default Solution

Information

Duplicate Detection Rule :... General Administration Notes

Related Common System Jobs Audit History

Name \* Business Phone number duplicate detection rule Status Reason \* Published

Description

Duplicate Detection Rule Criteria

Base Record Type \* Lead Matching Record Type \* Lead

Case-sensitive ☐ Exclude inactive matching records ☐

Field	Criteria	No. of Characters	Ignore Blank Values
Business Phone	Exact Match		<input type="checkbox"/>
Select			

Status: Active

Duplicate Records Detected

RT Reed Thompson - U Lead - Sales Insights

Lead to Opportunity Sal... Active for less than one mi...

Summary Relationship Analysis

CONTACT

Topic \* TEST

First Name + Reed

Last Name \* Thom

Job Title Deve

Business Phone +355

Mobile Phone ---

Email \* reedthompson@gmail.com

Duplicate records found

Merge to an existing record by choosing a record from matched list and clicking merge. To proceed without merging, click Ignore and save. [Learn more](#)

Current record

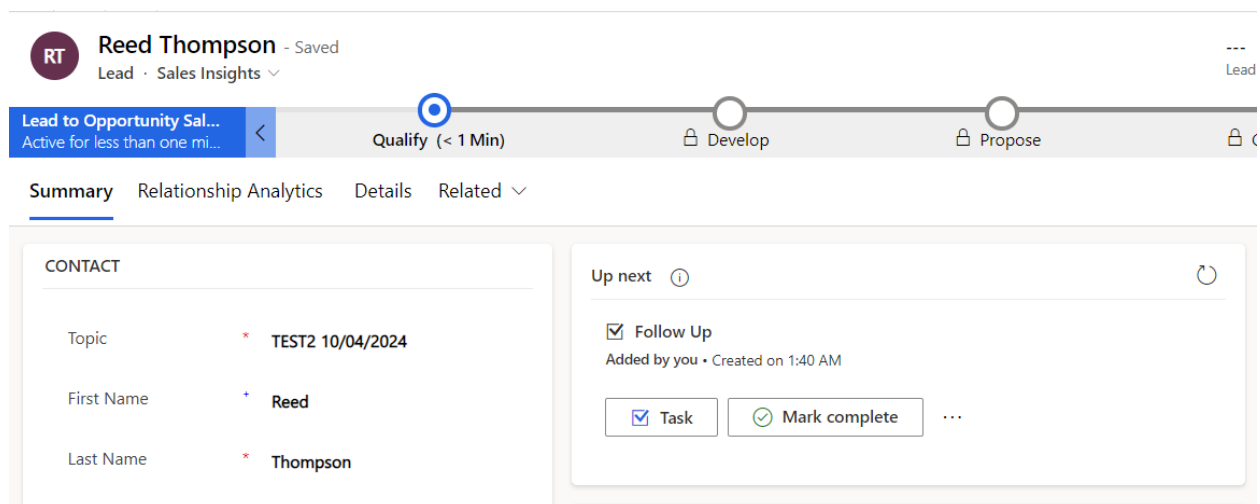
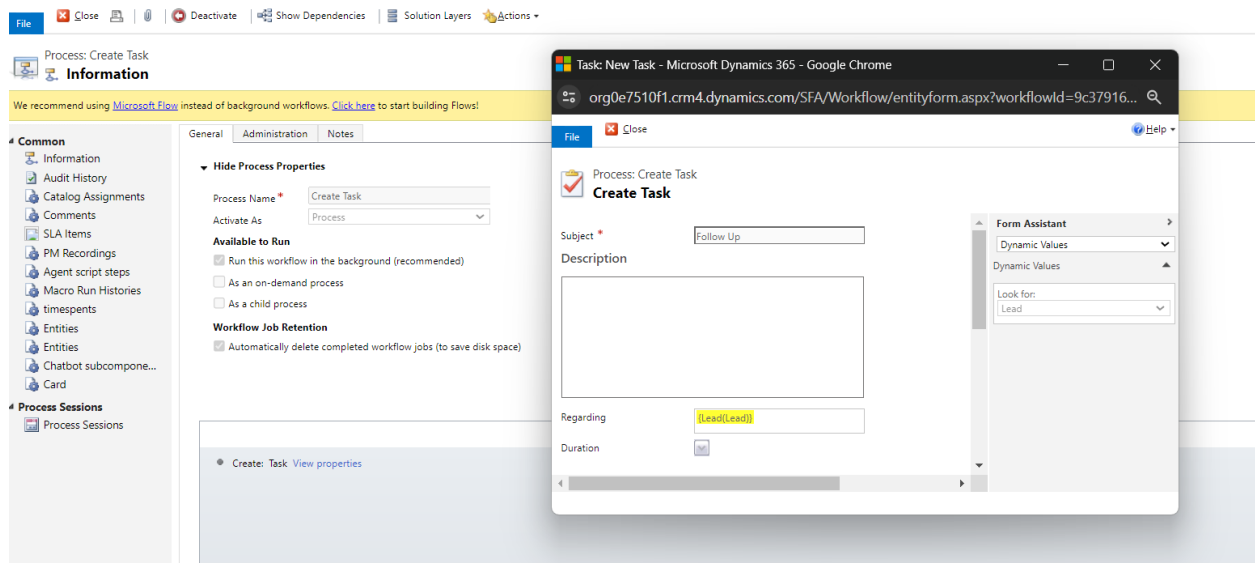
✓	Name	Company Name	Email	Business Phone
	Reed Thompson	test	reedthompson@gm...	+355774877777

Duplicates found: Lead (1)

✓	Name	Email	Modified On	Business Phone
	Euglen Bregu	euglenbregu1@gm...	4/11/2024 1:15 AM	+355774877777

Ignore and save Merge Cancel

4.5 Sa here qe krijohet nje Lead i ri, me ane te nje Workflow krijohet automatikisht nje Task I lidhur me lead-in e sapo krijuar me titullin “Follow Up”.



5 Theory question

Ne Dynamics 365 CRM per te zhvilluar me tej mundesite per detyra komplekse mund te perdorim Custom Actions. Mund te kryeje detyra dhe taske te cilat nuk I realizojme dot me plugin ose workflow. Nje custom action mund te ekzekutohet manualisht ose me ane ten je kodi ose workflow tjeter dhe mund te riperdoret ne disa entitete.

Nje custom action do e zgjidhja ta perdorja psh ne rastin e nje kompanie telefonike e cila do te ofroje ulje cmimi ne ofertat mujore per klientet e vjeter te kompanise. Mund te perdorim si parameter inputi fushen "Numer Telefoni" dhe si parameter outputi "Response". Me ane te nje butoni mund te therasim kete action i cili ne baze te numrit te telefonit kontrollon sa vite ka nje klient me kete kompani dhe ne response na vjen nje pergjigje me perqindjen e uljes qe mund te perfitoje cdo klient, dhe automatikisht I dergohet nje mesazh klientit per ta njoftuar per oferten.