

Certification Provider: Microsoft  
Exam: Microsoft Dynamics 365: Core Finance and Operations  
MB-300  
Number of questions in the database: 414  
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 Custom View Settings

### Topic 1 - Question Set 1

Question #1

Topic 1

Your company has recently deployed Dynamics 365 Finance.  
You are currently establishing the location of work items.  
Which two of the following work items are located in Accounts payable?  
NOTE: Each correct selection is worth one point.

- A. Purchase order. 
- B. Vendor invoice. 
- C. Transfer order.
- D. Customer Invoice.
- E. Sales Order.

**Correct Answer: AB**

*Community vote distribution*

AB (90%) 10%

Question #2

Topic 1

As part of the company's effort to regulate business processes, you plan to make use of the Business Process Modeler (BPM) tool in Lifecycle Services (LCS) to make business process alignment possible.  
You are classifying the key capabilities of BPM with regards to integration.  
Which of the following is TRUE with regards to the above scenario?

- A. You are able to pull master data.
- B. You are able to pull reference data.
- C. You are able to upload flowcharts from Task recorder.
- D. You are able to access external databases.

**Correct Answer: C**

*Community vote distribution*

C (100%)

Microsoft releases a new feature for public preview that does not require additional licensing.

You want to enable the new feature.

You enable the feature in Solution management.

Does this action enable the new feature?

A. Yes, it does

B. No, it does not

**Correct Answer: B**

Reference:

<https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/fin-ops/get-started/public-preview-releases>

## Service update overview

Service updates are continuous, touchless updates that provide new features and functionality. They eliminate the need to do expensive upgrades every few years. The service updates maintain backward compatibility, which means there is no need to 'merge your code'. We recommend leveraging tools such as the Regression suite automation tool (RSAT) for regression testing.

You are in control and manage how your organization receives these updates. For example, you can sign up for the First Release program so that your organization receives updates first. You can apply the updates to any of your environments manually (self-update) or remain on the default release schedule and receive the auto-updates when you schedule them using LCS.

Service updates contain both application and platform changes that are critical improvements to the service, including regulatory updates.

*Community vote distribution*

B (100%)

Microsoft releases a new feature for public preview that does not require additional licensing.

You want to enable the new feature.

You enable the feature in Lifecycle Services (LCS).

Does this action enable the new feature?

A. Yes, it does

B. No, it does not

**Correct Answer: A**

Reference:

<https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/fin-ops/get-started/public-preview-releases>

Preview Early Access Program (PEAP) is available to partners, customers, and ISV's who opt in through the [PEAP Survey](#). As a participant in the PEAP program you will have first access and visibility into the preview for the upcoming service update. The preview service update is used to validate customizations, learn about new features, and provide feedback to Microsoft. During this phase, the service update must be deployed on a Dev/Test environment. This release cannot be used in production. To join the PEAP program, sign up via the [PEAP Survey](#).

The First Release program is open to all customers. Customers who join the First Release program will be the first, select group of customers to take the service update all the way to production. Microsoft will manage the deployment of this service update to a UAT sandbox and then 7 days later will auto-deploy the update to production. Customers participating in this program have the additional benefit of having dedicated Microsoft engineers closely monitoring the environments for any issues after updates have been applied. To join First Release, sign up via the [First Release Survey](#).

*Community vote distribution*

B (100%)

Microsoft releases a new feature for public preview that does not require additional licensing.

You want to enable the new feature.

You enable the feature in Feature management.

Does this action enable the new feature?

A. Yes, it does Most Voted

B. No, it does not

**Correct Answer: B**

Reference:

<https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/fin-ops/get-started/public-preview-releases>

*Community vote distribution*

A (87%)

13%

You are employed as a Dynamics 365 Finance system administrator at your company.

You have been tasked with making sure that users are able to quickly reduce the number of records. To do this, the data must be filtered according to specified criteria.

Which of the following is the appropriate query filter syntax for today's date in a date field?

Which filter syntax should you use? To answer, select the appropriate options in the answer area.

- A. DD
- B. D
- C. T Most Voted
- D. T(0)

**Correct Answer:** C

Reference:

<https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/fin-ops/get-started/advanced-filtering-query-options>

## Advanced query syntax

Syntax	Character description	Description	Example
value	Equal to the value that is entered	Type the value to find.	Smith finds "Smith".
!value (exclamation point)	Not equal to the value that is entered	Type an exclamation point and then the value to exclude.	!Smith finds all values except "Smith".
from-value..to-value (double period)	Between the two values that are separated by double periods	Type the from-value, then two periods, and then the to-value.	1..10 finds all values from 1 through 10. However, in a string field, A..C finds all values that start with "A" and "B", and values that are exactly equal to "C".

*Community vote distribution*

C (100%)

Your company has a Dynamics 365 Finance environment that includes the use of Lifecycle Services (LCS).

You want to make sure that you are able to use Business Process Modeler (BPM) in the environment.

Which of the following is TRUE with regards to using BPM?

- A. As a minimum, you need Microsoft Office 2010 and a Microsoft Azure DevOps project.
- B. As a minimum, you need Microsoft Office 2019 and a Microsoft Azure DevOps project.
- C. As a minimum, you need Microsoft Office 2010 and Dynamics 365 Project Service Automation.
- D. As a minimum, you need Microsoft Office 2019 and Dynamics 365 Project Service Automation.

**Correct Answer: A**

Reference:

<https://docs.microsoft.com/en-us/dynamics365/unified-operations/dev-itpro/lifecycle-services/bpm-overview>

*Community vote distribution*

A (100%)

You need to consider the underlined segment to establish whether it is accurate.

The Global search reporting tool can be used to speedily find personal data for a specified individual.

Select 'No adjustment required' if the underlined segment is accurate. If the underlined segment is inaccurate, select the accurate option.

- A. No adjustment required.
- B. Person search report
- C. GDPR request
- D. Relevance search report

**Correct Answer: B**

Reference:

<https://docs.microsoft.com/en-gb/dynamics365/get-started/gdpr/>

## ☞ White papers, security reports, penetration tests, and risk assessment tools

To find detailed information about privacy and personal data for Dynamics 365 applications and services, visit [Data Protection Resources](#). This site provides white papers, FAQs, security reports, penetration tests, risk assessment tools, and other resources. In particular, the site provides guidance about how you should consider enhancing your data protection capabilities and how you might want to think about compliance as a process that has four stages: discover, manage, protect, and report.

[https://docs.microsoft.com/en-](https://docs.microsoft.com/en-us/dynamics365/unified-operations/dev-itpro/lifecycle-services/bpm-overview)

## Data subject requests

The General Data Protection Regulation (GDPR) is fundamentally about protecting and enabling the privacy rights of individuals. For information about the opportunities GDPR brings for organizations in the context of their business applications, whether there are any us/dynamics365/fin-ops-core/dev-itpro/gdpr/gdpr-guide

*Community vote distribution*

B (100%)

Your company make use of Dynamics 365 Finance.

You are responsible for assessing business processes and their related prerequisites, which includes bugs, tasks, backlog items, tests, and documents.

You have been tasked with tracking the progress of your implementation project and correlate different work items with prerequisites and business processes. You also have to detect and distribute bug fixes within your regular delivery schedule.

Which of the following should you use to create business process maps?

- A. Microsoft Visio
- B. Business process modeler**
- C. Microsoft Azure DevOps
- D. Microsoft GitHub

**Correct Answer: B**

*Community vote distribution*

B (100%)

DRAG DROP -

You are tasked with creating address books in your company's environment.

You are preparing to create a global address book, as well as additional address books for each line of business.

Which of the following are party types that can be added to global and additional address books? Answer by dragging the correct options from the list to the answer area.

Select and Place:

## Options

Customer

Vendor

Person

Organization

## Answer

Person

Organization

Correct Answer:

## Options

Customer

Vendor

Person

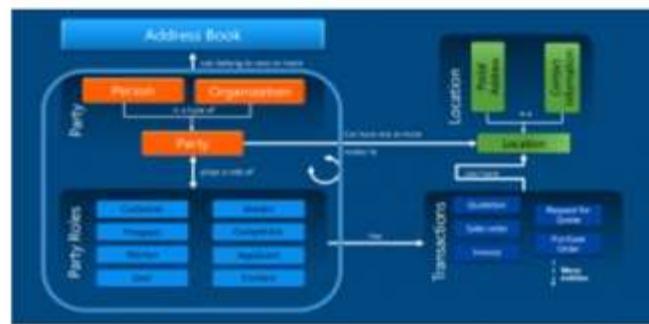
Organization

## Answer

Reference:

# How the global address book works

The following illustration shows how party records, party roles, locations, and transactions interact and relate to an address book. As the illustration shows, a party record can belong to one or more address books. Each party record can store one or more locations, or addresses, and is assigned a party role. The role that is assigned to the party record can have specific transaction types associated with it. The following sections provide more information about party roles, locations, and transaction types. The following image is a graphical representation of the ways that parties, party roles, locations, and transactions interact in relation to the global address book.



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Question #11

Topic 1

You need to consider the underlined segment to establish whether it is accurate.

To review who has been assigned the administrator role, you should use the Security duty assignments report.

Select 'No adjustment required' if the underlined segment is accurate. If the underlined segment is inaccurate, select the accurate option.

- A. No adjustment required.
- B. Security role access
- C. Role to user assignments
- D. User role assignments

**Correct Answer:** C

Reference:

<https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/sysadmin/security-reports#security-role-access>

## Role to user assignments

The **Role to user assignment** report provides an aggregation of role assignments. Expanding a role in the report shows the list of users assigned to the role, and expanding the user name shows any restrictions the role has applied. The same method for filtering the set of users can be applied to this report as described for the **User role assignments** report.

Organization type	Operating unit types	Organization name	Organization ID	Grant with children
Legal entity	None	ALL	ALL	No

*Community vote distribution*

C (67%)

D (33%)

You are setting up Dynamics 365 Finance for a company started in the United States and Canada.

You are currently determining policy rules for purchasing. You need to make sure that personnel in the United States and Canada purchase from separate catalogs and suppliers.

Which of the following actions should you take?

- A. Set up catalog policy rules.
- B. Set up purchasing policies at the legal-entity level.
- C. Set up category access policy rules.
- D. Set up purchasing policies at the organization level.

**Correct Answer:** B

Reference:

<https://docs.microsoft.com/en-us/dynamics365/unified-operations/supply-chain/procurement/purchase-policies>

## Assigning policies to organizations

Before a policy can take effect, it must be associated with an organization. Purchasing policies are associated with the **Procurement internal control** hierarchy purpose. Therefore, purchasing policies apply only to organizations in hierarchies that have a hierarchy purpose of **Procurement internal control**. You can also select organizations from the flat list of legal entities in the CompanyInfo table. These legal entities are designated in the policy framework as "Companies."

## Determining which rule to apply

Depending on how you configure your purchasing policies, multiple rules can affect the users in an organization. The following examples illustrate different ways that you can configure purchasing policies and specify how policies are applied when a transaction occurs.

*Community vote distribution*

D (67%)

B (33%)

You are setting up Dynamics 365 Finance for a company.

You are currently determining policy rules for purchasing. You are informed that your solution should allow for a certain user to only access the Tools category when generating purchase requisitions.

Which of the following actions should you take?

- A. Set up catalog policy rules.
- B. Set up category policy rule
- C. Set up category access policy rules.
- D. Set up purchasing policies at the organization level.

**Correct Answer:** C

Reference:

<https://docs.microsoft.com/en-us/dynamics365/unified-operations/supply-chain/procurement/purchase-policies>

## Policy rules

### Catalog policy rule

The catalog policy rule determines which procurement catalog users see when they create purchase requisitions. If a user has been granted permission to order products on behalf of another user, the requisition uses the catalog policy rule that is defined for the requester's legal entity and operating unit to determine which catalog to display. Before you can define a catalog policy rule, you must create and publish a procurement catalog.

### Category access policy rule

The category access policy rule determines which categories users have access to when they

Your company uses Dynamics 365 Finance.

You are responsible for approving purchases that exceed of a quarter million dollars. You need to use User Options to allow another user to take over your role.

You add the user and assign the user the All scope.

Does this action allow the user to take over your role?

- A. Yes, it does
- B. No, it does not

**Correct Answer:** B

*Community vote distribution*

A (100%)

Your company uses Dynamics 365 Finance.

You are responsible for approving purchases that exceed of a quarter million dollars. You need to use User Options to allow another user to take over your role.

You add the user and assign the user the Module scope.

Does this action allow the user to take over your role?

A. Yes, it does

B. No, it does not

**Correct Answer: B**

*Community vote distribution*

A (100%)

Your company uses Dynamics 365 Finance.

You are responsible for approving purchases that exceed of a quarter million dollars. You need to use User Options to allow another user to take over your role.

You add the user and assign the user the Workflow scope.

Does this action allow the user to take over your role?

A. Yes, it does

B. No, it does not

**Correct Answer: A**

Your company has a Dynamics 365 Finance environment.

You have found a large number of unused purchase order numbers. These order numbers are also not being reused.

Procurement processes are running 24/7 at present, and interruptions are not allowed.

You have to make sure that the unused purchase order numbers are used in the system.

Which of the following actions should you take? (Choose all that apply.)

A. Change the number sequence to continuous. Most Voted

B. Run Automatic cleanup of number sequence. Most Voted

C. Change the number sequence to non-continuous.

D. Create the new purchase orders.

E. Assign the number sequences to the new purchase orders manually.

**Correct Answer: BD**

*Community vote distribution*

AB (55%)

BD (36%)

9%

You work for a company that uses Dynamics 365 Finance.

You are assisting a systems administrator with email configuration for the system. The system is currently configured to prompt users for the manner in which they want to send emails according to the circumstance.

Which of the following is the messaging tool you would use to create a file to send to a colleague for further personalization?

- A. The Dynamics 365 email client.
- B. Outlook.
- C. A third-party email service.
- D. Microsoft Exchange server.

**Correct Answer:** B

*Community vote distribution*

B (100%)

You are employed as a system administrator for your company's Dynamics 365 Finance system.

You developed a work flow in your testing environment. However, when you move the workflow to the production environment, the workflow enters a wait state.

You have to get the workflow out of the wait state.

Which of the following actions should you take?

- A. Configure the workflow as critical job.
- B. Configure work item queues.
- C. Configure users for the workflow system.
- D. Configure the workflow execution account.

**Correct Answer:** D

Reference:

<https://docs.microsoft.com/en-us/dynamicsax-2012/appuser-itpro/specify-the-workflow-execution-account>

*Community vote distribution*

D (100%)

You are employed as a system administrator for your company's Dynamics 365 Finance environment.

You have been tasked with making sure that new personnel can use electronic signatures in their email.

Which of the following actions should you take?

- A. You should enable Maintenance mode in Electronic signature requirements, and then choose the Electronic signature check box.
- B. You should enable Maintenance mode in Electronic signature parameters, and then choose the Electronic signature check box.
- C. You should enable Maintenance mode in License configuration, and then choose the Electronic signature check box.
- D. You should enable Maintenance mode in Electronic signature parameters, and then choose the Electronic signature check box.

**Correct Answer:** C

Reference:

<https://docs.microsoft.com/en-us/dynamics365/unified-operations/fin-and-ops/organization-administration/tasks/set-up-electronic-signatures>

## Enable the Electronic signature configuration key

1. Go to System administration > Setup > License configuration.
2. In the tree, expand 'Administration'.
  - Verify that the Electronic signature check box is selected.
  - If the Electronic signature check box is not selected, you must enable maintenance mode. Maintenance mode can be enabled in this environment by running a maintenance job from Lifecycle Services, or by using the Deployment.Setup tool locally.
3. Close the page.

*Community vote distribution*

C (100%)

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⚙️ Custom View Settings

Question #21

Topic 1

Your company has intricate security prerequisites.

You have been tasked with ascertaining the key characteristics for security roles, duties, privileges, and permissions with the aim of configuring security access for users.

Which of the following is TRUE with regards to duties? (Choose all that apply.)

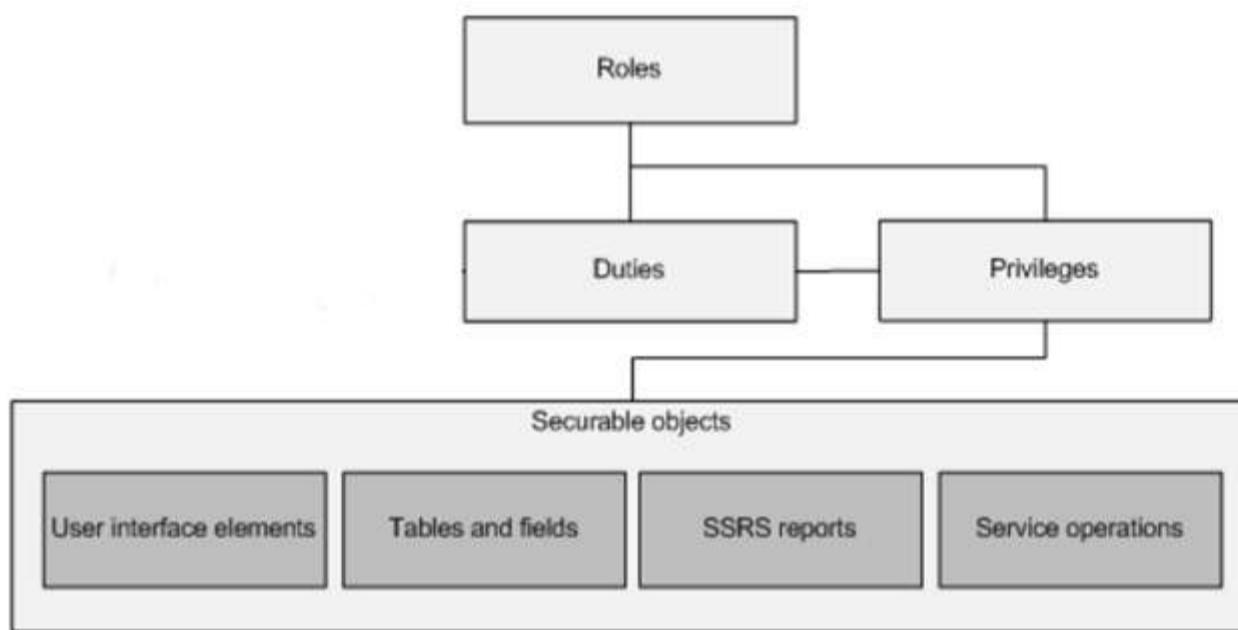
- A. Duties correspond to parts of a business process.
- B. Duties stipulate the level of access that is needed to perform a job, fix a problem, or conclude an assignment.
- C. Related duties can be assigned to separate roles.
- D. Duties group the securable objects and access levels that are needed to execute a function.

**Correct Answer:** AC

Reference:

<https://docs.microsoft.com/en-us/dynamics365/unified-operations/dev-itpro/sysadmin/role-based-security>

The following illustration shows the elements of role-based security and their relationships.

*Community vote distribution*

AC (100%)

You are configuring Dynamics 365 Finance to make sure that the typical secure SMTP settings are used for sending email.

You make sure that retention policies are enabled.

Does this action ensure that secure SMTP settings are used?

A. Yes, it does

B. No, it does not

**Correct Answer:** B

Field	Description
Outgoing mail server	The host name of the desired SMTP server. For Microsoft 365 production (including *.onmicrosoft.com accounts) use smtp.office365.com. (You can find this setting at outlook.office.com at <b>Settings &gt; Mail &gt; POP and IMAP</b> .) For Outlook/Hotmail use smtp-mail.outlook.com.
SMTP port number	Typically, the port number should be set to 587 for secure transport.
User name and Password	Specify, as needed, to send the email via the appropriate mail account. All users need to provide the SMTP account <b>Send As</b> and <b>Send On Behalf Of</b> permissions to enable the ability to send Simple Mail Transfer Protocol (SMTP) mail. You can configure Send As permissions in the Microsoft 365 admin center (portal.office.com/Admin), at <b>Users &gt; Active users &gt; User &gt; Edit mailbox permissions &gt; Send email from this mailbox</b> . For more information, see Enable sending email from another user's mailbox in Microsoft 365.
Specify if SSL is required	Determines whether secure transport is used. Typically, this is <b>Yes</b> , except for internal or troubleshooting scenarios.

Reference:

<https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/fin-ops/organization-administration/configure-email>

## ☞ [Administrator] Email parameters page

### Configuration tab

On the Email parameters page, note the following settings on the Configuration tab.

Field	Description
Batch email provider	Specifies which email provider will be used to send emails that are sent by processes in a batch or non-interactive manner. The Exchange provider will use the account associated with the batch process.
Attachment size limit	Specifies the maximum size of a single email that can be sent via the email subsystem.

*Community vote distribution*

B (100%)

You are configuring Dynamics 365 Finance to make sure that the typical secure SMTP settings are used for sending email.

You make sure that In-place hold and Litigation hold are enabled.

Does this action ensure that secure SMTP settings are used?

A. Yes, it does

B. No, it does not

**Correct Answer: B**

Field	Description
Outgoing mail server	The host name of the desired SMTP server. For Microsoft 365 production (including *.onmicrosoft.com accounts) use smtp.office365.com. (You can find this setting at outlook.office.com at <b>Settings &gt; Mail &gt; POP and IMAP</b> .) For Outlook/Hotmail use smtp-mail.outlook.com.
SMTP port number	Typically, the port number should be set to 587 for secure transport.
User name and Password	Specify, as needed, to send the email via the appropriate mail account. All users need to provide the SMTP account <b>Send As</b> and <b>Send On Behalf Of</b> permissions to enable the ability to send Simple Mail Transfer Protocol (SMTP) mail. You can configure Send As permissions in the Microsoft 365 admin center (portal.office.com/Admin), at <b>Users &gt; Active users &gt; User &gt; Edit mailbox permissions &gt; Send email from this mailbox</b> . For more information, see Enable sending email from another user's mailbox in Microsoft 365.
Specify if SSL is required	Determines whether secure transport is used. Typically, this is <b>Yes</b> , except for internal or troubleshooting scenarios.

Reference:

<https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/fin-ops/organization-administration/configure-email>

## Server information

Field	Description
Outgoing mail server	The host name of the desired Simple Mail Transfer Protocol (SMTP) server. <ul style="list-style-type: none"> <li>For Microsoft 365 production (including *.onmicrosoft.com accounts), use smtp.office365.com. (You can find this setting at outlook.office.com at <b>Settings &gt; Mail &gt; POP and IMAP</b>.)</li> <li>For Outlook/Hotmail, use smtp-mail.outlook.com.</li> </ul>
SMTP port number	Typically, the port number should be set to 587 for secure transport.
SSL required	Determines whether secure transport is used. Typically, this is <b>Yes</b> , except for internal or troubleshooting scenarios.

#### Authentication

You are configuring Dynamics 365 Finance to make sure that the typical secure SMTP settings are used for sending email.

You make sure that the Specify if SSL is required SMTP setting is selected.

Does this action ensure that secure SMTP settings are used?

A. Yes, it does

B. No, it does not

**Correct Answer: A**

Field	Description
Outgoing mail server	The host name of the desired SMTP server. For Microsoft 365 production (including *.onmicrosoft.com accounts) use smtp.office365.com. (You can find this setting at outlook.office.com at <b>Settings &gt; Mail &gt; POP and IMAP</b> .) For Outlook/Hotmail use smtp-mail.outlook.com.
SMTP port number	Typically, the port number should be set to 587 for secure transport.
User name and Password	Specify, as needed, to send the email via the appropriate mail account. All users need to provide the SMTP account <b>Send As</b> and <b>Send On Behalf Of</b> permissions to enable the ability to send Simple Mail Transfer Protocol (SMTP) mail. You can configure Send As permissions in the Microsoft 365 admin center (portal.office.com/Admin), at <b>Users &gt; Active users &gt; User &gt; Edit mailbox permissions &gt; Send email from this mailbox</b> . For more information, see Enable sending email from another user's mailbox in Microsoft 365.
Specify if SSL is required	Determines whether secure transport is used. Typically, this is <b>Yes</b> , except for internal or troubleshooting scenarios.

Reference:

<https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/fin-ops/organization-administration/configure-email>

## [Administrator] Email distributor batch process

Email that is sent directly from the server, without user interaction, via SMTP is sent by the **Email distributor batch** process. That batch process must be started to process the email queue. To start the process, open the **Email distributor batch** pane (**System administration > Periodic tasks > Email processing > Batch**) and turn on **Batch processing**.

If the Exchange provider is used, then the user account associated with the batch process (usually admin) will be sender.

*Community vote distribution*

A (100%)

You are configuring Dynamics 365 Finance to make sure that the typical secure SMTP settings are used for sending email.

You make sure that the SMTP port field is set to 587.

Does this action ensure that secure SMTP settings are used?

A. Yes, it does

B. No, it does not

**Correct Answer: A**

Field	Description
Outgoing mail server	The host name of the desired SMTP server. For Microsoft 365 production (including *.onmicrosoft.com accounts) use smtp.office365.com. (You can find this setting at outlook.office.com at <b>Settings &gt; Mail &gt; POP and IMAP</b> .) For Outlook/Hotmail use smtp-mail.outlook.com.
SMTP port number	Typically, the port number should be set to 587 for secure transport.
User name and Password	Specify, as needed, to send the email via the appropriate mail account. All users need to provide the SMTP account <b>Send As</b> and <b>Send On Behalf Of</b> permissions to enable the ability to send Simple Mail Transfer Protocol (SMTP) mail. You can configure Send As permissions in the Microsoft 365 admin center (portal.office.com/Admin), at <b>Users &gt; Active users &gt; User &gt; Edit mailbox permissions &gt; Send email from this mailbox</b> . For more information, see Enable sending email from another user's mailbox in Microsoft 365.
Specify if SSL is required	Determines whether secure transport is used. Typically, this is <b>Yes</b> , except for internal or troubleshooting scenarios.

Reference:

<https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/fin-ops/organization-administration/configure-email>

## ☞ [User] Email provider selection section on the Options page

The **Options** page can be opened via **Settings > User options**. The **Email provider selection** section is on the **Account** tab.

Field	Description
Email provider ID	Allows the user to select the email provider that should be used when sending an email. Selecting an option here is the equivalent of selecting <b>Do not ask again</b> in the <b>How would you like to send email</b> dialog box. Selecting the blank option <b>Prompt for which email provider to use</b> will cause the <b>How would you like to send email</b> dialog box to display when an email is going to be sent.
Sender email	Allows the administrator to provide an email address override for the user in the <b>From</b> field of the email. By default, the email alias that is associated with the user account is used as the <b>From</b> field in new emails, but this user option email address will override
<i>Community vote distribution</i>	
B (50%)	A (50%)

You are in the process of configuring fiscal calendars in financial accounting.

Which two of the following options are TRUE with regards to fiscal calendars?

- A. It is a non-compulsory setup.
- B. It is a compulsory setup. Most Voted
- C. It can be used for a fixed asset calendar. Most Voted
- D. It can be used for a procurement asset calendar.

**Correct Answer:** AC

Reference:

<https://docs.microsoft.com/en-us/dynamics365/unified-operations/financials/budgeting/fiscal-calendars-fiscal-years-periods>

*Community vote distribution*

BC (69%)	B (24%)	7%
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You are preparing to migrate data to Dynamics 365 Finance from a personalized version of a legacy application. A number of the fields in the entity are identical, while others vary.

You want to automatically map as much fields as you can within Dynamics 365 Finance.

You make use of the Mapping visualization tool.

Does this action map the fields in Dynamics 365 Finance?

- A. Yes, it does
- B. No, it does not Most Voted

**Correct Answer:** A

Reference:

<https://docs.microsoft.com/en-us/dynamics365/unified-operations/dev-itpro/data-entities/data-entities-data-packages?toc=/fin-and-ops/toc.json#mapping>

## View mapping

To view how an entity is mapped, locate the tile for the entity in the project, and then click

**View map.**

We provide mapping visualization view (default) and mapping details view. A red asterisk (\*) identifies any required fields in an entity. These fields must be mapped in order to work with the entity. Other fields can be unmapped as required when working with the entity.

- To unmap a field, highlight the field in either column (**Entity** or **Source**), click **Delete selection**, and then click **Save**. After saving, close the form to return to the project.

The field mapping from source to staging can also be edited after import using the same process.

CURRENCIES : CURRENCIES

Map source to staging

*Community vote distribution*

B (100%)
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You are preparing to migrate to a Dynamics 365 Finance environment from Dynamics AX 2009.

You plan to make use of the Data Import/Export Framework (DIXF) tool to create a data package from a group of entities in Dynamics AX 2009.

Which of the following is TRUE with regards to Data Import/Export Framework (DIXF) tool?

- A. It identifies tasks that you should do to prepare the AX 2012 environment.
- B. It produces an upgraded version of your code and a report about the remaining conflicts that must be resolved.
- C. It helps you find and fill gaps between the table schemas for each version, as well as helping you move your data.
- D. It creates a staging table for each entity in the Microsoft Dynamics AX database where the target table resides, where you can validate the data, and perform any clean up or conversion that is needed.

**Correct Answer:** D

Reference:

<https://docs.microsoft.com/en-us/dynamics365/unified-operations/dev-itpro/migration-upgrade/ax2009-upgrade-export-package>

The export package that the Data migration tool (DMT) generates can consist of one or many data entities. A typical data package consists of a group of entities for a specific task, such as import. For example, the data entities that are required for system setup might be part of one data package. The format of a data package is a compressed file that contains a package manifest, a package header, and any additional files for the data entities that are included.

Before you create a data package, plan out what should be included. In this way, you help guarantee that the correct entities, entity sequence, and fields are included.

Follow these steps to export the data package.

1. In AX 2009, in the navigation pane, click **Data migration > Common > Create migration group**.
2. In the **Migration group** form, select the migration group to export, and then click **Export now**.
3. In the **Export data** form, update the export file path as required, and then click **OK**.

*Community vote distribution*

D (100%)

Users import huge amounts of data into the system every day. You want to optimize the performance for the imports.

You enable data import recurrence.

Has your objective been met?

- A. Yes
- B. No

**Correct Answer:** B

*Community vote distribution*

B (100%)

Users import huge amounts of data into the system every day. You want to optimize the performance for the imports.

You enable change tracking for the data entities.

Has your objective been met?

A. Yes

B. No

**Correct Answer: B**

*Community vote distribution*

B (100%)

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 Custom View Settings

Question #31

Topic 1

Users import huge amounts of data into the system every day. You want to optimize the performance for the imports.

You configure entity execution parameters to make the data import multi-threaded.

Has your objective been met?

A. Yes 

B. No

**Correct Answer: A**

*Community vote distribution*

A (100%)

Question #32

Topic 1

You are preparing to migrate data to a Dynamics 365 Finance environment from Dynamics AX 2009.

You have to make sure that the data migration can be executed.

Which of the following is TRUE with regards to this scenario?

A. The current on-premises environment must first be upgraded to Dynamics 365 Finance online.

B. The migration can run without upgrading the current on-premises environment. 

C. The current on-premises environment must first be upgraded to Dynamics AX 2012 R2.

D. The current on-premises environment must first be upgraded to Dynamics AX 2009R3

**Correct Answer: C**

*Community vote distribution*

B (68%)

A (21%)

11%

You are preparing to migrate to a Dynamics 365 Finance environment from Dynamics AX 2012 R3.

Lifecycle Services (LCS) and the included tools will be used for the migration.

You want to make use of a tool that allows for the following:

- Data to be cleaned up
- SQL optimizations to be reviewed and configured
- Deprecated features in your code to be detected.

Which of the following is the tool required?

- A. Microsoft Azure DevOps
- B. Microsoft GitHub
- C. Task recorder
- D. Upgrade analyzer

**Correct Answer: D**

*Community vote distribution*

D (100%)

Over the years your company has acquired a vast number of partnerships. The partnership information is currently saved in a legacy system.

You export the partnership information to Microsoft Word format and generate Partnership and PartnershipGroup entities.

You are now preparing to import the partnership information into Dynamics 365 for Finance.

To achieve your goal, you need to convert the word files into a different format.

Which of the following is the format that the word files should be converted to?

- A. ODT
- B. CSV
- C. RTF
- D. HTML

**Correct Answer: B**

*Community vote distribution*

B (80%)

A (20%)

**DRAG DROP -**

You are preparing to migrate data to a Dynamics 365 Finance environment from Dynamics AX 2012.

You have been given the responsibility of managing and preparing a cutover to make sure that the experience for end users during the cutover is effortless.

You have already executed a basic data upgrade validation. You now need to need to execute a cutover.

Which of the following actions should execute in sequence? Answer by dragging the correct options from the list to the answer area.

Select and Place:

# Options

# Answer

Copy the upgraded database from the sandbox environment into the production environment.

Ensure that Synchronous transfer mode is enabled.

Perform a smoke test.

Perform a sync test.

Complete application setup tasks.

# Options

# Answer

Copy the upgraded database from the sandbox environment into the production environment.

Ensure that Synchronous transfer mode is enabled.

**Correct Answer:**

Perform a smoke test.

Perform a sync test.

Complete application setup tasks.

Copy the upgraded database from the sandbox environment into the production environment.

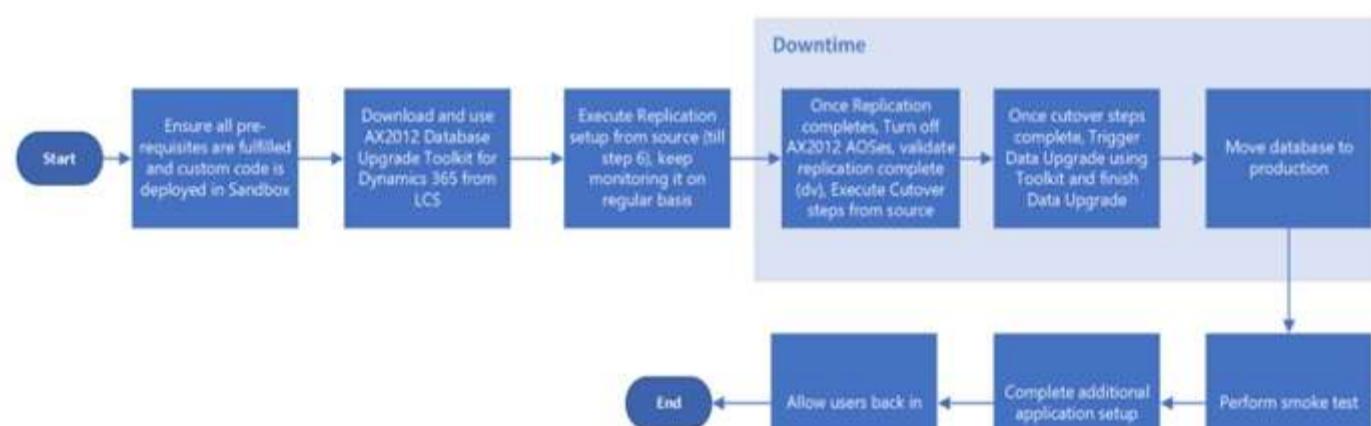
Perform a smoke test.

Complete application setup tasks.

Reference:

<https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/migration-upgrade/upgrade-cutover-testing>

The following illustration shows the overall process for cutover to go-live as it will occur in the production environment.



Question #36

Topic 1

You are preparing to migrate data to Dynamics 365 Finance from a personalized version of a legacy application. A number of the fields in the entity are identical, while others vary.

You want to automatically map as much fields as you can within Dynamics 365 Finance.

You create source mapping.

Does this action map the fields in Dynamics 365 Finance?

A. Yes, it does

B. No, it does not

**Correct Answer: B**

Reference:

<https://docs.microsoft.com/en-us/dynamics365/unified-operations/dev-itpro/data-entities/data-entities-data-packages?toc=/fin-and-ops/toc.json#mapping>

*Community vote distribution*

B (100%)

You are preparing to migrate data to Dynamics 365 Finance from a personalized version of a legacy application. A number of the fields in the entity are identical, while others vary.

You want to automatically map as much fields as you can within Dynamics 365 Finance.

You make use of the Data task automation tool.

Does this action map the fields in Dynamics 365 Finance?

A. Yes, it does

B. No, it does not

**Correct Answer: B**

Reference:

<https://docs.microsoft.com/en-us/dynamics365/unified-operations/dev-itpro/data-entities/data-entities-data-packages?toc=/fin-and-ops/toc.json#mapping>

You have been tasked with implementing new processes via mobile apps.

You plan to create a mobile app that gives users the ability to consistently generate and alter data in a Finance and operations app data entity via a business process flow component with a SiteMap to make the navigation structure available.

Which of the following is the app type you should use?

A. Canvas app

B. Model-driven app

C. Portal

D. Xamarin

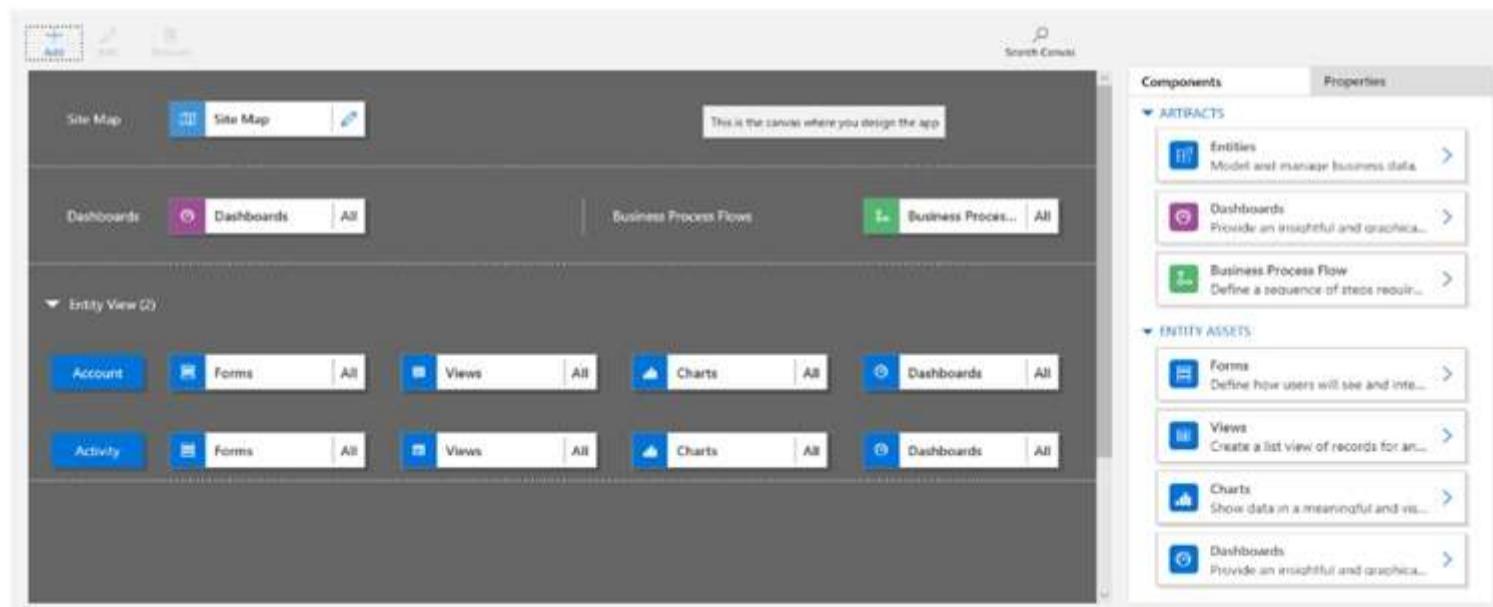
**Correct Answer: B**

Reference:

<https://docs.microsoft.com/en-us/powerapps/maker/model-driven-apps/add-edit-app-components>

## App designer layout

The app designer has two main areas. On the left side is the canvas where you add app components.



You have been tasked with restarting Internet Information Service (IIS) service in a nonproduction Tier 2 environment.

You have signed in to Lifecycle Services (LCS), and selected the necessary environment.

Which of the following is the page you should navigate to?

- A. Project users
- B. Environment details
- C. Environment monitoring
- D. System Administration parameters

**Correct Answer: B**

Reference:

<https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/lifecycle-services/restart-environment-services>

## Restart a specific service

To restart a specific service in a deployed environment, follow these steps.

1. In LCS, open the appropriate project, and select the environment to restart the service for.
2. On the **Environment details** page, select **Maintain > Restart services**.
3. In the **Restart a service** dialog box, select the service to restart, and then select **OK**.

The **Environment state** value is updated when the service is restarted.

4. To view the updated status, refresh the page.

You are developing a new Dynamics 365 Finance system for your company.

You want to create test plans that members of your team can use to test code during the development of the system.

You want to use a utility that will track and document test plans, as well as issues and their remediations.

What utility should you use?

- A. Task recorder for Finance and Operations apps
- B. Business process modeler (BPM) Library
- C. Microsoft Azure DevOps Most Voted
- D. Microsoft Power Platform.
- E. Configuration data manager

**Correct Answer: D**

[Custom View Settings](#)

Question #41

Topic 1

Your company has Dynamics 365 Finance system.

You are documenting the steps required to add a new customer to the system by using the Task Recorder utility. You want to add a credit check step that will be performed by a third-party app.

You want the credit check step to be part of the documentation.

How should you add the credit check step?

- A. Add the step as a Start sub-task
- B. Add the step as an Action step
- C. Add the step as an Info step Most Voted
- D. Add the step as a Queued Pending step

**Correct Answer:** D

Reference:

<https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/user-interface/task-recorder>

## Architecture

Task recorder can record user actions in the client with exact fidelity, because every control is instrumented to notify Task recorder about the execution of user actions. The control notifies Task recorder that an event has occurred and passes all the relevant information about the corresponding user action in real time. From this information, Task recorder can capture the type of user action (for example, a button click, value entry, or navigation) and any data that is related to the user action (for example, the input data value and type, form context, or record context). Task recorder persists the information with enough detail to ensure that a playback of the recording can run the recorded actions exactly as they were performed by the user.

*Community vote distribution*

C (100%)

Your company has a Dynamics 365 Finance environment that has been extensively modified.

Various users have begun complaining about a number of significant problems.

A new hotfix that will remedy these problems has become available. You want to make sure that the hotfix does not disrupt any modifications.

You have downloaded the hotfix from Lifecycle Services (LCS) and install the hotfix in your Microsoft Azure DevOps application development environment in an

Active state.

Does this action indicate whether the hotfix disrupts any modifications or not?

A. Yes, it does

B. No, it does not

**Correct Answer: B**

Reference:

<https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/migration-upgrade/install-metadata-hotfix-package>

Your company has a Dynamics 365 Finance environment that has been extensively modified.

Various users have begun complaining about a number of significant problems.

A new hotfix that will remedy these problems has become available. You want to make sure that the hotfix does not disrupt any modifications.

You have downloaded the hotfix from Lifecycle Services (LCS) and install the hotfix in your Microsoft Azure DevOps application development environment in an

Idle state.

Does this action indicate whether the hotfix disrupts any modifications or not?

A. Yes, it does

B. No, it does not

**Correct Answer: B**

Reference:

<https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/migration-upgrade/install-metadata-hotfix-package>

*Community vote distribution*

B (100%)

Your company has a Dynamics 365 Finance environment that has been extensively modified.

Various users have begun complaining about a number of significant problems.

A new hotfix that will remedy these problems has become available. You want to make sure that the hotfix does not disrupt any modifications.

You have downloaded the hotfix from Lifecycle Services (LCS) and install the hotfix in your Microsoft Azure DevOps application development environment in a

Pending state.

Does this action indicate whether the hotfix disrupts any modifications or not?

A. Yes, it does Most Voted

B. No, it does not

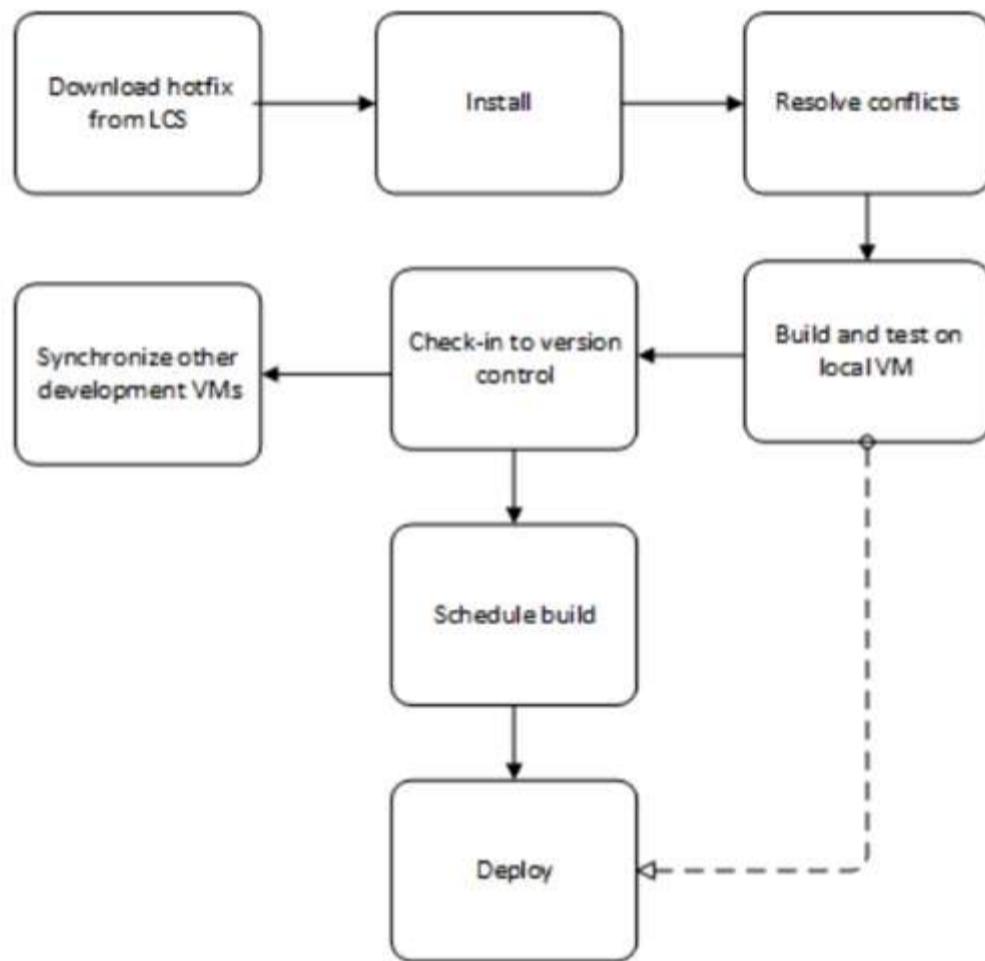
**Correct Answer: B**

Reference:

<https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/migration-upgrade/install-metadata-hotfix-package>

## Overall flow

The following diagram shows the overall flow.



*Community vote distribution*

A (100%)

**DRAG DROP -**

A company is implementing Dynamics 365 Finance.

The company has the following requirements:

- \* Employees must be able to upload travel receipts from their mobile device.
- \* Employees must be able to record effort spent on billable tasks.

You need to determine which mobile workspaces meet the requirements.

Which mobile workspaces should you use? To answer, drag the appropriate mobile workspaces to the correct requirements. Each mobile workspace may be used once, more than once, or not at all. You may need to drag the split bar between panes or scroll to view content.

NOTE: Each correct selection is worth one point.

Select and Place:

Mobile workspaces	Answer Area	Requirement	Mobile workspace
Expense management		Employees must be able to upload travel receipts from their mobile device.	
Cost controlling			
My team		Employees must be able to record effort spent on billable tasks.	
Project time entry			

**Correct Answer:**

Mobile workspaces	Answer Area	Requirement	Mobile workspace
Expense management		Employees must be able to upload travel receipts from their mobile device.	Expense management
Cost controlling			
My team		Employees must be able to record effort spent on billable tasks.	Project time entry
Project time entry			

**Box 1: Expense management -**

The Expense management mobile workspace.

This workspace lets users capture and upload a receipt, so that they can attach it to an expense report later. Users can also quickly create an expense line by using an attached receipt, and create and manage their expense reports. Additionally, approvers can use the Expense management mobile workspace to view expense reports that are assigned to them, and either approve or reject those expense reports.

**Box 2: Project time entry -**

As part of their daily work, project resources are often on-site or traveling. The Project time entry mobile workspace lets users enter their billable or non-billable time against a project on the mobile device of their choice. Therefore, project resources can record time entries anytime and anywhere. They can also view time entries that have already been recorded.

**Reference:**

<https://docs.microsoft.com/en-us/dynamics365/project-operations/expense/expense-using-mobile> <https://docs.microsoft.com/en-us/dynamics365/project-operations/prod-pma/project-time-entry-mobile-workspace>

You are implementing Dynamics 365 Finance and evaluating reporting capabilities.

The solution must allow business users to view cash flow forecasts as follows:

- by region
- across all legal entities
- in a graphical representation from within Dynamics 365 Finance

You need to select a tool to allow the business users to view the cash flow forecasts.

Which tool should you use?

- A. Microsoft Dataverse
- B. Financial reporter
- C. Power Automate
- D. Power BI embedded workspace**

**Correct Answer: D**

A company delivers seafood to retail stores.

Refrigeration trucks send temperature and distance data from Internet of Things (IoT) sensors over 5G. Data is written to an API endpoint in Microsoft Azure. The temperature and distance data are stored in Common Data Service and edited in Dynamics 365 Finance.

You create model-driven apps to visualize data. The apps support online and offline modes.

You must update the following:

- the shipment information in Dynamics 365 Finance based on delivery distance and real-time temperature readings from trucks
- the corresponding Common Data Service data with the latest shipment status

You need to update shipment information.

What should you use?

- A. Power Automate (Flow)
- B. Azure IoT Edge
- C. Azure IoT Central
- D. Azure IoT Hub
- E. Dual-write**

**Correct Answer: E**

Reference:

<https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/data-entities/dual-write/dual-write-overview>

**DRAG DROP -**

A company uses Dynamics 365 Supply Chain Management. A customer calls customer service to report that a product is defective.

The customer service process dictates that a formal set of activities needs to occur based on the specific incident.

You need to implement a repeatable process for the customer service representatives.

Which functionality should you use? To answer, drag the appropriate functionalities to the correct requirements. Each functionality may be used once, more than once, or not at all. You may need to drag the split bar between panes or scroll to view content.

NOTE: Each correct selection is worth one point.

Select and Place:

**Answer Area****Functionalities****Requirement****Functionality**

Case management

Manage the series of actions

Power Virtual Agents

Provide instructions on how to handle the customer service call

Workflow

**Correct Answer:****Answer Area****Functionalities****Requirement****Functionality**

Case management

Manage the series of actions

Power Virtual Agents

Provide instructions on how to handle the customer service call

Workflow

**Reference:**

<https://docs.microsoft.com/en-us/learn/modules/managing-cases-with-dynamics-365/5-case-management-scenarios>

You are implementing Dynamics 365 Finance.

Local customer service agents answer phone calls from customers and vendors on invoices and payments. All conversations with customers and vendors are recorded and documented.

Due to a quality assurance issue, not enough customer service agents are available to handle customer volume for invoices and payments.

You need to implement a technology to answer customer questions for invoices and payments.

Which technology should you use?

- A. Dynamics 365 Finance Document Routing Agent
- B. Microsoft Azure Cognitive Services Text to Speech
- C. Microsoft Azure Cognitive Services Speech to Text
- D. Dynamics 365 Finance Local Agent
- E. Power Virtual Agents

**Correct Answer: E**

Reference:

<https://docs.microsoft.com/en-us/power-virtual-agents/fundamentals-what-is-power-virtual-agents>

Note: This question is part of a series of questions that present the same scenario. Each question in the series contains a unique solution.

Determine whether the solution meets the stated goals. Some question sets might have more than one correct solution, while others might not have a correct solution.

After you answer a question in this section, you will NOT be able to return to it. As a result, these questions will not appear in the review screen.

You are a Dynamics 365 Finance sales manager. You use a Power BI dashboard that shows near-real-time sales data from reports and tiles.

It is impractical to keep switching between multiple applications.

You need to configure a way to access the Power BI reports within the Dynamics 365 Finance client.

Solution: Include the Power BI reports in a Power BI App and pin the Power BI App to your workspace.

Does the solution meet the goal?

- A. Yes
- B. No

**Correct Answer: B**

Reference:

<https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/analytics/pin-power-bi-reports>

 Previous Questions

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Question #6

Topic 2

**HOTSPOT -**

You want to enhance usability in the Dynamics 365 Finance deployment for your organization.

Your environment has been configured using default components. You set up filters on the channel deployment workspace.

You need to use the correct UI filter.

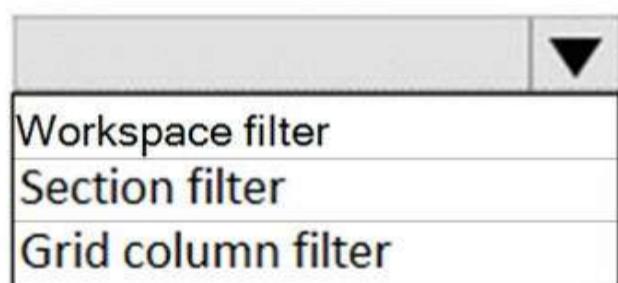
Which UI filter should you use? To answer, select the appropriate options in the answer area.

NOTE: Each correct selection is worth one point.

Hot Area:

**Answer Area****Desired result**

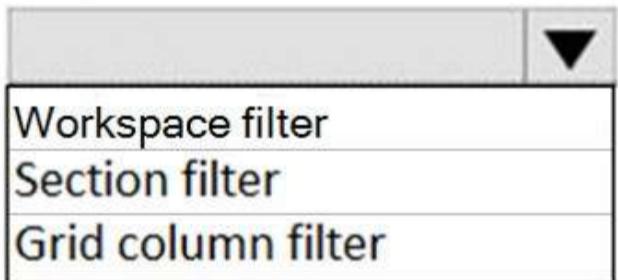
Filter retail stores by region from an all up workspace

**UI filter**

A dropdown menu with three options: Workspace filter, Section filter, and Grid column filter. The 'Workspace filter' option is highlighted with a green background.

Workspace filter
Section filter
Grid column filter

Look for stores in Illinois from a view of stores



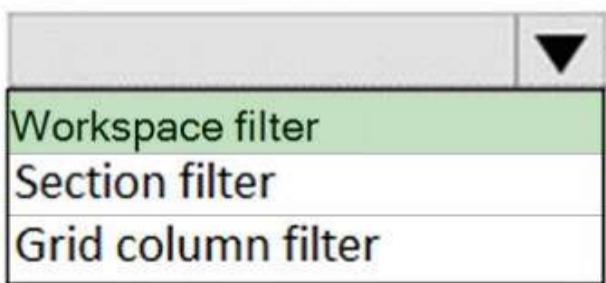
A dropdown menu with three options: Workspace filter, Section filter, and Grid column filter. The 'Section filter' option is highlighted with a green background.

Workspace filter
Section filter
Grid column filter

Correct Answer:

**Answer Area****Desired result**

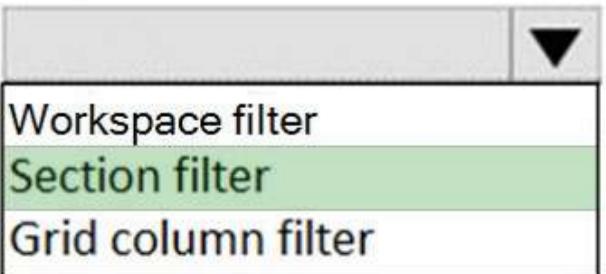
Filter retail stores by region from an all up workspace

**UI filter**

A dropdown menu with three options: Workspace filter, Section filter, and Grid column filter. The 'Workspace filter' option is highlighted with a green background.

Workspace filter
Section filter
Grid column filter

Look for stores in Illinois from a view of stores



A dropdown menu with three options: Workspace filter, Section filter, and Grid column filter. The 'Section filter' option is highlighted with a green background.

Workspace filter
Section filter
Grid column filter

Reference:

<https://docs.microsoft.com/en-us/dynamics365/unified-operations/fin-and-ops/get-started/configure-filter-workspaces>

Question #7

Topic 2

**HOTSPOT -**

You are tasked with setting up Case management in the Dynamics 365 Finance deployment for your organization.

Your organization must use cases to track defect and enhancement reports for products, so that engineers can improve products over time. Only appropriate employees within the organization should have access to cases and related information.

- ☞ Call center employees create thousands of service cases and ensure that the proper resources are allocated for each service.
- ☞ Service department employees fix cases created by the call center and create cases for defects and enhancement suggestion when they identify them.
- ☞ Engineers review the cases from the service department while planning and designing the next version.

You need to configure the tool to enable tracking of service cases and product defects and enhancements.

Which Case management settings should you choose for each category or categories? To answer, select the appropriate options in the answer area.

NOTE: Each correct selection is worth one point.

Hot Area:

**Answer Area**

<b>Option</b>	<b>Value</b>
Category to use	<div style="border: 1px solid black; padding: 5px; width: fit-content;"> <div style="background-color: #e0e0e0; height: 15px; margin-bottom: 5px;"></div> <div style="border: 1px solid black; padding: 2px;">General and Production</div> <div style="border: 1px solid black; padding: 2px;">Service and Product change</div> </div>
Service department in which employees create cases	<div style="border: 1px solid black; padding: 5px; width: fit-content;"> <div style="background-color: #e0e0e0; height: 15px; margin-bottom: 5px;"></div> <div style="border: 1px solid black; padding: 2px;">General</div> <div style="border: 1px solid black; padding: 2px;">Production</div> <div style="border: 1px solid black; padding: 2px;">Service</div> <div style="border: 1px solid black; padding: 2px;">Product change</div> </div>
Call center in which employees create cases	<div style="border: 1px solid black; padding: 5px; width: fit-content;"> <div style="background-color: #e0e0e0; height: 15px; margin-bottom: 5px;"></div> <div style="border: 1px solid black; padding: 2px;">General</div> <div style="border: 1px solid black; padding: 2px;">Production</div> <div style="border: 1px solid black; padding: 2px;">Service</div> <div style="border: 1px solid black; padding: 2px;">Product change</div> </div>

**Answer Area**

<b>Option</b>	<b>Value</b>
Category to use	<div style="border: 1px solid black; padding: 5px; width: fit-content;"> <div style="background-color: #e0e0e0; height: 15px; margin-bottom: 5px;"></div> <div style="border: 1px solid black; padding: 2px; background-color: #90EE90;">General and Production</div> <div style="border: 1px solid black; padding: 2px; background-color: #90EE90;">Service and Product change</div> </div>
Correct Answer: Service department in which employees create cases	<div style="border: 1px solid black; padding: 5px; width: fit-content;"> <div style="background-color: #e0e0e0; height: 15px; margin-bottom: 5px;"></div> <div style="border: 1px solid black; padding: 2px;">General</div> <div style="border: 1px solid black; padding: 2px;">Production</div> <div style="border: 1px solid black; padding: 2px;">Service</div> <div style="border: 1px solid black; padding: 2px; background-color: #90EE90;">Product change</div> </div>
Call center in which employees create cases	<div style="border: 1px solid black; padding: 5px; width: fit-content;"> <div style="background-color: #e0e0e0; height: 15px; margin-bottom: 5px;"></div> <div style="border: 1px solid black; padding: 2px;">General</div> <div style="border: 1px solid black; padding: 2px;">Production</div> <div style="border: 1px solid black; padding: 2px; background-color: #90EE90;">Service</div> <div style="border: 1px solid black; padding: 2px;">Product change</div> </div>

**DRAG DROP -**

An organization implements Dynamics 365 Finance.

You need to determine where work items originate.

From which module do the following work items originate? To answer, drag the appropriate modules to the correct work items. Each module may be used once, more than once, or not at all. You may need to drag the split bar between panes or scroll to view content.

NOTE: Each correct selection is worth one point.

Select and Place:

**Modules**

Accounts payable

Accounts receivable

Inventory management

Credit and collections

**Answer Area****Work item**

Purchase order

Invoice to customer

Vendor invoice

Transfer order

**Module**

Module

Module

Module

Module

Correct Answer:

**Modules**

Accounts payable

Accounts receivable

Inventory management

Credit and collections

**Answer Area****Work item**

Purchase order

Invoice to customer

Vendor invoice

Transfer order

**Module**

Accounts payable

Accounts receivable

Accounts payable

Inventory management

**HOTSPOT -**

You are tasked with enhancing usability in the Dynamics 365 Finance deployment for an organization.

The organization is evaluating different approaches, including using workspaces.

You need to identify the goals of using workspaces.

Which goals should you identify? To answer, select the appropriate options in the answer area.

NOTE: Each correct selection is worth one point.

Hot Area:

**Answer Area**

Requirement	Functional use
Visibility	<p>Understand the current state of the light task activity to support informed decisions Display deep information supporting complex task execution</p>
Workspace definition	<p>An initial overview for a specific role to increase productivity A view of complex activities requiring interaction across different roles</p>

**Answer Area**

Requirement	Functional use
Visibility	<p>Understand the current state of the light task activity to support informed decisions Display deep information supporting complex task execution</p>
Correct Answer: Workspace definition	<p>An initial overview for a specific role to increase productivity A view of complex activities requiring interaction across different roles</p>

A company plans to implement the case management feature of Dynamics 365 Finance. You need to describe the scenarios in which you should use the case management tool. Which three scenarios should be used? Each correct answer presents a complete solution.

NOTE: Each correct selection is worth one point.

- A. Since case activities can be assigned to different people, a case can use workflow.
- B. Although the sales module already has return-order functionality, case management is still used for customer returns and claims.
- C. Knowledge articles used by case management are associated with specific functional modules.
- D. A human resources generalist can use the case management tool to track employee interactions, even though the department stores confidential information about employees.
- E. A case can be used to track both external and internal issues.

**Correct Answer:** CDE

Reference:

<https://docs.microsoft.com/en-us/dynamics365/unified-operations/fin-and-ops/organization-administration/cases>

**HOTSPOT -**

You are a Dynamics 365 Finance system administrator.

Account managers need to use workspaces to monitor key pieces of data for customers and to navigate to forms for further actions.

You need to include workspace elements to achieve these needs.

Which design element should you use? To answer, select the appropriate configuration in the answer area.

NOTE: Each correct selection is worth one point.

Hot Area:

**Answer Area****Task**

View the number of sales orders that took place within the past seven days for a specific group of customers.

**Presentation**

Tiles
Links
Favorites
FactBoxes

Provide direct access to forms commonly used by workspace users.

Charts
Links
Favorites
FactBoxes

**Answer Area****Task**

View the number of sales orders that took place within the past seven days for a specific group of customers.

**Presentation**

Tiles
Links
Favorites
FactBoxes

Correct Answer:

Provide direct access to forms commonly used by workspace users.

Charts
Links
Favorites
FactBoxes

**HOTSPOT -**

You are a Dynamics 365 Finance system administrator.

Data must be filtered based on given criteria to help users quickly reduce the number of records.

You need to identify the appropriate syntax to solve user requirements.

Which query filter syntax should you use? To answer, select the appropriate options in the answer area.

NOTE: Each correct selection is worth one point.

Hot Area:

**Answer Area****Filter requirements**

Today's date in a date field

**Syntax**

D
Day(1)
T
Today

Customers with the names Tina and Tyna

T?na
T!na
T..na

**Answer Area****Filter requirements**

Today's date in a date field

**Syntax**

D
Day(1)
T
Today

Customers with the names Tina and Tyna

T?na
T!na
T..na

Correct Answer:

References:

<https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/fin-ops/get-started/advanced-filtering-query-options>

A client runs Dynamics 365 Finance.

The client wants to implement supply chain functionality that is fully integrated with the current Dynamics 365 Retail instance.

You need to implement the new functionality.

What should you do?

- A. Integrate Dynamics 365 Retail with Dynamics 365 Finance by using Common Data Model.
- B. Provision new instances of Dynamics 365 Finance and Dynamics 365 Supply Chain Management by using Lifecycle Services.**
- C. Clear the Dynamics 365 Finance configuration in the License configuration form.
- D. Clear the Dynamics 365 Retail configuration in the License configuration form.

**Correct Answer: B**

*Community vote distribution*

A (67%)

B (33%)

**HOTSPOT -**

A company implements Dynamics 365 Finance. It sets up and configures the system to support reporting requirements using Microsoft Power BI. The customer service manager wants to create reports in Power BI for analyzing customer order patterns, order fulfillment metrics, customer satisfaction KPIs, and customer service representative goal metrics. These reports compare aggregated information across multiple demographic regions and business lines for current trends against historic information.

The manager would like to use the reports to make individual team performance more visible to the managerial and executive teams. Since reports will be used by those teams as well as mobile users, the manager would like the report response to reflect the latest data without requiring the user to wait.

You need to determine which tool or functionality best fits the scenario.

Which feature or functionality should you use? To answer, select the appropriate feature or functionality in the dialog box in the answer area.

NOTE: Each correct selection is worth one point.

Hot Area:

**Answer Area**

<b>Scenario</b>	<b>Feature or functionality</b>
Stage the aggregate data for use by the reports.	<div style="border: 1px solid black; padding: 5px; width: fit-content; margin-left: auto; margin-right: auto;"><p>Dynamics 365 system administration settings</p><p>Power BI desktop client</p><p>Lifecycle Services</p></div>
Set the data source to use DirectQuery.	<div style="border: 1px solid black; padding: 5px; width: fit-content; margin-left: auto; margin-right: auto;"><p>Dynamics 365 system administration settings</p><p>Power BI desktop client</p><p>Lifecycle Services</p></div>
Publish the new reports to the production environment.	<div style="border: 1px solid black; padding: 5px; width: fit-content; margin-left: auto; margin-right: auto;"><p>Dynamics 365 system administration settings</p><p>Power BI desktop client</p><p>Lifecycle Services</p></div>
Configure the data refresh rate for periodic updating.	<div style="border: 1px solid black; padding: 5px; width: fit-content; margin-left: auto; margin-right: auto;"><p>Dynamics 365 system administration settings</p><p>Power BI desktop client</p><p>Lifecycle Services</p></div>

## Answer Area

Scenario	Feature or functionality
Stage the aggregate data for use by the reports.	Dynamics 365 system administration settings Power BI desktop client Lifecycle Services

Question #15

Topic 2

DRAG DROP -

A company plans to use record templates in its implementation.

Many employees need to be able to use the templates.

You need to set up and use record templates.

Which three actions should you perform in sequence to create the record templates? To answer, move the appropriate actions from the list of actions to the answer area and arrange them in the correct order.

Select and Place:

### Actions

- Use the Record info feature
- Create a user template
- Create a company accounts template
- Change the Record view property
- Identify the templated record

### Answer Area



Correct Answer:

### Actions

- Use the Record info feature
- Create a user template
- Create a company accounts template
- Change the Record view property
- Identify the templated record

### Answer Area

- Identify the templated record
- Use the Record info feature
- Create a company accounts template

Reference:

<https://docs.microsoft.com/en-us/dynamicsax-2012/appuser-itpro/maintain-record-templates>

◀ Previous Questions

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 Custom View Settings

Question #16

*Topic 2*

A company needs to be able to search for given addresses and remove all personally identifiable information about vendors, customers, and employees who might be in their system.

You need to identify a tool to quickly accomplish this.

Which tool should you use?

- A. Person search report
- B. Global search reporting
- C. GDPR request
- D. Asset classification

**Correct Answer: A**

Reference:

<https://docs.microsoft.com/en-gb/dynamics365/get-started/gdpr/> <https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/gdpr/gdpr-guide>

**DRAG DROP -**

A company requires data analysis for their business units from the default installation.

You need to select the appropriate functional module area where the data analysis requirements will be met by the system objects.

Which base reporting type objects should be used? To answer, drag the appropriate reporting type to the correct requirements. Each reporting type to leverage may be used once, more than once, or not at all. You may need to drag the split bar between panes or scroll to view content.

NOTE: Each correct selection is worth one point.

Select and Place:

**Answer Area****Reporting types** Form-based Report-based**Requirement**

Add fields that can be viewed and filtered as an end user.

Customize the view as an end user.

Leverage the batch framework.

**Reporting type**

Correct Answer:

**Answer Area****Reporting types** Form-based Report-based**Requirement**

Add fields that can be viewed and filtered as an end user.

Customize the view as an end user.

Leverage the batch framework.

**Reporting type** Form-based Form-based Report-based

A company implements Dynamics 365 Finance and sets up and configures the system to support its reporting requirements using Microsoft Power BI. A user creates a chart in her Power BI instance to display customer order patterns for the top 10 customers daily. You need to configure the Power BI integration to pin the chart to the user's workspace in Dynamics 365 Finance. Which three actions should you perform? Each correct answer presents part of the solution.

NOTE: Each correct selection is worth one point.

- A. In the Dynamics 365 Finance client, authorize sign-in to Power BI.
- B. In Azure Active Directory, grant the customer services manager administrative permissions to the company's Azure Active Directory account to run the report.
- C. In Microsoft Azure Active Directory, add the PowerBI service to the app registration and grant the necessary delegated permissions.
- D. In the Entity store, configure the Application ID and Application key for PowerBI.
- E. In the Dynamics 365 Finance System administration setup screen in PowerBI.com, configure the application ID and application key.

**Correct Answer:** ACE

Reference:

<https://docs.microsoft.com/en-us/dynamics365/unified-operations/dev-itpro/analytics/configure-power-bi-integration>

**SIMULATION -**

You are a functional consultant for Contoso Entertainment System USA (USMF).

You need to create a new workspace named Contoso Invoice that will display a list of all the open customer invoices.

To complete this task, sign in to the Dynamics 365 portal.

**Correct Answer:** See explanation below.

1. When you log in to Dynamics, you should see your workspaces page. Right-click in a blank area of the page and select Personalize TilePageContainer.
2. Click Add a workspace
3. Right-click on the new workspace and select Personalize < new workspace name>.
4. Name the workspace to Contoso Invoice.
5. Navigate to the Customer Invoices page.
6. Filter the page to display only open invoices.
7. Click on > Options.
8. Click on Add to workspace and select the Contoso Invoice workspace from the drop-down list.
9. In the Properties drop-down list, select List then click Configure.
10. Give the list a name such as Open Customer Invoices then click OK.

A company plans to create a global address book and additional address books for each line of business.

You need to help add parties to the address books.

Which two party types can you use for both the global address book and the additional address books? Each correct answer presents a complete solution.

NOTE: Each correct selection is worth one point.

A. Customer

B. Person

C. Competitor

D. Organization

E. Vendor

**Correct Answer:** BD

Reference:

<https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/fin-ops/organization-administration/overview-global-address-book>

HOTSPOT -

You need to implement new processes by using mobile apps.

Which mobile app should you use for each requirement? To answer, select the appropriate configuration in the answer area.

NOTE: Each correct selection is worth one point.

Hot Area:

## Answer Area

### Requirement

Create a mobile app that allows users to consistently create and modify data in a Finance and Operations app data entity through a business process flow component with a SiteMap to provide the navigation structure.

### App type

Canvas
Model-driven
Xamarin
Azure Web

Embed a mobile app within a Dynamics 365 Finance form as an end user that uses a button to send emails with entity information.

Canvas
Model-driven

Correct Answer:

## Answer Area

### Requirement

Create a mobile app that allows users to consistently create and modify data in a Finance and Operations app data entity through a business process flow component with a SiteMap to provide the navigation structure.

### App type

Canvas
Model-driven
Xamarin
Azure Web

Embed a mobile app within a Dynamics 365 Finance form as an end user that uses a button to send emails with entity information.

Canvas
Model-driven

**DRAG DROP -**

A company uses Dynamics 365 Finance.

Outbound documents do not meet the legal requirements for the regions to which they are sent.

You need to configure the outbound documents to address the compliance need.

In which order should you perform the actions? To answer, move all actions from the list of actions to the answer area and arrange them in the correct order.

Select and Place:

**Actions****Answer Area**

Configure Electronic Reporting parameters.



Import the Electronic Reporting configurations.

Create and activate Electronic Reporting Framework providers.

**Actions****Answer Area**

Correct Answer:

Configure Electronic Reporting parameters.



Create and activate Electronic Reporting Framework providers.

Import the Electronic Reporting configurations.

Reference:

<https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/analytics/er-quick-start2-customize-report>

**DRAG DROP -**

A company uses Dynamics 365 Finance.

Your company provides you with a workbook that lists individuals, companies, and legal entities. The workbook also includes descriptions about each individual, company, and legal entity.

You need to configure party roles for the Global Address Book.

Which party roles should you use? To answer, drag the appropriate party roles to the correct descriptions. Each party role may be used once, more than once, or not at all. You may need to drag the split bar between panes or scroll to view content.

NOTE: Each correct selection is worth one point.

Select and Place:

**Answer Area**

Party roles	Description	Party role
Customer		
Prospect	Purchases goods and services produced by individuals	
Vendor	Purchases goods and services produced by companies	
Competitor	Potentially provides legal entities with a service or benefit	
Worker	Supplies legal entities with products in exchange for payment	
User	Provides goods or services similar to what your company provides	
Contact		

Correct Answer:

**Answer Area**

Party roles	Description	Party role
Customer		
Prospect	Purchases goods and services produced by individuals	Customer
Vendor	Purchases goods and services produced by companies	Customer
Competitor	Potentially provides legal entities with a service or benefit	Prospect
Worker	Supplies legal entities with products in exchange for payment	Vendor
User	Provides goods or services similar to what your company provides	Competitor
Contact		

Reference:

<https://docs.microsoft.com/en-us/learn/modules/plan-config-global-address-book-finance-operations/1-introduction>

Question #24

*Topic 2*

You develop a Power Apps app that allows users to upload images. The app automatically resizes images and adds metadata tags to uploaded images.

The app must automatically tag images of checks within Dynamics 365 Finance. You must enable access to the Power App from Finance and pass a variable to indicate context to the app. Pop-up blockers are enabled on all user devices.

You need to configure the app.

What are two possible ways to achieve the goal? Each correct answer presents a complete solution.

NOTE: Each correct selection is worth one point.

- A. Add the app by using the Power Apps button on the standard Action pane.
- B. Use JavaScript to open a modeless dialog. Pass the context with a querystring value.
- C. Use JavaScript to open a new modal dialog. Pass the context with a querystring value.
- D. Embed the app on a page as a FastTab.
- E. Create a Power Automate flow that sends an email with a link to open the app.

**Correct Answer:** AD

Reference:

<https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/fin-ops/get-started/embed-power-apps?toc=/dynamics365/commerce/toc.json>

Question #25

*Topic 2*

A company plans to create a new workspace.

You need to design the workspace.

Which three components are mandatory? Each correct answer presents part of a solution.

NOTE: Each correct selection is worth one point.

- A. Related links
- B. Summary section
- C. Tabbed list
- D. Power BI section
- E. Section charts

**Correct Answer:** ABC

Reference:

<https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/user-interface/build-workspace>

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 Custom View Settings

Question #26

Topic 2

**HOTSPOT -**

You want to enhance usability in the Dynamics 365 Finance deployment for an organization.

You need to set up filters to help people find records that are used regularly.

Which filter expressions should you use? To answer, select the appropriate options in the answer area.

NOTE: Each correct selection is worth one point.

Hot Area:

**Answer Area****Desired result****Is circle or is equal to circle****Filter expression**

<input type="checkbox"/>	▼
circle	
circle*	
circle..	
..circle	

**Does not contain Texas**

<input type="checkbox"/>	▼
!*Texas*	
“!Texas	
“Texas”	
>Texas	

**After metal**

<input type="checkbox"/>	▼
>metal	
metal..	
metal*	
<metal	

**Less than or equal to zebra**

<input type="checkbox"/>	▼
..zebra	
>zebra	
zebra*	
<zebra	

## Answer Area

### Desired result

Is circle or is equal to circle

### Filter expression

	▼
circle	
circle*	
circle..	
..circle	

Does not contain Texas

	▼
!*Texas*	
“!Texas	
“Texas”	
>Texas	

After metal

	▼
>metal	
metal..	
metal*	
<metal	

Less than or equal to zebra

	▼
..zebra	
>zebra	
zebra*	
<zebra	

Correct Answer:

Reference:

<https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/fin-ops/get-started/advanced-filtering-query-options>

Question #27

Topic 2

A company wants to display a warehouse's performance metrics on a Power BI dashboard on a display in the warehouse.

You need to connect the Power BI instance to the Dynamics 365 Supply Chain Management instance that the warehouse uses.

Which three actions should you perform? Each correct answer presents part of the solution.

NOTE: Each correct selection is worth one point.

- A. Link Azure to Dynamics 365 Supply Chain Management by entering the Application ID in Dynamics 365 Supply Chain Management.
- B. Register the preconfigured Dynamics 365 service account within Azure.
- C. Obtain Azure Active Directory (Azure AD) administrative access.
- D. Configure the Dynamics 365 Entity Store.
- E. Register the Dynamics 365 application URL within Azure.

Correct Answer: ACE

Reference:

<https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/analytics/configure-power-bi-integration>

Note: This question is part of a series of questions that present the same scenario. Each question in the series contains a unique solution. Determine whether the solution meets the stated goals. Some question sets might have more than one correct solution, while others might not have a correct solution.

After you answer a question in this section, you will NOT be able to return to it. As a result, these questions will not appear in the review screen.

You are a Dynamics 365 Finance sales manager. You use a Power BI dashboard that shows near-real-time sales data from reports and tiles.

It is impractical to keep switching between multiple applications.

You need to configure a way to access the Power BI reports within the Dynamics 365 Finance client.

Solution: Create a link to the Power BI reports in your workspace.

Does the solution meet the goal?

A. Yes

B. No

**Correct Answer: A**

Reference:

<https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/analytics/pin-power-bi-reports>

Note: This question is part of a series of questions that present the same scenario. Each question in the series contains a unique solution.

Determine whether the solution meets the stated goals. Some question sets might have more than one correct solution, while others might not have a correct solution.

After you answer a question in this section, you will NOT be able to return to it. As a result, these questions will not appear in the review screen.

You are a Dynamics 365 Finance sales manager. You use a Power BI dashboard that shows near-real-time sales data from reports and tiles.

It is impractical to keep switching between multiple applications.

You need to configure a way to access the Power BI reports within the Dynamics 365 Finance client.

Solution: Import the Power BI reports through Lifecycle Services and pin it to your workspace.

Does the solution meet the goal?

A. Yes

B. No

**Correct Answer: B**

Reference:

<https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/analytics/pin-power-bi-reports>

Note: This question is part of a series of questions that present the same scenario. Each question in the series contains a unique solution. Determine whether the solution meets the stated goals. Some question sets might have more than one correct solution, while others might not have a correct solution.

After you answer a question in this section, you will NOT be able to return to it. As a result, these questions will not appear in the review screen.

You are a Dynamics 365 Finance sales manager. You use a Power BI dashboard that shows near-real-time sales data from reports and tiles.

It is impractical to keep switching between multiple applications.

You need to configure a way to access the Power BI reports within the Dynamics 365 Finance client.

Solution: Embed the Power BI reports on your application homepage.

Does the solution meet the goal?

A. Yes

B. No

**Correct Answer: B**

Reference:

<https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/analytics/pin-power-bi-reports>

A company uses Dynamics 365 Supply Chain Management. You plan to create four model-driven apps to add additional capabilities.

You need to ensure that the apps can consume, share, and modify the same data.

What should you use?

A. Lifecycle Services

B. Master Data Services

C. Common Data Service

D. Power BI Service

**Correct Answer: C**

Reference:

<https://docs.microsoft.com/en-us/powerapps/maker/data-platform/data-platform-intro>

A company implements Dynamics 365 Finance. The company uses business events to trigger sales order processes.

The cutoff for shipping customer orders is 3:00 PM.

You need to notify the warehouse manager in a Microsoft Teams channel whenever business events occur after 3:00 PM.

Which tool should you use?

- A. Power BI
- B. Power Automate**
- C. Workflow framework
- D. Power Virtual Agents

**Correct Answer: B**

Reference:

<https://yzhums.com/19698/>

**DRAG DROP -**

You are implementing Dynamics 365 Finance.

You have the following user requirements:

- ⇒ The ability to see a tile that will display the total of all received purchase orders
- ⇒ Coordinate the closure of Accounts payable after the last payment has been processed for the month

You need to configure the system.

Which option should you use? To answer, drag the appropriate option to the correct requirements. Each option may be used once, more than once, or not at all.

You may need to drag the split bar between panes or scroll to view content.

NOTE: Each correct selection is worth one point.

Select and Place:

**Answer Area**

Options	Requirements	Option
Workspace	Ability to see a tile that will display the total of all received purchase orders	
Workflow		
Purchase order inquiry	Coordinate the closure of Accounts payable	
Purchase order report		

Correct Answer:

**Answer Area**

Options	Requirements	Option
Workspace	Ability to see a tile that will display the total of all received purchase orders	Workspace
Workflow		
Purchase order inquiry	Coordinate the closure of Accounts payable	Workspace
Purchase order report		

Reference:

<https://dynamics-tips.com/workspaces-d365-finance-and-operations/>

<https://community.dynamics.com/crm/b/crm-powerobjects/posts/financial-period-closing-in-dynamics-365-for-finance-and-operations-enterprise-edition>

**HOTSPOT -**

You are implementing Dynamics 365 Supply Chain Management.

You must ensure employee address information is only accessible to users in the human resources department.

You need to configure the solution.

How should you configure the solution? To answer, select the appropriate options in the answer area.

NOTE: Each correct selection is worth one point.

Hot Area:

**Answer Area**

Requirements	Configuration
Hide employee records.	<ul style="list-style-type: none"><li>Mark the address as Private.</li><li>Mark the address as Primary.</li><li>Assign the part to an address book.</li><li>Create a relationship to another party.</li></ul>
Enable human resources access.	<ul style="list-style-type: none"><li>Assign security roles to Private location security roles.</li><li>Assign teams to the address book.</li><li>Assign the party to a user.</li><li>Assign team members to a team.</li></ul>

Correct Answer:

**Answer Area**

Requirements	Configuration
Hide employee records.	<ul style="list-style-type: none"><li>Mark the address as Private.</li><li>Mark the address as Primary.</li><li>Assign the part to an address book.</li><li>Create a relationship to another party.</li></ul>
Enable human resources access.	<ul style="list-style-type: none"><li>Assign security roles to Private location security roles.</li><li>Assign teams to the address book.</li><li>Assign the party to a user.</li><li>Assign team members to a team.</li></ul>

Reference:

<https://www.tomelliott.co.uk/2019/01/29/lets-talk-about-privacy/>

**DRAG DROP -**

A company uses Dynamics 365 Supply Chain Management to store inventory. The company has a website to display product information.

The company wants to add the following capabilities to the websites:

- Allow customers to check store inventory.
- Send an email to the product purchasing manager if a customer checks store inventory and the product is not in stock.

You need to configure the system.

What should you use? To answer, drag the appropriate technology to the correct requirements. Each technology may be used once, more than once, or not at all.

You may need to drag the split bar between panes or scroll to view content.

NOTE: Each correct selection is worth one point.

Select and Place:

**Answer Area**

Technologies	Requirement	Technology
Power Virtual Agents	Allow customers to check store inventory from the company's website.	
Power BI		
Model-driven app	Email the product purchasing manager if a customer checks store inventory and the product is not in stock.	
Power Automate		

Correct Answer:

**Answer Area**

Technologies	Requirement	Technology
Power Virtual Agents	Allow customers to check store inventory from the company's website.	Power Virtual Agents
Power BI		
Model-driven app	Email the product purchasing manager if a customer checks store inventory and the product is not in stock.	Power Automate
Power Automate		

Reference:

<https://docs.microsoft.com/en-us/power-virtual-agents/advanced-flow>

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Question #36

*Topic 2*

You implement Dynamics 365 Supply Chain Management. You have over 2,000 vendor records. You configure vendor groups to differentiate international vendors from domestic vendors.

You need to locate vendors in France with payment terms of 30 days.

What should you do?

- A. Use the global address book to locate the vendors.
- B. Create an advanced filter on the All vendors list page.
- C. Create a report filtered by vendor group.
- D. Use a successive quick filter for vendor group and payment terms.

**Correct Answer:** *B*

Question #37

*Topic 2*

You implement Dynamics 365 Finance.

You must view the number of purchase orders that were received and not invoiced. The view must automatically update.

You need to implement the view.

What should you use?

- A. alerts
- B. reports
- C. workspace tiles
- D. workspace lists

**Correct Answer:** *C*

Reference:

<https://dynamics-tips.com/workspaces-d365-finance-and-operations/>

A company is implementing Dynamics 365 Finance.

The company wants to use Power BI as a reporting solution. The reporting solution must be embedded into the workspace.

You need to identify the data strategy that supports this requirement.

What should you use?

- A. Dual-write
- B. Data management
- C. Bring your own database (BYOD)
- D. Entity store

**Correct Answer: D**

Entity store is an operational data store that is included with Microsoft Dynamics 365 Finance. Entity store enables Power BI integration.

Reference:

<https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/analytics/power-bi-integration-entity-store>

**DRAG DROP -**

A company uses Dynamics 365 Supply Chain Management.

You must implement a guided process to manage actions that must be performed when a customer reports a delivery that includes missing items.

You need to configure case management.

Where should you complete each configuration? To answer, drag the appropriate locations to the correct requirement. Each location may be used once, more than once, or not at all. You may need to drag the split bar between panes or scroll to view content.

**NOTE:** Each correct selection is worth one point.

Select and Place:

<b>Locations</b>	<b>Answer Area</b>	
	<b>Requirement</b>	<b>Location</b>
Case Process	Six tasks must be completed before a case can be resolved.	<input type="text"/>
Case Categories	Ensure that the customer service department is responsible for all cases.	<input type="text"/>
Case Workflow	The customer must be called after a case is resolved to gather feedback and confirm satisfaction.	<input type="text"/>
Case category type security		

**Correct Answer:**

<b>Locations</b>	<b>Answer Area</b>	
	<b>Requirement</b>	<b>Location</b>
Case Process	Six tasks must be completed before a case can be resolved.	<input type="text"/> Case Process
Case Categories	Ensure that the customer service department is responsible for all cases.	<input type="text"/> Case category type security
Case Workflow	The customer must be called after a case is resolved to gather feedback and confirm satisfaction.	<input type="text"/> Case Workflow
Case category type security		

**Box 1: Case Process -**

You should set up processes that employees must follow for the cases that are opened in your organization. Processes help guarantee consistency for the people who are involved in cases, and also help employees resolve cases faster and more efficiently. You can set up a process for each case category that cases are assigned to. Although planning a separate process for each case type takes time, case resolution will go much more smoothly if the processes are planned out.

**Box 2: Case category security -****Case category security by role -**

Only appropriate employees in an organization should have access to cases and related information. To control which employees have access to view, create, and update different types of cases, you can assign security roles to case category types. You must determine which security roles should have access to the various case category types.

Box 3: Case workflow -

You can setup cases in a deeper way by using workflows in Organization administration.

Reference:

<https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/fin-ops/organization-administration/plan-case-management>

**HOTSPOT -**

A company is implementing case management in Dynamics 365 Supply Chain Management.

The company has the following requirements:

- Create a simplified user interface to create new cases.
- Send a confirmation email after a case is submitted.
- Create a report to display case metrics.

You need to determine which technologies meet the requirements.

Which technologies should you use? To answer, select the appropriate options in the answer area.

NOTE: Each correct selection is worth one point.

Hot Area:

**Answer Area**

Requirement	Technology
Create a simplified user interface to create new cases.	<input type="checkbox"/> Power Apps <input type="checkbox"/> Power Automate <input type="checkbox"/> Power BI <input checked="" type="checkbox"/> Microsoft Dataverse
Send a confirmation email after a case is submitted.	<input type="checkbox"/> Power Apps <input type="checkbox"/> Power Automate <input type="checkbox"/> Power BI <input checked="" type="checkbox"/> Microsoft Dataverse
Create a report to display case metrics.	<input type="checkbox"/> Power Automate <input type="checkbox"/> Power BI <input checked="" type="checkbox"/> Microsoft Dataverse

Correct Answer:

### Answer Area

Requirement	Technology				
Create a simplified user interface to create new cases.	<table border="1"><tr><td>Power Apps</td></tr><tr><td>Power Automate</td></tr><tr><td>Power BI</td></tr><tr><td>Microsoft Dataverse</td></tr></table>	Power Apps	Power Automate	Power BI	Microsoft Dataverse
Power Apps					
Power Automate					
Power BI					
Microsoft Dataverse					
Send a confirmation email after a case is submitted.	<table border="1"><tr><td>Power Apps</td></tr><tr><td>Power Automate</td></tr><tr><td>Power BI</td></tr><tr><td>Microsoft Dataverse</td></tr></table>	Power Apps	Power Automate	Power BI	Microsoft Dataverse
Power Apps					
Power Automate					
Power BI					
Microsoft Dataverse					
Create a report to display case metrics.	<table border="1"><tr><td>Power Automate</td></tr><tr><td>Power BI</td></tr><tr><td>Microsoft Dataverse</td></tr></table>	Power Automate	Power BI	Microsoft Dataverse	
Power Automate					
Power BI					
Microsoft Dataverse					

Box 1: Power Apps -

Use Power Apps canvas apps for simple UI handling cases.

Box 2: Power Automate -

You can customize emails for Power Automate flows.

Box 3: Power BI -

Power BI can produce reports.

Reference:

<https://docs.microsoft.com/en-us/power-automate/email-customization>

**DRAG DROP -**

A company uses Dynamics 365 Supply Chain Management to store inventory. The company has a website to display product information.

The company wants to add the following capabilities to the website:

- Allow customers to check store inventory.
- Send an email to the product purchasing manager if a customer checks store inventory and the product is not in stock.

You need to configure the system.

What should you use? To answer, drag the appropriate technology to the correct requirements. Each technology may be used once, more than once, or not at all.

You may need to drag the split bar between panes or scroll to view content.

NOTE: Each correct selection is worth one point.

Select and Place:

**Technologies**

Power Virtual Agents

Power BI

Model-driven app

Power Automate

**Answer Area****Requirement**

Allow customers to check store inventory from the company's website.

**Technology**

Email the product purchasing manager if a customer checks store inventory and the product is not in stock.

**Correct Answer:****Technologies**

Power Virtual Agents

Power BI

Model-driven app

Power Automate

**Answer Area****Requirement**

Allow customers to check store inventory from the company's website.

**Technology**

Model-driven app

Email the product purchasing manager if a customer checks store inventory and the product is not in stock.

Power Automate

Box 1: Model-driven app -

Box 2: Power Automate -

You can customize emails for Power Automate flows.

Reference:

<https://docs.microsoft.com/en-us/power-automate/email-customization>



**HOTSPOT -**

You are configuring a new Dynamics 365 app deployment for a company.

The company has the following requirements:

- Create a rewards program for customers.
- Manage long-term relationships with customers through clienteling.

Manage customer ledger entries to reconcile payments.

You need to select the appropriate app to use.

Which app should you use? To answer, select the appropriate options in the answer area.

NOTE: Each correct selection is worth one point.

Hot Area:

**Answer Area****Requirement****App**

Create a rewards program for customers.

Dynamics 365 Finance
Dynamics 365 Supply Chain Management
Dynamics 365 Project Operations
Dynamics 365 Commerce

Manage long-term relationships with customers.

Dynamics 365 Finance
Dynamics 365 Supply Chain Management
Dynamics 365 Project Operations
Dynamics 365 Commerce

Manage customer ledger entries to reconcile payments.

Dynamics 365 Finance
Dynamics 365 Supply Chain Management
Dynamics 365 Project Operations
Dynamics 365 Commerce

**Correct Answer:**

**Answer Area**

**Requirement**

Create a rewards program for customers.

Manage long-term relationships with customers.

Manage customer ledger entries to reconcile payments.

**App**

Dynamics 365 Finance
Dynamics 365 Supply Chain Management
Dynamics 365 Project Operations
<b>Dynamics 365 Commerce</b>

Dynamics 365 Finance
Dynamics 365 Supply Chain Management
Dynamics 365 Project Operations
<b>Dynamics 365 Commerce</b>

Dynamics 365 Finance
Dynamics 365 Supply Chain Management
Dynamics 365 Project Operations
<b>Dynamics 365 Commerce</b>

Box 1: Dynamics 365 Commerce -

Loyalty programs can help increase customer loyalty by rewarding customers for their interactions with the retailer's brand. In Dynamics 365 Commerce, you can set up simple or complex loyalty programs that apply across your legal entities in any commerce channel.

You can set up your loyalty program so that they include the following options.

- \* Set up multiple types of rewards that you offer in your loyalty programs, and track participation in your loyalty programs.
- \* Etc.

Box 2: Dynamics 365 Commerce -

You can manage clienteling in Dynamics 365 Commerce.

Clienteling empowers sales associates to become trusted advisors and establish long-term relationships with their customers. Dynamics 365 Customer Insights helps organizations to gather disparate data, be it from transactional, observational, or behavioral sources, to gain a unified view of customers, and derive intelligent insights that drive key business processes.

Box 3: Dynamics 365 Finance -

Use Dynamics 365 Finance to manage customer ledger entries to reconcile payments

Reference:

[https://docs.microsoft.com/en-](https://docs.microsoft.com/en-us/dynamics365/commerce/set-up-customer-loyalty-program)

## DRAG DROP

A company implements finance and operations apps.

The company needs to implement master planning and budgeting.

You need to recommend which apps the company should implement.

Which apps should you recommend? To answer, drag the appropriate apps to the correct capabilities. Each app may be used once, more than once, or not at all. You may need to drag the split bar between panes or scroll to view content.

NOTE: Each correct selection is worth one point.

**Apps**

Dynamics 365 Supply Chain Management
Dynamics 365 Finance
Dynamics 365 Human Resources
...
...
...
...

**Answer Area**

Capability	App
Master planning	
Budgeting	

**Answer Area****Correct Answer:**

Capability	App
Master planning	Dynamics 365 Supply Chain Management
Budgeting	Dynamics 365 Finance

**HOTSPOT**

A company that distributes cleaning supplies and chemicals uses Dynamics 365 Supply Chain Management.

The purchasing manager for the chemicals has the following requirements:

- All purchasing agents in the department must have the purchase order list page configured to display vendors for only their buyer group.
- The list page must display only open purchase orders that have a delivery date five days from the current date.

The purchasing manager sets up the buyer group. The department personnel cannot see the changes.

You need to complete the configuration.

What should you do? To answer, select the appropriate options in the answer area.

**Answer Area**

Requirement	Configuration
Display only open purchase orders five days forward.	<input type="checkbox"/> Create a saved view. <input type="checkbox"/> Configure in User options. <input type="checkbox"/> Use a record template.
Allow agents to apply the manager's user interface changes.	<input type="checkbox"/> Create a saved view. <input checked="" type="checkbox"/> Share a personalization. <input type="checkbox"/> Add a tile to a workspace.

**Answer Area**

Requirement	Configuration
Display only open purchase orders five days forward.	<input checked="" type="checkbox"/> Create a saved view. <input type="checkbox"/> Configure in User options. <input type="checkbox"/> Use a record template.

**Correct Answer:**

Requirement	Configuration
Allow agents to apply the manager's user interface changes.	<input checked="" type="checkbox"/> Create a saved view. <input checked="" type="checkbox"/> Share a personalization. <input type="checkbox"/> Add a tile to a workspace.

**HOTSPOT**

A wholesale company is implementing finance and operations apps.

The business-to-business (B2B) and business-to-consumer (B2C) customers must be able to purchase in-person through two sales channels: warehouse or pop-up shops.

The B2B operations require automatic post and settlement of accounts receivable for cash sales.

The B2C operations require consolidated consumer sales per sales channel.

You need to configure the solutions.

Which solutions should you configure? To answer, select the appropriate options in the answer area.

NOTE: Each correct selection is worth one point.

**Answer Area**

Requirement	Solution
Automatic post and settlement of accounts receivable for cash sales	Dynamics 365 Commerce only Dynamics 365 Supply Chain Management only Dynamics 365 Commerce or Dynamics 365 Supply Chain Management
Consolidated consumer sales per sales channel	Dynamics 365 Commerce only Dynamics 365 Supply Chain Management only Dynamics 365 Commerce or Dynamics 365 Supply Chain Management

**Answer Area****Correct Answer:**

Requirement	Solution
Automatic post and settlement of accounts receivable for cash sales	Dynamics 365 Commerce only Dynamics 365 Supply Chain Management only Dynamics 365 Commerce or Dynamics 365 Supply Chain Management
Consolidated consumer sales per sales channel	Dynamics 365 Commerce only Dynamics 365 Supply Chain Management only Dynamics 365 Commerce or Dynamics 365 Supply Chain Management

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## DRAG DROP

A Dynamics 365 Finance app environment has been manually linked to multiple Microsoft Power Platform environments.

You enable Microsoft Power Platform integration, and a failure occurs.

You need to resolve the failure.

Which three actions should you perform in sequence? To answer, move the appropriate actions from the list of actions to answer area and arrange them in the correct order.

NOTE: More than one order of answer choices is correct. You will receive credit for any of the correct orders you select.

**Actions****Answer Area**

Reconfigure virtual entity solutions to link the Dynamics 365 Finance app environment to the Microsoft Power Platform environment created at deployment.

Disable the Microsoft Power Platform integration in Lifecycle Services (LCS).

Reconfigure virtual entity solutions to link all Microsoft Power Platform environments to the Dynamics 365 Finance app environment.

Reconfigure dual-write solutions to link the Dynamics 365 Finance app environment to the Microsoft Power Platform environment created at deployment.

Enable the Microsoft Power Platform integration in Lifecycle Services (LCS).

Reconfigure dual-write solutions to link all Microsoft Power Platform environments to the Dynamics 365 Finance app environment.

**Answer Area**

Enable the Microsoft Power Platform integration in Lifecycle Services (LCS).

**Correct Answer:**

Reconfigure virtual entity solutions to link the Dynamics 365 Finance app environment to the Microsoft Power Platform environment created at deployment.

Reconfigure dual-write solutions to link the Dynamics 365 Finance app environment to the Microsoft Power Platform environment created at deployment.

A company that uses Dynamics 365 Finance has a new data entry team.

The data entry team creates multiple records for a single contact.

You need to recommend methods to minimize creation of multiple contacts that are the same.

Which two options should you recommend? Each correct answer presents a complete solution.

NOTE: Each correct selection is worth one point.

- A. Set the Check for duplicate parameter.
- B. Check for duplicates on the global address book list page.
- C. Set the Delete parties with no roles parameter.
- D. Assign parties in the global address book.
- E. Set the secure by address book parameter.

**Correct Answer: BE**

A company uses Dynamics 365 Supply Chain Management. The company has two legal entities, one in the United States and one in Canada.

The Canada entity has a vendor that the US entity wants to order from directly. The US entity requires access to the vendor sales representative information for order placement.

You need to resolve the US access requirement.

What should you do?

- A. Associate the global address book party to the US company.
- B. Create an intercompany relationship.
- C. Create a new address book.
- D. Set the secure by address book parameter.

**Correct Answer: A**

**DRAG DROP -**

You design flow control for a complex expense workflow.

The workflow must run the approval process for several expensive reports simultaneously.

If an expense report is for an amount more than \$1,000, a supervisor must approve the expense report.

You need to design the workflow.

Which flow control elements should you use? To answer, drag the appropriate flow control shapes to the correct requirements. Each flow control shape may be used once, more than once, or not at all. You may need to drag the split bar between panes or scroll to view content.

NOTE: Each correct selection is worth one point.

Select and Place:

**Flow control shapes**

Conditional decision

Manual decision

Parallel activity

Subworkflow

**Answer Area****Requirement****Flow control shape**

Run several processes simultaneously.

Evaluate total amount for expense report.

**Correct Answer:****Flow control shapes**

Conditional decision

Manual decision

Parallel activity

Subworkflow

**Answer Area****Requirement****Flow control shape**

Run several processes simultaneously.

Evaluate total amount for expense report.

Box 1: Parallel activity -

Box 2: Conditional decision -

To run specific actions in your logic app only after passing a specified condition, add a condition action. This control structure compares the data in your workflow against specific values or fields. You can then specify different actions that run based on whether or not the data meets the condition.

Reference:

<https://docs.microsoft.com/en-us/azure/logic-apps/logic-apps-control-flow-conditional-statement>

A hospital plans to deploy a new instance of Dynamics 365 Finance. New users are created regularly.

You must add all employees as users of the system and assign the appropriate role to users.

Employees who have the initials M.D. after their name must be added to the Medical Doctors role.

You schedule the automatic role assignment batch job.

You need to complete the role assignment.

What should you do?

- A. Add a rule with a query to add employees with M.D. initials to the Medical Doctors role.
- B. Select a user who has M.D. in the name. Assign the Medical Doctors role. Repeat for each user.
- C. Configure segregation of duties for the M.D. roles.
- D. Create a role with extended data security and assign it to the M.D. employees.

**Correct Answer: A**

You can assign users to roles automatically, based on rules and business data, exclude users from automatic role assignment, or add users to roles manually.

Note: Automatically assign users to roles

This procedure explains how system administrators can automatically assign users to roles, based on business data.

1. Go to Navigation pane > Modules > System administration > Security > Assign users to roles.
2. In the tree, select 'Accounting supervisor'. Select the role that you want to configure the rule for. In this example, select Accounting supervisor.
3. Select Add rule to open the dialog menu.
4. In the Select a query list, find and select the desired record. Select the query to use for this rule.
5. In the Membership rule name list, click the link in the selected row.
6. Select Edit query. Edit the query, as needed.
7. Select OK.
8. Select Run automatic role assignment.
9. Go to Navigation pane > Modules > System administration > Users > Users (ideally in a separate browser tab).
10. Review the roles assigned to various users to confirm that the role assignment query was correct. Adjust and re-run if needed.

Reference:

<https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/sysadmin/tasks/assign-users-security-roles>

You manage Dynamics 365 Supply Chain Management for a company.

A user is unable to perform a critical business process. The user's permissions must be updated.

You need to identify and resolve the user's missing permissions.

Which feature should you use?

- A. Business process modeler
- B. Separation of duties
- C. Data security policies
- D. Security diagnostics for task recordings

**Correct Answer:** D

Reference:

<https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/sysadmin/tasks/security-diagstics-task-recordings>

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 Custom View Settings

Question #4

*Topic 3*

An asset management company implements Dynamics 365 Finance.

You need to evaluate the current security roles to ensure compliance.

What should you use?

- A. Role-based security
- B. Audit workbench
- C. Segregation of duties conflicts
- D. Segregation of duties rules

**Correct Answer:** C

Reference:

<https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/sysadmin/tasks/identify-resolve-conflicts-segregation-duties>

**DRAG DROP -**

You are the security administrator for a company that uses Dynamics 365 Finance.

The company requires the following:

- UserA must be restricted from deleting customer records.
- UserA must be able to create new customer records and edit existing records.
- UserB must be able to manage retail assortments business processes.

You must use the principle of least privilege when assigning user security. You must use existing security functionality.

You need to select the security components to implement the security requirements.

Which security components should you use? To answer, drag the appropriate security components to the correct security requirements. Each security component may be used once, more than once, or not at all. You may need to drag the split bar between panes or scroll to view content.

NOTE: Each correct selection is worth one point.

Select and Place:

**Answer Area****Security components****Requirement****Security component**

duty

Configure UserA's access level to customer records

permission

Enable UserB to manage retail assortments

privilege

role

**Correct Answer:****Answer Area****Security components****Requirement****Security component**

duty

Configure UserA's access level to customer records

privilege

permission

Enable UserB to manage retail assortments

duty

privilege

role

**DRAG DROP -**

A company named CompanyA is implementing Dynamics 365 Finance. The company is migrating organizational structure data from an older system.

CompanyA has a wholly-owned subsidiary named CompanyB that reports its own financials. CompanyA and CompanyB transact with each other.

The companies have three regional offices that are individual cost centers.

You need to configure the organization.

What should you use? To answer, drag the appropriate functionalities to the correct requirements. Each functionality may be used once, more than once, or not at all. You may need to drag the split bar between panes or scroll to view content.

NOTE: Each correct selection is worth one point.

Select and Place:

**Answer Area****Functionalities****Requirement****Functionality**

Legal entity

Set up financials for CompanyB

Financial dimension

Set up for regional offices

Financial dimension set

Consolidation legal entity

**Correct Answer:****Answer Area****Functionalities****Requirement****Functionality**

Legal entity

Set up financials for CompanyB

Legal entity

Financial dimension

Set up for regional offices

Financial dimension set

Financial dimension set

Consolidation legal entity

**DRAG DROP -**

You are implementing Dynamics 365 Finance.

You must send notifications to internal users when a new fixed asset is created or approved and acquired.

You need to configure the system to meet the requirements.

Which features should you use? To answer, drag the appropriate features to the correct requirements. Each feature may be used once, more than once, or not at all. You may need to drag the split bar between panes or scroll to view content.

NOTE: Each correct selection is worth one point.

Select and Place:

**Answer Area**

Features	Requirement	Feature
alert	Send a notification when a new fixed asset is created	
electronic messaging	Send a notification when a new fixed asset is approved and acquired	
workflow		

Correct Answer:

**Answer Area**

Features	Requirement	Feature
alert	Send a notification when a new fixed asset is created	alert
electronic messaging	Send a notification when a new fixed asset is approved and acquired	workflow
workflow		

**HOTSPOT -**

A company that has two legal entities is implementing Dynamics 365 Finance.

You need to ensure that the company can view the following business information:

- Information about the user that posts a journal transaction.
- Intercompany transactions between the two legal entities.

Which features should you implement? To answer, select the appropriate options in the answer area.

NOTE: Each correct selection is worth one point.

Hot Area:

**Answer Area**

Business information	Feature					
Information about the user that posts a journal transaction	<table border="1"><tr><td style="text-align: right;">▼</td></tr><tr><td>Audit trail</td></tr><tr><td>Audit workbench</td></tr><tr><td>Users</td></tr><tr><td>Voucher transactions</td></tr></table>	▼	Audit trail	Audit workbench	Users	Voucher transactions
▼						
Audit trail						
Audit workbench						
Users						
Voucher transactions						
Intercompany transactions between the two legal entities	<table border="1"><tr><td style="text-align: right;">▼</td></tr><tr><td>Accounting source explorer</td></tr><tr><td>Original document</td></tr><tr><td>Related vouchers</td></tr></table>	▼	Accounting source explorer	Original document	Related vouchers	
▼						
Accounting source explorer						
Original document						
Related vouchers						

Correct Answer:

**Answer Area**

Business information	Feature					
Information about the user that posts a journal transaction	<table border="1"><tr><td style="text-align: right;">▼</td></tr><tr><td>Audit trail</td></tr><tr><td>Audit workbench</td></tr><tr><td>Users</td></tr><tr><td>Voucher transactions</td></tr></table>	▼	Audit trail	Audit workbench	Users	Voucher transactions
▼						
Audit trail						
Audit workbench						
Users						
Voucher transactions						
Intercompany transactions between the two legal entities	<table border="1"><tr><td style="text-align: right;">▼</td></tr><tr><td>Accounting source explorer</td></tr><tr><td>Original document</td></tr><tr><td>Related vouchers</td></tr></table>	▼	Accounting source explorer	Original document	Related vouchers	
▼						
Accounting source explorer						
Original document						
Related vouchers						

Reference:

<https://docs.microsoft.com/en-us/dynamics365/finance/general-ledger/view-journal-entries-transactions>



**HOTSPOT -**

A company implements Dynamics 365 Supply Chain Management and Dynamics 365 Finance. The company adds new vendors to the system. A purchasing agent is responsible for populating all company-mandated fields on new vendor records.

Once the vendor is created, the purchasing manager must approve the vendor record before the vendor record can be used in any purchase requisitions. Every

Friday, the purchasing director must receive an email with the list of new vendors added to the system in the prior week.

You need to configure the system.

Which tools should you use? To answer, select the appropriate options in the answer area.

NOTE: Each correct selection is worth one point.

Hot Area:

**Answer Area****Requirement****Tool**

Assist a new purchasing agent with vendor creation

Task guide
Power Automate
Workflow
Business Process Modeler

Send information about a new vendor to a purchasing manager for approval

Workflow
Business Process Modeler
Data task automation
Regression suite automation tool

Send the purchasing manager an email every Friday with new vendor information

Power Automate
Workflow
Data task automation

Correct Answer:

## Answer Area

Requirement	Tool					
Assist a new purchasing agent with vendor creation	<table border="1"><tr><td>▼</td></tr><tr><td>Task guide</td></tr><tr><td>Power Automate</td></tr><tr><td>Workflow</td></tr><tr><td>Business Process Modeler</td></tr></table>	▼	Task guide	Power Automate	Workflow	Business Process Modeler
▼						
Task guide						
Power Automate						
Workflow						
Business Process Modeler						
Send information about a new vendor to a purchasing manager for approval	<table border="1"><tr><td>▼</td></tr><tr><td>Workflow</td></tr><tr><td>Business Process Modeler</td></tr><tr><td>Data task automation</td></tr><tr><td>Regression suite automation tool</td></tr></table>	▼	Workflow	Business Process Modeler	Data task automation	Regression suite automation tool
▼						
Workflow						
Business Process Modeler						
Data task automation						
Regression suite automation tool						
Send the purchasing manager an email every Friday with new vendor information	<table border="1"><tr><td>▼</td></tr><tr><td>Power Automate</td></tr><tr><td>Workflow</td></tr><tr><td>Data task automation</td></tr></table>	▼	Power Automate	Workflow	Data task automation	
▼						
Power Automate						
Workflow						
Data task automation						

Reference:

<https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/user-interface/task-recorder#playing-a-task-guide>

<https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/fin-ops/organization-administration/configure-approval-process-workflow>

**HOTSPOT -**

A company is implementing Dynamics 365 Supply Chain Management.

You need to configure a workflow to handle purchase requisitions. The workflow must meet the following requirements:

- Route the purchase requisition to the employee's direct manager for approval.
- Route the purchase requisition to the director of purchasing for all requisitions over \$10,000.

How should you configure the workflow? To answer, select the appropriate options in the answer area.

NOTE: Each correct selection is worth one point.

Hot Area:

**Answer Area****Requirement**

Route the purchase requisition to the employee's direct manager.

**Configuration option**

Hierarchies
Spending limits
Participants
Delegates

Route the purchase requisition to the director of purchasing for all requisitions over \$10,000.

Signing limits
Spending limits
Hierarchies
Participants

**Answer Area****Requirement**

Route the purchase requisition to the employee's direct manager.

**Configuration option**

Hierarchies
Spending limits
Participants
Delegates

Route the purchase requisition to the director of purchasing for all requisitions over \$10,000.

Signing limits
Spending limits
Hierarchies
Participants

Correct Answer:

Reference:

<https://exploredynamics365.home.blog/2020/11/27/workflow-assignment-hierarchy-based-approval-in-microsoft-dynamics-365-finance-and-operations-part1/> <https://docs.microsoft.com/en-us/dynamicsax-2012/appuser-itpro/about-signing-limits>

You set up Dynamics 365 Finance.  
Your organization will use email with the application.  
You need to ensure that email will be sent using typical secure settings.  
What setting must be set up as specified?

- A. The SMTP port field is set to 587.
- B. Information rights management is enabled.
- C. Encryption: S/MIME and PGP are enabled.
- D. In-place eDiscovery is enabled.

**Correct Answer: A**

Note:

There are several versions of this question in the exam. The question has two possible correct answers:

- 1. The SMTP port field is set to 587
- 2. Specify if SSL is required is selected

Other incorrect answer options you may see on the exam include the following:

- 1. Information rights management is enabled.
- 2. Encryption: S/MIME and PGP are enabled.
- 3. In-place eDiscovery is enabled.
- 4. Retention policies are enabled.
- 5. In-place hold and Litigation hold are enabled.
- 6. Encryption between on-premises servers and Exchange Online Archiving is enabled.

You are a Dynamics 365 Finance systems analyst.  
A user configures an alert for purchase orders that have a delivery date of two weeks away. However, batch alerts are not being sent.  
You need to troubleshoot why alerts are not processing.  
What two actions may be the cause for alerts not being sent? Each correct answer presents a complete solution.  
NOTE: Each correct selection is worth one point.

- A. A batch processing window may be set up for that batch job.
- B. The date format in the Dynamics 365 tenant does not match the format in the client device.
- C. The change-based alert has expired.
- D. There may not be a batch server assigned to the batch job.

**Correct Answer: CD**

Reference:

<https://community.dynamics.com/ax/b/shafeealabadixtutorials/posts/ax-2012-alert-management-part-ii-due-date-alerts>

**DRAG DROP -**

You are configuring the address books for a company's accounts receivable, accounts payable, and retail operations.

You need to configure the appropriate address books to meet various requirements.

Which address book should you use for each scenario? To answer, drag the appropriate address book objects to the correct scenarios. Each address book object may be used once, more than once, or not at all. You may need to drag the split bar between panes or scroll to view content.

NOTE: Each correct selection is worth one point.

Select and Place:

Address Book Object	Answer Area	Scenario	Address Book Object
employee		Restrict account visibility for a given retail channel transaction.	Address Book Object
global		Create an address for a vendor.	Address Book Object
customer		Link workers to retail locations.	Address Book Object
contact		Create an address for a prospect.	Address Book Object

**Correct Answer:**

Address Book Object	Answer Area	Scenario	Address Book Object
employee		Restrict account visibility for a given retail channel transaction.	customer
global		Create an address for a vendor.	global
customer		Link workers to retail locations.	employee
contact		Create an address for a prospect.	contact

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 Custom View Settings

Question #14

Topic 3

## HOTSPOT -

You set up a new instance of Dynamics 365 Finance.

The IT department needs to track requisitions for new equipment by using unique identifiers. Due to regulatory requirements, the unique identifiers must not have missing values. Everyone in the organization will make requisitions using the unique identifiers.

You need to establish unique identifiers.

What application features should you use? To answer, select the application feature to match the parameter in the answer area.

NOTE: Each correct selection is worth one point.

Hot Area:

**Answer Area**

Parameter	Application feature
System entity	<input type="text"/> Number sequences Case management Workflow system Purchasing policy
Type for a prefix of ITreq	<input type="text"/> Alphanumeric segment Constant segment
Scope	<input type="text"/> Legal entity Company Shared
Type	<input type="text"/> Non-continuous Continuous

Correct Answer:

## Answer Area

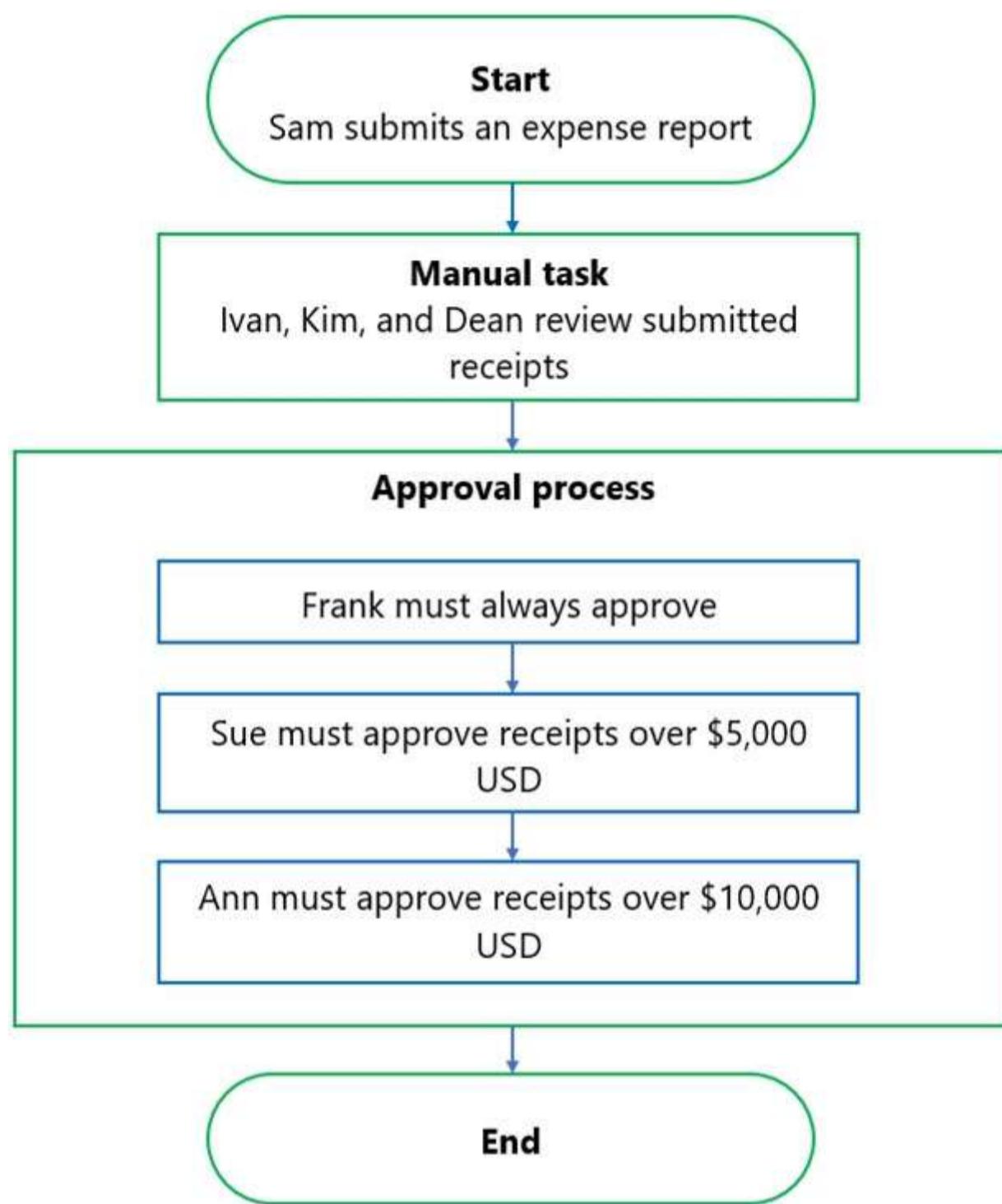
Parameter	Application feature
System entity	<div style="border: 1px solid black; padding: 5px;"><div style="background-color: #e0f2e0; border-bottom: 1px solid black; padding-bottom: 2px;">Number sequences</div>Case management Workflow system Purchasing policy</div>
Type for a prefix of ITreq	<div style="border: 1px solid black; padding: 5px;"><div style="background-color: #e0f2e0; border-bottom: 1px solid black; padding-bottom: 2px;">Alphanumeric segment</div>Constant segment</div>
Scope	<div style="border: 1px solid black; padding: 5px;"><div style="background-color: #e0f2e0; border-bottom: 1px solid black; padding-bottom: 2px;">Legal entity</div>Company Shared</div>
Type	<div style="border: 1px solid black; padding: 5px;"><div style="background-color: #e0f2e0; border-bottom: 1px solid black; padding-bottom: 2px;">Non-continuous</div>Continuous</div>

Reference:

<https://docs.microsoft.com/en-us/dynamics365/unified-operations/fin-and-ops/organization-administration/number-sequence-overview>

**HOTSPOT -**

A company sets up a workflow for expense reports. An employee named Sam submits an expense report totaling USD 7,000 to go through the workflow.



Use the drop-down menus to select the answer choice that answers each question based on the information presented in the graphic.

NOTE: Each correct selection is worth one point.

Hot Area:

**Answer Area**

Questions	Answer choice
What statement about the workflow is correct?	<input type="checkbox"/> Ann can reject the expense report. <input type="checkbox"/> Ivan, Kim, and Dean must all complete the manual task. <input type="checkbox"/> The workflow ends after Sue approves the expense report. <input type="checkbox"/> The expense report will go through Frank, Sue, and Ann for approval.
What type of workflow is this?	<input type="checkbox"/> Workflow with roles <input type="checkbox"/> Workflow with a manual decision <input type="checkbox"/> Workflow with multiple users in a task <input type="checkbox"/> Workflow with a line-item workflow element

**Correct Answer:**

## Answer Area

Questions	Answer choice
What statement about the workflow is correct?	<p>Ann can reject the expense report.</p> <p>Ivan, Kim, and Dean must all complete the manual task.</p> <p>The workflow ends after Sue approves the expense report.</p> <p>The expense report will go through Frank, Sue, and Ann for approval.</p>
What type of workflow is this?	<p>Workflow with roles</p> <p>Workflow with a manual decision</p> <p>Workflow with multiple users in a task</p> <p>Workflow with a line-item workflow element</p>

Reference:

<https://docs.microsoft.com/en-us/dynamicsax-2012/appuser-itpro/workflow-with-multiple-users-in-a-task>

You are a Dynamics 365 Finance system administrator. You have production and testing environments. You move the workflow from the testing environment to the production environment.

The workflow in the production environment is stuck in a wait state.

You need to resolve the issue with the workflow in the production environment.

What should you do?

- A. Set the workflow batch job to critical
- B. Set the workflow messaging batch job group
- C. Grant the user workflow permissions
- D. Set the workflow execution account in the workflow parameters

**Correct Answer:** D

A company implements Dynamics 365 for Finance.

They need additional information and want a subledger to record information for additional reporting rather than customizing all reports.

You need to set up the posting to accommodate the need for a subledger.

Which three actions should you take? Each answer presents part of the solution.

- A. Update existing reports to prevent data in the identified area from reporting
- B. Create posting profiles to post to the identified area as needed for the request
- C. Create posting definitions to post to the identified area as needed for the request
- D. Update existing reports to add data in the identified area from reporting
- E. Identify an area of the chart of accounts to record to as the subledger

**Correct Answer:** BDE

*Community vote distribution*

BCE (67%)

ACE (33%)

You are a systems administrator at a company that has implemented Dynamics 365 Finance.

New employees are starting at the company.

You need to extend the electronic signatures functionality to them.

Which two actions should you perform? Each answer presents part of the solution.

NOTE: Each correct selection is worth one point.

- A. On the Email parameters page, specify that SSL is required
- B. Specify the user's email address
- C. In License configuration, enable Maintenance mode
- D. Select the Electronic signature check box

**Correct Answer:** CD

Reference:

<https://docs.microsoft.com/en-us/dynamics365/unified-operations/fin-and-ops/organization-administration/tasks/set-up-electronic-signatures>

You are a Dynamics 365 Finance system administrator.

A company named Contoso Ltd. is creating a new legal entity that will be similar to an existing legal entity. Team members copy key entities to the new legal entity using the Data management workspace. They indicate that there were already-configured pieces of data unique to the new legal entity before they ran the Copy into legal entity process.

The data import/export framework settings are listed in the table below:

Setting	Current value
Ignore error	Yes
Create error file	Yes
Remove duplicates	Yes

You need to determine what happened to the already-configured pieces of data. What happened to the data?

- A. Any source legal entity data that already exists in the destination legal entity will be updated. Most Voted
- B. Any source legal entity data that already exists in the destination legal entity will be displayed as an error for user action in the Data management workspace.
- C. Any destination legal entity data will be deleted, and the source data will be inserted.
- D. Any source legal entity data that already exists in the destination legal entity will be ignored.

**Correct Answer: A**

*Community vote distribution*

A (100%)

A user with minimal privileges forgets to enter customer payments for the previous 15 days.

The user needs to enter all the payments using a previous date instead of the current date.

What should the user do?

- A. Change the date of the user session in the session date form.
- B. Change the system date on the user's operating system and restart the browser.
- C. Change the date of the customer payment journal header.
- D. Change the system date of the Application Object Server (AOS) in system administration.

**Correct Answer: A**

References:

<https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/fin-ops/organization-administration/tasks/change-date-session>

*Community vote distribution*

A (100%)

**HOTSPOT -**

You are a system administrator using Dynamics 365 Finance. You work in a project-based organization.

Each project has an approval process that will be assigned to different users of the system. Approvals are processed based on documents. Within those documents are different line items. Each line item may have a different approver.

You need to validate if the proposed action will satisfy the requirements.

For each of the following solutions, select Yes if the action meets the requirements. Otherwise, select No.

NOTE: Each correct selection is worth one point.

Hot Area:

**Answer Area**

Action	Yes	No
Configure document types. Configure document management parameters.	<input type="radio"/>	<input type="radio"/>
Create a document workflow. Configure line-item workflow elements for the document workflow.	<input type="radio"/>	<input type="radio"/>
Create workflow actions for when the document is assigned to the approver.	<input type="radio"/>	<input type="radio"/>
Set up reason codes for electronic signatures.	<input type="radio"/>	<input type="radio"/>

**Answer Area**

Correct Answer:

Action	Yes	No
Configure document types. Configure document management parameters.	<input type="radio"/>	<input checked="" type="radio"/>
Create a document workflow. Configure line-item workflow elements for the document workflow.	<input checked="" type="radio"/>	<input type="radio"/>
Create workflow actions for when the document is assigned to the approver.	<input checked="" type="radio"/>	<input type="radio"/>
Set up reason codes for electronic signatures.	<input type="radio"/>	<input checked="" type="radio"/>

**HOTSPOT -**

A company implements Dynamics 365 Finance.

It must set up the system to be ready for entering inventory items.

You need to select which unit of conversion fits the scenario.

Which conversion types should you use? To answer, select the appropriate options in the answer area.

NOTE: Each correct selection is worth one point.

Hot Area:

**Answer Area**

Car paints colors are purchased in quantitites Measured in gallons for the US and liters for Europe.

**Scenario****Conversion type**

Standard
Intra-class
Inter-class

Steel is purchased by size or weight depending on the request.

Standard
Intra-class
Inter-class

Nuts and bolts are purchased in quantities of 10 bolts to a box, 10 boxes to a case.

Standard
Intra-class
Inter-class

Correct Answer:

**Answer Area**

Car paints colors are purchased in quantitites Measured in gallons for the US and liters for Europe.

**Scenario****Conversion type**

Standard
Intra-class
Inter-class

Steel is purchased by size or weight depending on the request.

Standard
Intra-class
Inter-class

Nuts and bolts are purchased in quantities of 10 bolts to a box, 10 boxes to a case.

Standard
Intra-class
Inter-class

References:

<https://docs.microsoft.com/en-us/dynamicsax-2012/appuser-itpro/set-up-units-and-unit-conversions-retail-essentials>

You are a systems administrator for a Dynamics 365 Finance environment.

You need to configure an alert to notify the person responsible for deliverables that production may be delayed and deliveries to production are postponed.

For which object should you configure the alert?

- A. Product
- B. Purchase order
- C. Inventory location
- D. Inventory control

**Correct Answer:** B

References:

<https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/fin-ops/get-started/alerts-overview>

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 Custom View Settings

Question #24

Topic 3

**HOTSPOT -**

A company has complex security requirements. You are asked to set up security access for users.

You need to identify the main attributes for security role, duty, privilege, and permissions.

Which of the following attributes does each of the security components have? To answer, select the appropriate options in the answer area.

NOTE: Each correct selection is worth one point.

Hot Area:

**Answer Area**

Security component	Attributes
Security role	<p>Can be automatically assigned to users through batch jobs</p> <p>Is assessed through entry points</p> <p>Corresponds to parts of a business process and can be segregated</p>
Duty	<p>Can be automatically assigned to users through batch jobs</p> <p>Is assessed through entry points</p> <p>Corresponds to parts of a business process and can be segregated</p> <p>Specifies the level of access to perform a job or solve a problem</p>
Privilege	<p>Can be automatically assigned to users through batch jobs</p> <p>Is assessed through entry points</p> <p>Corresponds to parts of a business process and can be segregated</p> <p>Specifies the level of access to perform a job or solve a problem</p>
Permissions	<p>Can be automatically assigned to users through batch jobs</p> <p>Is assessed through entry points</p> <p>Corresponds to parts of a business process and can be segregated</p> <p>Specifies the level of access to perform a job or solve a problem</p>

Correct Answer:

### Answer Area

Security component	Attributes
Security role	<p>Can be automatically assigned to users through batch jobs</p> <p>Is assessed through entry points</p> <p>Corresponds to parts of a business process and can be segregated</p>
Duty	<p>Can be automatically assigned to users through batch jobs</p> <p>Is assessed through entry points</p> <p>Corresponds to parts of a business process and can be segregated</p> <p>Specifies the level of access to perform a job or solve a problem</p>
Privilege	<p>Can be automatically assigned to users through batch jobs</p> <p>Is assessed through entry points</p> <p>Corresponds to parts of a business process and can be segregated</p> <p>Specifies the level of access to perform a job or solve a problem</p>
Permissions	<p>Can be automatically assigned to users through batch jobs</p> <p>Is assessed through entry points</p> <p>Corresponds to parts of a business process and can be segregated</p> <p>Specifies the level of access to perform a job or solve a problem</p>

Reference:

<https://docs.microsoft.com/en-us/dynamics365/unified-operations/dev-itpro/sysadmin/role-based-security>

**HOTSPOT -**

You set up a new instance of Dynamics 365 Finance.

Your company sells widgets in cases of 12 units and pallets of 144 cases.

You need to establish the units of measure.

Which parameter is used to detail the units of measure? To answer, select the detail to match the parameter in the answer area.

NOTE: Each correct selection is worth one point.

Hot Area:

**Answer Area**

Parameter	Detail				
Unit class	<table border="1"><tr><td>Quantity</td></tr><tr><td>Mass</td></tr><tr><td>Area</td></tr></table>	Quantity	Mass	Area	
Quantity					
Mass					
Area					
From unit in widgets-per-case conversion	<table border="1"><tr><td>Unit</td></tr><tr><td>Case</td></tr><tr><td>Pallet</td></tr><tr><td>Widgets</td></tr></table>	Unit	Case	Pallet	Widgets
Unit					
Case					
Pallet					
Widgets					
To unit in cases-per-pallet conversion	<table border="1"><tr><td>Unit</td></tr><tr><td>Case</td></tr><tr><td>Pallet</td></tr><tr><td>Widgets</td></tr></table>	Unit	Case	Pallet	Widgets
Unit					
Case					
Pallet					
Widgets					

**Answer Area**

Parameter	Detail				
Unit class	<table border="1"><tr><td>Quantity</td></tr><tr><td>Mass</td></tr><tr><td>Area</td></tr></table>	Quantity	Mass	Area	
Quantity					
Mass					
Area					
Correct Answer: From unit in widgets-per-case conversion	<table border="1"><tr><td>Unit</td></tr><tr><td>Case</td></tr><tr><td>Pallet</td></tr><tr><td>Widgets</td></tr></table>	Unit	Case	Pallet	Widgets
Unit					
Case					
Pallet					
Widgets					
To unit in cases-per-pallet conversion	<table border="1"><tr><td>Unit</td></tr><tr><td>Case</td></tr><tr><td>Pallet</td></tr><tr><td>Widgets</td></tr></table>	Unit	Case	Pallet	Widgets
Unit					
Case					
Pallet					
Widgets					

References:

<https://docs.microsoft.com/en-us/dynamicsax-2012/unit-conversions-form?redirectedfrom=MSDN>

You are a Dynamics 365 Finance system administrator.

The expense department relies heavily on properly operating workflows. If there is a failure in the workflow, the issue needs to get resolved quickly.

You need to make sure that the system actively tracks the status, so the support team can monitor and take actions against any failures.

What should you do? Each correct answer presents a complete solution.

NOTE: Each correct selection is worth one point.

- A. Set the monitoring category of the Workflow message processing batch job to Workflow.
- B. Set the critical job flag of the Workflow message processing batch job to True.
- C. Set the Ignore task failure flag of the Workflow message processing batch job to False.
- D. Set the batch job named Workflow message processing to send an email when the status of the batch job is Error.
- E. Set the priority field of the Workflow message processing batch job to 1.

**Correct Answer:** BCD

You set up security roles for the users in a company.

You must use standard security roles when possible.

You need to identify the standard security roles.

Which of the following can you assign to a user as a standard security role?

- A. Waterspider Most Voted
- B. System engineer
- C. Developer
- D. Business development manager

**Correct Answer:** A

*Community vote distribution*

A (100%)

**HOTSPOT -**

A company implements Dynamics 365 Finance. You create a new security role to cover the approval of vendor invoices.

You must prevent users who enter vendor invoices from approving the invoices.

You need to ensure that the compliance policy is enforced.

Which options should you use? To answer, select the appropriate option in the answer area.

NOTE: Each correct selection is worth one point.

Hot Area:

**Answer Area****Requirement**

When new roles are assigned, the system must confirm that the compliance policy is enforced.

**Option**

Create a new Segregation of duties rule.
Add a new privilege for creating vendor invoices.
Add a new permission for creating vendor invoices.

Determine whether any violations of the policy for the accounts payable manager exist.

Use Verify compliance of user-role assignments.
Use the Segregation of duties rule.
Use Segregation of duties unresolved conflicts.

**Correct Answer:****Answer Area****Requirement**

When new roles are assigned, the system must confirm that the compliance policy is enforced.

**Option**

Create a new Segregation of duties rule.
Add a new privilege for creating vendor invoices.
Add a new permission for creating vendor invoices.

Determine whether any violations of the policy for the accounts payable manager exist.

Use Verify compliance of user-role assignments.
Use the Segregation of duties rule.
Use Segregation of duties unresolved conflicts.

**Reference:**

<https://docs.microsoft.com/en-us/dynamics365/unified-operations/dev-itpro/sysadmin/tasks/identify-resolve-conflicts-segregation-duties>

A multinational company plans to implement centralized procurement using purchase requisition workflows.

Multiple workflows must be of the same type. Each region must use its own purchase requisition workflow.

You need to implement the workflows.

What should you do?

- A. Configure Instructions for users
- B. Configure the workflow owner
- C. Configure automated tasks
- D. Configure manual tasks
- E. Add a condition for running the workflow

**Correct Answer: E**

A company implements Dynamics 365 Finance.

You have a requirement that the component data for address structure in the system be available in Portuguese (Brazil).

You need to provide address and contact information in Portuguese.

What should you do?

- A. Under Organization administration, on the Global addresses tab, enter the appropriate translation value in the translations form
- B. In User options, set the language preference to Portuguese pt-BR and enter addresses for customers and vendors
- C. Upload files to Dynamics 365 Translation Services (DTS) for conversion
- D. Apply return from Dynamics 365 Translation Services (DTS) to the system by submitting a support ticket

**Correct Answer: A**

A company plans to set up an organizational hierarchy to manage organizational relationships.

You need to identify which organizational purpose to use.

What purpose can you assign to an organizational hierarchy?

- A. Financial reason code
- B. Centralized payments
- C. Cost accounting
- D. Price models

**Correct Answer: B**

Reference:

<https://docs.microsoft.com/en-us/dynamics365/unified-operations/financials/cash-bank-management/set-up-centralized-payments>

**DRAG DROP -**

A company is migrating to Dynamics 365 Finance from a legacy system. The company is creating new questionnaires for customers.

When the survey responses come in, the company wants to provide ratings as a foundation for a further discussion.

You set up questionnaire types, question types, and questionnaire parameters.

You need to design the questionnaire.

In which order should you perform the actions? To answer, move all actions to the answer area and arrange them in the correct order.

Select and Place:

**Actions**

- Attach questions to the questionnaire
- Set up the questionnaire
- Set up questions and their association
- Set up answer groups and answers

**Answer Area****Correct Answer:****Actions**

- Attach questions to the questionnaire
- Set up the questionnaire
- Set up questions and their association
- Set up answer groups and answers

**Answer Area**

- Set up answer groups and answers
- Set up questions and their association
- Set up the questionnaire
- Attach questions to the questionnaire

**Reference:**

<https://docs.microsoft.com/en-us/dynamics365/unified-operations/talent/design-questionnaires>

**DRAG DROP -**

You are a Dynamics 365 Finance system administrator for your company.

The company sets up a new legal entity and wants to update the main page of the entity with a large banner containing the company logo.

You need to configure the new legal entity to display this.

Which four actions should you perform in sequence? To answer, move the appropriate actions from the list of actions to the answer area and arrange them in the correct order.

Select and Place:

**Actions**

Change the Dashboard company image type to Banner

Verify that the Dashboard company image type is set to Default

Select the new image

Use the Legal entities form

Use the Parameters form in the Organizational administration module

Edit the form

**Answer Area****Correct Answer:****Actions**

Change the Dashboard company image type to Banner

Verify that the Dashboard company image type is set to Default

Select the new image

Use the Legal entities form

Use the Parameters form in the Organizational administration module

Edit the form

**Answer Area**

Use the Legal entities form

Edit the form

Change the Dashboard company image type to Banner

Select the new image

**Reference:**

<https://docs.microsoft.com/en-us/dynamics365/unified-operations/fin-and-ops/get-started/tasks/change-banner-or-logo>

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Question #34

Topic 3

## DRAG DROP -

A multinational company has many legal entities and a complex organizational structure.

The management of the company wants to set up an organizational hierarchy to help improve efficiency.

You need to help create the organizational hierarchy.

In which order should you recommend that actions be performed to create an organizational hierarchy? To answer, move all actions from the list of actions to the answer area and arrange them in the correct order.

Select and Place:

**Actions**

Create organizations

Add organizations to the hierarchy

Create a hierarchy

Plan the organizational model

Assign a hierarchy purpose

**Answer Area****Correct Answer:****Actions**

Create organizations

Add organizations to the hierarchy

Create a hierarchy

Plan the organizational model

Assign a hierarchy purpose

**Answer Area**

Plan the organizational model

Create organizations

Create a hierarchy

Assign a hierarchy purpose

Add organizations to the hierarchy

**Reference:**

<https://docs.microsoft.com/en-us/dynamics365/unified-operations/fin-and-ops/organization-administration/tasks/create-organization-hierarchy>

**DRAG DROP -**

You set up a new installation of Dynamics 365 Finance for a Fortune 500 company. The company is organized into divisions.

You need to design the structure in the application.

What application features should you use? To answer, drag the appropriate setting to the correct drop targets. Each source may be used once, more than once, or not at all. You may need to drag the split bar between panes or scroll to view content.

NOTE: Each correct selection is worth one point.

Select and Place:

Application features	Answer Area
Legal entity	
Business unit	
Department	
Value stream	
Organizational structure	Application feature
The fortune 500 company	Application feature
A semi-autonomous operating entity	Application feature
Human resources	Application feature
Production flow activity control	Application feature

**Correct Answer:**

Application features	Answer Area
Legal entity	
Business unit	
Department	
Value stream	
Organizational structure	Application feature
The fortune 500 company	Legal entity
A semi-autonomous operating entity	Business unit
Human resources	Department
Production flow activity control	Value stream

**Reference:**

<https://docs.microsoft.com/en-us/dynamics365/unified-operations/fin-and-ops/organization-administration/organizations-organizational-hierarchies>

You are a Dynamics 365 Finance security administrator.  
Users are reporting that they cannot access a given form in the system.

You need to quickly identify what roles, duties, and privileges grant access to this form to determine the best course of action for granting access.  
What should you use?

A. Security duty assignments report

B. Security role access report

C. Security development tool

D. Security diagnostics

E. Maintenance mode

**Correct Answer: D**

*Community vote distribution*

Note: This question is part of a series of questions that present the same scenario. Each question in the series contains a unique solution that might meet the stated goals. Some question sets might have more than one correct solution, while others might not have a correct solution.

After you answer a question in this section, you will NOT be able to return to it. As a result, these questions will not appear in the review screen.

You are a Dynamics 365 Finance security administrator.

When testing security setups, users report that certain roles are gaining access to sensitive information via a form in the system.

You must investigate which user roles have what visibility and access level to system objects, and then send a report to the implementation team to address security compliance concerns.

You need to report the information from the system.

Solution: Generate the User role assignments report.

Does the solution meet the goal?

A. Yes

B. No

**Correct Answer: B**

Reference:

<https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/sysadmin/security-reports>

Note: This question is part of a series of questions that present the same scenario. Each question in the series contains a unique solution that might meet the stated goals. Some question sets might have more than one correct solution, while others might not have a correct solution. After you answer a question in this section, you will NOT be able to return to it. As a result, these questions will not appear in the review screen.

You are a Dynamics 365 Finance security administrator.

When testing security setups, users report that certain roles are gaining access to sensitive information via a form in the system.

You must investigate which user roles have what visibility and access level to system objects, and then send a report to the implementation team to address security compliance concerns.

You need to report the information from the system.

Solution: Generate the Security role access report.

Does the solution meet the goal?

A. Yes

B. No

**Correct Answer: A**

Reference:

<https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/sysadmin/security-reports>

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You are a Dynamics 365 Finance security administrator.

When testing security setups, users report that certain roles are gaining access to sensitive information via a form in the system.

You must investigate which user roles have what visibility and access level to system objects, and then send a report to the implementation team to address security compliance concerns.

You need to report the information from the system.

Solution: Generate the Role to user assignments report.

Does the solution meet the goal?

A. Yes

B. No

**Correct Answer: B**

Reference:

<https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/sysadmin/security-reports>

**HOTSPOT -**

A company uses May 1 as the start of its fiscal year.

You need to set up fiscal calendars and date intervals in financial accounting.

Which of the following attributes or purposes does each of the data configurations have? To answer, select the appropriate configuration in the answer area.

NOTE: Each correct selection is worth one point.

Hot Area:

**Answer Area****Date configurations****Fiscal calendar****Attributes**

- Is an optional setup
- Is a mandatory setup
- Is company specific
- Contains only one fiscal year

**Date interval**

- Is an optional setup
- Is a mandatory setup
- Used by one legal entity only
- Can cross different fiscal calendars

**Date configurations****Purposes****Fiscal calendar**

- Sales calendar
- Fixed asset calendar
- Warehouse calendar
- Procurement calendar

**Date interval**

- Easy date range selection
- Mark a date range for journal adjustments
- Mark a date for financial auditing
- Limit posting date range

Correct Answer:

## Answer Area

### Date configurations

Fiscal calendar

### Attributes

Is an optional setup
Is a mandatory setup
Is company specific
Contains only one fiscal year

Date interval

Is an optional setup
Is a mandatory setup
Used by one legal entity only
Can cross different fiscal calendars

### Date configurations

Fiscal calendar

### Purposes

Sales calendar
Fixed asset calendar
Warehouse calendar
Procurement calendar

Date interval

Easy date range selection
Mark a date range for journal adjustments
Mark a date for financial auditing
Limit posting date range

Reference:

<https://docs.microsoft.com/en-us/dynamics365/unified-operations/financials/budgeting/fiscal-calendars-fiscal-years-periods>

**SIMULATION -**

A company named Fabrikam, Inc. plans to open an office in the United Kingdom.

You need to create a new legal entity named Fabrikam that uses a company code of FABR.

To complete this task, sign in to the Dynamics 365 portal.

**Correct Answer:** See explanation below.

1. Go to Navigation pane > Modules > Organization administration > Organizations > Legal entities.
2. Click New.
3. In the Name field, type Fabrikam.
4. In the Company field, type FABR.
5. In the Country/region field, enter or select a value.
6. Click OK.

Reference:

<https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/fin-ops/organization-administration/tasks/create-legal-entity?toc=/dynamics365/commerce/toc.json> <https://docs.microsoft.com/en-us/learn/modules/plan-implement-legal-entities-finance-operations/2-create-legal-entity>

**SIMULATION -**

You are a functional consultant for Contoso Entertainment System USA (USMF).

You need to prevent a user named Arnie from adding receivable records to the customer payment journal. The solution must use only the default security roles.

To complete this task, sign in to the Dynamics 365 portal.

**Correct Answer:** See explanation below.

The Accounts receivable payments clerk role contains the maintain customer payments duty. One of the privileges in the maintain customer payments duty is the Post customer payment journal transactions privilege.

You need to duplicate the Accounts receivable payments clerk role and duplicate the maintain customer payments duty. Remove the Post customer payment journal privilege from the new duty. Remove the original maintain customer payments duty from the new role and add the new duty to the role.

Remove the Accounts receivable payments clerk role from Arnie and assign the new role to Arnie.

This solution will ensure that Arnie can do everything he could do before with the exception of adding receivable records to the customer payment journal. It will also ensure that anyone else assigned to the Accounts receivable payments clerk role can do everything they'd expect to be able to do with that role.

An alternative solution would be to deny the Post customer payment journal transactions privilege in the maintain customer payments duty.

However, this solution would affect all users assigned to the Accounts receivable payments clerk role.

Reference:

<https://docs.google.com/spreadsheets/d/1Ao-5w4t80LZhks902WFcMZUFXfFkl3uMYxDPEXp-kz0/edit#gid=0> <https://www.dynamics-tips.com/system-administration/security-roles>

**SIMULATION -**

You are a functional consultant for Contoso Entertainment System USA (USMF).

A company named Contoso, Ltd. plans to create a new legal entity for a new division that has a financial period close of March 31.

You need to create a new calendar for the planned legal entity.

To complete this task, sign in to the Dynamics 365 portal.

**Correct Answer:** See explanation below.

1. Go to Navigation pane > Modules > General Ledger > Ledger Setup > Fiscal Calendars.

2. Click the New Calendar button.

3. In the Calendar field, enter a name for the calendar.

4. In the Description field, enter a description for the calendar.

5. In the Start of fiscal year field, select April 1

.

st

6. In the End of fiscal year field, select March 31

.

st

7. In the Length of period field, enter 1.

8. In the Unit field, select Year.

9. Click the Create button to create the calendar.

Reference:

<https://docs.microsoft.com/en-us/learn/modules/create-fiscal-calendars-years-periods-dyn365-finance/3-create>

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Question #44

Topic 3

**SIMULATION -**

You are a functional consultant for Contoso Entertainment System USA (USMF).

You need to create a new number sequence named seq that meets the following requirements:

- Begins with the number 1
- Uses continuous numbers
- Uses a format of seq#####

To complete this task, sign in to the Dynamics 365 portal.

**Correct Answer:** See explanation below.

1. Go to Navigation pane > Modules > Organization administration > Number sequences > Number sequences.
2. Select Number sequence.
3. In the Number sequence code field, type seq.
4. In the Name field, type a value.
5. In the Segments section, click Add.
6. Select Constant and enter a value of seq
7. Click Add again.
8. Select Alphanumeric and enter a value of #####
9. In the General section, ensure that Continuous is set to Yes.
- 10.Under Number Allocation, enter 1 in the Smallest field.
- 11.Click Save to save the number sequence.

Reference:

<https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/fin-ops/organization-administration/tasks/set-up-number-sequences-individual-basis?toc=/dynamics365/retail/toc.json>

Question #45

Topic 3

**SIMULATION -**

You are a functional consultant for Contoso Entertainment System USA (USMF).

You need to ensure that when you purchase item number 1000 named Surface Pro 128GB, you can request a single unit or a box of eight units.

To complete this task, sign in to the Dynamics 365 portal.

**Correct Answer:** See explanation below.

- You need to configure a Unit of Measure for the box of eight units and another Unit of Measure for the single unit if one doesn't already exist.
1. Navigate to item number 1000.
  2. Select Item > Units of Measure.
  3. Click New.
  4. In the Code field, select an appropriate code such as Carton.
  5. In the QTY per unit of measure field, enter 8.
  6. There is likely to be a default Unit of Measure for purchasing a single unit. If there isn't, click New again.
  7. Select the PCS for the Code and enter 1 for the QTY per unit of measure.

**SIMULATION -**

You are a functional consultant for Contoso Entertainment System USA (USMF).

You need to ensure that a user named Alicia receives an alert notification each time a new release product is added from the product master list.

The alert must contain the word Products.

To complete this task, sign in to the Dynamics 365 portal.

**Correct Answer:** See explanation below.

1. Open the page that contains the data to monitor (Released Products)
2. On the Action Pane, on the Options tab, in the Share group, select Create alert rule.
3. In the Create alert rule dialog box, on the Alert me when FastTab, in the Event field, select Record has been created.
4. On the Alert me for FastTab, select the desired option. If you want to send the alert as a business event, ensure that Organization-wide is set to No.
5. On the Alert me with FastTab, in the Subject field, enter an appropriate subject (The word Products should be included in the Subject or Message text for this question).
6. In the Message field, enter an optional message. The text is used as the message that you receive when an alert is triggered.
7. Select OK to save the settings and create the alert rule.

Reference:

<https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/fin-ops/get-started/create-alerts> <https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/fin-ops/get-started/create-alerts>

**SIMULATION -**

You are a functional consultant for Contoso Entertainment System USA (USMF).

You need to ensure that when automated emails are sent by the Finance and Operations system, the emails are sent in bulk every five minutes.

To complete this task, sign in to the Dynamics 365 portal.

**Correct Answer:** See explanation below.

1. Go to System administration > Periodic tasks > Email processing > Email distributor batch.
2. Enable the Batch processing option.
3. Ensure No end date is selected.
4. Configure the frequency to 5 minutes.
5. Save the changes.

Reference:

<https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/fin-ops/organization-administration/configure-email?toc=/dynamics365/commerce/toc.json>

**SIMULATION -**

You are a functional consultant for Contoso Entertainment System USA (USMF).

You plan to implement a purchase order (PO) change management solution.

You need to configure the system to ensure that users can review a history of the changes made to POs by using approval workflows.

To complete this task, sign in to the Dynamics 365 portal.

**Correct Answer:** See explanation below.

1. Navigate to Procurement and sourcing > Setup > Procurement and sourcing parameters > General tab
2. Under Change Management For Purchase Orders, click the slider for Activate change management to set it to Yes.
3. Click the slider for Allow override of settings per supplier to set it to No.

**DRAG DROP -**

A company implements Dynamics 365 Finance. The company wants to automate some standard business practices and processes into the system.

A sales representative calls on a new customer and obtains an order. As part of the process, the representative must follow the standard procedure for onboarding a new customer by uploading the customer's credit application to the company OneDrive for processing, create the new customer record, set a default minimum credit limit, and enter the new order using the company's streamlined new-customer form.

After the credit application is approved by the finance manager, and the customer's credit limit is updated in the system, the order will be released for fulfillment.

You need to determine which tool or functionality best fits the scenario.

Which feature or functionality should you use? To answer, drag the appropriate setting to the correct drop targets. Each source may be used once, more than once, or not at all. You may need to drag the split bar between panes or scroll to view content.

NOTE: Each correct selection is worth one point.

Select and Place:

**Features or functionalities**

- Business process flow
- Workflow
- Microsoft Flow
- Task Guide

**Answer Area****Scenario**

Guide the salesperson through creating the new customer record and order.

Notify the finance manager of a new credit application by using email.

Automatically update the order status when the credit limit is updated.

**Feature or functionality**

- 
- 
- 

**Correct Answer:**

- Business process flow
- Workflow
- Microsoft Flow
- Task Guide

**Answer Area****Scenario**

Guide the salesperson through creating the new customer record and order.

Notify the finance manager of a new credit application by using email.

Automatically update the order status when the credit limit is updated.

**Feature or functionality**

- Task Guide
- Microsoft Flow
- Workflow

**SIMULATION -**

You are a functional consultant for Contoso Entertainment System USA (USMF).

You need to ensure that when a purchase of 10 units of a product named Surface Pro 128GB is initiated, the system can receive an overdelivery of an additional

10 units.

To complete this task, sign in to the Dynamics 365 portal.

**Correct Answer:** See explanation below.

You need to allow an overdelivery percentage of 100% to allow overdelivery of 10 units on an order of 10 units. (100% of 10 units is 10 units)

1. Navigate to Product information management > Common > Released products.

Select the product named Surface Pro 128GB.

2. Click Edit in the Action Pane.

3. Go to the Purchase tab.

4. In the Overdelivery field, enter 100.

5. Click Save to save the changes.

A company uses Dynamics 365 Finance.

User1 is an approver of expense reports. User1 will be on vacation next week.

You need to configure the system to assign a user named User2 temporary permissions to review and approve expense report submissions while User1 is on vacation.

What should you do?

- A. Assign User2 as the approver for expense reports using the workflow designer.

- B. Assign User2 the same user security roles as User1.

- C. Create a delegation rule for User1 for the duration of the vacation period. Most Voted

- D. Create a delegation rule for User2 for the duration of the vacation period.

**Correct Answer:** C

Reference:

<https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/fin-ops/organization-administration/tasks/delegate-work-items-workflow>

Community vote distribution

C (71%)

D (29%)

**HOTSPOT -**

You are a system administrator using Dynamics 365 Finance.

You are responsible for reviewing security roles.

You need to determine whether roles have been assigned properly.

Which reports should you use? To answer, select the appropriate report in the answer area.

NOTE: Each correct selection is worth one point.

Hot Area:

**Answer Area**

Review which roles members of the accounts receivable staff have.

User role assignments
Role to user assignment
Security role access
Security duty assignments

Review who has been assigned the administrator role.

User role assignments
Role to user assignment
Security role access
Security duty assignments

Determine whether a role has been modified to grant more permissions.

User role assignments
Role to user assignment
Security role access
Security duty assignments

**Correct Answer:****Answer Area**

Review which roles members of the accounts receivable staff have.

User role assignments
Role to user assignment
Security role access
Security duty assignments

Review who has been assigned the administrator role.

User role assignments
Role to user assignment
Security role access
Security duty assignments

Determine whether a role has been modified to grant more permissions.

User role assignments
Role to user assignment
Security role access
Security duty assignments

Reference:

<https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/sysadmin/security-reports#security-role-access>

You set up Dynamics 365 Finance.

Your organization will use email with the application.

You need to ensure that email will be sent using typical secure settings.

What setting must be set up as specified?

- A. In-place eDiscovery is enabled.
- B. Retention policies are enabled.
- C. In-place hold and Litigation hold are enabled.
- D. Specify if SSL is required is selected.

**Correct Answer:** D

Note:

There are several versions of this question in the exam. The question has two possible correct answers:

- 1. The SMTP port field is set to 587
- 2. Specify if SSL is required is selected

Other incorrect answer options you may see on the exam include the following:

- 1. Information rights management is enabled.
- 2. Encryption: S/MIME and PGP are enabled.
- 3. In-place eDiscovery is enabled.
- 4. Retention policies are enabled.
- 5. In-place hold and Litigation hold are enabled.
- 6. Encryption between on-premises servers and Exchange Online Archiving is enabled.

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Question #54

*Topic 3*

You are a Dynamics 365 Finance system administrator for a United States-based corporation that is expanding to other regions.

You set up a new legal entity for Brazil.

You need to enable localization for Brazil in the new legal entity.

What should you do?

- A. Create a new Lifecycle Services project.
- B. Create a new legal entity with the Brazil office address in the system, and then set preferences according to the user.
- C. Create a new configuration key and associate it with Brazil localization.
- D. Create a new entity in the system with your corporate address and set the user language preferences for Brazil.
- E. Create a new entity with your corporate address in the system, and then update the address to the Brazil office address.

**Correct Answer:** E

Question #55

*Topic 3*

You are responsible for automation efforts in a Dynamics 365 Finance environment.

You are running into performance issues on a specific Application Object Server (AOS) that is over-used.

You need to alter your batch processing of high-demand items to have affinity to a new AOS server.

Which batch processing component should you change?

- A. Batch group
- B. Batch periods
- C. Batch task
- D. Batch job

**Correct Answer:** A

Reference:

<https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/sysadmin/batch-server-overview>

**SIMULATION -**

You are a functional consultant for Contoso Entertainment System USA (USMF).  
A user named Inga is configured to approve purchase orders (POs) by using a workflow.  
You need to ensure that a user named Alicia can also approve POs by using a workflow.  
To complete this task, sign in to the Dynamics 365 portal.

**Correct Answer:** *See explanation below.*

1. Navigate to the purchase order workflow.
2. Edit the workflow.
3. In the Workflow Editor, right-click on the Approval step and select Properties.
4. Click on Assignment.
5. Select User then select Alicia from the list of users.
6. Save and activate the workflow.

**SIMULATION -**

You are a functional consultant for Contoso Entertainment System USA (USMF).  
You need to create a new number sequence named Fabrikam that will be used to invoice a new customer. The sequence number must support the manual entry of invoice numbers.  
To complete this task, sign in to the Dynamics 365 portal.

**Correct Answer:** *See explanation below.*

1. Go to Navigation pane > Modules > Organization administration > Number sequences > Number sequences.
2. Select Number sequence.
3. In the Number sequence code field, type a value.
4. In the Name field, type Fabrikam.
5. In the Segments section, click Add.
6. Select Alphanumeric and enter a value such as ##### (for a four-digit number)
7. In the General section, ensure that Manual is set to Yes.
8. Under Number Allocation, enter 1 in the Smallest field.
9. Click Save to save the number sequence.

Reference:

<https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/fin-ops/organization-administration/tasks/set-up-number-sequences-individual-basis?toc=/dynamics365/retail/toc.json>

**SIMULATION -**

You are a functional consultant for Contoso Entertainment System USA (USMF).

USMF plans to create reports for executives. The reports will compare the sales from a month this year to the sales from the same month last year.

You need to prepare the date intervals for the planned reports.

To complete this task, sign in to the Dynamics 365 portal.

**Correct Answer:** See explanation below.

1. Navigate to General ledger > Ledger setup > Date intervals.
2. Click New.
3. In the Date Interval Code field, type a code such as CurrMth PY.
4. In the Description field, type a description such as Current Month Previous Year.
5. In the Interval Start section, select Month in the From date period type field.
6. In the From date start/end, select Start.
7. In the From date +/- field, type -1 for -1 year (previous year).
8. In the From date adjustment unit field, select Year.
9. In the Interval End section, select Month in the From date period type field.
10. In the From date start/end, select End.
11. Click Save to save the date interval.

Reference:

<https://docs.microsoft.com/en-us/learn/modules/create-fiscal-calendars-years-periods-dyn365-finance/7-date-interval>

**SIMULATION -**

You are a functional consultant for Contoso Entertainment System USA (USMF).

You need to modify the hierarchy for centralized payments to include Contoso Consulting FR (FRSI) for all the payments run for USMF.

To complete this task, sign in to the Dynamics 365 portal.

**Correct Answer:** See explanation below.

1. Navigate to Organization Administration > Organizations > Organization Hierarchies.
2. Select the Centralized Payments organization hierarchy.
3. Click Edit > Insert.
4. Add the Contoso Consulting FR legal entity.
5. Save and Publish the hierarchy.

**SIMULATION -**

A user named Karl recently moved to France and will begin working at Contoso Consulting FR (FRSI).

You need to ensure that the default legal entity for Karl is set to FRSI. The solution must ensure that the default date, time, and number format for Karl is set to

French.

To complete this task, sign in to the Dynamics 365 portal.

**Correct Answer:** See explanation below.

1. Navigate to System Administration > Users > Users.
2. Select Karl's user account.
3. Click User Options.
4. Go to the Preferences tab.
5. In the Company field, select Contoso Consulting FR (FRSI).
6. In the Date, time and number format field, select French.
7. Click Save to save the changes.

**SIMULATION -**

You are a functional consultant for Contoso Entertainment System USA (USMF).

You need to create a new calendar named Work Week that will be defined as follows:

- ⇒ Open from Monday to Friday from 09:00 to 17:00
- ⇒ Closed all day Saturday and Sunday

To complete this task, sign in to the Dynamics 365 portal.

**Correct Answer:** See explanation below.

You need to create a working time template and a working time calendar.

Create the template:

1. Click Organization administration > Common > Calendars > Working time templates. Click New to create a new line.
2. On the Overview tab, in the Working time template field, enter an alphanumeric identifier of up to 10 characters.
3. In the Name field, enter a descriptive name for the template.
4. Select the tab that corresponds to the day of the week that you want to define working hours for, and click Add to create a new line.
5. In the From field, enter the starting time for the day or the period (09:00).
6. In the To field, enter the ending time for the day or the period (17:00)
7. Repeat steps 4 through 6 for each day of the week ensuring that Saturday and Sunday are marked as closed then save the template.

Create the calendar:

1. Click Organization administration > Common > Calendars > Calendars.
2. On the toolbar, click New to create a new line.
3. In the Calendar field, enter a unique identifier of up to ten characters.
4. In the Name field, enter Work Week.
5. Click Working times, and then click Compose working times to create or update working times for the calendar.
6. In the Calendar field, select the name of the calendar (Work Week) to compose working times for.
7. In the From date field, enter the first date to compose working times for. By default, the field contains the current date.
8. In the To date field, enter the last date to compose working times for. By default, the field contains a date that is one year from the current date.
9. In the Working time template field, select the template you created.
10. Click OK.

Reference:

<https://docs.microsoft.com/en-us/dynamicsax-2012/appuser-itpro/create-working-time-templates> <https://docs.microsoft.com/en-us/dynamicsax-2012/appuser-itpro/create-working-time-calendars>

**SIMULATION -**

You are a functional consultant for Contoso Entertainment System USA (USMF).

You recently configured all the sales taxes of USMF.

You need to validate the sales taxes by creating a sales order. The sales order must contain the following information:

⇒ Customer: Contoso Retail Los Angeles

⇒ Product: T0001

⇒ Quantity: 1

⇒ Size: 10

To validate your result, create a proforma invoice for the sales order and save the invoice in Microsoft Excel format to the Downloads\Sales folder.

To complete this task, sign in to the Dynamics 365 portal.

**Correct Answer: See explanation below.**

You need to create a sales order then create a proforma invoice for the sales order.

Create the sales order:

1. Go to Navigation pane > Modules > Accounts Receivable > Sales orders > All sales orders.

2. Select New.

3. In the Customer account field, select the drop-down button to open the lookup.

4. In the list, find and select the customer record for Contoso Retail Los Angeles.

5. Select OK.

6. Under the Sales order lines section, select the Sales order line.

7. In the Item number field, select the drop-down button to open the lookup.

8. Select item T0001.

9. If the Size dimension is not displayed, click on Sales order line > Display > Dimensions.

10. Select the Size dimension.

11. Click OK.

12. In the Size field, select the drop-down button to open the lookup.

13. Select Size 10.

14. In the Quantity field, enter 1.

15. Click on the Sell tab.

16. Under Generate, select Confirm sales order.

17. Click OK.

Create the proforma invoice:

1. On the sales order page, click on the Invoice tab.

2. Under Generate, select Pro forma invoice.

3. Set the Print invoice option to Yes.

4. Click OK.

5. Click on Export.

6. Save the invoice in Microsoft Excel format to the Downloads\Sales folder

Reference:

<https://docs.microsoft.com/en-us/dynamics365/supply-chain/sales-marketing/tasks/create-sales-orders>

**SIMULATION -**

You are a functional consultant for Contoso Entertainment System USA (USMF).

You need to modify the default print management setup for customer invoices to use the PDF format.

To complete this task, sign in to the Dynamics 365 portal.

**Correct Answer:** See explanation below.

1. Go to Navigation pane > Modules > Accounts Receivable Setup > Forms > Form setup
2. On the General tab, click the Print management button.
3. In the documents list, expand Customer invoice and select Original <Default>.
4. In the Destination field, select Printer setup.
5. In the Print destination settings windows, select File.
6. Select PDF for the File type.
7. Click OK to save the changes.

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Question #64

Topic 3

Note: This question is part of a series of questions that present the same scenario. Each question in the series contains a unique solution that might meet the stated goals. Some question sets might have more than one correct solution, while others might not have a correct solution.

After you answer a question in this section, you will NOT be able to return to it. As a result, these questions will not appear in the review screen.

You are a Dynamics 365 Finance system administrator.

Users report that purchase order numbers are being generated in a non-continuous configuration during bulk purchase order creation.

You need to determine how to improve performance.

Solution: Run the automatic cleanup of number sequences job.

Does the solution meet the goal?

A. Yes

B. No

**Correct Answer: B***Community vote distribution*

B (100%)

Question #65

Topic 3

Note: This question is part of a series of questions that present the same scenario. Each question in the series contains a unique solution that might meet the stated goals. Some question sets might have more than one correct solution, while others might not have a correct solution.

After you answer a question in this section, you will NOT be able to return to it. As a result, these questions will not appear in the review screen.

You are a Dynamics 365 Finance system administrator.

Users report that purchase order numbers are being generated in a non-continuous configuration during bulk purchase order creation.

You need to determine how to improve performance.

Solution: Create a new number sequence using the number sequence wizard.

Does the solution meet the goal?

A. Yes

B. No

**Correct Answer: B**

Note: This question is part of a series of questions that present the same scenario. Each question in the series contains a unique solution that might meet the stated goals. Some question sets might have more than one correct solution, while others might not have a correct solution.

After you answer a question in this section, you will NOT be able to return to it. As a result, these questions will not appear in the review screen.

You are a Dynamics 365 Finance system administrator.

Users report that purchase order numbers are being generated in a non-continuous configuration during bulk purchase order creation.

You need to determine how to improve performance.

Solution: Enable Preallocation for the purchase order number sequence.

Does the solution meet the goal?

A. Yes

B. No

**Correct Answer: A**

Reference:

<https://www.dynamics-tips.com/organization-administration/number-sequences-explained>

**HOTSPOT -**

A company plans to use Dynamics 365 Finance.

You need to implement the security architecture.

Which component should you use for each requirement? To answer, select the appropriate security component in the answer area.

NOTE: Each correct selection is worth one point.

Hot Area:

**Answer Area****Requirement**

Group the security configuration for employees with the same job function.

**Security component**

▼
Security roles
Duties
Privileges
Permissions

Assign check-depositing tasks to a group of people as part of the accounts receivable process.

▼
Security roles
Duties
Privileges
Permissions

Restrict access to a specific table or chart.

▼
Security roles
Duties
Privileges
Permissions

**Correct Answer:****Answer Area****Requirement**

Group the security configuration for employees with the same job function.

**Security component**

▼
Security roles
Duties
Privileges
Permissions

Assign check-depositing tasks to a group of people as part of the accounts receivable process.

▼
Security roles
Duties
Privileges
Permissions

Restrict access to a specific table or chart.

▼
Security roles
Duties
Privileges
Permissions

**Reference:**

<https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/sysadmin/role-based-security>

Question #68

Topic 3

You assign security roles to users in your company. The security roles contain one or more duty assignments.

The purchasing manager role must be able to view payment journals.

You need to edit the security configuration to meet the requirement.

What should you do?

- A. Edit the duty to view only on the payment journal. The duty is assigned to the purchasing manager role.
- B. Edit the existing role and assign the View payment journal transactions permission level.
- C. Create a new privilege. Assign the View only permission to the privilege. Then assign the privilege to the user.
- D. Create a new security role. Create a purchasing manager duty and assign it to that role. Then assign the duty to the user.

**Correct Answer: A**

Reference:

<https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/sysadmin/role-based-security>

Question #69

Topic 3

A company implements Dynamics 365 Finance.

The company's purchasing agents must be able to create purchase orders for a first-time vendor.

All new vendor requests must be reviewed and approved by the accounts payable manager.

A workflow must send an email to the accounts payable manager and the senior accounts payable clerk notifying both when a vendor application is waiting for approval. The workflow must be configured to account for people changing job roles.

You need to configure the system to meet these requirements.

What should you do?

- A. On the Recipient tab, select Workflow user. Then, select the role for vendor approval from the list.
- B. On the Recipient tab, select Participant. Then, select the role for vendor approval from the list.
- C. On the Recipient tab, select User. Then, select the users for the accounts payable manager and the senior accounts payable clerk from the list.
- D. On the Recipient tab, select Workflow user. Then, select the user for purchasing agents from the list.
- E. On the Recipient tab, select User. Then, select the role for vendor approval from the list.
- F. On the Recipient tab, select Participant. Then, select the users for the accounts payable manager and the senior accounts payable clerk from the list.

**Correct Answer: B**

Reference:

<https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/fin-ops/organization-administration/configure-approval-process-workflow>

*Community vote distribution*

B (100%)

**HOTSPOT -**

You are a Dynamics 365 Finance system administrator. You create different workflows for Canada and the United States.

You must create a workflow that sends a notification to the North American workflow administrator with workflow comments in the notification.

You need to configure the workflows.

What option should you select for each scenario? To answer, select the appropriate options in the answer area?

NOTE: Each correct selection is worth one point.

Hot Area:

**Answer Area**

<b>Scenario</b>	<b>Option</b>
Include a notification with workflow-specific data.	<div style="display: flex; align-items: center;"> <div style="flex-grow: 1; padding-right: 10px;">Notification texts Work item instructions Placeholders Line-item workflows</div> <span style="font-size: 1.5em;">▼</span> </div>
Run a different workflow for each region.	<div style="display: flex; align-items: center;"> <div style="flex-grow: 1; padding-right: 10px;">Condition Automatic action Parallel activity Automated task</div> <span style="font-size: 1.5em;">▼</span> </div>
Send an email to a group of users by role when a workflow task is rejected.	<div style="display: flex; align-items: center;"> <div style="flex-grow: 1; padding-right: 10px;">Workflow user Participant Queue</div> <span style="font-size: 1.5em;">▼</span> </div>

Correct Answer:

**Answer Area**

<b>Scenario</b>	<b>Option</b>
Include a notification with workflow-specific data.	<div style="display: flex; align-items: center;"> <div style="flex-grow: 1; padding-right: 10px;">Notification texts Work item instructions Placeholders Line-item workflows</div> <span style="font-size: 1.5em;">▼</span> </div>
Run a different workflow for each region.	<div style="display: flex; align-items: center;"> <div style="flex-grow: 1; padding-right: 10px;">Condition Automatic action Parallel activity Automated task</div> <span style="font-size: 1.5em;">▼</span> </div>
Send an email to a group of users by role when a workflow task is rejected.	<div style="display: flex; align-items: center;"> <div style="flex-grow: 1; padding-right: 10px;">Workflow user Participant Queue</div> <span style="font-size: 1.5em;">▼</span> </div>

Reference:

<https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/fin-ops/organization-administration/tasks/users-receive-workflow-related-email-messages>

A client uses Dynamics 365 Finance.

You need to configure a workflow to allow users to approve or deny workflow tasks from outside the system.

What should you configure?

- A. a business event and a Microsoft PowerApps workflow
- B. a standard notification in workflows
- C. a standard date-based alert
- D. a business event a Microsoft Flow workflow**
- E. a standard changed-based alert

**Correct Answer: D**

You set up security roles for the users in a company.

You must use standard security roles when possible.

You need to identify the standard security roles.

Which of the following can you assign to a user as a standard security role?

- A. Accounting manager**
- B. Alliance manager
- C. Developer
- D. Business development manager

**Correct Answer: A**

**SIMULATION -**

You are a functional consultant for Contoso Entertainment System USA (USMF).

You plan to create several customer approval workflows.

You need to configure the system to support customer approvals.

To complete this task, sign in to the Dynamics 365 portal.

**Correct Answer:** See explanation below.

1. Navigate to Accounts receivable > Setup > Accounts receivable parameters.
2. Click the General tab.
3. Expand the Customer Approval section.
4. Click the slider named Enable customer approvals to Yes.
5. Select the entities for which you wish to enable customer approvals.

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Question #74

Topic 3

**SIMULATION -**

You are a functional consultant for Contoso Entertainment System USA (USMF).

The pallets used by USMF can contain 12 boxes.

You need to create a unit of conversion for the boxes.

To complete this task, sign in to the Dynamics 365 portal.

**Correct Answer:** See explanation below.

You need to create a unit of measure for the pallet and another unit of measure for the box (if they don't already exist). Then you create a unit conversion.

Create a unit of measure for pallet and box:

1. Go to Navigation pane > Modules > Product information management > Released product maintenance.
2. Click Units.
3. Click New.
4. In the Unit field, type a value. Enter the ID or symbol to use when referring to the unit of measure.
5. In the Description field, type a value such as Pallet. Enter a descriptive name for the unit of measure in the system language.
6. In the Unit class field, select Quantity
7. In the Decimal precision field, enter a number. Specify the number of decimals that the converted unit of measure must be rounded to when a calculation is completed for the unit of measure.
8. Click Save.
9. Repeat the above steps for Box.

Define unit conversion rules -

1. On the Action Pane, click Unit conversions. Define rules for converting the unit of measure to and from other units of measure in the selected unit class.
2. Click New to open the drop dialog.
3. In the Factor field, enter 12. Conversion factor between the From unit (Pallet) and the To unit (Box).
4. In the To unit field, select Box.
5. In the Rounding field, select To nearest.
6. Click OK.
7. Close the page.

Reference:

<https://docs.microsoft.com/en-us/dynamics365/supply-chain/pim/tasks/manage-unit-measure>

**SIMULATION -**

You are a functional consultant for Contoso Entertainment System USA (USMF).

You need to modify which default webpage is displayed when you access the system so that the Employee Self Service Portal is displayed by default.

To complete this task, sign in to the Dynamics 365 portal.

**Correct Answer:** See explanation below.

1. Click the Settings icon in the upper right corner, then click Personalization Settings to open the Set Personal Options page.
2. On the General tab, under Select your home page and setting for Get Started paned, configure the Default Pane to be the Employee Self Service Portal.

**SIMULATION -**

You are a functional consultant for Contoso Entertainment System USA (USMF).

You need to create an email template for the users in the sales department and marketing department. The template must meet the following requirements:

- Be named Statement email
- Have a subject of Product information
- Include the name of the email recipient in the body of the message

The solution must ensure that the template can be used by the users in the sales and marketing departments as quickly as possible.

To complete this task, sign in to the Dynamics 365 portal.

**Correct Answer:** See explanation below.

1. Navigate to Settings > Templates > Email templates.
2. On the Actions toolbar, select New.
3. On the Email Templates form, enter Statement email for the title.
4. Enter Product information in the subject field.
5. To insert data fields to display information such as a customer's name select Insert/Update, and then in the Data Field Values dialog box, select Add.
6. In the Add Data Value dialog box, select User for the Record type and First Name for the Field value, and then select OK.
7. Select OK again to insert the data.
8. Select Insert/Update, and then in the Data Field Values dialog box, select Add.
9. In the Add Data Value dialog box, select User for the Record type and Last Name for the Field value, and then select OK.
10. Select OK again to insert the data.
11. Select Save or Save and Close.

Reference:

<https://docs.microsoft.com/en-us/power-platform/admin/create-templates-email>

**SIMULATION -**

You are a functional consultant for Contoso Entertainment System USA (USMF).

You discover that the currency exchange rates in the system are outdated.

You need to ensure that the system uses the latest currency exchange rates from the Central Bank of Europe.

To complete this task, sign in to the Dynamics 365 portal.

**Correct Answer:** *See explanation below.*

You need to import the latest currency exchange rates. You can also configure a schedule to automatically import the latest currency exchange rates.

1. Navigate to General Ledger > Currencies > Import currency exchange rates
2. Select the Default Exchange Rate Type.
3. Select Central Bank of Europe for the Exchange Rate Provider.
4. In the Import as of field, select Today's date.
5. Enable the Override existing exchange rates option.
6. To schedule automatic updates, expand the Run the background section.
7. Enable Batch Processing.
8. Click on the Recurrence link.
9. Configure a schedule for exchange rates import.
10. Click OK to save the changes.

**SIMULATION -**

You are a functional consultant for Contoso Entertainment System USA (USMF).

You plan to create several workflows. The workflows will contain several activities that you must perform.

You need to configure the User options to receive email notifications for the workflow activities.

To complete this task, sign in to the Dynamics 365 portal.

**Correct Answer:** *See explanation below.*

1. Go to Navigation pane > Modules > System administration > Users > Users.
2. In the list, find and select the desired record.
3. On the Action pane, click User options.
4. Click the Workflow tab. Make sure that the Notifications section is expanded. In the Notifications section, you can specify how you want the user to be notified about workflow-related events.
5. In the Line-item workflow notification type field, select an option.
  - Grouped – Notifications for line items are grouped into a single email message.
  - Individual – An email message is sent for each line item.
6. If you want the user to receive notifications in the client, select the Send notifications in email check box.

6. Click Save.

Reference:

<https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/fin-ops/organization-administration/tasks/users-receive-workflow-related-email-messages>

**SIMULATION -**

You are a functional consultant for Contoso Entertainment System USA (USMF).

You need to ensure that human resources managers can approve absences for employees.

To complete this task, sign in to the Dynamics 365 portal.

**Correct Answer:** See explanation below.

You need to assign the duty 'Approve employee leave requests' to the human resources managers.

1. Navigate to System Administration > Security > Security Configuration
2. On the Roles tab, select the Human Resources Manager role.
3. Click on Duties then click on Add references.
4. In the References section, click on Duties. This will list all the available duties.
5. Select the Approve employee leave requests duty to add it to the role.

**SIMULATION -**

You are a functional consultant for Contoso Entertainment System USA (USMF).

The legal department plans to publish all legal terms to a website that has a URL of <https://www.contoso.com/legalterms.html>.

You need to ensure that USMF uses the website for legal terms.

To complete this task, sign in to the Dynamics 365 portal.

**Correct Answer:** See explanation below.

1. Navigate to the System parameters page and click Legal and Privacy.
2. In the Legal Terms section, enter the URL: <https://www.contoso.com/legalterms.html>.
3. Click Save to save the changes.

Reference:

<https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/sysadmin/legal-terms-privacy-statement>

**SIMULATION -**

You are a functional consultant for Contoso Consulting FR (FRSI). FRSI is based in Paris.

You need to modify the dashboard to start in FRSI and to use the following settings:

- ⌚ Country: France
- ⌚ Time zone: Paris
- ⌚ Language: French

To complete this task, sign in to the Dynamics 365 portal.

**Correct Answer:** See explanation below.

1. Click the Gear icon in the top right corner of the page.
2. Select User Options from the drop-down menu.
3. Click the Preferences tab
4. In the Startup section, select FRSI in the Company field.
5. Select France in the Country field.
6. Select French in the Language field.
7. Select Paris in the Time zone field.
8. Click Save to save your changes.

You need to ensure that employees can submit and approve their own Dynamics 365 Finance workflow requests.

What are two possible ways to achieve this goal? Each correct answer presents a complete solution.

NOTE: Each correct selection is worth one point.

- A. Add the employees to the workflow administrator security role.
- B. Add the employees to Azure Active Directory (Azure AD) as domain administrators.
- C. Add the employees as an approver to the workflow action.
- D. Create a modification in the code that allows employees to modify workflows.
- E. Clear the Disallow approval by submitter check box.

**Correct Answer:** CE

**SIMULATION -**

You are a functional consultant for Contoso Entertainment System USA (USMF).

You need to assign the Purchasing agent security role to Wayne Samuel Jorden for USMF only.

To complete this task, sign in to the Dynamics 365 portal.

**Correct Answer:** See explanation below.

- ☞ Navigate to System administration > Security > Assign users to roles
- ☞ Select the Purchasing Agent role.
- ☞ Click the Manually assign / exclude users button
- ☞ Select the Wayne Samuel Jorden user account and click the Assign to role button.
- ☞ Click the Assign organizations button
- ☞ Select the Grant access to specific organizations option
- ☞ Select the USMF legal entity and click the Grant button.

Reference:

<https://www.dynamics-tips.com/system-administration/security-roles>

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 Custom View Settings

Question #84

Topic 3

**HOTSPOT -**

You are a system administrator using Dynamics 365 Finance.

You are responsible for troubleshooting workflows.

You need to determine where workflows are failing based on error messages.

Which runtime is raising the error when the following activity and error occurs? To answer, select the appropriate runtime in the answer area.

NOTE: Each correct selection is worth one point.

Hot Area:

**Answer Area****Activity and error**

A user submits an expense report by clicking the Submit button on one of the workflow controls. An error occurs.

**Runtime**

Managed workflow runtime
X++ workflow runtime

.NET Interop from X++ receives the message and starts a new workflow instance via Windows Workflow Foundation. An error occurs.

X++ workflow runtime
Managed workflow runtime

The messaging batch job reads the Workflow started message from the message queue and invokes the application event handler to process a workflow started event. An error occurs.

Managed workflow runtime
X++ workflow runtime

**Answer Area****Activity and error**

A user submits an expense report by clicking the Submit button on one of the workflow controls. An error occurs.

**Runtime**

Managed workflow runtime
X++ workflow runtime

**Correct Answer:**

.NET Interop from X++ receives the message and starts a new workflow instance via Windows Workflow Foundation. An error occurs.

X++ workflow runtime
Managed workflow runtime

The messaging batch job reads the Workflow started message from the message queue and invokes the application event handler to process a workflow started event. An error occurs.

Managed workflow runtime
X++ workflow runtime

**Reference:**

<https://docs.microsoft.com/en-us/dynamics365/unified-operations/fin-and-ops/organization-administration/workflow-system-architecture>

Note: This question is part of a series of questions that present the same scenario. Each question in the series contains a unique solution that might meet the stated goals. Some question sets might have more than one correct solution, while others might not have a correct solution.

After you answer a question in this section, you will NOT be able to return to it. As a result, these questions will not appear in the review screen.

You are a Dynamics 365 Finance security administrator.

When testing security setups, users report that certain roles are gaining access to sensitive information via a form in the system.

You must investigate which user roles have what visibility and access level to system objects, and then send a report to the implementation team to address security compliance concerns.

You need to report the information from the system.

Solution: Generate the Security duty assignments report.

Does the solution meet the goal?

A. Yes

B. No

**Correct Answer: B**

Reference:

<https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/sysadmin/security-reports>

**HOTSPOT -**

You are a consultant and set up Dynamics 365 Finance for local and multinational companies.

You need to establish policy rules for purchasing.

What policy frameworks should you implement for each scenario? To answer, select the appropriate options in the answer area.

NOTE: Each correct selection is worth one point.

Hot Area:

**Answer Area**

<b>Scenario</b>	<b>Policy framework</b>
A company is established in the US and Canada. Ensure that employees in the US and Canada buy from different catalogs and vendors.	<div style="border: 1px solid black; padding: 5px;"> <input type="checkbox"/> Purchasing policies are set up at the legal-entity level  <input type="checkbox"/> Purchasing policies are set up at the organizational level         </div>
For a large multinational company, ensure that department and global purchasing controls apply to sales users in the UK.	<div style="border: 1px solid black; padding: 5px;"> <input type="checkbox"/> Purchasing policies are set up at the legal-entity level  <input type="checkbox"/> Purchasing policies are set up at the organizational level         </div>
Ensure that a specific user can access only the Tools category when the user creates purchase requisitions.	<div style="border: 1px solid black; padding: 5px;"> <input type="checkbox"/> Catalog policy rule  <input type="checkbox"/> Category policy rule  <input type="checkbox"/> Category access policy rule         </div>
Ensure that a specific user can access only a subset of vendors for the Tools category.	<div style="border: 1px solid black; padding: 5px;"> <input type="checkbox"/> Catalog policy rule  <input type="checkbox"/> Category policy rule  <input type="checkbox"/> Category access policy rule         </div>

**Correct Answer:****Answer Area**

<b>Scenario</b>	<b>Policy framework</b>
A company is established in the US and Canada. Ensure that employees in the US and Canada buy from different catalogs and vendors.	<div style="background-color: #e0f2e0; border: 1px solid black; padding: 5px;"> <input checked="" type="checkbox"/> Purchasing policies are set up at the legal-entity level  <input type="checkbox"/> Purchasing policies are set up at the organizational level         </div>
For a large multinational company, ensure that department and global purchasing controls apply to sales users in the UK.	<div style="background-color: #e0f2e0; border: 1px solid black; padding: 5px;"> <input type="checkbox"/> Purchasing policies are set up at the legal-entity level  <input checked="" type="checkbox"/> Purchasing policies are set up at the organizational level         </div>
Ensure that a specific user can access only the Tools category when the user creates purchase requisitions.	<div style="background-color: #e0f2e0; border: 1px solid black; padding: 5px;"> <input type="checkbox"/> Catalog policy rule  <input type="checkbox"/> Category policy rule  <input checked="" type="checkbox"/> Category access policy rule         </div>
Ensure that a specific user can access only a subset of vendors for the Tools category.	<div style="background-color: #e0f2e0; border: 1px solid black; padding: 5px;"> <input type="checkbox"/> Catalog policy rule  <input checked="" type="checkbox"/> Category policy rule  <input type="checkbox"/> Category access policy rule         </div>

Reference:

<https://docs.microsoft.com/en-us/dynamics365/unified-operations/supply-chain/procurement/purchase-policies>

Question #87

Topic 3

A company implements Dynamics 365 Finance.

The company wants to utilize Case management to track project issues and risks and associate them to the projects. Project managers will be responsible for managing the new cases.

You need to configure the system.

What should you do?

- A. Create case category security roles named Issue and Risk and assign them to the Project managers duty.
- B. Create case activities for Issue and Risk
- C. Create parent case categories named Issue and Risk
- D. Create case subcategories named Issue and Risk

**Correct Answer: D**

Question #88

Topic 3

A company implements Dynamics 365 Finance.

You are the primary approver for purchase requisitions that are greater than \$500,000. You are going on vacation for two weeks.

You need to assign another user as the approver only for purchase requisitions greater than \$500,000.

What should you do?

- A. Under User Options, add a user and assign the scope of Module
- B. Under User Options, add a user and assign the scope of All
- C. Under User Options, add a user and assign the scope of Workflow

**Correct Answer: C**

Question #89

Topic 3

You are a Dynamics 365 Finance system administrator.

You have 50 identified purchase order numbers that are not used in the system and are not being recycled. Why they are missing is unknown.

Purchasing operations is currently operating around the clock and no downtime can occur.

You need to use the missing numbers in the system.

What should you do?

- A. Run the Number sequence wizard for the purchase order number sequence
- B. Change the number sequence to continuous and create the new purchase orders
- C. Run Automatic cleanup of number sequence and create the new purchase orders
- D. Change the number sequence to non-continuous and create the new purchase orders
- E. Change the number sequence to manual, then manually assign the number sequences to the new purchase orders

**Correct Answer: C**

You are asked to trigger a Power Automate flow for an approval for a business process that is not in the business events list.

You need to trigger the Power Automate flow without any code.

What are two possible ways to trigger the Power Automate workflow? Each correct answer presents a complete solution.

NOTE: Each correct selection is worth one point.

- A. from a due date alert
- B. from a change-based alert
- C. from a component in the Dynamics 365 Finance Workflow Designer
- D. from an application business event
- E. from a user's personalization functionality

**Correct Answer:** AB

Reference:

<https://docs.microsoft.com/en-us/power-automate/connection-dynamics365> <https://dynamics-tips.com/how-to-use-alerts-d365-finance-and-operations/>

DRAG DROP -

A company needs to set up its printers to work with Dynamics 365 Finance.

You need to set up the printers for network printing from the Dynamics 365 client browser.

Which three actions should be performed in order? To answer, move the appropriate actions from the list of actions to the answer area and arrange them in the correct order.

Select and Place:

**Actions**

- Activate the network printers
- Install and configure a document routing agent
- Set up the network printer and assign a static IP
- Register network printers in Finance and Operations

**Answer Area**



**Correct Answer:**

**Actions**

- Activate the network printers
- Install and configure a document routing agent
- Set up the network printer and assign a static IP
- Register network printers in Finance and Operations

**Answer Area**

- Install and configure a document routing agent
- Register network printers in Finance and Operations
- Activate the network printers

Reference:

<https://docs.microsoft.com/en-us/dynamics365/unified-operations/dev-itpro/analytics/install-document-routing-agent>

**HOTSPOT -**

You use different elements to construct a workflow.

You need to identify which workflow element to use for each scenario.

Which action should you use? To answer, select the appropriate options in the answer area.

NOTE: Each correct selection is worth one point.

Hot Area:

**Answer Area**

Scenario	Actions
Create a customer record for a customer if a record doesn't already exist.	<div style="border: 1px solid black; padding: 5px; display: inline-block;"><input type="checkbox"/> Create task <input type="checkbox"/> Create approval process</div>
Reject a document.	<div style="border: 1px solid black; padding: 5px; display: inline-block;"><input type="checkbox"/> Create task <input type="checkbox"/> Create approval process</div>
Assign a document to another user for approval.	<div style="border: 1px solid black; padding: 5px; display: inline-block;"><input type="checkbox"/> Create task <input type="checkbox"/> Create approval process</div>
Perform a credit check.	<div style="border: 1px solid black; padding: 5px; display: inline-block;"><input type="checkbox"/> Create task <input type="checkbox"/> Create approval process</div>

**Answer Area**

Scenario	Actions
Create a customer record for a customer if a record doesn't already exist.	<div style="border: 1px solid black; padding: 5px; display: inline-block;"><input checked="" type="checkbox"/> Create task <input type="checkbox"/> Create approval process</div>
Reject a document.	<div style="border: 1px solid black; padding: 5px; display: inline-block;"><input type="checkbox"/> Create task <input checked="" type="checkbox"/> Create approval process</div>
Assign a document to another user for approval.	<div style="border: 1px solid black; padding: 5px; display: inline-block;"><input type="checkbox"/> Create task <input checked="" type="checkbox"/> Create approval process</div>
Perform a credit check.	<div style="border: 1px solid black; padding: 5px; display: inline-block;"><input checked="" type="checkbox"/> Create task <input type="checkbox"/> Create approval process</div>

**Correct Answer:**

Reference:

<https://docs.microsoft.com/en-us/dynamics365/unified-operations/fin-and-ops/organization-administration/workflow-elements>

**HOTSPOT -**

You work with a systems administrator for Dynamics 365 Finance.

The system has been configured to prompt users for how they want to send emails based on the given scenario they are encountering. In certain situations, they will want to generate an email to forward to an account executive who doesn't have access to Dynamics 365 for Finance and Operations. Other times, the emails should be either sent as an attachment to a user email or through a generic no reply email.

You need to determine which configuration to provide to the system administrator for the given scenario.

Which option should you use? To answer, select the appropriate options in the answer area.

NOTE: Each correct selection is worth one point.

Hot Area:

**Answer Area**

<b>Scenario</b>	<b>Messaging Tool</b>
Generate a file to send to a coworker for additional personalization.	<div style="border: 1px solid black; padding: 5px; width: fit-content; margin: auto;"><p>Use an email app such as Outlook</p><p>Use the Dynamics 365 email client</p><p>Use Microsoft Exchange server for email</p></div>
Send an email with the actual user's email address without generating an external file.	<div style="border: 1px solid black; padding: 5px; width: fit-content; margin: auto;"><p>Use an email app such as Outlook</p><p>Use the Dynamics 365 email client</p><p>Use Microsoft Exchange server for email</p></div>
Send an email with a generic email address without generating an external file.	<div style="border: 1px solid black; padding: 5px; width: fit-content; margin: auto;"><p>Use an email app such as Outlook</p><p>Use the Dynamics 365 email client</p><p>Use Microsoft Exchange server for email</p></div>

**Answer Area**

<b>Scenario</b>	<b>Messaging Tool</b>
Generate a file to send to a coworker for additional personalization.	<div style="border: 1px solid black; padding: 5px; width: fit-content; margin: auto;"><p>Use an email app such as Outlook</p><p>Use the Dynamics 365 email client</p><p>Use Microsoft Exchange server for email</p></div>
Correct Answer: Send an email with the actual user's email address without generating an external file.	<div style="border: 1px solid black; padding: 5px; width: fit-content; margin: auto;"><p>Use an email app such as Outlook</p><p>Use the Dynamics 365 email client</p><p>Use Microsoft Exchange server for email</p></div>
Send an email with a generic email address without generating an external file.	<div style="border: 1px solid black; padding: 5px; width: fit-content; margin: auto;"><p>Use an email app such as Outlook</p><p>Use the Dynamics 365 email client</p><p>Use Microsoft Exchange server for email</p></div>

 Custom View Settings

Question #94

Topic 3

**HOTSPOT -**

A company uses Finance and Operations apps.

The company wants to use Power BI to view the actuals versus budget amounts of the current fiscal year. This requires handling several million transactions.

Some data must be near-real-time while other data must be updated every 10 minutes.

You need to identify which solution components meet these requirements.

Which component should you use for each requirement? To answer, select the appropriate options in the answer area.

NOTE: Each correct selection is worth one point.

Hot Area:

**Answer Area****Requirement****Component**

View large data sets requiring near-real-time data that is optimized for reporting.

▼
Transaction DB
Common Data Service
Entity Store
Dynamics 365 entities

Allow the data to refresh every 10 minutes.

▼
Aggregate Measurements
Power BI DirectQuery
Common Data Service
Business Events

**Answer Area****Requirement****Component**

View large data sets requiring near-real-time data that is optimized for reporting.

▼
Transaction DB
Common Data Service
Entity Store
Dynamics 365 entities

Correct Answer:

Allow the data to refresh every 10 minutes.

▼
Aggregate Measurements
Power BI DirectQuery
Common Data Service
Business Events

Reference:

<https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/analytics/power-bi-integration-entity-store>

**DRAG DROP -**

A company is implementing Dynamics 365 Finance.

The company hires a new accounting team member. The team member will be responsible for generating deposit slips and cancelling payments.

The team member must be able to view the Positive Pay report.

You need to configure security for the new team member.

Which security components should you use? To answer, drag the appropriate components to the correct requirements. Each component may be used once, more than once, or not at all. You may need to drag the split bar between panes or scroll to view content.

NOTE: Each correct selection is worth one point.

Select and Place:

**Answer Area**

Components	Requirement	Component
Role	Provide the new team member access.	
Duty	Generate deposit slips and cancel payments.	
Privilege		
Permissions	View the Positive Pay report.	

**Answer Area**

Components	Requirement	Component
Correct Answer:	Provide the new team member access.	Role
	Generate deposit slips and cancel payments.	Duty
Permissions	View the Positive Pay report.	Privilege

Reference:

<https://docs.microsoft.com/en-us/dynamics365/customerengagement/on-premises/admin/security-roles-privileges>

Note: This question is part of a series of questions that present the same scenario. Each question in the series contains a unique solution that might meet the stated goals. Some question sets might have more than one correct solution, while others might not have a correct solution. After you answer a question in this section, you will NOT be able to return to it. As a result, these questions will not appear in the review screen.

You are a Dynamics 365 Finance system administrator.

Users report that purchase order numbers are being generated in a non-continuous configuration during bulk purchase order creation.

You need to determine how to improve performance.

Solution: Change the number sequence to a continuous number sequence.

Does the solution meet the goal?

A. Yes

B. No

**Correct Answer: B**

Reference:

<https://dynamics-tips.com/number-sequences-explained-d365-finance-and-operations/>

You are working as a functional consultant in a new Dynamics 365 Finance environment.

Your organization conducts business within the United States, with offices in several states. The organization has legal entities defined for each state and must share common tables between entities.

Each legal entity has the following setup:

- Users
- Products
- Customers
- Tax authorities
- Payment terms
- Human Resources data
- Site-specific stock ordering

You need to consolidate reports used for financial-consolidation reporting in a new legal entity.

What should you do?

- A. Define the consolidation period
- B. Specify the range of product for consolidation
- C. Define Human Resources data
- D. Create users

**Correct Answer: A**

**DRAG DROP -**

You are configuring a sales order workflow in Dynamics 365 Supply Chain Management.

An application stores the priority status value. The application is not integrated with Dynamics 365 Supply Chain Management.

You need to select the element type to use in the workflow.

Which element type should you use? To answer, drag the appropriate element type to the correct element. Each element type may be used once, more than once, or not at all. You may need to drag the split bar between panes or scroll to view content.

NOTE: Each correct selection is worth one point.

Select and Place:

**Answer Area**

Element types	Element	Element Type
Manual Task	A user confirms if priority status is awarded, which will result in additional checks being skipped.	
Manual Decision	A credit check must be performed by the system.	
Automated Task		
Conditional Decision	If the customer does not have a primary phone number, additional tasks must be performed.	

Correct Answer:

**Answer Area**

Element types	Element	Element Type
Manual Task	A user confirms if priority status is awarded, which will result in additional checks being skipped.	Manual Decision
	A credit check must be performed by the system.	Automated Task
	If the customer does not have a primary phone number, additional tasks must be performed.	Conditional Decision

Reference:

<https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/fin-ops/organization-administration/workflow-elements?toc=/dynamics365/commerce/toc.json>

**DRAG DROP -**

A client wants to automate approvals for various business processes.

You need to use workflow configuration to meet the requirements.

Which workflow configuration should you use? To answer, drag the appropriate configurations to the correct requirements. Each configuration may be used once, more than once, or not at all. You may need to drag the split bar between panes or scroll to view content.

NOTE: Each correct selection is worth one point.

Select and Place:

**Configurations**




**Answer Area****Requirement**

When a purchase requisition is submitted, it should go to the employee's manager.

**Configuration**



When an expense report is submitted, it should go to a user group of managers.

**Correct Answer:****Configurations**




**Answer Area****Requirement**

When a purchase requisition is submitted, it should go to the employee's manager.

**Configuration**



When an expense report is submitted, it should go to a user group of managers.

**Box 1: Hierarchy -**

Hierarchy: Users in a specific organizational hierarchy.

1. After you select Hierarchy, on the Hierarchy selection tab, in the Hierarchy type list, select the type of hierarchy to assign the step to.
2. The system must retrieve a range of user names from the hierarchy. These names represent users that the step can be assigned to.

**Box 2: Participant -**

Participant: Users who are assigned to a specific group or role.

After you select Participant, on the Role based tab, in the Type of participant list, select the type of group or role to assign the step to.

In the Participant list, select the group or role to assign the step to.

**Reference:**

<https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/fin-ops/organization-administration/configure-approval-step-workflow>

You are the administrator of a Dynamics 365 Finance system.

Messages sent from the system exceed the sending limits of the Microsoft 365 Exchange Online service.

You need to prevent sending limits from being exceeded.

What should you configure?

A. Email distributor batch job

B. Email throttling

C. Throttling priority mappings

D. Attachment size limits

**Correct Answer: B**

The email throttling feature allows noninteractive email providers to adhere to a per-minute email sending limit, which prevents errors that are currently triggered when the system attempts to send more emails than the provider can handle. When email throttling is enabled, sending limits for Microsoft 365 email providers will be set automatically; manual configuration is required for all other email providers.

Reference:

<https://docs.microsoft.com/en-us/dynamics365-release-plan/2020wave2/finance-operations/finance-operations-crossapp-capabilities/email-throttling>

Dynamics 365 Finance is implemented at your company.

Users in the accounts payable roles and inventory management roles can edit the general ledger details for all departments. These roles must not be able to change the inventory on hand or be able to pay a parts supplier. The users have physical access to warehouses.

You attempt to remove the users from the roles and see that the users are then added back to the roles.

Users must not be able to be added to both roles. Users in a single role must be able to perform their duties.

You need to ensure that users are assigned to the proper roles.

What are two possible ways to achieve this goal? Each correct answer presents a complete solution.

NOTE: Each correct selection is worth one point.

A. Remove the privileges from the roles.

B. Include the users in automatic assignment.

C. Set up segregation of duties for the users.

D. Remove segregation of duties for the users.

E. Exclude the users from automatic assignment.

**Correct Answer: BC**

B: To use anything other than common capabilities in finance and operations apps, users must be assigned to security roles. You can assign users to roles automatically, based on rules and business data, exclude users from automatic role assignment, or add users to roles manually.

C: You can set up rules to separate tasks that must be performed by different users. This concept is named segregation of duties.

Reference:

<https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/sysadmin/tasks/assign-users-security-roles>

<https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/sysadmin/tasks/set-up-segregation-duties>

You set up Dynamics 365 Finance.  
Your organization will use email with the application.  
You need to ensure that email will be sent using typical secure settings.  
What setting must be set up as specified?

- A. Information rights management is enabled.
- B. Retention policies are enabled.
- C. Encryption between on-premises servers and Exchange Online Archiving is enabled.
- D. Specify if SSL is required is selected.

**Correct Answer: D**

SMTP settings tab.

On the Email parameters page, note the following settings on the SMTP settings tab.

Server information -

SSL required - Determines whether secure transport is used. Typically, this is Yes, except for internal or troubleshooting scenarios.

Etc.

Reference:

<https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/fin-ops/organization-administration/configure-email>

A company uses Dynamics 365 Supply Chain Management.  
A batch job that is running in the production environment must be canceled.  
You attempt to cancel the batch job. The batch job is not canceled within a reasonable time period.  
You need to force the batch job to stop processing.  
What should you do?

- A. Use the Abort function on the batch task.
- B. Update the recurrence of the batch job.
- C. Set the status of the batch job to Withhold.
- D. Delete the batch job.

**Correct Answer: A**

Cancel an executing batch job -

Complete the following steps to immediately cancel the running task.

☞ Go to System administration > Inquiries > Batch jobs.

☞ Select a batch job that has a Status of Canceling.

☞ On the Batch tasks tab, select Abort on the task, and then select OK.

Note: Sometimes canceling a batch job can take a long time if already executing tasks will take a long time to finish. This option provides a system administrator or batch job manager with the ability to cancel already executing tasks for jobs that are in the process of being canceled.

This provides a much faster mechanism to cancel a long running job that is impacting system usage elsewhere.

Reference:

<https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/sysadmin/batch-abort>

Custom View Settings

Question #104

Topic 3

A company that sells, rents, and services heating, ventilation, and air conditioning (HVAC) systems implements Dynamics 365 Supply Chain Management.

When a maintenance request is created for a condenser unit, the request must be reviewed and approved before a work order is created. You must send both an email message and a text message to the reviewer for each maintenance request.

You need to configure the system.

Which two options should you configure? Each answer represents part of the solution.

NOTE: Each correct selection is worth one point.

- A. Business events
- B. Power Apps apps
- C. Standard workflows
- D. Workspaces
- E. Power Automate flows

**Correct Answer: AC**

A: Business events provide a mechanism that lets external systems receive notifications from finance and operations applications. In this way, the systems can perform business actions in response to the business events.

Business events occur when a business process is run. During a business process, users who participate in it perform business actions to complete the tasks that make up the business process.

A business action that a user performs can be either a workflow action or a non-workflow action. Approval of a purchase requisition is an example of a workflow action, whereas confirmation of a purchase order is an example of a non-workflow action. Both types of actions can generate business events that external systems can use in integration and notification scenarios.

C: Some organizations require that purchase requisitions and purchase orders are approved by a user other than the person who entered the transaction. To set up an approval process, you can create a workflow.

Reference:

<https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/business-events/home-page> <https://docs.microsoft.com/en-us/dynamics365/supply-chain/procurement/procurement-sourcing-workflows>

**HOTSPOT -**

Your company uses Dynamics 365 Supply Chain Management.

Discounts are being applied to customer invoices at month end incorrectly. Users are configuring the wrong discount group when maintaining customer accounts.

You need to implement alerts to identify when the wrong discount group is configured.

Which alert value should you use? To answer, select the appropriate options in the answer area.

NOTE: Each correct selection is worth one point.

Hot Area:

**Answer Area**

<b>Configuration</b>	<b>Value</b>
Alert me when table	Price agreements Customers Invoice lines Sales order lines
Alert me when event	Has changed Is set to: Record has been created Record has been deleted

Correct Answer:

**Answer Area**

<b>Configuration</b>	<b>Value</b>
Alert me when table	Price agreements Customers Invoice lines Sales order lines
Alert me when event	Has changed Is set to: Record has been created Record has been deleted

Box 1: Price agreements -

Trade agreements (Price/ discount agreement) in Dynamics 365 for Finance and Operations - Setup.

Trade agreements in AX. It is also called as Price/discount agreements.

As the name suggests, it is used to setup the prices (sales prices & purchase prices) and the discounts (Line discounts, Multiline discounts & Total discounts) for the item, customer and Vendor combinations. Once price and discount rules are set up in the trade agreements, the valid prices and/or discounts are fetched and applied to quotations, orders, and invoices in AX.

**HOTSPOT**

You are the system administrator of a Dynamics 365 Finance system. You review the configuration of batch jobs in the system.

You need to complete the configuration to meet the requirements.

Which features should you configure? To answer, select the appropriate options in the answer area.

**NOTE:** Each correct selection is worth one point.

**Answer Area**

**Requirement**  
System maintenance jobs must run outside business hours.

**Feature**

active periods  
system job parameters  
working time templates

Define the processing order of batch jobs.

active periods  
scheduling priority  
throttling priority mapping

Inform the IT support team when a critical job fails.

alerts  
database logging  
email broadcast

**Answer Area**

**Requirement**  
System maintenance jobs must run outside business hours.

**Feature**

active periods  
system job parameters  
working time templates

Define the processing order of batch jobs.

active periods  
scheduling priority  
throttling priority mapping

Inform the IT support team when a critical job fails.

alerts  
database logging  
email broadcast

A company uses Dynamics 365 Finance. You configure a standard workflow for travel requisitions approvals. You configure the workflow which requires a single approver. You configure a pool of five managers to approve all travel requisitions.

Managers must submit their own travel requisitions. A separate manager must approve the travel requisition.

You need to ensure the system prevents managers from approving their own travel requisitions.

What should you do?

- Create an escalation path for the Approve travel requisition step of the travel requisition workflow.
- Configure an activation condition on the travel requisition workflow to prevent activation for managers.
- Set the value of the Disallow approval by submitter option to Yes.
- Configure a condition to prevent the approval step from running when the originator is a manager.

**Correct Answer: C**

## DRAG DROP

An organization is implementing Dynamics 365 Finance.

The organization is comprised of a parent company named Company1 and the following fully owned subsidiaries: SubsidiaryA, SubsidiaryB, and SubsidiaryC.

Company1, SubsidiaryA and SubsidiaryB all use US Dollars to report financials. Company1 pays the invoices of SubsidiaryA and SubsidiaryB without setting up centralized payment.

SubsidiaryC uses Canadian dollars to report financials.

You need to configure the system.

Which organizational hierarchy should you use? To answer, drag the appropriate organizational hierarchy to the correct organization. Each organizational hierarchy may be used once, more than once, or not at all. You may need to drag the split bar between panes or scroll to view content.

NOTE: Each correct selection is worth one point.

**Organizational hierarchies**

- Legal entities
- Operating units
- Consolidation entity

**Answer Area****Organization**

SubsidiaryA

**Organizational Hierarchy**

SubsidiaryC

**Answer Area****Correct Answer:****Organization**

SubsidiaryA

**Organizational Hierarchy** Operating units

SubsidiaryC

 Legal entities

A company uses Dynamics 365 Finance. The company uses a number sequence named GenJml\_01 for general journal vouchers. The number sequence is configured as follows:

Configuration option	Value
Format	GNJL####
Smallest number allocation	1
Largest number allocation	9999
Next number allocation	10000
Allow user changes to a lower number	No
Allow user changes to a higher number	No

A user receives the following error message when creating a new general journal: Number sequence GenJrn\_01 has been exceeded.

You need to update the configuration of the number sequence to resolve the error.

Which two actions should you perform? Each correct answer presents part of the solution.

NOTE: Each correct selection is worth one point.

- A. Update Allow user changes to a higher number to Yes.
- B. Update the number format to GNJL#####.
- C. Update the Next number allocation to 1.
- D. Update the Largest number allocation to 99999.
- E. Update the Smallest number allocation to 1000.

**Correct Answer: BD**

Actual exam question from Microsoft's MB-300

Question #: 110

Topic #: 3

[\[All MB-300 Questions\]](#)

#### HOTSPOT

-

A company plans to use Dynamics 365 Finance.

The company requires that only certain employees can access certain records on a table by default. Employees with restricted access to records on that table should have no way to access them in the system. Those employees should be able to see all other non-restricted records in the table.

You need to identify how to restrict access to data.

Which components should you identify for each requirement? To answer, select the appropriate options in the answer area.

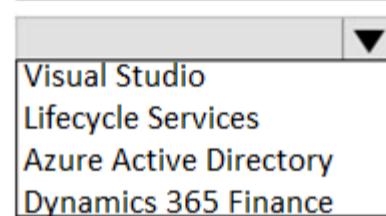
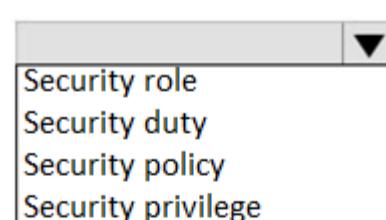
NOTE: Each correct selection is worth one point.

#### Answer Area

##### Requirement

Restrict employee access to data.

##### Component



Tool to create the security component.

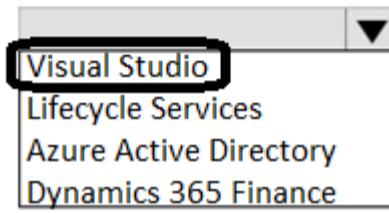
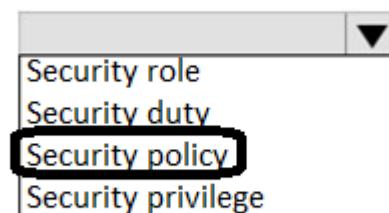
[Hide Answer](#)

## Answer Area

### Requirement

Restrict employee access to data.

### Component



### Suggested Answer:

Tool to create the security component.

by Diggus at June 20, 2023, 11:01 a.m.

## Comments

**Diggus** 4 days, 19 hours ago

Q2 must be Dynamics 365 Finance. In Dynamics 365, you can create security policies using the Dynamics 365 Finance application itself, specifically through the Security configuration workspace. Visual Studio, on the other hand, is primarily used for development and customization purposes in Dynamics 365. So, for creating security policies, you would typically use the Dynamics 365 Finance application rather than Visual Studio.

upvoted 1 times

## Topic 4 - Question Set 4

Question #1

*Topic 4*

A company is implementing Dynamics 365 Finance.

You must load configuration data from a previous version of Dynamics 365 Finance. You extract data from the previous system into a Microsoft Excel workbook.

Each worksheet contains setup and configuration data that correlates to a specific data entity.

You load sites and warehouses from the worksheets into the data entities.

Another user makes changes to the workbook.

You need to load the updated version of the workbook into the current data project.

What should you do?

- A. Use the existing entities.
- B. Run the Run project option.
- C. Replace the existing entities.
- D. Select the Resequence button.

**Correct Answer: D**

You can use the Resequence button to update any entities that you've selected.

Reference:

<https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/data-entities/copy-configuration>

A company is using dual-write to synchronize customer data between Dynamics 365 Sales and Dynamics 365 Finance.

During an unplanned maintenance window for Dynamics 365 Finance, synchronization of customer data was interrupted. The interruption caused multiple errors and a loss of new requests.

You need to prevent errors and data loss from recurring.

What should you do?

- A. Enable an alert condition.
- B. Use catch-up errors.
- C. Skip initial sync.
- D. Select re run execution.

**Correct Answer:** D

Clicking on the individual project will show you the direction in which the sync failed (Finance and Operations app to Dataverse or vice-versa) and details of why it failed. You can choose to fix the underlying issues and then select Re-run execution which retries the entire execution, along with the records that failed or errored out in the last sync. Once this completes, initial sync is completed and the table returns to the Running state.

Reference:

<https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/data-entities/dual-write/errors-and-alerts>

A company is starting to implement Dynamics 365 Finance.

The company has identified several data entities that are needed for an integration with other systems. The company has already enabled and disabled several configuration keys in the environment but nothing else has been configured.

You need to determine whether the necessary data entities can still be used for the integrations.

What should you do?

- A. Run Entity store refresh
- B. Use the Data validation checklist workspace
- C. Run the Data entity wizard
- D. Run Entity list refresh

**Correct Answer:** D

Reference:

<https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/data-entities/data-entities>

**HOTSPOT -**

A company is deploying a second instance of Dynamics 365 Finance.

You export configuration and setup data from the existing instance. You observe the following issues:

- When you export the account structures from the existing instance, only two of five account structures export.
- When you import the workflow entity into the new instance, an error occurs.

You need to fix the export and import issues.

How should you fix the issues? To answer, select the appropriate options in the answer area.

NOTE: Each correct selection is worth one point.

Hot Area:

**Answer Area**

Error	Action
-------	--------

**Account structures**

▼
Activate the account structures
Activate the chart of accounts
Reimport the account structures
Reimport the chart of accounts

**Workflow error**

▼
Adjust the version number of the workflow
Change the workflow owner to admin prior to export
Change the workflow owner to admin prior to import
Set the workflow status to Draft before export

Correct Answer:

**Answer Area**

Error	Action
-------	--------

**Account structures**

▼
Activate the account structures
Activate the chart of accounts
Reimport the account structures
Reimport the chart of accounts

**Workflow error**

▼
Adjust the version number of the workflow
Change the workflow owner to admin prior to export
Change the workflow owner to admin prior to import
Set the workflow status to Draft before export

Reference:

<https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/data-entities/copy-configuration>



**HOTSPOT -**

You are planning to import trade agreement journal lines into Dynamics 365 Supply Chain Management from a Microsoft Excel workbook.

You configure the source and target mapping as shown in the table below:

<b>Auto-Generated</b>	<b>Auto Default</b>	<b>Source field</b>	<b>Staging field</b>
No	No	JournalNo	JournalNumber
No	No	ItemCode	ItemNumber
Yes	No	Auto	LineNumber
No	No	SalesPrice	Price
No	Yes	Default	CurrencyCode

You need to validate the Excel file and the mappings.

Which field or fields originate from which sources? To answer, select the appropriate options in the answer area.

NOTE: Each correct selection is worth one point.

Hot Area:

**Answer Area****Source**      **Field****Fields in the Excel file**

▼
JournalNo, ItemCode, SalesPrice
JournalNumber, ItemNumber, Price
JournalNo, ItemCode, Auto, SalesPrice, Default
JournalNumber, ItemNumber, LineNumber, Price, CurrencyCode

**Field calculated by the system**

▼
LineNumber
JournalNumber
ItemNumber
CurrencyCode

**Field fixed to a single value**

▼
CurrencyCode
JournalNumber
ItemNumber
LineNumber

Correct Answer:

## Answer Area

Source	Field				
Fields in the Excel file	<table border="1"><tr><td>JournalNo, ItemCode, SalesPrice</td></tr><tr><td>JournalNumber, ItemNumber, Price</td></tr><tr><td>JournalNo, ItemCode, Auto, SalesPrice, Default</td></tr><tr><td>JournalNumber, ItemNumber, LineNumber, Price, CurrencyCode</td></tr></table>	JournalNo, ItemCode, SalesPrice	JournalNumber, ItemNumber, Price	JournalNo, ItemCode, Auto, SalesPrice, Default	JournalNumber, ItemNumber, LineNumber, Price, CurrencyCode
JournalNo, ItemCode, SalesPrice					
JournalNumber, ItemNumber, Price					
JournalNo, ItemCode, Auto, SalesPrice, Default					
JournalNumber, ItemNumber, LineNumber, Price, CurrencyCode					
Field calculated by the system	<table border="1"><tr><td>LineNumber</td></tr><tr><td>JournalNumber</td></tr><tr><td>ItemNumber</td></tr><tr><td>CurrencyCode</td></tr></table>	LineNumber	JournalNumber	ItemNumber	CurrencyCode
LineNumber					
JournalNumber					
ItemNumber					
CurrencyCode					
Field fixed to a single value	<table border="1"><tr><td>CurrencyCode</td></tr><tr><td>JournalNumber</td></tr><tr><td>ItemNumber</td></tr><tr><td>LineNumber</td></tr></table>	CurrencyCode	JournalNumber	ItemNumber	LineNumber
CurrencyCode					
JournalNumber					
ItemNumber					
LineNumber					

Reference:

<https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/data-entities/data-entities-data-packages>

**HOTSPOT -**

You need to integrate Dynamics 365 Finance data entities with other data stores.

Which integration technologies should you use? To answer, select the appropriate options in the answer area.

NOTE: Each correct selection is worth one point.

Hot Area:

**Answer Area**

Data stores	Integration technology
Microsoft Office	<input type="checkbox"/> Custom Service <input type="checkbox"/> Data Management Pipeline <input type="checkbox"/> Dual-write <input type="checkbox"/> OData APIs
Dynamics 365 mobile app	<input type="checkbox"/> Custom Service <input type="checkbox"/> Data Management Pipeline <input type="checkbox"/> Dual-write <input type="checkbox"/> OData APIs
Interactive file-based import/export	<input type="checkbox"/> Custom Service <input type="checkbox"/> Data Management Pipeline <input type="checkbox"/> Dual-write <input type="checkbox"/> OData APIs
Recurring files	<input type="checkbox"/> Custom Service <input type="checkbox"/> Data Management Pipeline <input type="checkbox"/> Dual-write <input type="checkbox"/> OData APIs
Recurring queues	<input type="checkbox"/> Custom Service <input type="checkbox"/> Data Management Pipeline <input type="checkbox"/> Dual-write <input type="checkbox"/> OData APIs

## Answer Area

### Data stores

Microsoft Office

### Integration technology

Custom Service
Data Management Pipeline
Dual-write
OData APIs

Dynamics 365 mobile app

Custom Service
Data Management Pipeline
Dual-write
OData APIs

**Correct Answer:** Interactive file-based import/export

Custom Service
Data Management Pipeline
Dual-write
OData APIs

Recurring files

Custom Service
Data Management Pipeline
Dual-write
OData APIs

Recurring queues

Custom Service
Data Management Pipeline
Dual-write
OData APIs

Reference:

<https://www.axug.com/blogs/shilpi-thakur1/2020/05/20/dm-tools-concepts-in-d365-fo-and-lcs-part3>

You are implementing Dynamics 365 Supply Chain Management. You have a CSV file that contains two million records.

You need to import the file into Dynamics 365 Supply Chain Management without manual manipulation of the data.

What should you use?

- A. Data management import job
- B. Microsoft Excel Add-In
- C. Classic data integration
- D. Microsoft SQL Server Integration Services

**Correct Answer: A**

Reference:

<https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/data-entities/data-import-export-job>

**DRAG DROP -**

You are integrating Dynamics 365 Supply Chain Management with data from external systems.

You need to select components for various integration scenarios.

Which components should you use? To answer, drag the appropriate components to the correct scenarios. Each component may be used once, more than once, or not at all. You may need to drag the split bar between panes or scroll to view content.

NOTE: Each correct selection is worth one point.

Select and Place:

**Components**

- Data entities only
- Composite data entities only
- Data entities and composite data entities

**Answer Area**

Scenario	Component
Implement synchronous OData integration.	
Implement batched data integration.	
Include header and line data in a single XML document.	
Implement the Microsoft Excel Data Connector add-in.	

**Correct Answer:****Components**

- Data entities only
- Composite data entities only
- Data entities and composite data entities

**Answer Area**

Scenario	Component
Implement synchronous OData integration.	Data entities only
Implement batched data integration.	Data entities only
Include header and line data in a single XML document.	Composite data entities only
Implement the Microsoft Excel Data Connector add-in.	Data entities only

**Reference:**

<https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/data-entities/data-entities> <https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/data-entities/develop-composite-data-entities>

[Previous Questions](#)[Next Questions](#)

Custom View Settings

Question #9

Topic 4

Note: This question is part of a series of questions that present the same scenario. Each question in the series contains a unique solution that might meet the stated goals. Some question sets might have more than one correct solution, while others might not have a correct solution.

After you answer a question in this section, you will NOT be able to return to it. As a result, these questions will not appear in the review screen.

You have the following Dynamics 365 Finance instances:

Instance	Comments
1	Contains configuration data for a company named CompanyA
2	Contains a blank setup for a company named CompanyB

You must copy the configuration data from CompanyA to CompanyB.

Solution: Use dual-write to copy the configuration data.

Does the solution meet the goal?

A. Yes

B. No

**Correct Answer: B**

Reference:

<https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/data-entities/copy-configuration>

Question #10

Topic 4

Note: This question is part of a series of questions that present the same scenario. Each question in the series contains a unique solution that might meet the stated goals. Some question sets might have more than one correct solution, while others might not have a correct solution.

After you answer a question in this section, you will NOT be able to return to it. As a result, these questions will not appear in the review screen.

You are a Dynamics 365 Finance system administrator. You have a test environment that is used by several people at any given time.

You create a new data entity in your development environment and migrate the code to the test environment. In the test environment, you are unable to find the data entity in the list.

You need to locate the data entity.

Solution: Enable the Public API check box in the data entity.

Does the solution meet the goal?

A. Yes

B. No

**Correct Answer: B**

**HOTSPOT -**

A company implements Dynamics 365 Finance.

You set up a conference room pilot. You must configure the pilot with information from another instance by using the Data management tool.

The screenshot shows the Dynamics 365 Finance Data Management interface. On the left, there's a sidebar with a 'Hotspot' icon, a 'Dynamics 365' dropdown, and a 'Finance and Operations' tab. The main area has tabs for 'System administration > Workspaces > Data management'. Below these are buttons for 'Save', 'Export', 'Create recurring job', 'Apply Template', 'Job history', 'Download', 'OPTIONS', and a search icon. A 'Selected files and entities' section contains a 'Customer invoice' entity with a red 'X' icon and a 'View map' link. To its right are 'Customer V3', 'Customer groups', and 'Customer parameters' entities, each also with a red 'X' icon. On the left, under 'JOB DETAILS', there are fields for 'Name' (set to 'Conference Room Pilot'), 'Source data format' (set to 'AX'), 'Entity name' (empty), 'Skip staging' (set to 'No'), 'Default refresh type' (set to 'Incremental push only'), 'Add entity' (unchecked), and 'Generate data package' (set to 'Yes').

Use the drop-down menus to select the answer choice that answers each question based on the information presented in the graphic.

NOTE: Each selection is worth one point.

Hot Area:

**Answer Area**

You receive an error when importing data into the pilot instance. You need to troubleshoot the error. What should you do first?

- Set the entity order to Customer parameters, Customer groups, Customers V3, Customer invoicing journal.
- Set Default refresh type to Full push only.
- Set Skip staging to Yes.
- Set Generate data package to No.

Only a subset of customers is imported into the pilot instance. You make a correction to ensure that all customer data is imported. What should you do next?

- Set the entity order to Customer parameters, Customer groups, Customers V3, Customer invoicing journal.
- Set Default refresh type to Full push only.
- Set Skip staging to Yes.
- Set Generate data package to No.

## Answer Area

You receive an error when importing data into the pilot instance. You need to troubleshoot the error. What should you do first?

Set the entity order to Customer parameters, Customer groups, Customers V3, Customer invoicing journal.
Set Default refresh type to Full push only.
Set Skip staging to Yes.
Set Generate data package to No.

Correct Answer:

Only a subset of customers is imported into the pilot instance. You make a correction to ensure that all customer data is imported. What should you do next?

Set the entity order to Customer parameters, Customer groups, Customers V3, Customer invoicing journal.
Set Default refresh type to Full push only.
Set Skip staging to Yes.
Set Generate data package to No.

**HOTSPOT -**

A company sets up a data package to import data by using the data management framework. You have the following data entity sequence.

### Definition group entity sequence

Entity	Execution unit ↑	Level in execution unit	Sequence in level	Fail level on error	Fail execution u...
Sales tax codes	1	1	1	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Sales tax code values	1	1	2	<input type="checkbox"/>	<input type="checkbox"/>
Sales tax code limits	1	1	3	<input type="checkbox"/>	<input type="checkbox"/>
Sales tax groups	1	1	4	<input type="checkbox"/>	<input type="checkbox"/>
Sales tax group details	1	1	5	<input type="checkbox"/>	<input type="checkbox"/>
Sales tax item groups	1	1	6	<input type="checkbox"/>	<input type="checkbox"/>
Sales tax exempt numbers	2	1	1	<input type="checkbox"/>	<input type="checkbox"/>
Sales tax exempt code	3	1	1	<input type="checkbox"/>	<input type="checkbox"/>
Sales tax reporting codes	4	1	1	<input type="checkbox"/>	<input type="checkbox"/>

Use the drop-down menus to select the answer choice that answers each question based on the information presented in the graphic.

NOTE: Each selection is worth one point.

Hot Area:

### Answer Area

Which data entity will be imported first?

▼

Sales tax item groups
Sales tax code values
Sales tax reporting codes
Sales tax groups

What data entities will start the importing process immediately after the data package is submitted for execution?

▼

All entities in the list
Sales tax codes, sales tax groups, and sales tax item groups only
Sales tax codes, sales tax exempt number, sales tax exempt code, and sales tax reporting codes only
Sales tax codes, sales tax code values, sales tax code limits, sales tax groups, sales tax group details, and sales tax item groups

Correct Answer:

### Answer Area

Which data entity will be imported first?

▼

Sales tax item groups
Sales tax code values
Sales tax reporting codes
Sales tax groups

What data entities will start the importing process immediately after the data package is submitted for execution?

▼

All entities in the list
Sales tax codes, sales tax groups, and sales tax item groups only
Sales tax codes, sales tax exempt number, sales tax exempt code, and sales tax reporting codes only
Sales tax codes, sales tax code values, sales tax code limits, sales tax groups, sales tax group details, and sales tax item groups

Reference:

<https://docs.microsoft.com/en-us/dynamics365/unified-operations/dev-itpro/data-entities/data-entities-data-packages?toc=/fin-and-ops/toc.json#import>

You are a Dynamics 365 Finance system administrator.

Data is being migrated from a customized version of a legacy application to Dynamics 365 Finance. Some of the fields in the entity are the same, and some are different.

As a starting point, you need to automatically map as many fields as possible within Dynamics 365 Finance.

Which feature or tool should you use?

- A. Use the Mapping visualization tool
- B. Generate source mapping
- C. Use Data templates
- D. Use the Data task automation tool
- E. Copy configuration data

**Correct Answer: A**

Reference:

<https://docs.microsoft.com/en-us/dynamics365/unified-operations/dev-itpro/data-entities/data-entities-data-packages?toc=/fin-and-ops/toc.json#mapping>

*Community vote distribution*

B (100%)

You plan the migration from Dynamics AX 2009 to a Dynamics 365 Finance environment.

You will be moving data.

You need to create a data package from a group of entities in Dynamics AX 2009.

What should you use?

- A. Upgrade analyzer
- B. Code upgrade estimation tools
- C. Dynamics AX 2009 Data migration tool (DMT)
- D. Data Import/Export Framework (DIXF)

**Correct Answer: D**

Reference:

<https://docs.microsoft.com/en-us/dynamics365/unified-operations/dev-itpro/migration-upgrade/ax2009-upgrade-export-package>

*Community vote distribution*

C (100%)

**HOTSPOT -**

You are a system administrator of an Azure-based Dynamics 365 Finance instance.

Your company is using a single master configuration environment to refresh a test environment during implementation. You need to perform refreshes several times and make sure they are done successfully.

You need to automate the data migration and leverage the data task automation tool.

Which objects should you use for each scenario? To answer, select the appropriate options in the answer area.

NOTE: Each correct selection is worth one point.

Hot Area:

**Answer Area****Scenario**

Data packages need to be used in automated testing. Where are they stored?

**Object**

File imports
Data tasks
Data projects
Data entities

You need to add a new task in the automation steps. Where do you add it?

XML manifests
Lifecycle Services projects
Data task automation manager
Data projects

There were errors that need to be viewed. Where can you view them?

Data task automation manager
Data validation project page
Data validation checklist workspace
Lifecycle Services project

**Answer Area****Scenario**

Data packages need to be used in automated testing. Where are they stored?

**Object**

File imports
Data tasks
Data projects
Data entities

Correct Answer: You need to add a new task in the automation steps. Where do you add it?

XML manifests
Lifecycle Services projects
Data task automation manager
Data projects

There were errors that need to be viewed. Where can you view them?

Data task automation manager
Data validation project page
Data validation checklist workspace
Lifecycle Services project

**SIMULATION -**

You are a functional consultant for Contoso Entertainment System USA (USMF).

You need to export a list of all the contacts of USMF to an XLS file. The file must be saved to the Downloads folder.

To complete this task, sign in to the Dynamics 365 portal.

**Correct Answer:** See explanation below.

1. Navigate to System Administration > Workspaces > Data management.
2. Click the Framework parameters tile.
3. In the Shared working directory field, enter C:\users\public\documents\ then click Validate.
4. Click the Export tile.
5. In the Name field, enter a name for the export job.
6. In the Entity Name field, select the Contact entity.
7. Click on Add entity.
8. In the Target data format field, select EXCEL.
9. Set the Skip staging option to No.
10. Click the Add button.
11. Click Export to begin the export.
12. Click on Download package.
13. Select the Downloads folder as the location to save the downloaded file.

**SIMULATION -**

You are a functional consultant for Contoso Entertainment System USA (USMF).

Another functional consultant attempts to create an export job in the system. The consultant reports that the export job fails and the path is unavailable.

You need to modify the data export settings to resolve the issue.

To complete this task, sign in to the Dynamics 365 portal.

**Correct Answer:** See explanation below.

You need to modify the path in the framework parameters for the export job.

1. Navigate to System Administration > Workspaces > Data management.
2. Click the Framework parameters tile.
3. In the Shared working directory field, enter a valid path such as C:\users\public\documents\ then click Validate.
4. Click Save to save the changes.

Note: This question is part of a series of questions that present the same scenario. Each question in the series contains a unique solution that might meet the stated goals. Some question sets might have more than one correct solution, while others might not have a correct solution. After you answer a question in this section, you will NOT be able to return to it. As a result, these questions will not appear in the review screen.

You are developing a file-based integration to Dynamics 365 Finance.

Microsoft Excel files with 15,000 or more records need to be imported into the system periodically by individual users. The records need to be imported in full within a 5-minute approved window.

You need to determine how to accomplish the import into the system.

Solution: Import the data by using the Application Integration Framework.

Does the solution meet the goal?

A. Yes

B. No

**Correct Answer:** B

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Question #19

Topic 4

You are a Dynamics 365 Finance system administrator.

You manage a system that imports a large volume of sales orders from multiple systems daily. The system encounters a performance problem due to the amount of data.

You need to improve performance for the import.

What should you do?

- A. Create an ODBC-type source data format and import directly from the database.
- B. Enable data import in recurrence.
- C. Configure entity execution parameters to make the data import multi-threaded.
- D. Enable change tracking for the data entities.

**Correct Answer:** C

Question #20

Topic 4

You plan a data migration from Dynamics AX 2009 to a Dynamics 365 Finance environment.

You need to ensure that you can perform the data migration.

What should you do first?

- A. Upgrade the existing on-premises environment to Dynamics 365 Finance online
- B. Migrate content to Dynamics POS (Point-of-Sale) 2009
- C. Upgrade the existing on-premises environment to Dynamics AX 2012 R2
- D. Migrate content to Dynamics 365 Business Central

**Correct Answer:** C

You plan the migration from Dynamics AX 2012 R3 to a Dynamics 365 Finance environment.

You will be using Lifecycle Services (LCS) and the tools provided with it.

You need to clean up data, review and configure SQL optimizations, and identify deprecated features in your code.

What tool should you use?

- A. Microsoft Azure DevOps
- B. Code upgrade estimation tools
- C. Data Import/Export Framework (DIXF)
- D. Upgrade analyzer

**Correct Answer: D**

*Community vote distribution*

D (100%)

**HOTSPOT -**

You manage a Dynamics 365 Finance environment.

In preparation for being migrated into a new environment, data packages are being numbered in alignment with the default numbering formats in Lifecycle Services. A package is named 03.01.002.

You need to identify what this package contains. To answer, select the appropriate option in the answer area.

NOTE: Each correct selection is worth one point.

Hot Area:

**Answer Area****Segments      Component**

03

- The environment
- The module
- The data type
- The month

01

- The module
- The month
- The sequence number
- The data type

002

- The sequence number
- The data package version
- The data entity
- The data type reference

## Answer Area

### Segments

03

### Component

The environment
The module
The data type
The month

Question #23

Topic 4

DRAG DROP -

You manage a Dynamics 365 Finance environment.

You create a new Microsoft Azure SQL Database instance.

You need to copy data from specific Dynamics 365 entities to the new database instance.

Which three actions should you perform in sequence before creating a data project? To answer, move three actions from the list of actions to the answer area and arrange them in the correct order.

Select and Place:

### Actions

### Answer Area

Disable the Run business validation option from the data entities.

In Data management, open Configure entity export to database

Enable set-based processing for the data entities.

Select the connection string of the Azure SQL database.

Publish the data entities to be exported.



### Actions

### Answer Area

Disable the Run business validation option from the data entities.

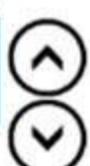
In Data management, open Configure entity export to database

Correct Answer:

Enable set-based processing for the data entities.

Select the connection string of the Azure SQL database.

Publish the data entities to be exported.



Reference:

<https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/analytics/export-entities-to-your-own-database>

**DRAG DROP -**

Your company acquires hundreds of partnerships after it purchases a separate company. The separate company stores the partnership records in a legacy system.

You export Partnership and PartnershipGroup files from the legacy system into Microsoft Word format. You create Partnership and PartnershipGroup entities.

You need to import the partnerships into Dynamics 365 Finance.

Which four actions should you perform in order? To answer, move four actions from the list of actions to the answer area and arrange them in the correct order.

Select and Place:

**Answer Area****Actions**

In SQL Server Management Studio, use the SQL Server Integration Services import wizard.

Validate all entity data mapping.

Convert the Word files to CSV format. In the Dynamics 365 client Data management workspace, create a new data project.

For each file, select the entities and upload the files.

In the Visual Studio Finance and Operations project, use the Data entity wizard.

Convert the Word files to OData format. In the Dynamics 365 client Data management workspace, create a new data project.

Perform the data import.

**Correct Answer:**

**Actions**

In SQL Server Management Studio, use the SQL Server Integration Services import wizard.

Validate all entity data mapping.

Convert the Word files to CSV format. In the Dynamics 365 client Data management workspace, create a new data project.

For each file, select the entities and upload the files.

In the Visual Studio Finance and Operations project, use the Data entity wizard.

Convert the Word files to OData format. In the Dynamics 365 client Data management workspace, create a new data project.

Perform the data import.

**Answer Area**

Convert the Word files to CSV format. In the Dynamics 365 client Data management workspace, create a new data project.

For each file, select the entities and upload the files.

Validate all entity data mapping.

Perform the data import.

Note: This question is part of a series of questions that present the same scenario. Each question in the series contains a unique solution that might meet the stated goals. Some question sets might have more than one correct solution, while others might not have a correct solution. After you answer a question in this section, you will NOT be able to return to it. As a result, these questions will not appear in the review screen. You have the following Dynamics 365 Finance instances:

Instance	Comments
1	Contains configuration data for a company named CompanyA
2	Contains a blank setup for a company named CompanyB

You must copy the configuration data from CompanyA to CompanyB.

Solution: Export from CompanyA. Import to CompanyB.

Does the solution meet the goal?

A. Yes

B. No

**Correct Answer: A**

Reference:

<https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/data-entities/copy-configuration>

**SIMULATION -**

You are a functional consultant for Contoso Entertainment System USA (USMF).

You need to export a list of all the vendors in the USMF legal entry by using an export job to an XLS file. The file must be saved to the Downloads folder.

To complete this task, sign in to the Dynamics 365 portal.

NOTE: To complete this task, you must configure the Shared working directory for the Framework parameters to C:\users\public\documents\.

**Correct Answer: See explanation below.**

1. Navigate to System Administration > Workspaces > Data management.
2. Click the Framework parameters tile.
3. In the Shared working directory field, enter C:\users\public\documents\ then click Validate.
4. Click the Export tile.
5. In the Name field, enter a name for the export job.
6. In the Entity Name field, select the Vendors entity.
7. Click on Add entity.
8. In the Target data format field, select EXCEL.
9. Set the Skip staging option to No.
10. Click the Add button.
11. Click Export to begin the export.
12. Click on Download package.
13. Select the Downloads folder as the location to save the downloaded file.

**HOTSPOT -**

A company implements Dynamics 365 Supply Chain Management. The company creates a separate Microsoft Azure SQL database for reporting.

You must synchronize any data changes made in the Supply Chain Management database with the reporting database.

You need to configure the system.

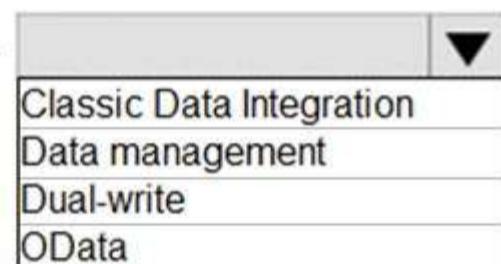
What should you use? To answer, select the appropriate options in the answer area.

NOTE: Each correct selection is worth one point.

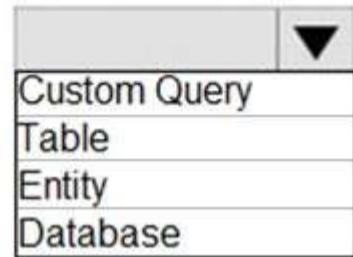
Hot Area:

**Answer Area****Requirement**

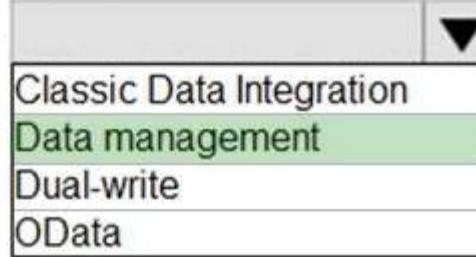
Implement the feature used to synchronize the data.

**Component**

Identify the data to synchronize.

**Answer Area****Requirement**

Implement the feature used to synchronize the data.

**Component**

Correct Answer:

Identify the data to synchronize.



Reference:

<https://docs.microsoft.com/en-us/power-platform/admin/replicate-data-microsoft-azure-sql-database>

**DRAG DROP -**

You must migrate product data from a third-party database into Dynamics 365 Finance. The data includes units of measure and accounting currency.

You need to identify the data entity types.

What should use? To answer, drag the appropriate entity types to the correct data. Each entity type may be used once, more than once, or not at all. You may need to drag the split bar between panes or scroll to view content.

NOTE: Each correct selection is worth one point.

Select and Place:

**Answer Area**

Entity types	Data	Entity types
Master		
Reference	Units of measure	
Parameter	Accounting currency	
Transaction		

**Answer Area**

Entity types	Data	Entity types
Master		
Reference	Units of measure	Reference
Parameter	Accounting currency	Parameter
Transaction		

Reference:

<https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/data-entities/data-entities>

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Question #29

Topic 4

A customer maintains a single database that will be used to create a template that includes final configuration data for a Dynamics 365 Supply Chain Management implementation.

The database must contain all data required to enter sales and purchase orders into the system, including the customer and vendor data. You must exclude historical and open order data from the database build.

You need to ensure that the database includes only the relevant data.

Which three types of entity data should you use? Each correct answer presents part of the solution.

NOTE: Each correct selection is worth one point.

A. Document

B. Reference

C. Parameter

D. Master

E. Transaction

**Correct Answer:** BCD

Reference:

<https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/data-entities/data-entities>

*Community vote distribution*

BCD (100%)

**HOTSPOT -**

A company is deploying Dynamics 365 Finance.

The company must migrate customer data from a third-party system to Dynamics 365 Finance. The third-party system creates a new customer record for every unique address.

Customers that have multiple addresses have the following conditions:

- CustomerA owns multiple subsidiaries that operate independently.
- CustomerB has multiple fully-owned locations and uses centralized receivables.
- CustomerC has multiple operational sites.

You need to migration strategy for the customer data.

How should you migrate the data? You need to identify the features that support the expansion.

Which feature should you use? To answer, select the appropriate options in the answer area.

NOTE: Each correct selection is worth one point.

Hot Area:

**Answer Area****Migration strategy**

CustomerA

- Create a separate customer per subsidiary.
- Create one customer with multiple ship-to addresses.
- Create a customer for each location. Link each customer to an invoice account.

CustomerB

- Create a separate customer per subsidiary.
- Create one invoice customer per location.
- Create a customer for each location. Link each customer to an invoice account.

CustomerC

- Create a separate customer per subsidiary.
- Create one customer with multiple ship-to addresses.
- Create a customer for each location. Link each customer to an invoice account.

**Answer Area****Migration strategy**

CustomerA

- Create a separate customer per subsidiary.
- Create one customer with multiple ship-to addresses.
- Create a customer for each location. Link each customer to an invoice account.

Correct Answer: CustomerB

- Create a separate customer per subsidiary.
- Create one invoice customer per location.
- Create a customer for each location. Link each customer to an invoice account.

CustomerC

- Create a separate customer per subsidiary.
- Create one customer with multiple ship-to addresses.
- Create a customer for each location. Link each customer to an invoice account.

**DRAG DROP -**

You create a new Dynamics 365 Finance instance.

You must migrate data from several third-party financial systems into a Dynamics 365 Finance instance. You gather all relevant data.

You need to map the third-party data to Dynamics 365 Finance entities.

Which entity categories should you use? To answer, drag the appropriate entity categories to the correct source data. Each entity category may be used once, more than once, or not at all. You may need to drag the split bar between panes or scroll to view content.

NOTE: Each correct selection is worth one point.

Select and Place:

**Answer Area**

Entity categories	Source data	Entity category
Document	Accounts receivable configurations	
Master	Methods of payment	
Parameter	Customers	
Reference	Sales orders	
Transaction	Payment vouchers	

**Answer Area**

Entity categories	Source data	Entity category
Document	Accounts receivable configurations	Parameter
Master	Methods of payment	Reference
Parameter	Customers	Master
Reference	Sales orders	Document
Transaction	Payment vouchers	Transaction

Reference:

<https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/data-entities/data-entities>

**DRAG DROP -**

You are importing from a third-party e-commerce system into Dynamics 365 Finance.

The Sales Tax Code Groups data package is configured as follows:

Entity	Execution unit	Level in execution unit	Sequence in level
Sales tax code names	1	1	1
Sales tax code values	1	1	2
Sales tax code limits	1	1	4
Sales tax exempt numbers	2	1	2
Sales tax reporting codes	3	1	1

You start the import process.

You need to determine when each entity will start to import.

What will the system do? To answer, drag the start imports to the appropriate entity. Each start import may be used once, more than once, or not at all. You may need to drag the split bar between panes or scroll to view content.

NOTE: Each correct selection is worth one point.

Select and Place:

**Answer Area**

Start imports	Entity	Start import
Immediately	Sales tax code names	
After Sales tax code names	Sales tax code values	
After Sales tax code values	Sales tax code limits	
After Sales tax limits	Sales tax exempt numbers	
After Sales tax exempt numbers	Sales tax reporting codes	

**Answer Area**

Start imports	Entity	Start import
Immediately	Sales tax code names	Immediately
Correct Answer: After Sales tax code names	Sales tax code values	After Sales tax code names
After Sales tax code values	Sales tax code limits	After Sales tax code values
After Sales tax limits	Sales tax exempt numbers	After Sales tax limits
After Sales tax exempt numbers	Sales tax reporting codes	After Sales tax exempt numbers

Reference:

<https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/data-entities/data-entities-data-packages>

A company implements Dynamics 365 Finance.  
You need to schedule a recurring general journal import.  
What should you use?

- A. Data integrator
- B. Common Data Service
- C. Microsoft Excel add-in
- D. Data Import Export Framework**
- E. Dual-write

**Correct Answer: D**

**HOTSPOT -**

During the implementation planning process, a company decides to migrate various functional data from its legacy systems. These include accounting data, sales data, and purchasing data.

Some functional data elements reference data stored in other tables.

You need to ensure that data types and data elements are imported in the correct order.

In what order should you perform the data migration? To answer, select the appropriate configuration in the answer area.

NOTE: Each correct selection is worth one point.

Hot Area:

**Answer Area**

<b>Sequential order</b>	<b>Order options</b>
Data category	<div style="border: 1px solid black; padding: 5px; height: 150px; width: 100%;"><p>Master, reference, transaction Reference, master, transaction Transaction, reference, master Transaction, master, reference</p></div>
Data entity	<div style="border: 1px solid black; padding: 5px; height: 150px; width: 100%;"><p>Ledger journals, chart of accounts, account structures Chart of accounts, account structures, ledger journals Account structures, chart of accounts, ledger journals Ledger journals, account structures, chart of accounts</p></div>

Correct Answer:

**Answer Area**

<b>Sequential order</b>	<b>Order options</b>
Data category	<div style="border: 1px solid black; padding: 5px; height: 150px; width: 100%;"><p>Master, reference, transaction <b>Reference, master, transaction</b> Transaction, reference, master Transaction, master, reference</p></div>
Data entity	<div style="border: 1px solid black; padding: 5px; height: 150px; width: 100%;"><p>Ledger journals, chart of accounts, account structures <b>Chart of accounts, account structures, ledger journals</b> Account structures, chart of accounts, ledger journals Ledger journals, account structures, chart of accounts</p></div>

**SIMULATION -**

You are a functional consultant for Contoso Entertainment System USA (USMF).

You plan to import customers from an old legacy system to USMF.

You need to identify the format used for the customer details v2 entity by creating an export job. The solution must use a Microsoft Excel data format and Contoso

Europe. To validate your results, save the file in Microsoft Excel format to the Downloads\Customer folder.

To complete this task, sign in to the Dynamics 365 portal.

NOTE: To complete this task, you must configure the Shared working directory for the Framework parameters to C:\users\public\documents\.

**Correct Answer:** See explanation below.

1. Navigate to System Administration > Workspaces > Data management.
2. Click the Framework parameters tile.
3. In the Shared working directory field, enter C:\users\public\documents\ then click Validate.
4. Click the Export tile.
5. In the Name field, enter a name for the export job.
6. In the Entity Name field, select the Customer details v2 entity.
7. Click on Add entity.
8. In the Target data format field, select EXCEL.
9. Set the Skip staging option to No.
10. Click the Add button.
11. Click Export to begin the export.
12. Click on Download package.
13. Select the Downloads\Customer folder as the location to save the downloaded file.

**SIMULATION -**

You are a functional consultant for Contoso Entertainment System USA (USMF).

You plan to import the banking information of a new legal entity to USMF.

You need to identify the format used in the bank account entity by creating an export job. The solution must use a Microsoft Excel data format. To validate your results, save the file in Microsoft Excel format to the Downloads\Bank folder.

To complete this task, sign in to the Dynamics 365 portal.

**Correct Answer:** See explanation below.

1. Navigate to System Administration > Workspaces > Data management.
2. Click the Framework parameters tile.
3. In the Shared working directory field, enter C:\users\public\documents\ then click Validate.
4. Click the Export tile.
5. In the Name field, enter a name for the export job.
6. In the Entity Name field, select the Bank Account entity.
7. Click on Add entity.
8. In the Target data format field, select EXCEL.
9. Set the Skip staging option to No.
10. Click the Add button.
11. Click Export to begin the export.
12. Click on Download package.
13. Select the Downloads\Bank folder as the location to save the downloaded file.

You plan the migration from a Dynamics AX 2012 to a Dynamics 365 Finance environment.

You are tasked with overseeing and planning a cutover to guarantee a smooth experience for end users during the cutover. You perform a basic data upgrade validation.

You need to perform a cutover.

Which three tasks must you perform? Each correct answer presents part of the solution.

NOTE: Each correct selection is worth one point.

- A. Enable the Microsoft Power BI AppSource content packs for Cost management, Financial performance, and Retail channel performance.
- B. Copy the upgraded database from the sandbox environment into the production environment.
- C. Ensure that Synchronous transfer mode is enabled.
- D. Perform a smoke test.
- E. Complete application setup tasks.

**Correct Answer:** *BDE*

References:

<https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/migration-upgrade/upgrade-cutover-testing>

Note: This question is part of a series of questions that present the same scenario. Each question in the series contains a unique solution that might meet the stated goals. Some question sets might have more than one correct solution, while others might not have a correct solution.

After you answer a question in this section, you will NOT be able to return to it. As a result, these questions will not appear in the review screen.

You are a Dynamics 365 Finance system administrator. You have a test environment that is used by several people at any given time.

You create a new data entity in your development environment and migrate the code to the test environment. In the test environment, you are unable to find the data entity in the list.

You need to locate the data entity.

Solution: Restart the Application Object Server (AOS) of the test environment.

Does the solution meet the goal?

- A. Yes
- B. No

**Correct Answer:** *B*

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Question #39

*Topic 4*

Note: This question is part of a series of questions that present the same scenario. Each question in the series contains a unique solution that might meet the stated goals. Some question sets might have more than one correct solution, while others might not have a correct solution.

After you answer a question in this section, you will NOT be able to return to it. As a result, these questions will not appear in the review screen.

You are developing a file-based integration to Dynamics 365 Finance.

Microsoft Excel files with 15,000 or more records need to be imported into the system periodically by individual users. The records need to be imported in full within a 5-minute approved window.

You need to determine how to accomplish the import into the system.

Solution: Import the data by using the recurring data integrations API.

Does the solution meet the goal?

A. Yes

B. No

**Correct Answer: A**

References:

<https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/data-entities/integration-overview> <https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/data-entities/data-management-api>

Note: This question is part of a series of questions that present the same scenario. Each question in the series contains a unique solution that might meet the stated goals. Some question sets might have more than one correct solution, while others might not have a correct solution. After you answer a question in this section, you will NOT be able to return to it. As a result, these questions will not appear in the review screen. You are developing a file-based integration to Dynamics 365 Finance.

Microsoft Excel files with 15,000 or more records need to be imported into the system periodically by individual users. The records need to be imported in full within a 5-minute approved window.

You need to determine how to accomplish the import into the system.

Solution: Import the data by using the Data Management Framework's package API.

Does the solution meet the goal?

A. Yes

B. No

**Correct Answer: B**

References:

<https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/data-entities/integration-overview> <https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/data-entities/data-management-api>

Note: This question is part of a series of questions that present the same scenario. Each question in the series contains a unique solution that might meet the stated goals. Some question sets might have more than one correct solution, while others might not have a correct solution.

After you answer a question in this section, you will NOT be able to return to it. As a result, these questions will not appear in the review screen.

You are developing a file-based integration to Dynamics 365 Finance.

Microsoft Excel files with 15,000 or more records need to be imported into the system periodically by individual users. The records need to be imported in full within a 5-minute approved window.

You need to determine how to accomplish the import into the system.

Solution: Import the data by using the Excel Add-in.

Does the solution meet the goal?

A. Yes

B. No

**Correct Answer: B**

References:

<https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/data-entities/integration-overview> <https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/data-entities/data-management-api>

Note: This question is part of a series of questions that present the same scenario. Each question in the series contains a unique solution that might meet the stated goals. Some question sets might have more than one correct solution, while others might not have a correct solution.

After you answer a question in this section, you will NOT be able to return to it. As a result, these questions will not appear in the review screen.

You are a Dynamics 365 Finance system administrator. You have a test environment that is used by several people at any given time.

You create a new data entity in your development environment and migrate the code to the test environment. In the test environment, you are unable to find the data entity in the list.

You need to locate the data entity.

Solution: Reopen the client browser.

Does the solution meet the goal?

A. Yes

B. No

**Correct Answer: B**

Note: This question is part of a series of questions that present the same scenario. Each question in the series contains a unique solution that might meet the stated goals. Some question sets might have more than one correct solution, while others might not have a correct solution.

After you answer a question in this section, you will NOT be able to return to it. As a result, these questions will not appear in the review screen.

You are a Dynamics 365 Finance system administrator. You have a test environment that is used by several people at any given time.

You create a new data entity in your development environment and migrate the code to the test environment. In the test environment, you are unable to find the data entity in the list.

You need to locate the data entity.

Solution: In the Data management framework parameter screen, refresh the Entity list.

Does the solution meet the goal?

A. Yes

B. No

**Correct Answer: A**

**HOTSPOT -**

A company uses Dynamics 365 Customer Engagement. The company plans to implement Dynamics 365 Finance.

The company must be able to synchronize customer data between both systems. The company must be able to import fixed assets from an existing system and implement offline catch-up synchronization capabilities.

You need to implement data management tools.

Which tools should you use? To answer, select the appropriate options in the answer area.

NOTE: Each correct selection is worth one point.

Hot Area:

**Answer Area**

Requirement	Tool
Synchronize customer data between Dynamics 365 Customer Engagement and Dynamics 365 Finance.	<ul style="list-style-type: none"><li>Dual-write</li><li>Data import export framework</li><li>Microsoft Excel add-in</li></ul>
Import fixed assets from an existing system.	<ul style="list-style-type: none"><li>Dual-write</li><li>Data import export framework</li><li>Lifecycle Services</li></ul>

**Answer Area**

Requirement	Tool
Correct Answer: Synchronize customer data between Dynamics 365 Customer Engagement and Dynamics 365 Finance.	<ul style="list-style-type: none"><li>Dual-write</li><li>Data import export framework</li><li>Microsoft Excel add-in</li></ul>
Import fixed assets from an existing system.	<ul style="list-style-type: none"><li>Dual-write</li><li>Data import export framework</li><li>Lifecycle Services</li></ul>

Reference:

<https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/data-entities/dual-write/dual-write-overview>

A company implements Dynamics 365 Finance and Dynamics 365 Customer Service.

For which two scenarios can you use Dual Write? Each correct answer presents a complete solution.

NOTE: Each correct selection is worth one point.

- A. Synchronize customer data between both Dynamics 365 systems.
- B. Import customers from an older system.
- C. Synchronize customer data between Dynamics 365 Finance and Microsoft Azure Data Lake.
- D. Support offline catch-up of data synchronization between systems.

**Correct Answer:** AD

Reference:

<https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/data-entities/dual-write/dual-write-overview>

**HOTSPOT -**

A company is implementing Dynamics 365 Finance and Dynamics 365 Supply Chain Management. The company is preparing to migrate data to the new systems.

You need to import sales order headers and lines by using a single entity. All legal entities must contain the same setup data.

What should you use? To answer, select the appropriate options in the answer area.

NOTE: Each correct selection is worth one point.

Hot Area:

**Answer Area****Requirement                      Option**

Import the sales order header and lines by using a single entity.

- Composite entity
- Data entity
- Configuration data project

Ensure that all legal entities contain the same setup data.

- Composite entity
- Data entity
- Copy into legal entity
- Configuration data project

**Answer Area****Requirement                      Option**

Import the sales order header and lines by using a single entity.

- Composite entity
- Data entity
- Configuration data project

Correct Answer:

Ensure that all legal entities contain the same setup data.

- Composite entity
- Data entity
- Copy into legal entity
- Configuration data project

Reference:

<https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/data-entities/develop-composite-data-entities>

<https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/data-entities/copy-configuration>

Note: This question is part of a series of questions that present the same scenario. Each question in the series contains a unique solution that might meet the stated goals. Some question sets might have more than one correct solution, while others might not have a correct solution.

After you answer a question in this section, you will NOT be able to return to it. As a result, these questions will not appear in the review screen.

You have the following Dynamics 365 Finance instances:

Instance	Comments
1	Contains configuration data for a company named CompanyA
2	Contains a blank setup for a company named CompanyB

You must copy the configuration data from CompanyA to CompanyB.

Solution: Use Copy into legal entity.

Does the solution meet the goal?

A. Yes

B. No

**Correct Answer: B**

Reference:

<https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/data-entities/copy-configuration>

A company is migrating address data from an external system to Dynamics 365 Finance. The company has one data package with three entities that contain dependencies:

- Cities
- States
- Postal codes

You need to sequence the data entities within the data package.

To which sequence should you assign cities?

A. 2.2.1

B. 1.1.1

C. 1.1.2

D. 2.1.1

**Correct Answer: C**

Previous Questions

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Custom View Settings

Question #49

*Topic 4*

A company acquires an analytics company that performs research on customer online purchases.

You must import customer purchase data from a pre-existing canvas-driven app into a new Dynamics 365 Finance instance. Data must be mapped to the out-of-the-box entities. The canvas-driven app uses Microsoft Excel as a data store.

You need to perform the migration.

What should you use?

- A. Data entity change tracking
- B. Microsoft Azure Data Lake
- C. Dual-write
- D. Data Management Framework configuration data template

**Correct Answer: D**

Reference:

<https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/data-entities/configuration-data-templates>

**DRAG DROP -**

A company needs to move data from multiple legacy databases and a separate Dynamics 365 instance into a Dynamics 365 Finance environment.

You need to plan the migration strategy.

Which tool should you use for each requirement? To answer, drag the appropriate components to the correct requirements. Each component may be used once, more than once, or not at all. You may need to drag the split bar between panes or scroll to view content.

NOTE: Each correct selection is worth one point.

Select and Place:

**Answer Area**

Components	Requirement	Component
Staging tables	Place the legacy database data in a location where you can manipulate and verify the data.	
Entities	Migrate sales configuration data from a test environment to a production environment.	
Configuration data projects		
Configuration Manager		

Correct Answer:

**Answer Area**

Components	Requirement	Component
Staging tables	Place the legacy database data in a location where you can manipulate and verify the data.	Staging tables
Entities	Migrate sales configuration data from a test environment to a production environment.	Configuration data projects
Configuration data projects		
Configuration Manager		

Reference:

<https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/data-entities/data-import-export-job> <https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/data-entities/configuration-data-projects>

**DRAG DROP -**

You must migrate historical customer data into a new environment instance for compliance purposes. The file includes data for the Customer entity.

Some column names in the data file do not map to the entity.

You need to import the file by using a data project in the data management workspace.

In which order should you perform the actions? To answer, move all actions from the list of actions to the answer area and arrange them in the correct order.

Select and Place:

**Actions****Answer Area**

Select the entity.

Select Import.

Adjust the mapping.

Select Import Now.

Upload the data file.



Correct Answer:

**Actions****Answer Area**

Select Import.

Select the entity.

Upload the data file.

Adjust the mapping.

Select Import Now.



Reference:

<https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/data-entities/build-consuming-data-entities>

You are implementing Dynamics 365 Finance and Dynamics 365 Supply Chain Management.

Items must be migrated from a legacy system. Units of measure must be present in Dynamics 365 Finance and Dynamics 365 Supply Chain Management before the items can be loaded.

You need to import units of measure.

Which entity category should you use?

A. Reference

B. Parameter

C. Master

D. Transaction

**Correct Answer: A**

Reference:

<https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/data-entities/data-entities>

**DRAG DROP -**

A company uses Dynamics 365 Finance.

The Finance implementation must leverage multiple data sources.

You need to complete the configuration.

What should you use? To answer, drag the appropriate functionalities to the correct scenarios. Each functionality may be used once, more than once, or not at all.

You may need to drag the split bar between panes or scroll to view content.

NOTE: Each correct selection is worth one point.

Select and Place:

**Answer Area**

Functionalities	Scenario	Functionality
	Export data to a data warehouse.	<input type="text"/>
BYOD Dual-write	Synchronize Dynamics 365 Finance and customer engagement apps.	<input type="text"/>
	Support offline data processing.	<input type="text"/>

**Answer Area**

Functionalities	Scenario	Functionality
Correct Answer: BYOD Dual-write	Export data to a data warehouse.	BYOD
	Synchronize Dynamics 365 Finance and customer engagement apps.	Dual-write
	Support offline data processing.	Dual-write

Reference:

<https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/analytics/export-entities-to-your-own-database>

<https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/data-entities/dual-write/dual-write-overview>

**HOTSPOT -**

You are migrating more than five million records to a new Dynamics 365 instance.

You must optimize data migration jobs and import jobs.

You need to establish a migration strategy.

Which values should you use? To answer, select the appropriate options in the answer area.

NOTE: Each correct selection is worth one point.

Hot Area:

**Answer Area**

Setting	Value
Change tracking	<input type="checkbox"/> Enable <input type="checkbox"/> Disable
Set-based processing	<input type="checkbox"/> Enable <input type="checkbox"/> Disable
Priority-based batch processing	<input type="checkbox"/> Enable <input type="checkbox"/> Disable
Number of batch threads	<input type="checkbox"/> Maximize <input type="checkbox"/> Minimize
Import action	<input type="checkbox"/> Import Now <input type="checkbox"/> Import in Batch

## Answer Area

### Setting

Change tracking

### Value

A dropdown menu with two options: 'Enable' and 'Disable'. The 'Disable' option is highlighted with a green background.

Set-based processing

A dropdown menu with two options: 'Enable' and 'Disable'. The 'Enable' option is highlighted with a green background.

**Correct Answer:**

Priority-based batch processing

Question #55

Topic 4

You are preparing to migrate data into Dynamics 365 Supply Chain Management.

You need to identify which tool to use for data migration activities.

Which three tools can you use? Each correct answer presents a complete solution.

NOTE: Each correct selection is worth one point.

- A. Excel workbook designer
- B. Office integration
- C. Data management workspace
- D. Regression suite automation tool
- E. Electronic reporting tool

**Correct Answer:** ABC

Question #56

Topic 4

Note: This question is part of a series of questions that present the same scenario. Each question in the series contains a unique solution that might meet the stated goals. Some question sets might have more than one correct solution, while others might not have a correct solution.

After you answer a question in this section, you will NOT be able to return to it. As a result, these questions will not appear in the review screen.

You have the following Dynamics 365 Finance instances:

Instance	Comments
1	Contains configuration data for a company named CompanyA
2	Contains a blank setup for a company named CompanyB

You must copy the configuration data from CompanyA to CompanyB.

Solution: Use the Move Database option in Lifecycle Services.

Does the solution meet the goal?

- A. Yes
- B. No

**Correct Answer:** B

Reference:

<https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/data-entities/copy-configuration>

**HOTSPOT -**

You are preparing to import data into Dynamics 365 Finance.

You need to use the data management framework for the data import process.

Which components should you use? To answer, select the appropriate options in the answer area.

NOTE: Each correct selection is worth one point.

Hot Area:

**Purpose**  
multiple underlying tables combined to complete a common data concept

**Component**

- data entity
- data package
- data project

a process that executes a schedule and processing options

- data job
- data package
- data project

**Correct Answer:**

**Purpose**  
multiple underlying tables combined to complete a common data concept

**Component**

- data entity
- data package
- data project

a process that executes a schedule and processing options

- data job
- data package
- data project

Box 1: data package -

Data package - A single compressed file that contains a data project manifest and data files. This is generated from a data job and used for import or export of multiple files with the manifest.

Note: A data package for a Dynamics 365 Finance and Operations app can consist of one or many data entities. A typical data package consists of a group of entities for a specific task, process, or function. For example, the data entities that are required for general ledger setup might be part of one data package. The format of a data package is a compressed file that contains a package manifest, a package header, and any additional files for the data entities that are included.

Incorrect:

A data entity is an abstraction from the physical implementation of database tables.

Box 2: data job -

Data job - A job that contains an execution instance of the data project, uploaded files, schedule (recurrence), and processing options.

Reference:

<https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/lcs-solutions/process-data-packages-lcs-solutions>

<https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/data-entities/data-entities-data-packages>

**DRAG DROP -**

A company is implementing Dynamics 365 Finance. The company is planning a data migration.

The company must migrate the following data:

- customers
- open sales orders

You need to assign a data type for each set of migration data.

Which data types should you assign? To answer, drag the appropriate data types to the correct migration data. Each data type may be used once, more than once, or not at all. You may need to drag the split bar between panes or scroll to view content.

NOTE: Each correct selection is worth one point.

Select and Place:

**Data types**

- master
- parameter
- reference
- transactional

**Answer Area****Migration data**

- customers
- open sales orders

**Data type**

- Data type
- Data type

**Correct Answer:****Data types**

- master
- parameter
- reference
- transactional

**Answer Area****Migration data**

- customers
- open sales orders

**Data type**

- master
- transactional

Box 1: master -

The new customer attribute framework lets you use configurations to add new fields to the customer master record.

Note: Data types include setup, master, and transaction.

Box 2: transactional -

Reference:

<https://docs.microsoft.com/en-us/dynamics365/commerce/dev-itpro/customer-attributes>

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Custom View Settings

Question #59

Topic 4

DRAG DROP -

You are implementing Dynamics 365 Supply Chain Management. Dynamics 365 Customer Engagement was deployed to production.

You have the following requirements:

- Upload the initial on-hand quantities into Dynamics 365 Supply Chain Management.
- View on-hand inventory to include current transactions in Dynamics 365 Customer Engagement.

You need to manage the on-hand records in the applications.

Which features should you use? To answer, drag the appropriate features to the correct requirements. Each feature may be used once, more than once, or not at all.

You may need to drag the split bar between panes or scroll to view content.

NOTE: Each correct selection is worth one point.

Select and Place:

Features	Answer Area	Requirement	Feature
Data Management Framework		Upload the initial on-hand quantities into Dynamics 365 Supply Chain Management.	
Dual Write		View on-hand inventory to include current transactions in Dynamics 365 Customer Engagement.	
Excel add-in			
Microsoft Dataverse			

Correct Answer:

Features	Answer Area	Requirement	Feature
Data Management Framework		Upload the initial on-hand quantities into Dynamics 365 Supply Chain Management.	
Dual Write		View on-hand inventory to include current transactions in Dynamics 365 Customer Engagement.	
Excel add-in			
Microsoft Dataverse			

Box 1: Data Management Framework

The data management framework consists of the following concepts:

- \* Data job - A job that contains an execution instance of the data project, uploaded files, schedule (recurrence), and processing options.
- \* Etc.

Box 2: Microsoft DataVerse -

Reference:

<https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/data-entities/data-entities-data-packages>

**HOTSPOT -**

You implement Dynamics 365 Finance. All financial records are stored in QuickBooks 2003 Pro.

You need to import the financial records into Dynamics 365 Finance by using the data management framework.

Which file format should you use? To answer, select the appropriate options in the answer area.

NOTE: Each correct selection is worth one point.

Hot Area:

**Answer Area****Data type****Entity****File format**

- Tab-delimited Excel file
- JSON file
- BACPAC file

**Data package**

- ZIP file
- GZ file
- RAR file
- TAR file

**Answer Area****Data type****Entity****File format**

- Tab-delimited Excel file
- JSON file
- BACPAC file

**Correct Answer:****Data package**

- ZIP file
- GZ file
- RAR file
- TAR file

Box 1: Tab-delimited Excel file -

If you want to migrate data from other finance solutions, you must either check if an extension is available for that solution or import from Excel.

**Box 2: ZIP file -**

Supported import file formats include .csv, .zip, .txt, .xml, and .xlsx.

**Reference:**

<https://docs.microsoft.com/en-us/dynamics365/business-central/across-import-data-configuration-packages> <https://internetnews.com/stories/import-data-dynamics-365-for-finance-and-operations/>

Question #61

*Topic 4*

You are preparing to migrate data into Dynamics 365 Finance from an older system.

You must assign customers to specific receivables accounts by region. A custom field within the older system exists to assign the customer to a region.

You need to map the customer data.

What should you do?

- A. Map the value from the custom field in the older system to the customer segment field in Dynamics 365 Finance.
- B. Map the custom field from the older system to the customer group field in Dynamics 365 Finance.**
- C. Map the custom field from the older system to the customer account number in Dynamics 365 Finance.
- D. Add a field in Dynamics 365 Finance to mirror the older system configuration.

**Correct Answer: B**

A customer group is a way of aggregating customers that are similar in some way. For example, you may use them to distinguish between retail and wholesale customers or between company employees and external customers etc.

**Incorrect:**

Not A: Segments let you create groups of related contacts that you can target with customer journeys. Segments are created using the segment designer. One way to build segments is by querying across related entities including contacts, leads, accounts, events, marketing lists, and more. You can also query the marketing-insights service to find contacts that have engaged with your marketing initiatives. The marketing-insights service also allows you to query contacts that you aren't reaching because of issues such as email bounces.

**Reference:**

<https://docs.microsoft.com/en-us/dynamicsax-2012/appuser-itpro/create-a-customer-group>

Your company attends a conference where many part suppliers will be in attendance. Your supplier relations executives meet with suppliers to discuss contracts with your company at the conference.

You are building a mobile app to support the discussions. The mobile app must access multiple data entities within Dynamics 365 Finance. Data operations must be synchronous and provide minor updates to existing information.

You need to implement a data access technology.

Which data access technology should you use?

A. Business events

B. OData APIs

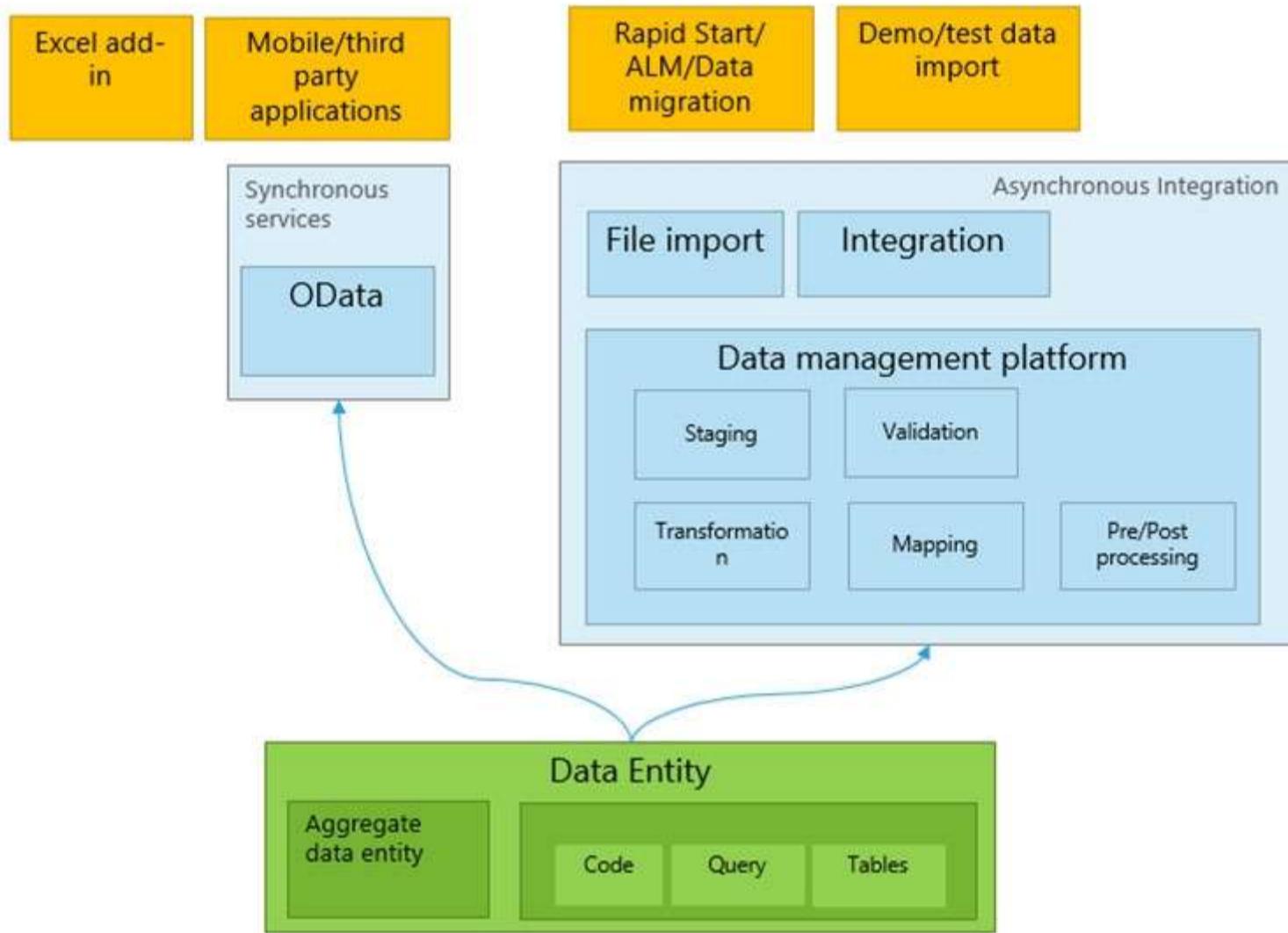
C. ADO.NET

D. Data management framework

**Correct Answer: B**

A data entity can be exposed as OData services, and then used in tabular-style synchronous integration scenarios and Microsoft Office integrations.

Illustration:



Reference:

<https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/data-entities/data-entities>

Custom View Settings

Question #63

Topic 4

DRAG DROP

You are configuring a recurring integration in Dynamics 365 Supply Chain Management. The released products entity is enabled for change tracking.

The integration must meet the following requirements:

- Export released product information using the recurring integrations capability within the data management framework.
- Export only released products assigned to item group A.
- Export only the released product, which has been amended since the previous export.

You need to configure the recurring integration.

Which four actions should you perform in sequence? To answer, move the appropriate actions from the list of actions to the answer area and arrange them in the correct order.

**Actions**

**Answer area**

Add the data entity with a default refresh type set to **Full push only**.

Add the Released Products entity with a default refresh type set to **Incremental push only**.

Create a recurring data job and configure the processing recurrence to start immediately.

Configure the filter criteria for item group A.

Use the Export in batch function to trigger the export

Configure an Export data project.



**Answer area**

Configure an Export data project.

Configure the filter criteria for item group A.

Create a recurring data job and configure the processing recurrence to start immediately.

Add the Released Products entity with a default refresh type set to **Incremental push only**.

**Correct Answer:**

**HOTSPOT**

A company uses finance and operations apps. The company operates and ships to only the United States, Canada, and the United Kingdom. The company has online stores for each of the countries/regions.

The company requires its customers to purchase online merchandise from only the country/region where the customer is physically located and redirects the customer to the appropriate site.

You need to configure the requirements.

What should you configure? To answer, select the appropriate options in the answer area.

NOTE: Each correct selection is worth one point.

**Answer Area****Requirement**

Define the country/region per online store.

**Configuration**

Associate the country/region to the store.  
Create a party ID.  
Assign an address format.  
Create a default customer.

Ensure that customers purchase from only the country/region where they are physically located.

Set up geo detection.  
Split the country/region by statement method.  
Assign an organizational address.  
Create a default customer.

**Answer Area****Requirement**

Define the country/region per online store.

**Configuration**

Associate the country/region to the store.  
Create a party ID.  
Assign an address format.  
Create a default customer.

**Correct Answer:**

Ensure that customers purchase from only the country/region where they are physically located.

Set up geo detection.  
Split the country/region by statement method.  
Assign an organizational address.  
Create a default customer.

**DRAG DROP -**

You manage the business process testing for a Dynamics 365 Finance implementation.

You need to configure test cases to use the Regression Suite Automation Tool (RSAT).

In which order should you perform the actions? To answer, move all actions from the list of actions to the answer area and arrange them in the correct order.

Select and Place:

**Actions**

- Record, save, and upload a task recording
- Create a test plan and suite in Microsoft Azure DevOps and attach test cases
- Configure a Business Process Modeler library
- Synchronize test cases to Microsoft Azure DevOps

**Answer Area****Correct Answer:****Actions**  
  
  
**Answer Area**

- Configure a Business Process Modeler library
- Record, save, and upload a task recording
- Synchronize test cases to Microsoft Azure DevOps
- Create a test plan and suite in Microsoft Azure DevOps and attach test cases

**Reference:**

<https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/lifecycle-services/using-task-guides-and-bpm-to-create-user-acceptance-tests>

**DRAG DROP -**

A company plans to migrate a Dynamics AX 2012 R3 instance to Dynamics 365 Finance. Developers at the company use virtual machines that are hosted on

Microsoft Azure.

You implement and configure Azure DevOps as a source code repository.

You need to establish an upgrade and migration strategy.

Which tools should you use? To answer, drag the appropriate tools to the correct requirements. Each tool may be used once, more than once, or not at all. You may need to drag the split bar between panes or scroll to view content.

NOTE: Each correct selection is worth one point.

Select and Place:

**Answer Area**

Tools	Requirement	Tool
GitHub	Convert and re-baseline metadata	
LCS Code Upgrade Service	Automatically inform developers what to fix using TODO	
Visual Studio	Check upgraded solutions into Azure DevOps	
	Connect to the new development environment	
	Connect to the new solution repository	

**Correct Answer:****Answer Area**

Tools	Requirement	Tool
GitHub	Convert and re-baseline metadata	LCS Code Upgrade Service
LCS Code Upgrade Service	Automatically inform developers what to fix using TODO	LCS Code Upgrade Service
Visual Studio	Check upgraded solutions into Azure DevOps	LCS Code Upgrade Service
	Connect to the new development environment	Visual Studio
	Connect to the new solution repository	GitHub

**Reference:**

<https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/migration-upgrade/prepare-migration>

A company implements Dynamics 365 Finance.

You are responsible for creating a custom feature within a solution by using Microsoft Azure DevOps. Testers have found a bug while running one of the User Acceptance Testing (UAT) scripts. However, it is not a high-severity bug and has been found to not have interconnected dependencies to other branches within the process flow.

You need to deploy the passed functionality features.

What should you do?

- A. Exclude the specific package from the Business process modeler (BPM)
- B. Exclude the specific package from the deployable package in Microsoft Azure DevOps**
- C. Exclude the specific package from the data package in the Data management tool
- D. Exclude the specific package from the deployable package in Configuration data manager

**Correct Answer:** B

Reference:

<https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/dev-tools/exclude-test-packages>

**DRAG DROP -**

You are implementing Dynamics 365 Finance.

You need to perform testing.

Which test should you perform? To answer, drag the appropriate test types to the correct requirements. Each test type may be used once, more than once, or not at all. You may need to drag the split bar between panes or scroll to view content.

NOTE: Each correct selection is worth one point.

Select and Place:

**Answer Area****Test types****Requirement****Test type**

Component test

Ensure that a singular function within the application works with real objects from other classes

Performance test

Ensure that the latency of the application meets acceptability metrics for users

Regression test

Ensure that as new capabilities are added, old capabilities are not broken

Unit test

**Correct Answer:****Answer Area****Test types****Requirement****Test type**

Component test

Ensure that a singular function within the application works with real objects from other classes

Performance test

Ensure that the latency of the application meets acceptability metrics for users

Regression test

Ensure that as new capabilities are added, old capabilities are not broken

Unit test

**HOTSPOT -**

A company is using Dynamics 365 Supply Chain Management.

You need to select the technology needed to automate test cases for Dynamics 365 Supply Chain Management.

Which technology should you use? To answer, select the appropriate options in the answer area.

NOTE: Each correct selection is worth one point.

Hot Area:

**Answer Area**

Requirement	Technology
Replay test cases click by click	<input type="checkbox"/> Microsoft Azure DevOps <input type="checkbox"/> Microsoft Azure Test Plans <input type="checkbox"/> Selenium <input type="checkbox"/> Task Recorder
Maintain data to use in test cases	<input type="checkbox"/> Microsoft Azure DevOps <input type="checkbox"/> Dynamics 365 <input type="checkbox"/> Microsoft Excel <input type="checkbox"/> Task Recorder

Correct Answer:

**Answer Area**

Requirement	Technology
Replay test cases click by click	<input checked="" type="checkbox"/> Microsoft Azure DevOps <input type="checkbox"/> Microsoft Azure Test Plans <input type="checkbox"/> Selenium <input type="checkbox"/> Task Recorder
Maintain data to use in test cases	<input type="checkbox"/> Microsoft Azure DevOps <input checked="" type="checkbox"/> Dynamics 365 <input type="checkbox"/> Microsoft Excel <input type="checkbox"/> Task Recorder

Reference:

<https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/lifecycle-services/using-task-guides-and-bpm-to-create-user-acceptance-tests>

**HOTSPOT -**

You are testing Dynamics 365 Supply Chain Management after applying a system update in a test environment.

You must test common business processes. The tests must be reused for future system updates. The tests must reduce the amount of manual interaction required for each test run.

You need to identify the appropriate solutions to create, store, and run the tests.

Which solution should you use? To answer, select the appropriate options in the answer area.

NOTE: Each correct selection is worth one point.

Hot Area:

**Answer Area**

<b>Task</b>	<b>Solution</b>				
Create the business process test scripts	<div style="border: 1px solid black; padding: 5px; text-align: right;">▼</div> <table border="1" style="margin-left: auto; margin-right: auto;"><tr><td>Task management</td></tr><tr><td>Task recorder</td></tr><tr><td>Test plans</td></tr><tr><td>Test recorder</td></tr></table>	Task management	Task recorder	Test plans	Test recorder
Task management					
Task recorder					
Test plans					
Test recorder					
Store the tests and parameters for future use	<div style="border: 1px solid black; padding: 5px; text-align: right;">▼</div> <table border="1" style="margin-left: auto; margin-right: auto;"><tr><td>Azure DevOps</td></tr><tr><td>Azure SQL Database</td></tr><tr><td>Microsoft Dataverse</td></tr><tr><td>Shared asset library</td></tr></table>	Azure DevOps	Azure SQL Database	Microsoft Dataverse	Shared asset library
Azure DevOps					
Azure SQL Database					
Microsoft Dataverse					
Shared asset library					
Run the acceptance tests without manual interactions	<div style="border: 1px solid black; padding: 5px; text-align: right;">▼</div> <table border="1" style="margin-left: auto; margin-right: auto;"><tr><td>Data task automation</td></tr><tr><td>Regression suite automation tool</td></tr><tr><td>SysTest Framework</td></tr><tr><td>Visual Studio Test Explorer</td></tr></table>	Data task automation	Regression suite automation tool	SysTest Framework	Visual Studio Test Explorer
Data task automation					
Regression suite automation tool					
SysTest Framework					
Visual Studio Test Explorer					

Correct Answer:

**Answer Area**

<b>Task</b>	<b>Solution</b>				
Create the business process test scripts	<div style="border: 1px solid black; padding: 5px; text-align: right;">▼</div> <table border="1" style="margin-left: auto; margin-right: auto;"><tr><td>Task management</td></tr><tr><td>Task recorder</td></tr><tr><td>Test plans</td></tr><tr><td>Test recorder</td></tr></table>	Task management	Task recorder	Test plans	Test recorder
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Test plans					
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Azure DevOps					
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Data task automation					
Regression suite automation tool					
SysTest Framework					
Visual Studio Test Explorer					

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Question #7

*Topic 5*

You are responsible for regulatory compliance for a Dynamics 365 Finance environment.

You need to be able to search for regulatory features in Microsoft Dynamics Lifecycle Services (LCS).

What should you use?

- A. Intelligent Data Management Framework (IDMF)
- B. System diagnostics
- C. Application Object Tree (AOT)
- D. Issue search

**Correct Answer:** D

Reference:

<https://docs.microsoft.com/en-us/dynamics365/unified-operations/dev-itpro/lifecycle-services/issue-search-lcs>

**HOTSPOT -**

A company is standardizing its business processes. You plan to facilitate business process alignment by using the Business Process Modeler (BPM) tool in Lifecycle Services (LCS).

You need to identify the main capabilities of BPM.

Which of the following can you accomplish with the BPM tool in LCS? To answer, select the appropriate options in the answer area.

NOTE: Each correct selection is worth one point.

Hot Area:

**Answer Area**

Capability	Tasks
Integration	<ul style="list-style-type: none"><li>Upload flowcharts from Task recorder</li><li>Pull master data</li><li>Pull reference data</li><li>Connect to external databases</li></ul>
All functionality except	<ul style="list-style-type: none"><li>Modify flowcharts</li><li>Attach video</li><li>Push process configurations to instances</li><li>Generate gap analysis</li></ul>

**Answer Area**

Capability	Tasks
Integration	<ul style="list-style-type: none"><li>Upload flowcharts from Task recorder</li><li>Pull master data</li><li>Pull reference data</li><li>Connect to external databases</li></ul>
Correct Answer: All functionality except	<ul style="list-style-type: none"><li>Modify flowcharts</li><li>Attach video</li><li>Push process configurations to instances</li><li>Generate gap analysis</li></ul>

Note: This question is part of a series of questions that present the same scenario. Each question in the series contains a unique solution that might meet the stated goals. Some question sets might have more than one correct solution, while others might not have a correct solution. After you answer a question in this section, you will NOT be able to return to it. As a result, these questions will not appear in the review screen.

You are a functional consultant who is deploying Dynamics 365 Finance.

The implementation must:

- Use an iterative approach

Integrate with real-world data -

-

- Implement multiple rounds of feedback

You need to deploy and validate the implementation.

Solution: Use the XPPBP tool to export customizations and scenarios from a development sandbox. Make changes to the sandbox containing users. Deploy from the sandbox to the production environment.

Does the solution meet the goal?

A. Yes

B. No

**Correct Answer: B**

Note: This question is part of a series of questions that present the same scenario. Each question in the series contains a unique solution that might meet the stated goals. Some question sets might have more than one correct solution, while others might not have a correct solution.

After you answer a question in this section, you will NOT be able to return to it. As a result, these questions will not appear in the review screen.

You are a functional consultant who is deploying Dynamics 365 Finance.

The implementation must:

- Use an iterative approach
- Integrate with real-world data
- Implement multiple rounds of feedback

You need to deploy and validate the implementation.

Solution: Perform a fit-gap analysis. Configure Dynamics 365 Finance to address the functional gap. Deploy the configuration.

Does the solution meet the goal?

A. Yes

B. No

**Correct Answer: A**

You are upgrading a Dynamics 365 Finance solution.

You must run functional test passes for the upgraded solution.

You need to plan a production environment test flow for the solution.

Which three steps should you verify in the production test flow? Each correct step presents part of the solution.

NOTE: Each correct selection is worth one point.

- A. Purchase orders are generated
- B. Item requirements are present
- C. Production order processing occurs
- D. Production orders are generated
- E. The item master is designed and released to a legal entity

**Correct Answer:** ABD

*Community vote distribution*

ABE (100%)

A company uses Dynamics 365 Finance Lifecycle Services (LCS).

Your company needs to document and test all possible scenarios for a given implementation. Implementation gaps need to be documented using the tool available for tracking and linking to delivered extensions.

You need to identify the correct tool to accomplish this.

What should you use?

- A. APQC Unified Libraries
- B. Shared asset library
- C. Business process modeler (BPM)
- D. Microsoft Azure DevOps

**Correct Answer:** C

**DRAG DROP -**

You are the project owner in a Lifecycle Services (LCS) project to deploy a Dynamics 365 Finance environment.

The system must be configured to enable testers to record processes that become business and test plans.

You need to configure the system to generate User Acceptance Testing (UAT) test plans.

In which order should you perform the actions? To answer, move all actions from the list of actions to the answer area and arrange them in the correct order.

Select and Place:

**Actions**

- Enable Azure DevOps sync
- Enable Sync test cases
- Configure system administrator help parameters to the LCS project
- Create business process libraries in the LCS project
- Configure Azure DevOps for the LCS project

**Answer Area****Correct Answer:****Actions**

- Enable Azure DevOps sync
- Enable Sync test cases
- Configure system administrator help parameters to the LCS project
- Create business process libraries in the LCS project
- Configure Azure DevOps for the LCS project

**Answer Area**

- Create business process libraries in the LCS project
- Configure Azure DevOps for the LCS project
- Configure system administrator help parameters to the LCS project
- Enable Azure DevOps sync
- Enable Sync test cases

You are a Dynamics 365 Finance system administrator.

An issue has been reported that appears to be a base Dynamics 365 bug. The system was last updated three weeks ago. Searching for the issue by description in

Lifecycle Services is not working.

You need to determine other ways to search for similar issues to help narrow down the search before opening a Microsoft ticket.

What are two ways to search for a released hotfix? Each correct answer presents a complete solution.

NOTE: Each correct selection is worth one point.

- A. By industry
- B. By Microsoft support ticket number
- C. By Application Object Tree (AOT) object name
- D. Date range for release

**Correct Answer: BC**

Reference:

<https://docs.microsoft.com/en-us/dynamics365/unified-operations/dev-itpro/lifecycle-services/issue-search-lcs>

You implement Dynamics 365 Finance. The implementation will undergo User Acceptance Testing (UAT).

You create test case recordings. To coordinate testing across multiple environments, UAT must be integrated with Microsoft Azure DevOps.

You need to configure Business process modeler (BPM) and Azure DevOps to complete user acceptance testing.

Which three actions should you perform? Each correct answer presents a complete solution.

NOTE: Each correct selection is worth one point.

- A. Synchronize the BPM library with Azure DevOps
- B. Create a test pass and test case in Azure DevOps
- C. Upload saved Task recorder files to BPM
- D. Create a test plan and test suites in Azure DevOps
- E. Synchronize the BPM library with a Git repo
- F. Upload saved Task recorder files to Azure DevOps

**Correct Answer: ACD**

Reference:

<https://docs.microsoft.com/en-us/dynamics365/unified-operations/dev-itpro/lifecycle-services/using-task-guides-and-bpm-to-create-user-acceptance-tests>

A company is implementing Finance and Operations apps.

All required Microsoft implementation tools are being used for project tracking for standardized Microsoft FastTrack and Support visibility.

You need to view the official critical milestone dates for completing the analysis phase.

Which tool should you use?

- A. Microsoft Teams
- B. Microsoft Planner
- C. Dynamics 365 Project module
- D. Lifecycle Services

**Correct Answer:** D

Reference:

<https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/lifecycle-services/project-onboarding>

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Question #17

*Topic 5*

You are a Dynamics 365 Finance implementation team lead.

A series of test plans need to be created and tracked during a company's development phase. Multiple users will be testing multiple aspects as code is released.

Issues and remediations to bugs will also need to be tracked.

You need to identify Microsoft solutions that offer these capabilities.

What should you use?

- A. Dynamics 365 for Finance and Operations
- B. Lifecycle Services (LCS)
- C. Solution management
- D. Microsoft Azure DevOps

**Correct Answer: D**

**DRAG DROP -**

Your company is using a highly customized version of Dynamics 365 Finance.

You have identified a new hotfix that will correct several important issues that have caused many user complaints.

You need to determine whether the hotfix will break any customizations.

Which four actions should you perform in sequence? To answer, move the appropriate actions from the list of actions to the answer area and arrange them in the correct order.

Select and Place:

**Actions**

Upload the hotfix to Lifecycle Services

Download the hotfix from Lifecycle Services

Check in the entire hotfix as pending change and schedule and deploy it to the production environment

Build the hotfix in the development environment and accept changes

Install the hotfix in your Microsoft Azure DevOps application development environment in an Active state

Install the hotfix in your Microsoft Azure DevOps application development environment in a Pending state

**Answer Area****Correct Answer:****Actions**

Upload the hotfix to Lifecycle Services

Download the hotfix from Lifecycle Services

Check in the entire hotfix as pending change and schedule and deploy it to the production environment

Build the hotfix in the development environment and accept changes

Install the hotfix in your Microsoft Azure DevOps application development environment in an Active state

Install the hotfix in your Microsoft Azure DevOps application development environment in a Pending state

**Answer Area**

Download the hotfix from Lifecycle Services

Install the hotfix in your Microsoft Azure DevOps application development environment in a Pending state

Check in the entire hotfix as pending change and schedule and deploy it to the production environment

Build the hotfix in the development environment and accept changes

**Reference:**

<https://docs.microsoft.com/en-us/dynamics365/unified-operations/dev-itpro/migration-upgrade/install-metadata-hotfix-package>

**HOTSPOT -**

You are a project manager using Dynamics 365 Finance Lifecycle Services (LCS).

You must be able to identify and publish gaps within your normal delivery schedule.

You need to determine whether your organization has the minimum requirements in place to use Business Process Modeler (BPM).

Which prerequisites are required to use Business Process Modeler? To answer, select the appropriate options in the answer area.

NOTE: Each correct selection is worth one point.

Hot Area:

**Answer Area**

<b>Applications</b>	<b>Prerequisite</b>
Choose the BPM prerequisites	<div style="border: 1px solid black; padding: 5px; width: fit-content; margin-left: auto; margin-right: 0;"><p>Microsoft Azure DevOps</p><p>Dynamics 365 Voice of the Customer</p><p>Dynamics 365 Project Service Automation</p></div>
Use the BPM-compatible application to generate documentation for business processes	<div style="border: 1px solid black; padding: 5px; width: fit-content; margin-left: auto; margin-right: 0;"><p>Microsoft Word</p><p>Microsoft Excel</p><p>Microsoft Visio</p><p>Microsoft Azure DevOps</p></div>
Open business process diagrams with this BPM-compatible application	<div style="border: 1px solid black; padding: 5px; width: fit-content; margin-left: auto; margin-right: 0;"><p>Microsoft Word</p><p>Microsoft Excel</p><p>Microsoft Visio</p><p>Microsoft Azure DevOps</p></div>

**Answer Area**

<b>Applications</b>	<b>Prerequisite</b>
Choose the BPM prerequisites	<div style="border: 1px solid black; padding: 5px; width: fit-content; margin-left: auto; margin-right: 0;"><p>Microsoft Azure DevOps</p><p>Dynamics 365 Voice of the Customer</p><p>Dynamics 365 Project Service Automation</p></div>
Correct Answer: Use the BPM-compatible application to generate documentation for business processes	<div style="border: 1px solid black; padding: 5px; width: fit-content; margin-left: auto; margin-right: 0;"><p>Microsoft Word</p><p>Microsoft Excel</p><p>Microsoft Visio</p><p>Microsoft Azure DevOps</p></div>
Open business process diagrams with this BPM-compatible application	<div style="border: 1px solid black; padding: 5px; width: fit-content; margin-left: auto; margin-right: 0;"><p>Microsoft Word</p><p>Microsoft Excel</p><p>Microsoft Visio</p><p>Microsoft Azure DevOps</p></div>

Reference:

<https://docs.microsoft.com/en-us/dynamics365/unified-operations/dev-itpro/lifecycle-services/bpm-overview>

**HOTSPOT -**

A company implements Dynamics 365 Finance and uses Lifecycle Services (LCS). The company uses both standard and customized functionality.

Testers have reported problems using the recent User Acceptance Testing (UAT) round.

You need to resolve these issues before UAT can proceed.

Which tools should you use? To answer, select the appropriate options in the answer area.

NOTE: Each correct selection is worth one point.

Hot Area:

**Answer Area****Issue**

A UAT tester cannot add a newly created bill of materials (BOM) into a production order.

**LCS tool**

Issue search
Usage profiler
System diagnostics

A UAT tester finds an error in the company's process to create a new vendor.

Business process modeler
Customization analysis
Issue search

Correct Answer:

**Answer Area****Issue**

A UAT tester cannot add a newly created bill of materials (BOM) into a production order.

**LCS tool**

Issue search
Usage profiler
System diagnostics

A UAT tester finds an error in the company's process to create a new vendor.

Business process modeler
Customization analysis
Issue search

You are a Dynamics 365 Finance system administrator.

A user is reporting an issue with the Sales Order form. The UI for the form is not loading properly, and there are some performance issues. The object was working fine until the most recent update release. The user who personalized the form is using Microsoft Edge. No other users are reporting issues.

You need to resolve the issue.

What should you do?

- A. Reset all the usage data for the user.
- B. Switch to Microsoft Edge instead of Internet Explorer 11.
- C. Reimport and compile the AOT object causing issues.
- D. Open the form in a new Microsoft Edge InPrivate session.

**Correct Answer: A**

Reference:

<https://stoneridgesoftware.com/how-to-clear-usage-data-or-personalizations-in-dynamics-365-finance-and-operations/>

A company is implementing Dynamics 365 Finance.

You plan to use Task Recorder to document the process of adding a new customer to the system. Before assigning a credit limit to the customer record, the customer's credit must be checked in an external system.

You need to include the credit check in the task recording.

What should you create?

- A. End sub-task
- B. Start sub-task
- C. Action step
- D. Info step
- E. Pending step

**Correct Answer: D**

Reference:

<https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/user-interface/task-recorder>

Note: This question is part of a series of questions that present the same scenario. Each question in the series contains a unique solution that might meet the stated goals. Some question sets might have more than one correct solution, while others might not have a correct solution.

After you answer a question in this section, you will NOT be able to return to it. As a result, these questions will not appear in the review screen.

A company's Dynamics 365 Commerce production instance is updated monthly as new versions of the software are released.

The company needs to identify any potential issues in new releases. They do not have developers to help with this initiative.

You need to implement a way to regression test scenarios.

Solution: Use the SysTest framework to create unit tests for critical business processes.

Does the solution meet the goal?

A. Yes

B. No

**Correct Answer: B**

Reference:

<https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/perf-test/testing-validation>

Note: This question is part of a series of questions that present the same scenario. Each question in the series contains a unique solution that might meet the stated goals. Some question sets might have more than one correct solution, while others might not have a correct solution.

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A company's Dynamics 365 Commerce production instance is updated monthly as new versions of the software are released.

The company needs to identify any potential issues in new releases. They do not have developers to help with this initiative.

You need to implement a way to regression test scenarios.

Solution: Use the Acceptance Test Library (ATL) framework to create regression test scenarios for critical business processes that do not require any X++ code changes.

Does the solution meet the goal?

A. Yes

B. No

**Correct Answer: B**

Reference:

<https://ellipsesolutions.com/acceptance-test-library-for-dynamics-365-for-finance-and-operations-or-when-rsat-is-not-enough/>

Note: This question is part of a series of questions that present the same scenario. Each question in the series contains a unique solution that might meet the stated goals. Some question sets might have more than one correct solution, while others might not have a correct solution.

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A company's Dynamics 365 Commerce production instance is updated monthly as new versions of the software are released.

The company needs to identify any potential issues in new releases. They do not have developers to help with this initiative.

You need to implement a way to regression test scenarios.

Solution: Place data packages that are related to data task automation in the individual Dynamics Lifecycle Services (LCS) asset library.

Does the solution meet the goal?

A. Yes

B. No

**Correct Answer: A**

Reference:

<https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/perf-test/rsat/rsat-overview>

You are a Dynamics 365 Finance system administrator.

A user is reporting an issue with the Sales Order form. The UI for the form is not loading properly, and there are some performance issues. The object was working fine until the most recent update release. The user has personalized this form, is using Microsoft Internet Explorer 11, and no other users are reporting issues.

You need to resolve the issue.

What should you do?

A. Switch to Microsoft Edge instead of Internet Explorer 11.

B. Delete the sales from object in the usage data form.

C. Export, delete, then reimport the usage data for the sales from object.

D. Reimport and compile the AOT object causing issues.

**Correct Answer: A**

Note:

There are several versions of this question in the exam. The question has two possible correct answers:

1. Switch to Microsoft Edge instead of Internet Explorer 11.

2. Reset all the usage data for the user.

Other incorrect answer options you may see on the exam include the following:

1. Disable and then re-enable the user.

2. Rebuild the system indexes.

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Question #27

Topic 5

You are a Dynamics 365 Finance developer.

New features for Dynamics 365 Finance have been released. Your company plans to upgrade their Dynamics 365 instance soon.

You need to download a virtual machine that includes all of the new features so that you can explore the new features.

Where should you go?

- A. Microsoft Connect
- B. Shared Asset library
- C. Environments
- D. My subscription
- E. Microsoft Developer Network

**Correct Answer: C**

*Community vote distribution*

B (100%)

Question #28

Topic 5

You are implementing Dynamics 365 Supply Chain Management.

New sales orders must be evaluated every hour. Warehouse operations managers must be sent an email alert to include new sales orders. The solution must not include custom code development.

You need to use a Power Platform product to implement the solution.

Which product should you use?

- A. Power Apps
- B. Power BI
- C. Power Virtual Agents
- D. Power Automate

**Correct Answer: B**

**DRAG DROP -**

You are a Dynamics 365 Finance system administrator.

The finance department is experiencing electronic reporting submittal issues. You must use all available sources to troubleshoot those issues.

You need to identify potential hotfixes.

Which four actions should you perform in sequence? To answer, move the appropriate actions from the list of actions to the answer area and arrange them in the correct order.

Select and Place:

<b>Actions</b>	<b>Answer Area</b>
Log in to Lifecycle Services (LCS).	
Enter the issue case number.	
Use the Issue search tile.	↖ ↘
Create a new case.	
Enter search terms.	
Select a project to work in.	

**Correct Answer:**

<b>Actions</b>	<b>Answer Area</b>
Log in to Lifecycle Services (LCS).	Log in to Lifecycle Services (LCS).
Enter the issue case number.	Select a project to work in.
Use the Issue search tile.	↖ ↘
Create a new case.	Enter search terms.
Enter search terms.	
Select a project to work in.	Use the Issue search tile.

**Reference:**

<https://docs.microsoft.com/en-us/dynamics365/unified-operations/dev-itpro/lifecycle-services/issue-search-lcs>

You manage a Dynamics 365 Finance environment.  
Users report slow queries, deadlocks, and crashes.  
You need identify which tool to use to troubleshoot.  
What should you use?

- A. Environment monitoring
- B. Microsoft Azure Active Directory Connect Health Agent
- C. System diagnostics
- D. DirectQuery

**Correct Answer: A**

Reference:

<https://docs.microsoft.com/en-us/learn/modules/performance-monitoring-finance-operations/6-exercise>

**DRAG DROP -**

A company needs test scripts that can be leveraged by the Regression Suite Automated Testing (RSAT) tool. Several users are creating their test cases and sending the files to you to upload.

You need to create these scripts and link them to the RSAT tool.

Which three actions should you perform in sequence? To answer, move the appropriate actions from the list of actions to the answer area and arrange them in the correct order.

Select and Place:

**Actions****Answer Area**

Create a BPM library and upload XML task recorder files.



Create a BPM library and upload AXTR task recorder files.

Create test suite scripts in Microsoft Azure DevOps.

Sync to Microsoft Azure DevOps.

**Actions****Answer Area**

Create a BPM library and upload XML task recorder files.

Create a BPM library and upload AXTR task recorder files.

Correct Answer:



Sync to Microsoft Azure DevOps.

Create test suite scripts in Microsoft Azure DevOps.

**References:**

<https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/lifecycle-services/using-task-guides-and-bpm-to-create-user-acceptance-tests> <https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/perf-test/rsat/rsat-overview>

You are a Dynamics 365 Finance system administrator.

A user is reporting an issue with the Sales Order form. The UI for the form is not loading properly, and there are some performance issues. The object was working fine until the most recent update release. The user has personalized this form, is using Microsoft Internet Explorer 11, and no other users are reporting issues.

You need to resolve the issue.

What should you do?

- A. Reset all the usage data for the user.
- B. Disable and then re-enable the user.
- C. Export, delete, then reimport the usage data for the sales from object.
- D. Rebuild the system indexes.

**Correct Answer: A**

Note:

There are several versions of this question in the exam. The question has two possible correct answers:

- 1. Switch to Microsoft Edge instead of Internet Explorer 11.
- 2. Reset all the usage data for the user.

Other incorrect answer options you may see on the exam include the following:

- 1. Delete the sales from object in the usage data form.
- 2. Reimport and compile the AOT object causing issues.

**DRAG DROP -**

You are a Dynamics 365 Finance implementation consultant.

You plan to use automated regression testing in a company's environment, as the system will be updated frequently until automatic updates can be applied.

You need to identify when and what key business object should be used during the implementation.

Which business objects should you use? To answer, drag the appropriate objects to the correct component actions. Each object may be used once, more than once, or not at all. You may need to drag the split bar between panes or scroll to view content.

NOTE: Each correct selection is worth one point.

Select and Place:

**Answer Area**

Objects	Component Actions	Object
Test scripts	Generate from the analysis meetings	
Business requirements	Use for regression testing	
	Generate use cases	
	Use in a gap analysis process	

**Answer Area**

Objects	Component Actions	Object
Correct Answer:	Generate from the analysis meetings	Test scripts
Test scripts	Use for regression testing	Test scripts
Business requirements	Generate use cases	Business requirements
	Use in a gap analysis process	Business requirements

You are Dynamics 365 Finance system administrator for a new implementation.

You have a solution that needs to be tested using User Acceptance Testing (UAT). You have created a Business process modeler (BPM) library.

You need to validate and support the solution.

Which three actions should you perform? Each answer presents part of the solution.

- A. Create a new Business process library.
- B. Record test cases and save them to BPM.
- C. Upload the saved recording to BPM.
- D. Create and save a new task recording.
- E. Export the task recording to Microsoft Word and upload it to BPM.

**Correct Answer:** *BCD*

**DRAG DROP -**

You sign in to Lifecycle Services (LCS).

You need to restart the Internet Information Service (IIS) service in a nonproduction Tier 2 environment.

Which three actions should you perform in sequence? To answer, move the appropriate actions from the list of actions to the answer area and arrange them in the correct order.

Select and Place:

**Answer Area****Actions**

Select **Maintain** and then select **Restart services**.

Enter the command **iisreset /restart**.

Select the appropriate environment.

Navigate to the Environment Details page.

Navigate to the System Administration parameters page.

Remotely connect to the server that hosts the Dynamics 365 IIS service.


**Correct Answer:****Answer Area****Actions**

--

Enter the command **iisreset /restart**.

--

--

Navigate to the System Administration parameters page.

Remotely connect to the server that hosts the Dynamics 365 IIS service.

Select the appropriate environment.

Navigate to the Environment Details page.

Select **Maintain** and then select **Restart services**.

**Reference:**

<https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/lifecycle-services/restart-environment-services>

A company implements Dynamics 365 Finance.

The implementation team must build acceptance testing scripts to make sure that common business use cases can be performed in the new system. They must use cases by stepping through required tasks, organized by functional hierarchy.

You need to create User Acceptance Testing (UAT) tests in Lifecycle Services (LCS) that can be easily repeatable.

What should you use?

- A. Task Recorder
- B. APQC Unified Library
- C. Usage profiler
- D. Configuration data manager

**Correct Answer: A**

[Previous Questions](#)

[Next Questions](#)

Custom View Settings

Question #37

Topic 5

Note: This question is part of a series of questions that present the same scenario. Each question in the series contains a unique solution that might meet the stated goals. Some question sets might have more than one correct solution, while others might not have a correct solution.

After you answer a question in this section, you will NOT be able to return to it. As a result, these questions will not appear in the review screen.

You are a functional consultant who is deploying Dynamics 365 Finance.

The implementation must:

Use an iterative approach -

- □ Integrate with real-world data
- □ Implement multiple rounds of feedback

You need to deploy and validate the implementation.

Solution: Deploy the out-of-box solution with no customizations. Enable users to customize the solution based on individual user scenarios.

Does the solution meet the goal?

A. Yes

B. No

**Correct Answer: B**

DRAG DROP -

You are implementing Dynamics 365 Finance.

You need to perform testing.

What tools should you use? To answer, drag the appropriate test tools to the correct requirements. Each test tool may be used once, more than once, or not at all.

You may need to drag the split bar between panes or scroll to view content.

NOTE: Each correct selection is worth one point.

Select and Place:

### Answer Area

Test tools	Requirement	Test tool
Build Machine	Author unit tests.	
RSAT	Author component tests.	
SysTest Framework	Run load testing.	
PerfSDK	Perform regression tools.	

### Answer Area

Test tools	Requirement	Test tool
Build Machine	Author unit tests.	SysTest Framework
RSAT	Author component tests.	SysTest Framework
SysTest Framework	Run load testing.	PerfSDK
PerfSDK	Perform regression tools.	RSAT

Reference:

<https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/perf-test/testing-validation> <https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/perf-test/rsat/rsat-overview> <https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/perf-test/multi-user-testing-perf sdk-azuredevops>

**DRAG DROP -**

A company is implementing Dynamics 365 Finance and preparing for go-live.

You need to thoroughly test the system.

Which tools should you use? To answer, drag the appropriate tools to the correct scenarios. Each tool may be used once, more than once, or not at all. You may need to drag the split bar between panes or scroll to view content.

NOTE: Each correct selection is worth one point.

Select and Place:

**Answer Area**

Tools	Scenario	Tool
Business process modeler	A developer needs to test code.	
Data task automation	A procurement analyst needs to test the purchase order entry process.	
RSAT	A system engineer needs to test integration with a third-party warehouse solution.	
SysTest		

Correct Answer:

**Answer Area**

Tools	Scenario	Tool
Business process modeler	A developer needs to test code.	SysTest
	A procurement analyst needs to test the purchase order entry process.	RSAT
	A system engineer needs to test integration with a third-party warehouse solution.	Data task automation

Reference:

<https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/perf-test/rsat/rsat-overview> <https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/perf-test/testing-validation> <https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/data-entities/data-task-automation>

Note: This question is part of a series of questions that present the same scenario. Each question in the series contains a unique solution that might meet the stated goals. Some question sets might have more than one correct solution, while others might not have a correct solution.

After you answer a question in this section, you will NOT be able to return to it. As a result, these questions will not appear in the review screen.

A company's Dynamics 365 Commerce production instance is updated monthly as new versions of the software are released.

The company needs to identify any potential issues in new releases. They do not have developers to help with this initiative.

You need to implement a way to regression test scenarios.

Solution: Use the Regression Suite Automation Testing (RSAT) framework with Azure DevOps to create regression test scenarios for critical business processes.

Does the solution meet the goal?

A. Yes

B. No

**Correct Answer: A**

Reference:

<https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/perf-test/rsat/rsat-overview>

You are a Dynamics 365 Finance system administrator.

Microsoft recently released a new feature for public preview that would add significant value to your organization without licensing adjustments.

You need to enable the feature.

Where can you enable the preview feature?

A. Solution management

B. Lifecycle Services

C. Organizational administration module

D. [experience.dynamics.com](http://experience.dynamics.com)

**Correct Answer: B**

References:

<https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/fin-ops/get-started/public-preview-releases>

**HOTSPOT -**

You are a business process analyst using Dynamics 365 Finance.

You develop business processes for your organization.

You need to review standard business processes from similar industries and make modifications for your organization.

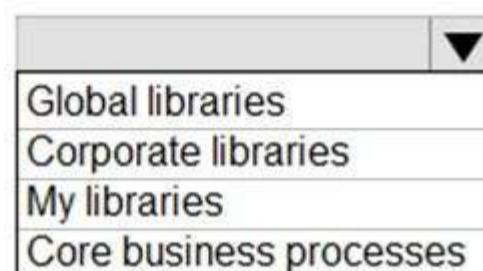
Which business process libraries in Lifecycle Services should you use? To answer, select the appropriate options in the answer area.

NOTE: Each correct selection is worth one point.

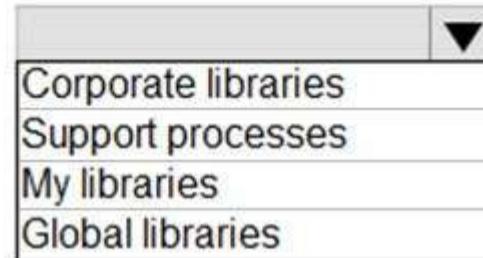
Hot Area:

**Answer Area****Requirements**

Find standard business processes used by other corporations and industries.

**Tools**

Find processes from other departments.

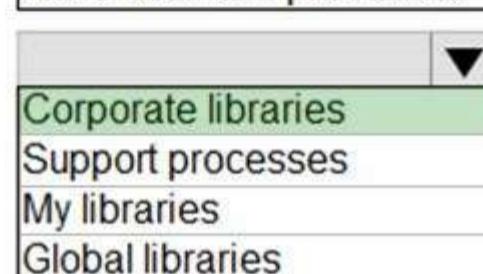
**Answer Area****Requirements**

Find standard business processes used by other corporations and industries.

**Tools**

Correct Answer:

Find processes from other departments.



References:

<https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/lifecycle-services/creating-editing-browsing>

A company implements Dynamics 365 Finance.

The implementation team must build acceptance scripts to make sure that common business use cases can be performed in the new system.

They must test use cases by stepping through required tasks, organized by functional hierarchy.

You need to create User Acceptance Testing (UAT) tests in Lifecycle Services (LCS) that can be easily repeatable.

What should you use?

- A. Task recorder
- B. APQC Unified Library
- C. Asset library
- D. Configuration data manager

**Correct Answer: A**

Reference:

<https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/lifecycle-services/using-task-guides-and-bpm-to-create-user-acceptance-tests>

**HOTSPOT -**

A company uses Dynamics 365 Finance.

You review business processes and their associated requirements. These work items include bugs, tasks, backlog items, tests, and documents.

You need to perform the following tasks:

- Track the progress of your implementation project and associate various work items with requirements and business processes.
- Identify and publish bug fixes within your normal delivery schedule.

Which tools should you use? To answer, select the appropriate options in the answer area.

NOTE: Each correct selection is worth one point.

Hot Area:

**Answer Area****Requirements**

Connect your business process maps to the recommended work management system.

**Tools**

Business process modeler connected to Microsoft Azure DevOps
Microsoft Visio connected to Microsoft Project Server
Microsoft Visual Studio connected to Microsoft Github

Create business process maps.

Business process modeler
Microsoft Visual Studio
Microsoft Visio

Manage progress and work items.

Microsoft GitHub
Microsoft Project Online
Microsoft Azure DevOps

**Correct Answer:****Answer Area****Requirements**

Connect your business process maps to the recommended work management system.

**Tools**

Business process modeler connected to Microsoft Azure DevOps
Microsoft Visio connected to Microsoft Project Server
Microsoft Visual Studio connected to Microsoft Github

Create business process maps.

Business process modeler
Microsoft Visual Studio
Microsoft Visio

Manage progress and work items.

Microsoft GitHub
Microsoft Project Online
Microsoft Azure DevOps

**HOTSPOT -**

You are a Dynamics 365 Finance system administrator.

You need to configure the system to support several new use case scenarios.

Which features should you use? To answer, select the appropriate options in the answer area.

NOTE: Each correct selection is worth one point.

Hot Area:

**Answer Area****Scenario****Value**

**Business processes can be documented by clicking through the steps of a user in the application.**

Business process modeler	▼
Task recorder	▼
Operational workspaces	▼
Test generation	▼

**Documented steps can be used for test-code generation.**

Download the task recording package.	▼
Download the Business process modeler package.	▼
Save the developer recording file.	▼
Save to a disconnected Lifecycle Services library.	▼

**A user can search for a business process and be guided by the prompted steps in the application.**

Maintenance mode	▼
Business process modeler	▼
Help	▼
Microsoft SharePoint	▼

**A user can be prevented from clicking on elements on the task guide during a business-scenario training walkthrough.**

Error detection	▼
Security roles	▼
Gestures	▼
Lock	▼

**Correct Answer:****Answer Area****Scenario****Value**

**Business processes can be documented by clicking through the steps of a user in the application.**

Business process modeler	▼
Task recorder	▼
Operational workspaces	▼
Test generation	▼

**Documented steps can be used for test-code generation.**

Download the task recording package.	▼
Download the Business process modeler package.	▼
Save the developer recording file.	▼
Save to a disconnected Lifecycle Services library.	▼

**A user can search for a business process and be guided by the prompted steps in the application.**

Maintenance mode	▼
Business process modeler	▼
Help	▼
Microsoft SharePoint	▼

**A user can be prevented from clicking on elements on the task guide during a business-scenario training walkthrough.**

Error detection	▼
Security roles	▼
Gestures	▼
Lock	▼

Reference:

<https://docs.microsoft.com/en-us/dynamics365/unified-operations/dev-itpro/user-interface/task-recorder?toc=/fin-and-ops/toc.json>

**DRAG DROP -**

You are implementing Dynamics 365 Finance.

You use Business process modeler to capture the business process. You integrate Lifecycle Services with Task Recorder, Microsoft Azure DevOps, and Test

Runner to perform end-to-end testing of new features.

You need to perform testing.

Which testing tools should you use? To answer, drag the appropriate testing tools to the correct requirements. Each testing tool may be used once, more than once, or not at all. You may need to drag the split bar between panes or scroll to view content.

NOTE: Each correct selection is worth one point.

Select and Place:

**Testing tools**

Azure DevOps

Task Recorder

Business process modeler

Test Runner

**Answer Area****Requirement**

Capture test cases into AXTR files.

Associate test cases with Use Case diagrams.

Create a test plan and test suites.

Manage automated test cases.

Perform manual test cases.

**Testing tool**


**Correct Answer:****Testing tools**

Azure DevOps

Task Recorder

Business process modeler

Test Runner

**Answer Area****Requirement**

Capture test cases into AXTR files.

Associate test cases with Use Case diagrams.

Create a test plan and test suites.

Manage automated test cases.

Perform manual test cases.

**Testing tool**

Task Recorder

Business process modeler

Azure DevOps

Azure DevOps

Test Runner

**Reference:**

<https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/user-interface/task-recorder> <https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/lifecycle-services/using-task-guides-and-bpm-to-create-user-acceptance-tests>  
<https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/lifecycle-services/using-activity-diagrams>

**Previous Questions****Next Questions**

Custom View Settings

Question #47

Topic 5

A company implements Dynamics 365 Finance.

The company plans to implement the Regression Suite Automation Tool (RSAT) to assist with their automated testing. The company creates test scripts and must store the scripts in a location that is accessible by RSAT.

You need to configure RSAT.

Where should you upload the test scripts?

- A. Microsoft SharePoint
- B. Microsoft Azure DevOps**
- C. Document Management
- D. Common Data Service

**Correct Answer: B**

Reference:

<https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/perf-test/rsat/rsat-overview#rsat-user-interface-overview>

Question #48

Topic 5

A company is implementing Dynamics 365 Finance.

You apply an update. After you test the update, you find that the delivery dates on some open sales orders occur in the past. You identify data conflicts based on the test results.

You need to ensure that the delivery date value is equal to or greater than the current date in future automated testing.

Which two options could you configure? Each answer presents a complete solution.

NOTE: Each correct selection is worth one point.

- A. Current Value**
- B. Task Recorder developer placeholder
- C. Task Recorder sub-task
- D. Operators for Validation**

**Correct Answer: AD**

Reference:

<https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/perf-test/rsat/rsat-validate-expected>

**DRAG DROP -**

You are using Dynamics 365 Finance and preparing for a service update.

You must test the following solution components:

- Sales order entry process
- Dynamics 365 Finance custom development

You need to determine which type of testing is required for the solution components.

Which testing types should you use? To answer, drag the appropriate testing types to the correct solution components. Each type may be used once, more than once, or not at all. You may need to drag the split bar between panes or scroll to view content.

NOTE: Each correct selection is worth one point.

Select and Place:

**Answer Area**

<b>Testing types</b>	<b>Solution component</b>	<b>Testing type</b>
Performance	Sales order entry process	
Regression	Dynamics 365 Finance custom development	
Unit		

Correct Answer:

**Answer Area**

<b>Testing types</b>	<b>Solution component</b>	<b>Testing type</b>
Performance	Sales order entry process	Regression
Regression	Dynamics 365 Finance custom development	Unit
Unit		

**DRAG DROP -**

You are planning to perform testing during an implementation of Dynamics 365 Finance.

You need to identify the appropriate tools to support the testing.

Which tools should you use? To answer, drag the appropriate tools to the correct requirements. Each tool may be used once, more than once, or not at all. You may need to drag the split bar between panes or scroll to view content.

NOTE: Each correct selection is worth one point.

Select and Place:

**Answer Area**

Tools	Requirement	Tool
Business Process Modeler	Create a user acceptance test library.	
Data risk validation	Use a business process recording to perform acceptance tests.	
Regression suite automation tool		
Task recorder	Use a shared package to verify import processes.	

**Correct Answer:****Answer Area**

Tools	Requirement	Tool
Business Process Modeler	Create a user acceptance test library.	Business Process Modeler
Data risk validation	Use a business process recording to perform acceptance tests.	Regression suite automation tool
Regression suite automation tool		
Task recorder	Use a shared package to verify import processes.	Regression suite automation tool

**Reference:**

<https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/lifecycle-services/using-task-guides-and-bpm-to-create-user-acceptance-tests>

**HOTSPOT -**

You finalize customizations to a deployment by using Dynamics 365 Commerce.

The deployment is global and requires support of multiple languages. You engage with Microsoft FastTrack. The Microsoft FastTrack engineer requires you to share the languages for the deployment.

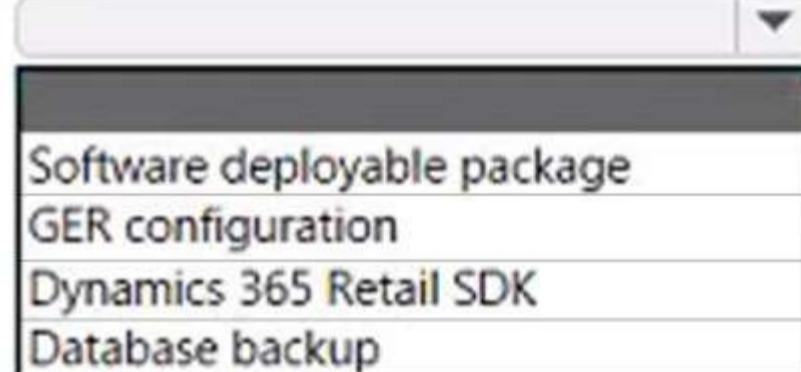
You need to provide the language data to the engineer by using asset libraries.

How should you configure the asset libraries? To answer, select the appropriate options in the answer area.

NOTE: Each correct selection is worth one point.

Hot Area:

**Answer Area**

<b>Asset library option</b>	<b>Configuration</b>
Asset library type	 <ul style="list-style-type: none"><li>Shared</li><li>Project level</li></ul>
Asset type	 <ul style="list-style-type: none"><li>Software deployable package</li><li>GER configuration</li><li>Dynamics 365 Retail SDK</li><li>Database backup</li></ul>
Asset scope	 <ul style="list-style-type: none"><li>Me</li><li>Project</li><li>Organization</li></ul>

## Answer Area

### Asset library option

Asset library type

### Configuration

Shared
Project level

Asset type

Correct Answer:

Software deployable package
GER configuration
Dynamics 365 Retail SDK
Database backup

Asset scope

Me
Project
Organization

**HOTSPOT -**

Your company acquires another company that has a default installation of Dynamics 365 Finance.

A separate environment is configured for each lifecycle phase. The user acceptance testing (UAT) environment has been configured for the maximum amount of compute and database capacity.

You need to identify the environment tier aligned with each lifecycle phase.

Which environment tier should you select? To answer, select the appropriate options in the answer area.

NOTE: Each correct selection is worth one point.

Hot Area:

**Answer Area****Lifecycle phase**

Evaluation and analysis

**Environment tier**

Tier 1
Tier 2
Tier 3
Tier 4
Tier 5

Customize

Tier 1
Tier 2
Tier 3
Tier 4
Tier 5

Golden configuration

Tier 1
Tier 2
Tier 3
Tier 4
Tier 5

User acceptance testing (UAT)

Tier 1
Tier 2
Tier 3
Tier 4
Tier 5

## Answer Area

### Lifecycle phase

Evaluation and analysis

### Environment tier

Tier 1
Tier 2
Tier 3
Tier 4
Tier 5

Customize

Tier 1
Tier 2
Tier 3
Tier 4
Tier 5

Golden configuration

Tier 1
Tier 2
Tier 3
Tier 4
Tier 5

User acceptance testing (UAT)

Tier 1
Tier 2
Tier 3
Tier 4
Tier 5

Correct Answer:

Box 1: Tier 1 -

Evaluation and analysis at Tier 1

Here's how the lifecycle maps to the available environments. If you already have environments deployed in your Lifecycle Services project, you can find the

Environment Type and Environment Sub type on each environment's details page.

Lifecycle phase	Environment tier	Subscription	Environment types	Environment sub-type
Evaluation and analysis	Tier 1 sandbox	Cloud hosted	Customer-managed	Demo
Customize	Tier 1 sandbox	Cloud hosted or VHD	Customer-managed	Develop
Golden configuration	Tier 1 sandbox	Cloud hosted	Customer-managed	Develop
User acceptance testing (UAT)	Tiers 2-5 sandbox	Microsoft	Microsoft-managed or self-service	Not applicable
Go live	Production	Microsoft	Microsoft-managed or self-service	Not applicable

Box 2: Tier 1 -  
Customization at Tier 1.

Box 3: Tier 1 -

Golden config at Tier 1 -

Box 4: Tier 5 -  
User acceptance testing at Tiers 2-5.

Tiers 2-5 can be purchased to increase performance of the environment. The higher the tier, the more compute and database capacity is reserved for your use.

**DRAG DROP -**

A company is implementing Dynamics 365 Finance.

The company is evaluating role-based security for an accounting manager who must issue refunds to customers.

You need to select a security component for each requirement.

Which security components should you assign? To answer, drag the appropriate security components to the correct requirements. Each security component may be used once, more than once, or not at all. You may need to drag the split bar between panes or scroll to view content.

NOTE: Each correct selection is worth one point.

Select and Place:

Security components	Requirement	Security component
duty	accounting manager	
privilege	refund customer	
role		

Correct Answer:

Security components	Requirement	Security component
duty	accounting manager	duty
privilege	refund customer	privilege
role		

You are currently running version 10.0.2 of Dynamics 365 Finance.

You build a solution that includes dependencies on components in version 10.0.2. You have deferred updates of versions 10.0.3, 10.0.4, and 10.0.5. Microsoft releases version 10.0.6 of Dynamics 365 Finance. The 10.0.2 components do not work in version 10.0.6.

You need to ensure that your solution continues to work properly.

What should you do? Each correct answer presents part of the solution.

NOTE: Each correct selection is worth one point.

- A. Accept the version 10.0.6 update
- B. Update the dependencies to support version 10.0.6
- C. Pause the version 10.0.6 update
- D. Maintain the dependencies on version 10.0.2

**Correct Answer:** BD

**HOTSPOT -**

A company wants to increase user satisfaction by centralizing different work streams in one accessible area by department.

You need to recommend a workspace for each requirement.

Which workspace should you recommend? To answer, select the appropriate options in the answer area.

NOTE: Each correct selection is worth one point.

Hot Area:

**Answer Area**

<b>Requirement</b>	<b>Workspace</b>
Current status for month-end processing	<ul style="list-style-type: none"><li>▼</li><li>Financial period close</li><li>CFO overview</li><li>Cost accounting ledger administration</li><li>Financial insights</li></ul>
A vendor's suggested changes to a purchase order	<ul style="list-style-type: none"><li>▼</li><li>Purchase order preparation</li><li>Vendor information</li><li>Purchase order confirmation</li><li>Vendor bidding</li></ul>

Correct Answer:

**Answer Area**

<b>Requirement</b>	<b>Workspace</b>
Current status for month-end processing	<ul style="list-style-type: none"><li>▼</li><li>Financial period close</li><li>CFO overview</li><li>Cost accounting ledger administration</li><li>Financial insights</li></ul>
A vendor's suggested changes to a purchase order	<ul style="list-style-type: none"><li>▼</li><li>Purchase order preparation</li><li>Vendor information</li><li>Purchase order confirmation</li><li>Vendor bidding</li></ul>

**DRAG DROP -**

A client needs to import customers into Dynamics 365 to prepare for go-live.

You need to identify which data management component meets the requirements.

Which component meets the requirement? To answer, drag the appropriate components to the correct requirements. Each component may be used once, more than once, or not at all. You may need to drag the split bar between panes or scroll to view content.

NOTE: Each correct selection is worth one point.

Select and Place:

Components	Requirement	Component
Data entity	Contains configured mapping and default processing options	
Data project	A compressed file containing manifest and data files	
Data job	Contains an execution instance of uploaded files and schedule	
Data package		

**Correct Answer:**

Components	Requirement	Component
Data entity	Contains configured mapping and default processing options	
Data project	A compressed file containing manifest and data files	Data project
Data job	Contains an execution instance of uploaded files and schedule	Data package
Data package		Data job

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[Custom View Settings](#)

Question #57

*Topic 5*

A company is preparing for go-live with Dynamics 365 Finance.  
The company plans to test the sales order process.  
You need to ensure that a delivery note is generated for each sales order created.  
What should you use?

- A. Chain test case
- B. Derived test case**
- C. SysTest
- D. Data task automation

**Correct Answer: B**

Question #58

*Topic 5*

A company implements Dynamics 365 Finance.  
New system users need to import journals. Journal data must be validated before it is imported into Dynamics 365 Finance.  
You need to import the journal data.  
What should you use?

- A. Microsoft Dataverse
- B. Excel add-in
- C. Periodic journal
- D. General processing workspace**

**Correct Answer: D**

You are implementing Dynamics 365 Finance. You use the Microsoft Dynamics Office add-in for Excel to import journals for sample test data. You must add two additional fields in the journal template which are not defined in the Microsoft Excel workbook designer. You are not able to add the columns.

The Design button is not visible in Microsoft Dynamics Office add-in for Excel.

You need to ensure that you can add the additional columns.

What should you do?

- A. Sign out and sign back in to the Excel add-in
- B. Add the columns to the Excel document and select Publish
- C. Enable data source designer
- D. Select Refresh to use the most up-to-date template

**Correct Answer: C**

A parts supplier provides several terabytes of data that must be imported into Dynamics 365 Finance in bulk.

Data operations must provide for insert operations and be asynchronous.

You need to implement a data access technology.

Which data access technology should you use?

- A. OData APIs
- B. Data management framework
- C. AJAX
- D. Dual-write

**Correct Answer: A**

**DRAG DROP -**

A user attempts to view a list of vendors in Dynamics 365 Finance.

You collaborate with the user to access Dynamics 365 Finance. The user logs in using their device and credentials to show you the vendor list menu is missing.

You log in and create a task recording on the user's device. The recording shows you accessing the menu. You then upload the recording.

You need to use the security diagnostics tool on your device to grant the user permissions.

Which four actions should you perform in sequence? To answer, move the appropriate actions from the list of actions to the answer area and arrange them in the correct order.

Select and Place:

**Actions****Answer Area**

Select **Open from LCS**



Add a reference to a role, duty, or privilege

Enter the user's ID

View the objects where the Missing permissions field displays the value **No**

View the objects where the Missing permissions field displays the value **Yes**

Select **Open from this PC**

Enter the user's device ID

**Correct Answer:****Actions****Answer Area**

Select **Open from LCS**

Add a reference to a role, duty, or privilege

Add a reference to a role, duty, or privilege

View the objects where the Missing permissions field displays the value **Yes**

Enter the user's ID

Select **Open from this PC**

View the objects where the Missing permissions field displays the value **No**

Select **Open from LCS**

View the objects where the Missing permissions field displays the value **Yes**

Select **Open from this PC**

Enter the user's device ID

**DRAG DROP -**

A company plans to use Dynamics 365 finance and operations apps to replace existing systems.

You need to recommend apps to meet the following requirements:

- Set up work templates and location directives for warehouses.
- Assign month-end closing tasks to team members and track progress.

Which apps should you recommend? To answer, drag the appropriate apps to the correct requirements. Each app may be used once, more than once, or not at all. You may need to drag the split bar between panes or scroll to view content.

NOTE: Each correct selection is worth one point.

Select and Place:

Apps	Requirement	App
Dynamics 365 Finance	Set up work templates and location directives for warehouses	
Dynamics 365 Project Operations	Assign month-end closing tasks to team members and track progress	
Dynamics 365 Supply Chain Management		

**Correct Answer:**

Apps	Requirement	App
Dynamics 365 Finance	Set up work templates and location directives for warehouses	Dynamics 365 Supply Chain Management
Dynamics 365 Project Operations	Assign month-end closing tasks to team members and track progress	Dynamics 365 Finance
Dynamics 365 Supply Chain Management		

**HOTSPOT -**

Your company is upgrading to Dynamics 365 Finance. The company has 20 offices in 20 countries. Each office currently uses their own Microsoft Dynamics AX

2012 R3 implementation. Transactions occurring in the systems are high volume. Viewing data from each office requires logging into 20 different AX implementations and takes hours to complete.

You must upgrade to a solution that provides near real-time data refreshes and views the data in a single Power BI dashboard.

You need to implement the solution.

Which technology should you use? To answer, select the appropriate options in the answer area.

NOTE: Each correct selection is worth one point.

Hot Area:

**Answer Area****Requirement**

Refresh data

**Technology**

	▼
Batch framework	
Dual-write	
Azure Batch	
AzureWebJobs	

Synchronized data for reporting

	▼
Entity store	
Dual-write	
JSON documents	
Lifecycle Services (LCS)	

**Answer Area****Requirement**

Refresh data

**Technology**

	▼
Batch framework	
Dual-write	
Azure Batch	
AzureWebJobs	

Correct Answer:

Synchronized data for reporting

	▼
Entity store	
Dual-write	
JSON documents	
Lifecycle Services (LCS)	

**HOTSPOT -**

You implement Dynamics 365 Supply Chain Management for a whiskey distillery.

Barrels used during the whiskey production process are continually valued based on their age and condition. An insurance policy requires that valuation of the bands and the contents of the barrels must occur daily. A maintenance job must perform the valuation process of the barrels. You need to configure the valuation and maintenance jobs.

Which component of Dynamics 365 Supply Chain Management should you configure? To answer, select the appropriate options in the answer area.

NOTE: Each correct selection is worth one point.

Hot Area:

## Answer Area

### Requirement

#### Valuation

	▼
Cost Management	
Cost Accounting	
Master Planning	
Procurement and Sourcing	

#### Maintenance job

	▼
Asset Management	
Master Planning	
Production Control	
Service Management	

## Answer Area

### Requirement

#### Valuation

	▼
Cost Management	
Cost Accounting	
Master Planning	
Procurement and Sourcing	

Correct Answer:

#### Maintenance job

	▼
Asset Management	
Master Planning	
Production Control	
Service Management	

**HOTSPOT -**

An existing Dynamics 365 Finance and Dynamics 365 Supply Chain Management implementation accepts invoices from parts suppliers. A custom workflow runs when parts are received. The workflow updates inventory for all production lines.

Suppliers request access to failure rate data for the parts they supply in real time. The data requested must include the part number and the date the parts were received. Part failure rate data must be uploaded to a OneDrive for Business folder for each parts supplier.

You need to implement a solution.

Which technology should you use? To answer, select the appropriate options in the answer area.

NOTE: Each correct selection is worth one point.

Hot Area:

**Answer Area****Requirement**

Initiate a process in real time

**Technology**

Workflow business events
Dynamics 365 Finance batch jobs
Azure Batch
Azure WebJob

Gather failure rate data

Dynamics 365 Finance Microsoft Power Platform
Dynamics 365 SDK
Azure SDK

Post data to supplier's OneDrive

Power Automate flow
Dynamics 365 Finance workflow
Business process flow
Azure Service Bus

Correct Answer:

## Answer Area

### Requirement

Initiate a process in real time

### Technology

Workflow business events
Dynamics 365 Finance batch jobs
Azure Batch
Azure WebJob

Gather failure rate data

Dynamics 365 Finance Microsoft Power Platform
Dynamics 365 SDK
Azure SDK

Post data to supplier's OneDrive

Power Automate flow
Dynamics 365 Finance workflow
Business process flow
Azure Service Bus

Question #66

Topic 5

A company is implementing Dynamics 365 Finance and Dynamics 365 Supply Chain Management. A proprietary reporting solution is used across multiple enterprise resource planning (ERP) applications and is the primary reporting engine for the company.

Several key entities must be synchronized to a reporting database and aggregated with other ERP systems. The reporting database must be accessed by using

Microsoft Transact-SQL (T-SQL).

You need to implement the Dynamics 365 Finance and Dynamics 365 Supply Chain Management feature.

Which feature should you use?

- A. Data task automation
- B. Finance and Operations Connector
- C. Dual-write
- D. Bring your own database (BYOD)

Correct Answer: D

Previous Questions

Next Questions

Custom View Settings

Question #67

Topic 5

You are a Dynamics 365 Finance system administrator.

A user is reporting an issue with the Sales Order form. The UI for the form is not loading properly, and there are some performance issues. The object was working fine until the most recent update release. The user who personalized this form is using Microsoft Edge. No other users are reporting issues.

You need to resolve the issue.

What should you do?

- A. Delete the sales form object in the usage data form.
- B. Open the form in a new Microsoft Edge InPrivate session.
- C. Reimport and compile the AOT object causing issues.
- D. Rebuild the system indexes.

**Correct Answer:** D

*Community vote distribution*

A (100%)

Question #68

Topic 5

A company implements Dynamics 365 Finance.

The implementation team must build acceptance testing scripts to make sure that common business use cases can be performed in the new system. They must test use cases by stepping through required tasks, organized by functional hierarchy.

You need to create User Acceptance Testing (UAT) tests in Lifecycle Services (LCS) that can be easily repeatable.

What should you use?

- A. Microsoft Azure DevOps test plans
- B. APQC Unified Library
- C. Asset library
- D. Business process modeler (BPM) synced with Microsoft Azure DevOps

**Correct Answer:** C

You are implementing Dynamics 365 Supply Chain Management.

You must import data from a third-party system into Supply Chain Management.

You need to import files by using the Data Management framework.

Which three file formats can you use? Each correct answer presents a complete solution.

NOTE: Each correct selection is worth one point.

- A. .xml
- B. .zip
- C. .dat
- D. Pipe delimited
- E. Microsoft Excel

**Correct Answer:** ABE

You implement Dynamics 365 Finance.

You must post a message to a Microsoft Teams channel each time a write-off amount is over \$1,000 USD.

You need to determine which tools to use.

Which two tools should you use? Each correct answer presents part of the solution.

NOTE: Each correct selection is worth one point.

- A. Dynamics 365 Finance workflow
- B. Power Apps
- C. Business Events
- D. Power Automate

**Correct Answer:** BD

**DRAG DROP -**

You are testing service updates for Dynamics 365 Finance by using the Regression suite automation tool (RSAT).

You need to select the appropriate test case type for each test requirement.

Which test case types should you use? To answer, drag the appropriate test case types to the correct test requirements. Each test case type may be used once, more than once, or not at all. You may need to drag the split bar between panes or scroll to view content.

NOTE: Each correct selection is worth one point.

Select and Place:

Test case types	Answer Area	Test requirement	Test case type
automated		Use a single task recording to complete multiple tests by using different parameter values.	
chained		Use a value captured in one test as a variable in a second test.	
derived			
manual			

**Correct Answer:**

Test case types	Answer Area	Test requirement	Test case type
automated		Use a single task recording to complete multiple tests by using different parameter values.	derived
chained		Use a value captured in one test as a variable in a second test.	chained
derived			
manual			

Box 1: derived -

Derived test case -

RSAT lets you use the same task recording with multiple test cases, enabling a task to run with different data configurations.

Box 2: chained -

Saved variables and chaining of test cases

One of the key features of RSAT is the chaining of test cases, that is, the ability of a test to pass variables to other tests

Reference:

<https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/perf-test/rsat/rsat-tutorial>

A company is implementing Dynamics 365 Finance.

The company uses 2 third-party applications.

The first application is used for sales taxes and must have current tax data present for sales order entry.

The second application is used for exchange rates and must have current daily exchange rates available for reference within Dynamics 365 Finance.

You need to ensure that the third-party applications work with Dynamics 365 Finance.

Which test type should you use?

- A. Integration
- B. Regression
- C. Performance
- D. Functional

**Correct Answer: A**

Toolkit Overview: RSAT Integration Testing

RSAT (regression suite automation tool) will get a new improvement where our RSAT tool should be able to support an end-to-end integration scenario. It will allow run sessions for third-party applications that run before or after Finance and Supply Chain Management is run. Essentially, you will be able to trigger an integration in some portal and then verify the outcomes in Finance and Supply Chain Management. It's the same as if you were doing with the C# NUnit framework and selenium WebDrivers, although, in this case, you likely won't require coding. The main idea is to be able to do integration scenario testing and be able to do that without developer help. Since development can be expensive it's not something that customers really aim to do. We will get this feature in general availability and in public preview within the next few months, so stay tuned and follow the latest Microsoft improvements so you don't miss out!

Reference:

<https://companial.com/blog/how-to-automate-integration-testing-in-microsoft-dynamics-365-fscm/>

**HOTSPOT -**

You support custom functionality in Dynamics 365 Finance.

Your company requires that all solutions be fully tested before they are deployed to production.

You need to use different testing types prior to deployments.

Which testing type should you use? To answer, select the appropriate options in the answer area.

NOTE: Each correct selection is worth one point.

Hot Area:

**Answer Area****Requirement**

Isolate and test new features individually.

**Testing type**

Unit
Regression
Functional
End to end

Test whether new features break existing capabilities.

Unit
Regression
Functional
End to end

Validate that multiple new features meet requirements.

Unit
Regression
Functional
End to end

Test all components of the solution together.

Unit
Regression
Functional
End to end

## Answer Area

Requirement	Testing type				
Isolate and test new features individually.	<table border="1"><tr><td>Unit</td></tr><tr><td>Regression</td></tr><tr><td>Functional</td></tr><tr><td>End to end</td></tr></table>	Unit	Regression	Functional	End to end
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Regression					
Functional					
End to end					

Box 1: Unit -

Unit testing is a software development process in which the smallest testable parts of an application, called units, are individually and independently scrutinized for proper operation. This testing methodology is done during the development process by the software developers and sometimes QA staff.

Box 2: Regression -

What is regression testing?

Image result for Dynamics 365 what is regression testing

Regression testing is a software testing practice that ensures an application still functions as expected after any code changes, updates, or improvements.

Regression testing is responsible for the overall stability and functionality of the existing features.

Box 3: Functional -

FUNCTIONAL TESTING is a type of software testing that validates the software system against the functional requirements/specifications.

Box 4: End to End -

End-to-end testing is a methodology that assesses the working order of a complex product in a start-to-finish process. End-to-end testing verifies that all components of a system are able to run and perform optimally under real-world scenarios.

Reference:

<https://www.techtarget.com/searchsoftwarequality/definition/unit-testing> <https://katalon.com/resources-center/blog/regression-testing>

<https://www.guru99.com/functional-testing.html> <https://www.techtarget.com/searchsoftwarequality/definition/End-to-end-testing>

**DRAG DROP**

You plan environment tiers for life cycle phases.

You need to select environment tiers to use for each life cycle phase with minimal costs.

Which tier should you recommend for each purpose? To answer, drag the appropriate tiers to the correct purposes. Each tier may be used once, more than once, or not at all. You may need to drag the split bar between panes or scroll to view content.

NOTE: Each correct selection is worth one point.

Tiers	Answer Area
Tier 1	Purpose
Tier 2	Evaluation and analysis
Tier 3	Golden configuration
Tier 4	User acceptance testing
Tier 5	Tier

Answer Area	Purpose	Tier
<b>Correct Answer:</b>	Evaluation and analysis	Tier 1
	Golden configuration	Tier 1
	User acceptance testing	Tier 2

**HOTSPOT**

A company implements Dynamics 365 finance.

During user acceptance testing, users observe performance issues for some pages.

You need to troubleshoot the performance issues and examine remote procedure calls (RPC) and database calls.

What should you do? To answer, select the appropriate options in the answer area.

NOTE: Each correct selection is worth one point.

**Answer Area**

Requirement	Action
Troubleshoot performance issues.	<ul style="list-style-type: none"><li>Use Trace parser.</li><li>Use Task recorder.</li><li>Use Business process modeler.</li><li>Use Regression suite automation tool.</li></ul>
Examine RPC and database calls.	<ul style="list-style-type: none"><li>Review X++ calls.</li><li>Review the overview data.</li><li>Review the recorded task.</li><li>Review the Windows Event Log.</li></ul>

**Answer Area**

Requirement	Action
Troubleshoot performance issues.	<ul style="list-style-type: none"><li>Use Trace parser.</li><li>Use Task recorder.</li><li>Use Business process modeler.</li><li>Use Regression suite automation tool.</li></ul>

**Correct Answer:**

Requirement	Action
Examine RPC and database calls.	<ul style="list-style-type: none"><li>Review the Windows Event Log.</li><li>Review X++ calls.</li><li>Review the overview data.</li><li>Review the recorded task.</li><li>Review the Windows Event Log.</li></ul>

**HOTSPOT**

You are implementing Dynamites 365 Supply Chain Management. You use the Regression Suite Automation Tool (RSAT) to test the solution.

You are planning to create the following test cases:

- Create a new purchase order
- Receipt the purchase order.

You need to complete the configuration to chain the test cases together.

How should you complete the configuration? To answer, select the appropriate configuration in the answer area.

NOTE: Each correct selection is worth one point.

**Answer Area**

Requirement	Action
Create a variable for the purchase order number when creating the first task recording.	<ul style="list-style-type: none"><li>Use the Copy option.</li><li>Use the Validate option.</li><li>Add a developer placeholder.</li><li>Add an info step.</li></ul>
Configure the second task recording to use the variable.	<ul style="list-style-type: none"><li>Replace the hardcoded value with the variable name.</li><li>Create a derived test case.</li><li>Add a message validation using the variable name.</li><li>Enable Use operators for validation.</li></ul>

**Answer Area**

Requirement	Action
Create a variable for the purchase order number when creating the first task recording.	<ul style="list-style-type: none"><li>Use the Copy option.</li><li>Use the Validate option.</li><li>Add a developer placeholder.</li><li>Add an info step.</li></ul>
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**Correct Answer:**

A company implements Dynamics 365 Supply Chain Management. The company is starting a short-term project that has a rigid budget.

The warehouse manager requests an environment that has demo data so that users can look at samples of the warehouse module. A cloud scale unit is not required.

You need to recommend a cost-effective environment.

What should you recommend?

- A. Tier 3
- B. Tier 1
- C. Tier 2
- D. Tier 4

**Correct Answer: B**

You are implementing Dynamics 365 Finance and build out customizations. You finalize all configurations.

You need to deploy the solution to a Microsoft-managed user acceptance testing (UAT) environment. Costs must be minimized.

What should you do first?

- A. Complete project onboarding in lifecycle Services (LCS).
- B. Upload a new estimate to the subscription estimator.
- C. Purchase a tier 3 UAT environment.
- D. Purchase a tier 5 UAT environment.

**Correct Answer:** C

[Previous Questions](#)

[Next Questions](#)

## Introductory Info

Case study -

This is a case study. Case studies are not timed separately. You can use as much exam time as you would like to complete each case. However, there may be additional case studies and sections on this exam. You must manage your time to ensure that you are able to complete all questions included on this exam in the time provided.

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To start the case study -

To display the first question in this case study, click the Next button. Use the buttons in the left pane to explore the content of the case study before you answer the questions. Clicking these buttons displays information such as business requirements, existing environment, and problem statements. If the case study has an All Information tab, note that the information displayed is identical to the information displayed on the subsequent tabs. When you are ready to answer a question, click the Question button to return to the question.

Background -

Relecloud is a cloud point of sale (POS) software company specializing in direct to consumer food stands. They have multiple business units using their new

Dynamics 365 Finance implementation including customer-facing representatives for account management, technical support, customer service, and finance.

There are two legal entities, one for operations and one for financials. Customers pay for the Relecloud POS software monthly and everything is deployed in the cloud. The Dynamics instance URL is <https://relecloud-prod.operations.dynamics.com>.

Munson's Pickles and Preserves Farm is a company that uses Relecloud's cloud POS software to sell their produce in farmers markets. Munson's was one of

Relecloud's first customers, and Relecloud stocks their employee lunchroom with Munson's products. Munson's has also been subcontracting their employees to

Relecloud to help functionally build a best-in-breed solution. Munson's employees assume multiple organizational positions. Each employee has only a single email address by which people can contact them.

Current environment: System and IT

Dynamics 365 for Finance was recently updated.

All recurring batch jobs in the system were removed and recreated.

The alert notification batch processing was recently changed from every 10 minutes to once every two hours.

Real-time reporting of the information is not needed.

Current environment: Customer Service

Customer credit requests are entered through the customer service team.

All requests must contain a date, time, reason for request, and customer service notes on initial recommendations for credit action.

Customers have multiple points of contact who can enter support tickets to the Relecloud portal.

Tickets are automatically generated in the support team's third-party system when they are created by support technicians.

The Dynamics 365 email client mail is used to correspond with customers.

Current environment: Technical Support/IT

The technical support team gets involved when technical issues arise with the Relecloud software. Service tickets are entered and get escalated to the team, depending on the issue.

Microsoft Flow is used for automating different workstreams.

Workflows are not configured for the technical support request flows in Dynamics 365 Finance.

Management and history of technical support tickets are handled in a third-party issue management solution.

The technical service team manages issues related to the Relecloud POS as well as the Dynamics 365 application.

Current environment: Account Representatives

Each customer is assigned a single account representative.

Account representatives use multiple devices.

Only account representatives have the ability to approve credits.

All emails to customers come through their own Outlook instance.

Current environment: Finance -

Customers do not have invoice accounts.

Only finance resources have the ability to enter credits.

Credits can be entered by any of the four finance resources assigned the Credits and Refunds security role.

If the request has not been updated in four days, the request is escalated to the Controller. The account representative must be alerted when this occurs.

Requirements: Technical support/IT

Support technicians must use Microsoft's existing knowledge base to resolve open issues.

If an issue exists, support technicians must report the status of the issue on a weekly basis.

If there is no existing support request, support technicians must create one for Microsoft evaluation.

All software must be installed centrally when possible.

The Dynamics 365 Finance production environment must have an update cadence of every second Saturday from 4-7 A.M. EST.

Updates must be tested in a separate environment.

Requirements: Account representatives

Account representatives must be able to see only the relevant customer fields and records automatically from their dashboard.

Account representatives must be able to export the list of customers to Microsoft Excel.

Account representatives must be able to navigate to the customer master record for any editing or record entry tasks.

The forms must be relevant based on each account representative's needs.

Account representatives need a centralized location to see multiple data components.

Account representatives require an offline list of their current customers in Excel with only the fields they need.

The IT Director must reassign all instances of an account representative's customer contacts if the representative leaves the company.

An alert must be sent automatically to an account representative when a credit is issued or any data is changed on a customer's record.

Requirements: Financials -

Any refund must be printed as a physical check.

All printers must be exclusive to the financial legal entity.

Issues -

Typing 'pickle' in the search box yields no returned results for the account representative.

After the latest update, an account representative reports that he is no longer receiving alert notifications when a customer's contact is changed.

An account representative has recently resigned.

### Question

HOTSPOT -

You need to address the client's technical support requirements.

Which solutions should you use? To answer, select the appropriate options in the answer area.

NOTE: Each correct selection is worth one point.

Hot Area:

### Answer Area

Action	Solution				
Look for Microsoft submitted support requests that might match the issue in question.	<table border="1"><tr><td>Issue Search</td></tr><tr><td>Open work items</td></tr><tr><td>Release Notes</td></tr><tr><td>Support Issues</td></tr></table>	Issue Search	Open work items	Release Notes	Support Issues
Issue Search					
Open work items					
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Correct Answer:

## Answer Area

Action	Solution				
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### Question

DRAG DROP -

You need to design a business process for the account manager's customer list requirements.

Which three actions you perform in sequence? To answer, move the appropriate actions to the answer area and arrange them in the correct order.

NOTE: Each correct selection is worth one point.

Select and Place:

### Answer Area

#### Actions

On the workspace list, hide/remove fields by using **Personalize this form**.

Use the **Export to Excel** functionality on the data in the grid.

Use the **Open in Excel** functionality on the data in the grid.

Add the form to a workspace as a list.

Add the form to a workspace as a **Tile**.

On the workspace list, apply filters for **Advanced filter or sort**.

On the All Customers grid, hide/remove fields via **Personalize this form**.

On the All Customers grid, apply filters for **Advanced filter or sort**.


Correct Answer:

### Answer Area

#### Actions

On the workspace list, hide/remove fields by using **Personalize this form**.

Use the **Export to Excel** functionality on the data in the grid.

Use the **Open in Excel** functionality on the data in the grid.

Add the form to a workspace as a list.

Add the form to a workspace as a **Tile**.

On the workspace list, apply filters for **Advanced filter or sort**.

On the All Customers grid, hide/remove fields via **Personalize this form**.

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Background -

Relecloud is a cloud point of sale (POS) software company specializing in direct to consumer food stands. They have multiple business units using their new

Dynamics 365 Finance implementation including customer-facing representatives for account management, technical support, customer service, and finance.

There are two legal entities, one for operations and one for financials. Customers pay for the Relecloud POS software monthly and everything is deployed in the cloud. The Dynamics instance URL is <https://relecloud-prod.operations.dynamics.com>.

Munson's Pickles and Preserves Farm is a company that uses Relecloud's cloud POS software to sell their produce in farmers markets. Munson's was one of

Relecloud's first customers, and Relecloud stocks their employee lunchroom with Munson's products. Munson's has also been subcontracting their employees to

Relecloud to help functionally build a best-in-breed solution. Munson's employees assume multiple organizational positions. Each employee has only a single email address by which people can contact them.

Current environment: System and IT

Dynamics 365 for Finance was recently updated.

All recurring batch jobs in the system were removed and recreated.

The alert notification batch processing was recently changed from every 10 minutes to once every two hours.

Real-time reporting of the information is not needed.

Current environment: Customer Service

Customer credit requests are entered through the customer service team.

All requests must contain a date, time, reason for request, and customer service notes on initial recommendations for credit action.

Customers have multiple points of contact who can enter support tickets to the Relecloud portal.

Tickets are automatically generated in the support team's third-party system when they are created by support technicians.

The Dynamics 365 email client mail is used to correspond with customers.

Current environment: Technical Support/IT

The technical support team gets involved when technical issues arise with the Relecloud software. Service tickets are entered and get escalated to the team, depending on the issue.

Microsoft Flow is used for automating different workstreams.

Workflows are not configured for the technical support request flows in Dynamics 365 Finance.

Management and history of technical support tickets are handled in a third-party issue management solution.

The technical service team manages issues related to the Relecloud POS as well as the Dynamics 365 application.

Current environment: Account Representatives

Each customer is assigned a single account representative.

Account representatives use multiple devices.

Only account representatives have the ability to approve credits.

All emails to customers come through their own Outlook instance.

Current environment: Finance -

Customers do not have invoice accounts.

Only finance resources have the ability to enter credits.

Credits can be entered by any of the four finance resources assigned the Credits and Refunds security role.

If the request has not been updated in four days, the request is escalated to the Controller. The account representative must be alerted when this occurs.

Requirements: Technical support/IT

Support technicians must use Microsoft's existing knowledge base to resolve open issues.

If an issue exists, support technicians must report the status of the issue on a weekly basis.

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All software must be installed centrally when possible.

The Dynamics 365 Finance production environment must have an update cadence of every second Saturday from 4-7 A.M. EST.

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Requirements: Account representatives

Account representatives must be able to see only the relevant customer fields and records automatically from their dashboard.

Account representatives must be able to export the list of customers to Microsoft Excel.

Account representatives must be able to navigate to the customer master record for any editing or record entry tasks.

The forms must be relevant based on each account representative's needs.

Account representatives need a centralized location to see multiple data components.

Account representatives require an offline list of their current customers in Excel with only the fields they need.

The IT Director must reassign all instances of an account representative's customer contacts if the representative leaves the company.

An alert must be sent automatically to an account representative when a credit is issued or any data is changed on a customer's record.

Requirements: Financials -

Any refund must be printed as a physical check.

All printers must be exclusive to the financial legal entity.

Issues -

Typing 'pickle' in the search box yields no returned results for the account representative.

After the latest update, an account representative reports that he is no longer receiving alert notifications when a customer's contact is changed.

An account representative has recently resigned.

### Question

You need to determine why the sales associate is not able to see Munson's in the search results.

What is the cause of the issue?

- A. The search criteria is searching for only names that are exactly 'pickles'.
- B. The search criteria is only able to search by the shortened search name of the customer.
- C. The search criteria is searching for all customer names that start with 'pickles'.
- D. The search criteria is case sensitive.

**Correct Answer: C**

Reference:

<https://docs.microsoft.com/en-us/dynamics365/customer-engagement/basics/search-records>

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### Question

You need to resolve the contact reassignment issue.

What should you search by?

- A. user ID in the global address book
- B. email address in the person search report
- C. email in the customer and vendor master
- D. contact address in the global address book
- E. name in the customer master

**Correct Answer: E**

*Community vote distribution*

D (100%)

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Background -

Liberty's Delightful Sinful Bakery & Caf© is a baked goods company headquartered in Denver, Colorado. The company has 200 locations around the United States.

Contoso, Ltd. purchases a majority stake in Liberty's. As part of this acquisition, Contoso, Ltd. plans to implement Dynamics 365 Finance, Dynamics 365 Supply

Chain Management, and Dynamics 365 Retail to support the rapid future growth. Streamlined business processes will be implemented to replace manual processes and Microsoft Excel.

Contoso, Ltd. already has 10 legal entities that use all Dynamics 365 modules in a single tenant. Liberty's will exist within the Contoso, Ltd. tenant as its own legal entity and Lifecycle Services (LCS) project. All environments are cloud based.

Current environment: General -

Contoso, Ltd. uses One Version for detailed regression test planning. The testing plan is fully automated by using the Regression Suite Automation Tool (RSAT).

There is a standardized set of core business processes in a single Business Process Library and functionality-specific business process libraries for the various

Contoso, Ltd. businesses.

Current environment: Environments

The following links are used to connect to Contoso, Ltd.'s environments:

Microsoft SharePoint: <https://Libertys.sharepoint.com>

Dynamics 365: <https://LibertysAos.cloudax.dynamics.com>

Microsoft Azure Dev Ops: <https://Libertys.visualstudio.com>

Microsoft Office 365: <https://Libertys-my.sharepoint.com>

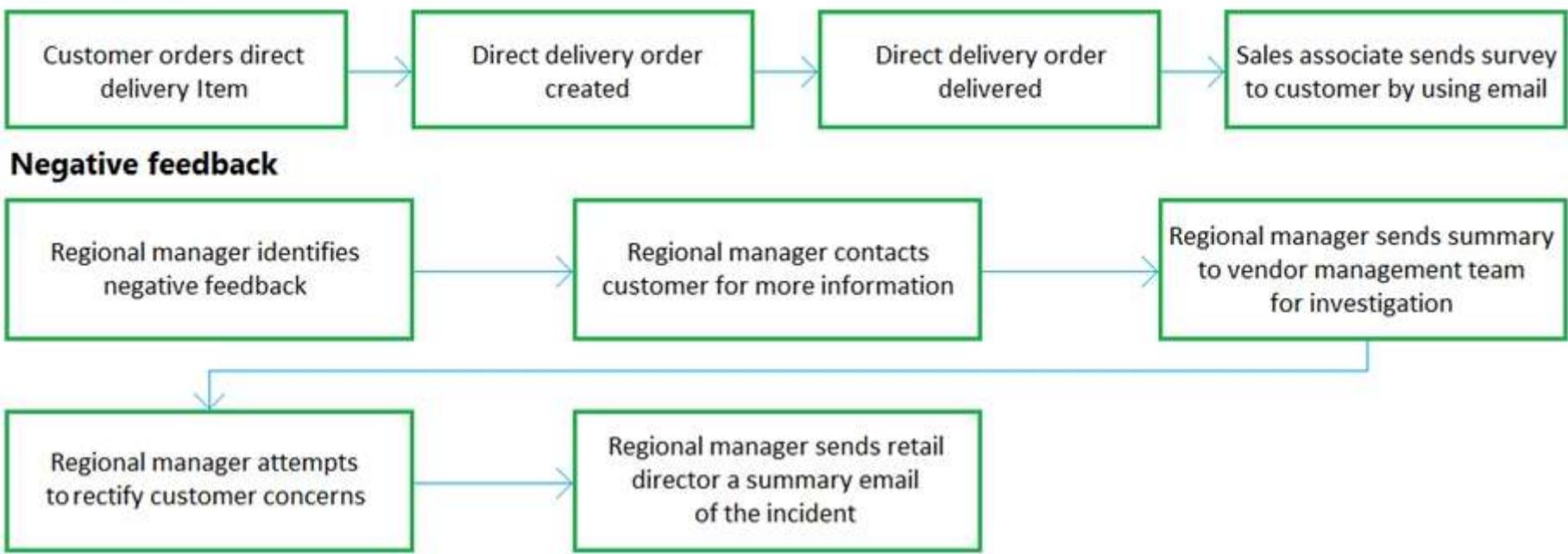
The company uses the following Dynamics 365 version: 10.0.6/Update 30.

Current environment: Operations -

Excel is used extensively by Liberty's and there are many experienced Excel users in the organization. Many users have altered the existing Excel sheets for their own purposes. There is no standard Excel workbook template.

Current environment: Current Workflows

## Direct delivery



Requirements: Business Processes/LCS

Liberty's needs to leverage as many existing Contoso, Ltd.'s business processes as possible to shorten the implementation lifecycle and create similarities between the organizations. There will be one master business process library for Liberty's. There are 100 user acceptance testing scripts. Fourth Coffee is one of Contoso, Ltd.'s legal entities.

Liberty's has a business process library that contains a specific set of functionality. Liberty's would like to use as an existing node in their core business process library.

Sales discounts for high-volume customers must be calculated by using predefined Excel templates. Sales team members must be able to access the template directly from the sales order form.

Requirements: Data Import/Export

Any Excel templates need to be standardized and easily accessible. The integrity of shared templates must be strictly maintained.

After the implementation, the core Liberty's team needs to be empowered to further identify future value-add opportunities for interacting and manipulating their data as future phase initiatives. Once they understand the data structures and capabilities, they need to start creating their own templates that meet their specific needs.

Requirements: Workflow -

A workflow to streamline the feedback of the customer experience is critical. Any negative experience needs to be quickly addressed. Any steps to rectify the customer concerns are handled offline at the discretion of regional managers.

As the company grows, customer history of vendor direct delivery performance must be documented to assure stakeholders that the company is monitoring vendor performance. Any actions to rectify the customer concerns must be approved prior to execution.

Requirements: Go Live/Cutover -

Go Live date: October 1.

Cutover: Seven days before go live with daily delta imports occurring nightly. This process has been fully vetted and is operating properly.

Data Packages to migrate: Two.

Data Imports: Six hours total for all imports.

Performance testing: Liberty's team system administrator reports that they are not planning to conduct performance testing.

Requirements: Software updates -

The customer cannot take updates during their busy season from November 1 - December 31. Any system downtime requires a notification to the users through the proper application management tool. 100% of user acceptance testing is required for any system update.

The first official update to the live software will be the third week of October.

Requirements: Regression testing

There will be no dedicated regression testing team after going live. They are dedicated prior to go live and anything that can be done to virtually eliminate the overhead of regression testing will be done prior to go live.

Requirements: Workspaces -

A standard workspace will be assigned to each regional manager. The workspace will show the following information for stores associated with a regional manager:

Single detailed view of multiple components of their sales data

KPIs for regional sales goals

Drill down capabilities to inquire about the data

Any direct delivery special orders

Any negative inventory items

Regional managers may personalize workspaces as needed.

**Issues -**

The current Open in Excel templates option on the All Customers form is missing several fields. It also contains several additional fields. This form must be replaced.

There was an issue with agreeing upon a supplemental organizational hierarchy used for sales reporting at go live. This hierarchy is exclusively for reporting purposes.

Customer surveys are conducted by using open-ended emails or in store comment cards from the regional managers at random. This process makes it difficult to consistently analyze satisfaction metrics.

There is a concern that there will be something that pops up stopping the go live. A list must be compiled describing notable risk points.

A regional manager is asked to review a direct delivery sales order to determine whether it was created correctly in a test environment. The regional manager trainer cannot see the sales order in question by using the direct delivery sales order link in the user's workspace.

Liberty's instance goes live successfully. In preparation for the first update, several business scenarios were reported as failing in the validation testing. You are working with Microsoft support and reviewing potential fixes to address the issues.

**Question**

You need to configure the system to meet the data import, export, and operations requirements.

Which two options should you implement? Each correct answer presents part of the solution.

NOTE: Each correct selection is worth one point.

- A. Document templates
- B. Electronic reporting
- C. REST APIs
- D. Excel Add-in data source
- E. Application Integration Framework

**Correct Answer:** AD

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Background -

Wide World Importers (WWI) is an importer and supplier of fair trade, handmade home goods to independent retailers in North America.

One of WWI's products was recently featured on several major television talk shows and has become very popular. As a result, WWI is expanding their prospective sales operations to new markets as well as engaging current customers in a more direct manner.

Current environment -

Sales representatives -

Sales representatives are highly competent users of this Dynamics 365 Finance implementation.

They typically operate independently, but due to the recent high sales volume they must work together as a team.

Sales representatives are not available to test the new business processes and security roles being introduced.

Customer and prospect data is currently stored in Excel spreadsheets.

Requirements: Functional requirements

A mechanism to facilitate an interactive step-by-step training guide within the Dynamics 365 application must be implemented.

Tips and hints for data entry in the interactive training guide must also be included because most sales representatives will not be available for training prior to

▪ implementation of the new functionality. They need to be able to use the functionality as soon as it is implemented.

Sales representatives must be able to see all report and form data for specific sales and inventory reports and forms.

Many sales representatives have applied individual changes to forms and reports, such as moved, added, and hidden fields. These changes are critical to the sales representatives' efficiencies and must remain in place.

New processes must be standardized and documented according to current standards.

Several sales representatives run custom queries on SSRS reports. Sales representatives must be able to see the default data as well as their custom queries for those reports.

Requirements: Power Apps initiative

A Power Apps also must be created and embedded on the customer form. The form displays other prospects who reside within a certain radius of the current customer. This functionality will be distributed on a per-request basis.

A Power Apps app must be embedded in a feedback form within the Sales order form in Dynamics 365 Finance. The form must display questions for a sales representative to ask customers while reviewing their previous sales orders.

Requirements: Data import and export

WWI must consolidate and migrate all their data currently in Excel spreadsheets into the Dynamics 365 system.

Sales managers must cleanse their region's prospects and bring them into the Dynamics 365 system by a specified date for final analysis.

Sales manager's data sheet templates must include the most recent data from the Dynamics 365 system. The managers must check for duplicate data.

The data templates used for data import must be intuitively located within the Dynamics 365 forms where the data primarily resides.

For any other core data that must be imported, all test imports must be as repeatable and consistent as possible while data validation errors are

identified and addressed.

Requirements: Technical requirements

The implementation must be done as quickly as possible with no development needed.

A tool for project workstream, task management, and work stories must be implemented for the rapid deployment sprints, issues, and feature backlogs that will result from the implementation.

The solution must also facilitate automation of regression testing for the One Version business continuity initiatives.

Basic entity templates must be acceptable for imports.

Issues -

The Dynamics 365 Commerce customer data cannot currently be accessed by a Power Apps data source.

Several sales representatives have applied individual changes to forms, preventing the new business processes. All representatives should use the same form layouts.

Sales representatives report errors on a few existing sales reports. You identify that the criteria used to generate the reports is the root cause for the errors.

### Question

You need to configure the import methods for the sales representatives.

What should you do?

- A. Create an Excel template as the data template for use with the Excel Add-in.
- B. Create a Microsoft SharePoint list as a data template for use in a Power App for bulk import.
- C. Create an Excel template as the data template for use in the Data Management framework.
- D. Create a CSV data template for use in the Data Management framework.
- E. Create a pipe delimited data template for use in the Data Management framework.

**Correct Answer:** C

Reference:

<https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/data-entities/data-entities-data-packages>

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### Question

You need to enable the sales managers to consistently import their prospects.

Which tool should you configure?

- A. Data Management Workspace
- B. Power Automate
- C. Configuration data packages
- D. Power App portals
- E. Excel desktop application Dynamics add-in

**Correct Answer: A**

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WWI must consolidate and migrate all their data currently in Excel spreadsheets into the Dynamics 365 system.

Sales managers must cleanse their region's prospects and bring them into the Dynamics 365 system by a specified date for final analysis.

Sales manager's data sheet templates must include the most recent data from the Dynamics 365 system. The managers must check for duplicate data.

The data templates used for data import must be intuitively located within the Dynamics 365 forms where the data primarily resides.

For any other core data that must be imported, all test imports must be as repeatable and consistent as possible while data validation errors are identified and addressed.

#### Requirements: Technical requirements

The implementation must be done as quickly as possible with no development needed.

A tool for project workstream, task management, and work stories must be implemented for the rapid deployment sprints, issues, and feature backlogs that will result from the implementation.

The solution must also facilitate automation of regression testing for the One Version business continuity initiatives.

Basic entity templates must be acceptable for imports.

**Issues -**

The Dynamics 365 Commerce customer data cannot currently be accessed by a Power Apps data source.

Several sales representatives have applied individual changes to forms, preventing the new business processes. All representatives should use the same form layouts.

Sales representatives report errors on a few existing sales reports. You identify that the criteria used to generate the reports is the root cause for the errors.

**Question**

You need to implement a solution for importing core system data.

Which two tools should you use? Each correct answer presents part of the solution.

NOTE: Each correct selection is worth one point.

- A. Data Validation checklist workspace
- B. Record templates
- C. Multiple data templates for each entity
- D. Lifecycle Services Work items
- E. Data Task Automation

**Correct Answer: AE**

Reference:

<https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/user-interface/data-validation-workspace>

<https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/data-entities/data-task-automation>

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Background -

Current environment -

Adventure Works Cycles is a high-end bicycle manufacturer in North America founded in 2010. The company has standard bicycles available year round in addition to limited-edition bicycle models released domestically several times per year to boutique retailers.

The limited-edition bicycles are the most successful. They have high margins, are in high demand, and have a fervent following with the younger bicycle community that wants to make a social statement. Most consumers become aware of the other Adventure Works Cycles bicycles through these limited editions.

Adventure Works Cycles wants to triple its manufacturing capabilities and expand to countries/regions in South America, Western Europe, and United Arab

Emirates (UAE) over the next few years.

General -

To facilitate these expansions, Adventure Works Cycles has decided to invest in Dynamics 365 Finance, Dynamics 365 Supply Chain Management, and the

Power Platform products to digitally innovate from a custom-built enterprise resource plan (ERP), and Microsoft Excel worksheets.

Adventure Works Cycles sells only to North America and Canada but still cannot keep up with current demand. Over time, market expansion will be the only way to remain profitable.

Expansion has been limited in the past due to legal requirements and regulations around document formatting and the lack of a developer.

Adventure Work Cycles has no capabilities or budget to undertake any development past the Excel formula-level tasks.

There are no formal change management procedures.

Sales -

There are three distinct sales teams:

An internal sales team (B2B)

- Sells to retailers.

- Submits orders via EDI, email, or call-in.

A street sales team (B2C)

- Sells directly to high profile or social media influencer consumers.

- Provides customers with discounts or has marketing arrangements in exchange for driving sales to retailer-direct sales channels

- Submits orders by using email or call-in because pricing and terms must be negotiated.

An Adventure Works Cycles administrative sales team

- Has same responsibilities and activities as the internal sales team.

- Coordinates the management activities of the B2B and B2C teams.

## Products -

Before new bike models are unveiled through social media, it can be difficult for the street team representatives to show customers and retailers the new products with the most up-to-date information because the product is still being manufactured.

Often the data and images for the products are out of date.

The internal sales team uses the Dynamics 365 Supply Chain Management product from to show this information to customers.

For questions about bike-specific warranties and service level agreements, consumers can contact Adventure Works Cycles directly through the active

Adventure Works Cycles social media pages. The company expansion will put a strain on the manual interactions of answering questions.

Information and attributes change often.

## International compliance -

Sales are currently restricted to the US only.

## Requirements -

### General -

No coding is in scope for the project.

Change management operations need to be implemented.

A One Version strategy needs to be implemented.

The most critical business processes must never break when the software updates to the newest version.

No third-party testing tools will be used. Adventure Works Cycles wants to use everything in the Microsoft stack if there is an option available. Because the company is at capacity with the overwhelming demand, the testing process must be done without users running through the processes every time the software updates.

With the different bike configurations, Adventure Works Cycles would like to use a single business process but test against 10 different data configurations to streamline errors against data variations in the manufacturing process.

## Data administrator -

A single person, the Adventure Works Cycle data administrator, will be tasked with owning all reporting and data tasks.

This one person will need to intimately know all entities and fields, in addition to any changes in the new versions of the software.

Adventure Works Cycles users will inquire with the data administrator about certain data they need to view. The data administrator needs to quickly search data entities by field names and advise users on how to extract data into their own Excel templates for ad hoc reporting and data management tasks.

## Data migration -

The data cleansing and loading into Dynamics 365 will be done by the Adventure Works Cycles data administrator.

With the many changes for the products and data, imports for the data loads must be repeatable and consistent.

The different data loading components will all be done at one time.

After the import order and cadence is done correctly in a test environment, that same process must be reliably replicable for the golden configuration, in addition to any environment refreshes going forward.

Any errors on the data loading must identify the issue for the person to address and fix for future loads.

## Sales -

The sales street team must be able to view and edit (only product descriptions) near real-time information from the Dynamics 365 system about products on their personal mobile phones.

No street team representatives will have access to the Dynamics 365 Supply Chain Management application, but they must be able to enter orders and update customer information into the system without Adventure Works Cycles assistance.

The Adventure Works Cycles internal sales support team must be able to see all street team sales orders entered to provide support, but the internal team should not see any information around the commissions configured on the orders.

The sales support team must be able to see all orders and fields for the different sales teams. No other security differences from a Dynamics perspective are needed.

## Products -

Warranty and Service Level Agreements stored in Dynamics 365 for the different products must not be exposed directly to sales representatives.

The representatives must be able to pose questions from customers and retailers and get answers back almost immediately.

Any opportunity to extend this type of product inquiry and support mechanism to customers and retailers must be evaluated.

The data for all of the product information must be easily extractable back into Excel.

International compliance -

Payments and invoices inbound and outbound must be converted or translated to the correct localized format

Regardless of regulatory compliance, the customer-facing business documents must have a unique template for each country that can be designed within

Microsoft Office applications. These documents must be embedded in Dynamics 365 forms for data export and configurable by non-developers.

### Question

You need to load the data for the environment refresh activities.

Which location should you use?

- A. Microsoft SharePoint
- B. Microsoft Azure Data Lake
- C. Dynamics 365
- D. Microsoft Azure DevOps
- E. Project-level asset library

**Correct Answer: C**

Reference:

<https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/data-entities/data-entities-data-packages>

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### Question

You need to identify a mechanism to enable products for the sales street team application that meet the requirements.

Which tool should you use?

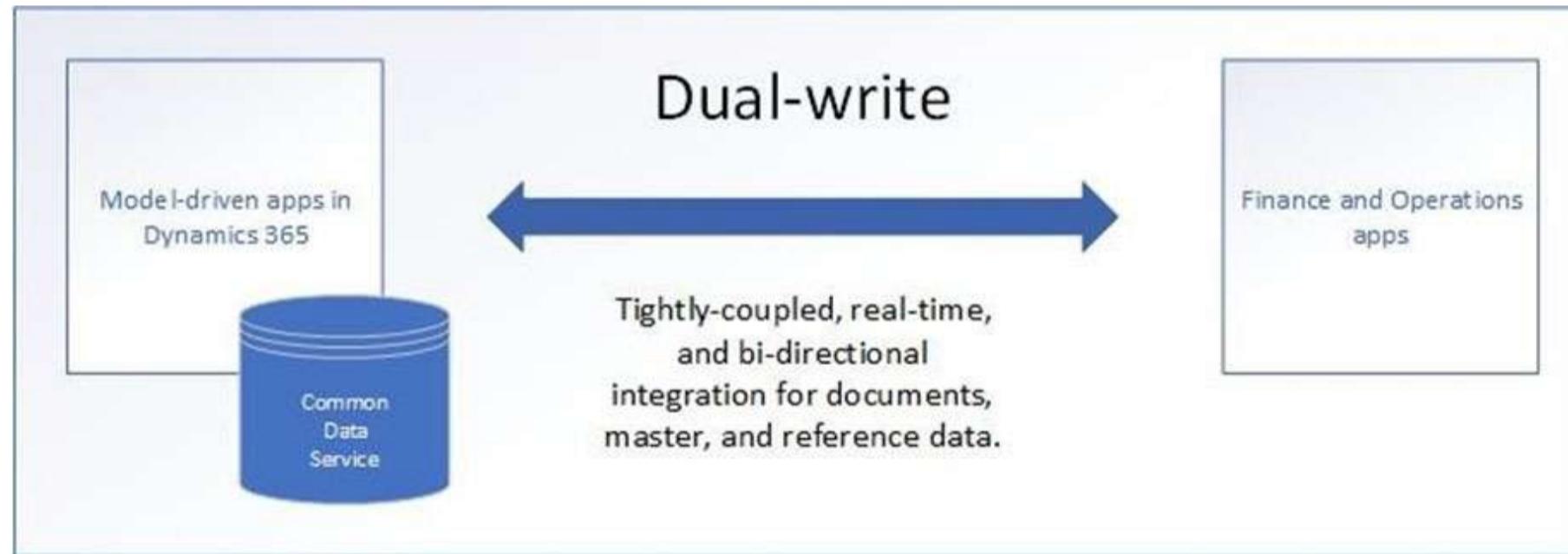
- A. Application connector
- B. Common Data Service
- C. Batch data APIs
- D. Dual-write
- E. OData APIs

### Correct Answer: D

The sales street team must be able to view and edit (only product descriptions) near real-time information from the Dynamics 365 system about products on their personal mobile phones.

Microsoft announces dual-write, a new capability that enables data to become available natively on Common Data Service across Finance and Operations apps, and model-driven apps in Dynamics 365.

The dual-write solution package covers master data scenarios for customers, products, and vendors, and for end-to-end process flows like prospect to cash, and for on-demand functions like pricing and reference data for ledger, tax, payment terms, and schedules. Dual-write will continue to expand in the future to support more scenarios for party, project, on-hand inventory, and more. The framework is extensible and accommodates customer-centric business data exchange through a few additional clicks.



Reference:

<https://cloudblogs.microsoft.com/dynamics365/it/2020/03/27/dual-write-automates-data-flow-between-dynamics-365-applications-and-common-data-service/>

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Background -

Alpine Ski House sells a variety of ski and outdoor equipment, including apparel and digital content to retailers and wholesalers located in the United States. The central distribution center, accounting and customer service center are located in the company's headquarters building in the state of Colorado. The company also has an additional warehouse in the state of New York. The company is known for its customer-friendly policies.

Current environment -

Alpine Ski House currently has an outdated accounting system that is not connected to the New York warehouse.

The warehouse system contains inventory quantities, but does not have costing, therefore the FIFO principles are applied through spreadsheet calculations at month end.

Alpine Ski House has worked to create a future state roadmap as a foundation for growth. They have decided to implement Dynamics 365 cloud applications and must limit the amount of on premises hardware as they are not staffed for support. They are expecting to implement required devices for warehouse applications to support WMS only.

The customer service center places phone orders on behalf of wholesalers and retailers.

The customer service team provides concierge services to the top 20 largest customers. Each customer service team member is assigned to 5 customers as the customer's dedicated customer service representative.

The call center has a phone system that records calls and stores the call duration.

Data is a combination of systems that are disconnected to include warehouse and accounting. Customer records and consumer records are stored in the call center third-party system. Excel spreadsheets are used for consolidated reporting from these systems.

Alpine Ski House must enable business partners to place their own B2B orders on the web as well as manage their own users.

The company has decided to expand distribution to Banff, Alberta and create a new operating legal entity in Canada. This expansion must be planned for as part of the solution, as it will be up and running six months after the initial US company is operating on the new applications.

Requirements -

Applications and environment -

Required applications must align to the future state roadmap.

Business partners must have the ability to onboard their own users for placing orders on the web.

The Canadian company must use the same base data as the US operating company and must be set up in the same instance.

Sales order history data must not be imported. All current and future orders must be migrated to the new system.

Master data for customers must be migrated from both the call center third-party system as well as the accounting system. You identify the following requirements:

- The mapping fields for customer records in both systems are the same, except the accounting system which has three additional fields that must be mapped.
- Duplicate records must not be imported.

## Cutover plan

- User1 reports that sales orders will be open and not shipped at the time of cutover to production. There are 20 orders expected to be open.

## Customer service -

### General -

Concierge customer service reps must be able to access customer records for all customers in their customer group.

Customer service reps must be able organize how information is presented when they sign into the new system.

Security must be applied to the customer service reps as a group and must not be applied at the individual level.

### Return policies -

Sporting equipment is warranted by the manufacturer and must not be returned to Alpine Ski House warehouse. Alpine Ski House does not strictly enforce this policy. Exceptions to the policy are allowed with manager approval.

Customer service must track reported issues with sporting equipment to identify trends.

Customers can exchange apparel, but refunds must not be permitted. Any consumer exchanges must occur directly through Alpine's call center and cannot be returned to a physical store.

### Exchange policies -

All consumer calls must be logged for tracking purposes. The customer service representative will determine if there is an exchange, or if the consumer should be redirected to the manufacturer. Digital content is final sale only. All complaints must still be tracked.

Returns and replacement orders must be processed through the warehouse. Consumer information for returns and replacement orders does not need to be stored.

A record of the location where the consumer purchased the product must be stored for tracking purpose

The customer service reps must be able to view the order status for delayed shipments or orders that have been shipped but not invoiced. They need to have shortcuts to view this information.

Returns or credits for a concierge customer that are not from a consumer do not require notifications to the concierge representative.

Web orders must be limited to B2B, and consumers web access must not be required for order placement.

The call center must track the call minutes in the phone system by customer number.

The system must send the following notifications:

- Dedicated concierge representative must be automatically notified when an exchanged product has shipped. The concierge representative must set up the alert.

- External customers must be notified of the new consumer exchanges. The notification must integrate into the customer's third party dashboard and must not be sent as an email notification.

## Customer Service -

The customer service center is overloaded with frequently asked questions (FAQ's) that are consuming resources and creating issues with customer service levels.

Alpine Ski House has decided to deploy an automated FAQ website because they do not have sufficient staff resources to manage customer interactions. All automated interactions must be stored for 30 days.

The company has decided to extend its concierge program to the top 25 customers. A new representative has been hired and requires the same screen layout as other team members.

When new customers are created in the system, the customer number must automatically pass to the call center phone system.

## Implementation -

The implementation is expected to take 12 months. Alpine Ski House wants to ensure that when they go live, they are on the most current available update of

Dynamics 365. Testing must occur in the various stages of the implementation. You identify the following testing requirements:

- Platform updates will be applied, and business processes will be verified to perform as expected, either manual or automated where possible against stored task recordings.

- Development must be completed by the 10th month. Developers must perform initial testing code that they create.

- When development is completed, all processes in the system must be tested by the user group.

Due to competing demands for the project team, the company wants to automate as much of the testing as possible.

The project manager is concerned that a critical field must have validation scripts run against it during automated testing. The developers will be required to write the custom validation script. The user creating the test script must document the step in the test script that the specific validation script must be run for the developers.

The project manager wants to put a control in place to ensure that once the automated testing is established the test scripts are not modified or overwritten.

**Question**

Which two features should you use to meet the customer exchange requirements? Each correct answer presents part of the solution.

NOTE: Each correct selection is worth one point.

A. Case management

B. Quality order

C. Document handling

D. Quarantine order

E. Customer credit

**Correct Answer: AC**

A: A case typically represents a situation or incident that's reported by a customer and that requires a resolution. Cases are designed to track the process from the initial intake of an incident, through the remediation process, to the final resolution. From a customer service standpoint, a case can represent several items.

C: You can use document management, also known as document handling, to attach notes, documents, or document references to records. You can also use

Office Add-ins for Microsoft Dynamics AX to integrate with document management and create Microsoft Word and Microsoft Excel documents or document templates that use Microsoft Dynamics AX data.

Incorrect:

Not B: Quality assurance involves product testing and the management of nonconforming material. Quality management processes help guarantee a high level of product quality in your supply chain

Not D: Quarantine orders let you block inventory. For example, you might want to quarantine items for quality control reasons. Inventory that has been quarantined is transferred to a quarantine warehouse.

Not E: Customer credit management lets you manage credit limits and control the flow of sales orders through the posting process, based on credit rules that you create.

Reference:

<https://docs.microsoft.com/en-us/learn/modules/managing-cases-with-dynamics-365/1-case-management-overview>

<https://docs.microsoft.com/en-us/dynamicsax-2012/appuser-itpro/configure-document-management>

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When new customers are created in the system, the customer number must automatically pass to the call center phone system.

### Implementation -

The implementation is expected to take 12 months. Alpine Ski House wants to ensure that when they go live, they are on the most current available update of

Dynamics 365. Testing must occur in the various stages of the implementation. You identify the following testing requirements:

- Platform updates will be applied, and business processes will be verified to perform as expected, either manual or automated where possible against stored task recordings.
- Development must be completed by the 10th month. Developers must perform initial testing code that they create.
- When development is completed, all processes in the system must be tested by the user group.

Due to competing demands for the project team, the company wants to automate as much of the testing as possible.

The project manager is concerned that a critical field must have validation scripts run against it during automated testing. The developers will be required to write the custom validation script. The user creating the test script must document the step in the test script that the specific validation script must be run for the developers.

The project manager wants to put a control in place to ensure that once the automated testing is established the test scripts are not modified or overwritten.

## Question

**HOTSPOT -**

You must perform the data migration for User1 to meet the applications and environment requirements.

What should you do? To answer, select the appropriate options in the answer area.

NOTE: Each correct selection is worth one point.

Hot Area:

**Answer Area****Action**

Define data type

**Option**

- Master
- Transactional
- Parametric

Select migration method

- Manual only
- Import only
- Manual or import

Correct Answer:

**Answer Area****Action**

Define data type

**Option**

- Master
- Transactional
- Parametric

Select migration method

- Manual only
- Import only
- Manual or import

Box 1: Transactional -

\* Sales order history data must not be imported. All current and future orders must be migrated to the new system.

\* Cutover plan

User1 reports that sales orders will be open and not shipped at the time of cutover to production. There are 20 orders expected to be open.

Box 2: Manual only

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Background -

Relecloud is a cloud point of sale (POS) software company specializing in direct to consumer food stands. They have multiple business units using their new

Dynamics 365 Finance implementation including customer-facing representatives for account management, technical support, customer service, and finance.

There are two legal entities, one for operations and one for financials. Customers pay for the Relecloud POS software monthly and everything is deployed in the cloud. The Dynamics instance URL is <https://relecloud-prod.operations.dynamics.com>.

Munson's Pickles and Preserves Farm is a company that uses Relecloud's cloud POS software to sell their produce in farmers markets. Munson's was one of

Relecloud's first customers, and Relecloud stocks their employee lunchroom with Munson's products. Munson's has also been subcontracting their employees to

Relecloud to help functionally build a best-in-breed solution. Munson's employees assume multiple organizational positions. Each employee has only a single email address by which people can contact them.

Current environment: System and IT

Dynamics 365 for Finance was recently updated.

All recurring batch jobs in the system were removed and recreated.

The alert notification batch processing was recently changed from every 10 minutes to once every two hours.

Real-time reporting of the information is not needed.

Current environment: Customer Service

Customer credit requests are entered through the customer service team.

All requests must contain a date, time, reason for request, and customer service notes on initial recommendations for credit action.

Customers have multiple points of contact who can enter support tickets to the Relecloud portal.

Tickets are automatically generated in the support team's third-party system when they are created by support technicians.

The Dynamics 365 email client mail is used to correspond with customers.

Current environment: Technical Support/IT

The technical support team gets involved when technical issues arise with the Relecloud software. Service tickets are entered and get escalated to the team, depending on the issue.

Microsoft Flow is used for automating different workstreams.

Workflows are not configured for the technical support request flows in Dynamics 365 Finance.

Management and history of technical support tickets are handled in a third-party issue management solution.

The technical service team manages issues related to the Relecloud POS as well as the Dynamics 365 application.

Current environment: Account Representatives

Each customer is assigned a single account representative.

Account representatives use multiple devices.

Only account representatives have the ability to approve credits.

All emails to customers come through their own Outlook instance.

Current environment: Finance -

Customers do not have invoice accounts.

Only finance resources have the ability to enter credits.

Credits can be entered by any of the four finance resources assigned the Credits and Refunds security role.

If the request has not been updated in four days, the request is escalated to the Controller. The account representative must be alerted when this occurs.

Requirements: Technical support/IT

Support technicians must use Microsoft's existing knowledge base to resolve open issues.

If an issue exists, support technicians must report the status of the issue on a weekly basis.

If there is no existing support request, support technicians must create one for Microsoft evaluation.

All software must be installed centrally when possible.

The Dynamics 365 Finance production environment must have an update cadence of every second Saturday from 4-7 A.M. EST.

Updates must be tested in a separate environment.

Requirements: Account representatives

Account representatives must be able to see only the relevant customer fields and records automatically from their dashboard.

Account representatives must be able to export the list of customers to Microsoft Excel.

Account representatives must be able to navigate to the customer master record for any editing or record entry tasks.

The forms must be relevant based on each account representative's needs.

Account representatives need a centralized location to see multiple data components.

Account representatives require an offline list of their current customers in Excel with only the fields they need.

The IT Director must reassign all instances of an account representative's customer contacts if the representative leaves the company.

An alert must be sent automatically to an account representative when a credit is issued or any data is changed on a customer's record.

Requirements: Financials -

Any refund must be printed as a physical check.

All printers must be exclusive to the financial legal entity.

Issues -

Typing 'pickle' in the search box yields no returned results for the account representative.

After the latest update, an account representative reports that he is no longer receiving alert notifications when a customer's contact is changed.

An account representative has recently resigned.

### Question

You need to determine when and where the user regression testing should take place for new Dynamics 365 Finance releases.

When and where should the testing take place?

- A. the Monday before the second Saturday in the month in the base Test/User Acceptance Testing environment
- B. the Monday before the second Saturday in the month in the base sandbox environment
- C. the Monday after the second Saturday in the month in the base Test/User Acceptance Testing environment
- D. the Monday after the second Saturday in the month in the base sandbox environment

**Correct Answer: A**

[Previous Questions](#)

[Next Questions](#)

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Chain Management, and Dynamics 365 Retail to support the rapid future growth. Streamlined business processes will be implemented to replace manual processes and Microsoft Excel.

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Current environment: General -

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Current environment: Environments

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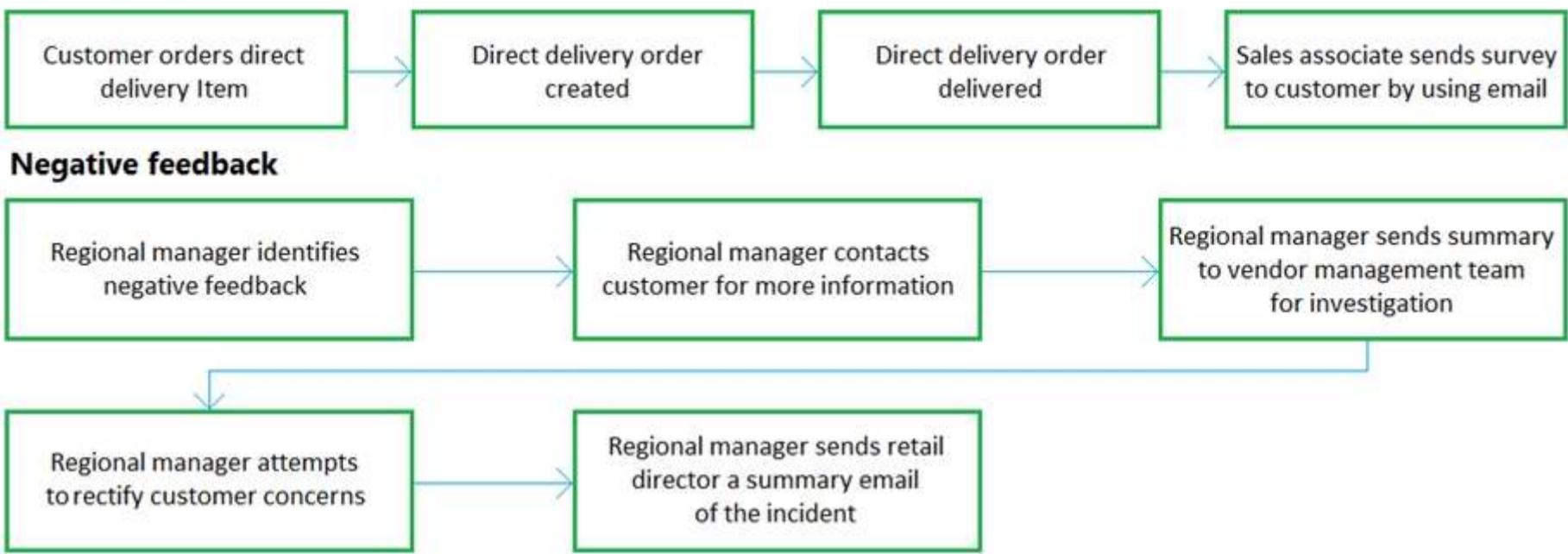
The company uses the following Dynamics 365 version: 10.0.6/Update 30.

Current environment: Operations -

Excel is used extensively by Liberty's and there are many experienced Excel users in the organization. Many users have altered the existing Excel sheets for their own purposes. There is no standard Excel workbook template.

Current environment: Current Workflows

## Direct delivery



Requirements: Business Processes/LCS

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Liberty's has a business process library that contains a specific set of functionality. Liberty's would like to use as an existing node in their core business process library.

Sales discounts for high-volume customers must be calculated by using predefined Excel templates. Sales team members must be able to access the template directly from the sales order form.

Requirements: Data Import/Export

Any Excel templates need to be standardized and easily accessible. The integrity of shared templates must be strictly maintained.

After the implementation, the core Liberty's team needs to be empowered to further identify future value-add opportunities for interacting and manipulating their data as future phase initiatives. Once they understand the data structures and capabilities, they need to start creating their own templates that meet their specific needs.

Requirements: Workflow -

A workflow to streamline the feedback of the customer experience is critical. Any negative experience needs to be quickly addressed. Any steps to rectify the customer concerns are handled offline at the discretion of regional managers.

As the company grows, customer history of vendor direct delivery performance must be documented to assure stakeholders that the company is monitoring vendor performance. Any actions to rectify the customer concerns must be approved prior to execution.

Requirements: Go Live/Cutover -

Go Live date: October 1.

Cutover: Seven days before go live with daily delta imports occurring nightly. This process has been fully vetted and is operating properly.

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Data Imports: Six hours total for all imports.

Performance testing: Liberty's team system administrator reports that they are not planning to conduct performance testing.

Requirements: Software updates -

The customer cannot take updates during their busy season from November 1 - December 31. Any system downtime requires a notification to the users through the proper application management tool. 100% of user acceptance testing is required for any system update.

The first official update to the live software will be the third week of October.

Requirements: Regression testing

There will be no dedicated regression testing team after going live. They are dedicated prior to go live and anything that can be done to virtually eliminate the overhead of regression testing will be done prior to go live.

Requirements: Workspaces -

A standard workspace will be assigned to each regional manager. The workspace will show the following information for stores associated with a regional manager:

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Any direct delivery special orders

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Regional managers may personalize workspaces as needed.

Issues -

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A regional manager is asked to review a direct delivery sales order to determine whether it was created correctly in a test environment. The regional manager trainer cannot see the sales order in question by using the direct delivery sales order link in the user's workspace.

Liberty's instance goes live successfully. In preparation for the first update, several business scenarios were reported as failing in the validation testing. You are working with Microsoft support and reviewing potential fixes to address the issues.

**Question**

HOTSPOT -

You need to identify the platform version that Liberty's live instance uses as well as the update version they must use if they continue to delay updates due to reported issues.

Which answers should you give? To answer, select the appropriate options in the answer area.

NOTE: Each correct selection is worth one point.

Hot Area:

**Answer Area**

Request	Answer
Platform version for Liberty's live instance	<div style="border: 1px solid black; padding: 5px; width: fit-content;"><p>▼</p><ul style="list-style-type: none"><li>Update 23</li><li>10.0.5</li><li>Dynamics 365</li><li>Dynamics AX</li></ul></div>
Application version that can no longer be delayed	<div style="border: 1px solid black; padding: 5px; width: fit-content;"><p>▼</p><ul style="list-style-type: none"><li>10.0.8</li><li>Update 34</li><li>10.0.10</li><li>Update 32</li></ul></div>

**Answer Area**

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Reference:

<https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/fin-ops/get-started/public-preview-releases>

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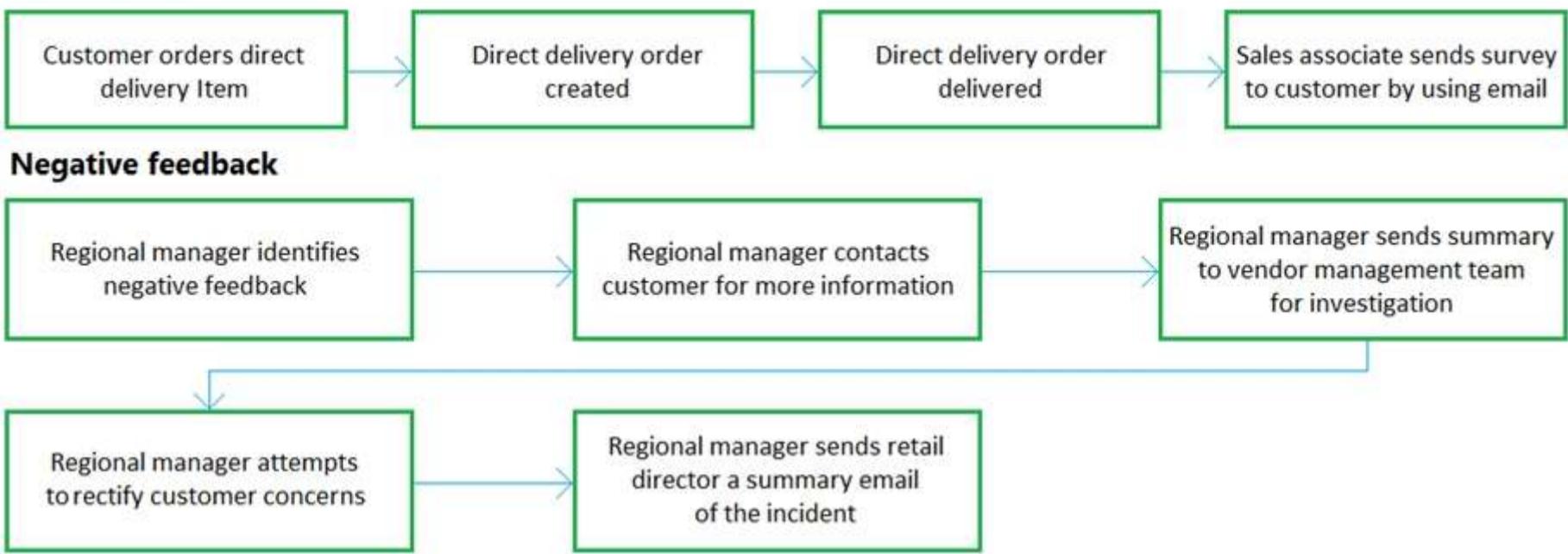
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**Question**

DRAG DROP -

You need to configure regression testing and user notification processes for updates.

What should you use? To answer, drag the appropriate tools or apps to the correct scenarios. Each tool or app may be used once, more than once, or not at all.

You may need to drag the split bar between panes or scroll to view content.

NOTE: Each correct selection is worth one point.

Select and Place:

Tools or apps	Answer Area	Tool or app
Lifecycle Services		Tool or app
Dynamics 365 application	Scenario Generate application blackout notifications.	Tool or app
Azure DevOps	Regression test all user acceptance tests.	Tool or app
Power Automate		

**Correct Answer:**

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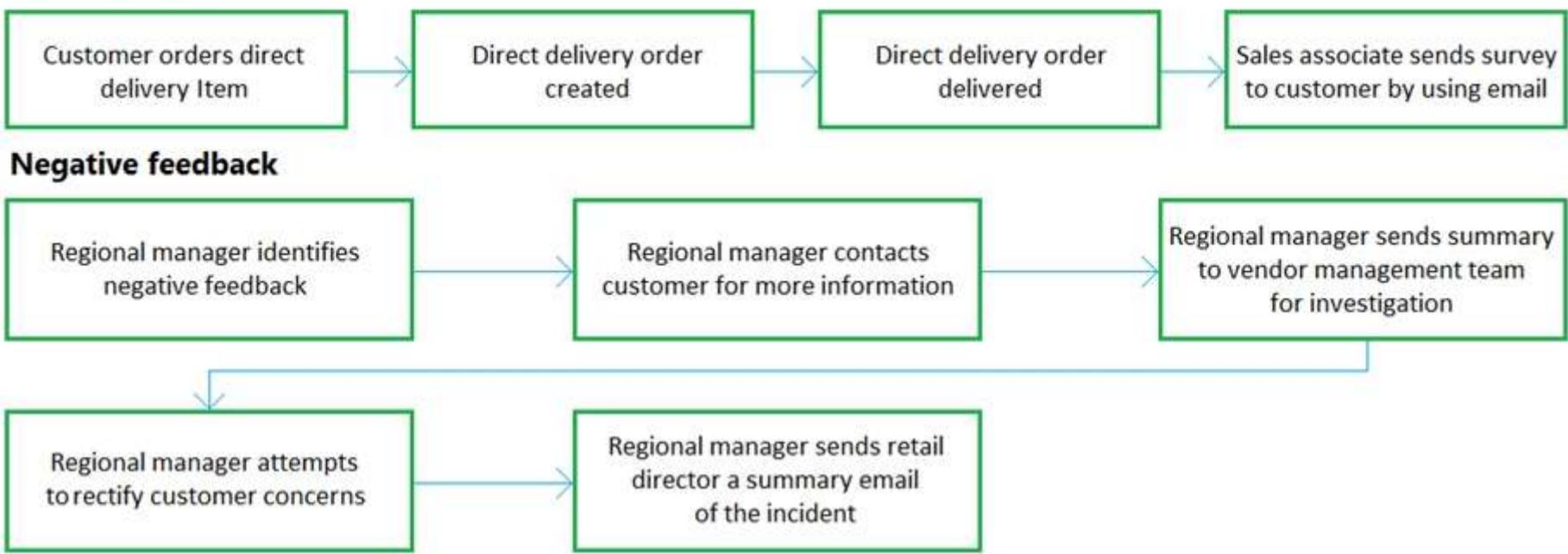
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**Question**

You need to ensure that Liberty's can use the business processes from Contoso, Ltd.

What should you do?

- A. Import the specific BPM library into the appropriate sub-node as a child.
- B. Create a reference to the BPM library into the appropriate sub-node as a sibling.
- C. Create a reference to the BPM library into the appropriate sub-node as a child.
- D. Import the specific BPM library into the appropriate sub-node as a sibling.

**Correct Answer: C**

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Background -

Liberty's Delightful Sinful Bakery & Caf© is a baked goods company headquartered in Denver, Colorado. The company has 200 locations around the United States.

Contoso, Ltd. purchases a majority stake in Liberty's. As part of this acquisition, Contoso, Ltd. plans to implement Dynamics 365 Finance, Dynamics 365 Supply

Chain Management, and Dynamics 365 Retail to support the rapid future growth. Streamlined business processes will be implemented to replace manual processes and Microsoft Excel.

Contoso, Ltd. already has 10 legal entities that use all Dynamics 365 modules in a single tenant. Liberty's will exist within the Contoso, Ltd. tenant as its own legal entity and Lifecycle Services (LCS) project. All environments are cloud based.

Current environment: General -

Contoso, Ltd. uses One Version for detailed regression test planning. The testing plan is fully automated by using the Regression Suite Automation Tool (RSAT).

There is a standardized set of core business processes in a single Business Process Library and functionality-specific business process libraries for the various

Contoso, Ltd. businesses.

Current environment: Environments

The following links are used to connect to Contoso, Ltd.'s environments:

Microsoft SharePoint: <https://Libertys.sharepoint.com>

Dynamics 365: <https://LibertysAos.cloudax.dynamics.com>

Microsoft Azure Dev Ops: <https://Libertys.visualstudio.com>

Microsoft Office 365: <https://Libertys-my.sharepoint.com>

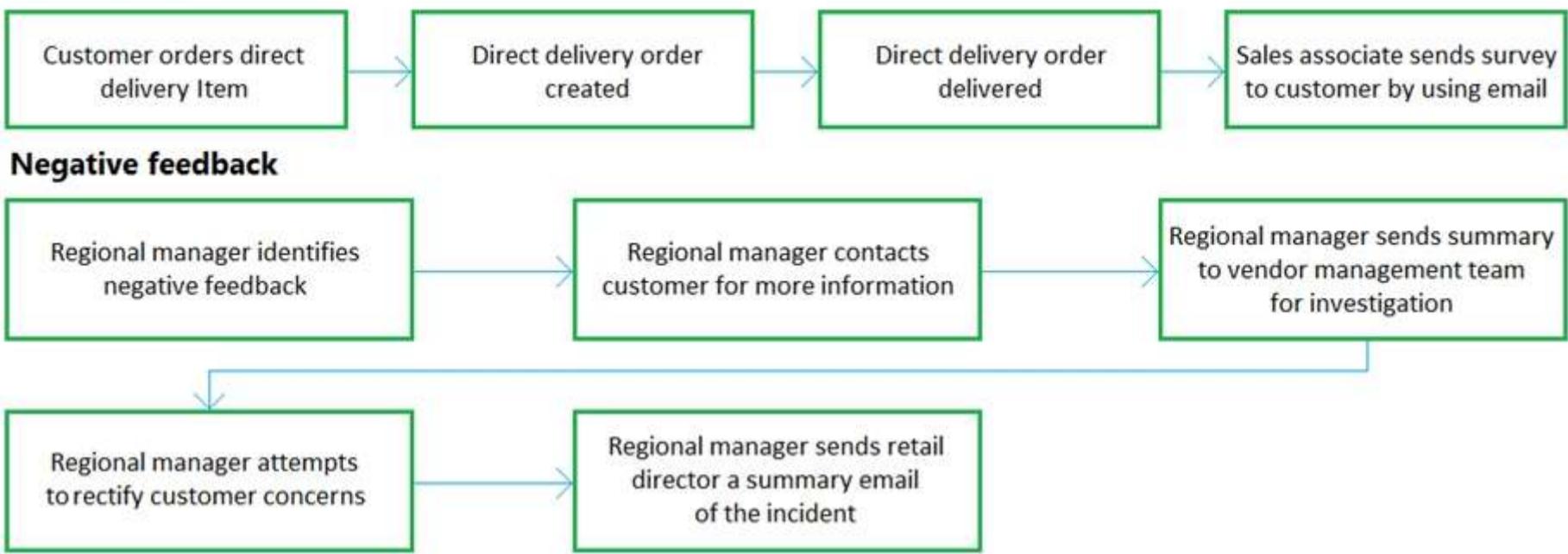
The company uses the following Dynamics 365 version: 10.0.6/Update 30.

Current environment: Operations -

Excel is used extensively by Liberty's and there are many experienced Excel users in the organization. Many users have altered the existing Excel sheets for their own purposes. There is no standard Excel workbook template.

Current environment: Current Workflows

## Direct delivery



Requirements: Business Processes/LCS

Liberty's needs to leverage as many existing Contoso, Ltd.'s business processes as possible to shorten the implementation lifecycle and create similarities between the organizations. There will be one master business process library for Liberty's. There are 100 user acceptance testing scripts. Fourth Coffee is one of Contoso, Ltd.'s legal entities.

Liberty's has a business process library that contains a specific set of functionality. Liberty's would like to use as an existing node in their core business process library.

Sales discounts for high-volume customers must be calculated by using predefined Excel templates. Sales team members must be able to access the template directly from the sales order form.

Requirements: Data Import/Export

Any Excel templates need to be standardized and easily accessible. The integrity of shared templates must be strictly maintained.

After the implementation, the core Liberty's team needs to be empowered to further identify future value-add opportunities for interacting and manipulating their data as future phase initiatives. Once they understand the data structures and capabilities, they need to start creating their own templates that meet their specific needs.

Requirements: Workflow -

A workflow to streamline the feedback of the customer experience is critical. Any negative experience needs to be quickly addressed. Any steps to rectify the customer concerns are handled offline at the discretion of regional managers.

As the company grows, customer history of vendor direct delivery performance must be documented to assure stakeholders that the company is monitoring vendor performance. Any actions to rectify the customer concerns must be approved prior to execution.

Requirements: Go Live/Cutover -

Go Live date: October 1.

Cutover: Seven days before go live with daily delta imports occurring nightly. This process has been fully vetted and is operating properly.

Data Packages to migrate: Two.

Data Imports: Six hours total for all imports.

Performance testing: Liberty's team system administrator reports that they are not planning to conduct performance testing.

Requirements: Software updates -

The customer cannot take updates during their busy season from November 1 - December 31. Any system downtime requires a notification to the users through the proper application management tool. 100% of user acceptance testing is required for any system update.

The first official update to the live software will be the third week of October.

Requirements: Regression testing

There will be no dedicated regression testing team after going live. They are dedicated prior to go live and anything that can be done to virtually eliminate the overhead of regression testing will be done prior to go live.

Requirements: Workspaces -

A standard workspace will be assigned to each regional manager. The workspace will show the following information for stores associated with a regional manager:

Single detailed view of multiple components of their sales data

KPIs for regional sales goals

Drill down capabilities to inquire about the data

Any direct delivery special orders

Any negative inventory items

Regional managers may personalize workspaces as needed.

Issues -

The current Open in Excel templates option on the All Customers form is missing several fields. It also contains several additional fields. This form must be replaced.

There was an issue with agreeing upon a supplemental organizational hierarchy used for sales reporting at go live. This hierarchy is exclusively for reporting purposes.

Customer surveys are conducted by using open-ended emails or in store comment cards from the regional managers at random. This process makes it difficult to consistently analyze satisfaction metrics.

There is a concern that there will be something that pops up stopping the go live. A list must be compiled describing notable risk points.

A regional manager is asked to review a direct delivery sales order to determine whether it was created correctly in a test environment. The regional manager trainer cannot see the sales order in question by using the direct delivery sales order link in the user's workspace.

Liberty's instance goes live successfully. In preparation for the first update, several business scenarios were reported as failing in the validation testing. You are working with Microsoft support and reviewing potential fixes to address the issues.

**Question**

You need to ensure that Liberty's can use the business processes from Contoso, Ltd.

What should you do?

- A. Import a business process library Excel file from Contoso, Ltd.'s business process library.
- B. Create a new business process library and use Task Recorder to document business processes.
- C. Use Task Recorder to create Contoso, Ltd.'s business processes for the current implementation.
- D. Download a clean business process library template and create the Contoso, Ltd.'s business processes by using Task Recorder.

**Correct Answer: A**

Reference:

<https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/lifecycle-services/creating-editing-browsing>

*Community vote distribution*

A (100%)

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### Current environment -

#### Sales representatives -

Sales representatives are highly competent users of this Dynamics 365 Finance implementation.

They typically operate independently, but due to the recent high sales volume they must work together as a team.

Sales representatives are not available to test the new business processes and security roles being introduced.

Customer and prospect data is currently stored in Excel spreadsheets.

#### Requirements: Functional requirements

A mechanism to facilitate an interactive step-by-step training guide within the Dynamics 365 application must be implemented.

Tips and hints for data entry in the interactive training guide must also be included because most sales representatives will not be available for training prior to

- implementation of the new functionality. They need to be able to use the functionality as soon as it is implemented.

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Requirements: Technical requirements

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Basic entity templates must be acceptable for imports.

Issues -

The Dynamics 365 Commerce customer data cannot currently be accessed by a Power Apps data source.

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Sales representatives report errors on a few existing sales reports. You identify that the criteria used to generate the reports is the root cause for the errors.

### Question

DRAG DROP -

You need to identify potential issues with the security roles and new processes.

Which tools should you use? To answer, drag the appropriate tools to the correct requirements. Each tool may be used once, more than once, or not at all. You may need to drag the split bar between panes or scroll to view content.

NOTE: Each correct selection is worth one point.

Select and Place:

Tools	Answer Area	Requirement	Tool
Segregation of Duties conflicts		Document the security objects needed.	Tool
Task Recording		Determine any gaps in security.	Tool
Security Diagnostics			
Security Development Tool			

Correct Answer:

Tools	Answer Area	Requirement	Tool
Segregation of Duties conflicts		Document the security objects needed.	Security Diagnostics
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Reference:

<https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/sysadmin/tasks/identify-resolve-conflicts-segregation-duties>

<https://global.hitachi-solutions.com/blog/create-custom-security-roles-dynamics-365>

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#### Issues -

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Sales representatives report errors on a few existing sales reports. You identify that the criteria used to generate the reports is the root cause for the errors.

#### Question

HOTSPOT -

You need to implement a solution for the sales associates business process navigation training.

Which technologies should you use? To answer, select the appropriate options in the answer area.

NOTE: Each correct selection is worth one point.

Hot Area:

### Answer Area

#### Requirement

Document the business process that the sales associate needs to complete.

#### Technology

- Microsoft Excel
- Task Recorder
- Business Process Modeler
- Microsoft Teams

Upload the business process for the user guide.

- Help Documentation
- Dynamics 365 Workflow
- Lifecycle Services
- Task Management

### Answer Area

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HOTSPOT -

You need to implement a solution for the project task management.

Which tool or tools support the solution? To answer, select the appropriate options in the answer area.

NOTE: Each correct selection is worth one point.

Hot Area:

### Answer Area

#### Requirement

Manage workstreams and project tasks.

#### Tool

- Microsoft Tasks
- Visual Studio
- Microsoft Project
- Azure DevOps

Recommend the task solution for future One Version initiatives.

- Azure Active Directory Integration
- Lifecycle Services Integration
- Dual-Write Integration
- Dynamics 365 Finance Integration

### Answer Area

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#### Question

HOTSPOT -

You need to resolve the sales representatives' report data issue.

What should you do? To answer, select the appropriate options in the answer area.

NOTE: Each correct selection is worth one point.

Hot Area:

### Answer Area

Inquiry	Action
How to resolve the issue	<ul style="list-style-type: none"><li>Delete the usage data for all of the users.</li><li>Remove the Report Selections data for the users.</li><li>Remove the saved queries for the users.</li><li>Delete then add the users back into the system.</li></ul>
Where to find the issue	<ul style="list-style-type: none"><li>Navigate to the Usage Data for each user.</li><li>Navigate to the SSRS report query object in Visual Studio.</li><li>Navigate to the report filter criteria.</li><li>Navigate the system-level personalization from for each user.</li></ul>

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Customer and prospect data is currently stored in Excel spreadsheets.

#### Requirements: Functional requirements

A mechanism to facilitate an interactive step-by-step training guide within the Dynamics 365 application must be implemented.

Tips and hints for data entry in the interactive training guide must also be included because most sales representatives will not be available for training prior to

- implementation of the new functionality. They need to be able to use the functionality as soon as it is implemented.

Sales representatives must be able to see all report and form data for specific sales and inventory reports and forms.

Many sales representatives have applied individual changes to forms and reports, such as moved, added, and hidden fields. These changes are critical to the sales representatives' efficiencies and must remain in place.

New processes must be standardized and documented according to current standards.

Several sales representatives run custom queries on SSRS reports. Sales representatives must be able to see the default data as well as their custom queries for those reports.

#### Requirements: Power Apps initiative

A Power Apps also must be created and embedded on the customer form. The form displays other prospects who reside within a certain radius of the current customer. This functionality will be distributed on a per-request basis.

A Power Apps app must be embedded in a feedback form within the Sales order form in Dynamics 365 Finance. The form must display questions for a sales representative to ask customers while reviewing their previous sales orders.

#### Requirements: Data import and export

WWI must consolidate and migrate all their data currently in Excel spreadsheets into the Dynamics 365 system.

Sales managers must cleanse their region's prospects and bring them into the Dynamics 365 system by a specified date for final analysis.

Sales manager's data sheet templates must include the most recent data from the Dynamics 365 system. The managers must check for duplicate data.

The data templates used for data import must be intuitively located within the Dynamics 365 forms where the data primarily resides.

For any other core data that must be imported, all test imports must be as repeatable and consistent as possible while data validation errors are identified and addressed.

#### Requirements: Technical requirements

The implementation must be done as quickly as possible with no development needed.

A tool for project workstream, task management, and work stories must be implemented for the rapid deployment sprints, issues, and feature backlogs that will result from the implementation.

The solution must also facilitate automation of regression testing for the One Version business continuity initiatives.

Basic entity templates must be acceptable for imports.

Issues -

The Dynamics 365 Commerce customer data cannot currently be accessed by a Power Apps data source.

Several sales representatives have applied individual changes to forms, preventing the new business processes. All representatives should use the same form layouts.

Sales representatives report errors on a few existing sales reports. You identify that the criteria used to generate the reports is the root cause for the errors.

### Question

You need to troubleshoot the source of and reason for the errors reported by the sales representative.

Which tool should you use?

- A. Alert Service
- B. System diagnostics
- C. Environment History
- D. Azure Monitor
- E. Microsoft Azure Virtual Machine

**Correct Answer: C**

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Background -

Current environment -

Adventure Works Cycles is a high-end bicycle manufacturer in North America founded in 2010. The company has standard bicycles available year round in addition to limited-edition bicycle models released domestically several times per year to boutique retailers.

The limited-edition bicycles are the most successful. They have high margins, are in high demand, and have a fervent following with the younger bicycle community that wants to make a social statement. Most consumers become aware of the other Adventure Works Cycles bicycles through these limited editions.

Adventure Works Cycles wants to triple its manufacturing capabilities and expand to countries/regions in South America, Western Europe, and United Arab

Emirates (UAE) over the next few years.

General -

To facilitate these expansions, Adventure Works Cycles has decided to invest in Dynamics 365 Finance, Dynamics 365 Supply Chain Management, and the

Power Platform products to digitally innovate from a custom-built enterprise resource plan (ERP), and Microsoft Excel worksheets.

Adventure Works Cycles sells only to North America and Canada but still cannot keep up with current demand. Over time, market expansion will be the only way to remain profitable.

Expansion has been limited in the past due to legal requirements and regulations around document formatting and the lack of a developer.

Adventure Work Cycles has no capabilities or budget to undertake any development past the Excel formula-level tasks.

There are no formal change management procedures.

Sales -

There are three distinct sales teams:

An internal sales team (B2B)

- Sells to retailers.

- Submits orders via EDI, email, or call-in.

A street sales team (B2C)

- Sells directly to high profile or social media influencer consumers.

- Provides customers with discounts or has marketing arrangements in exchange for driving sales to retailer-direct sales channels

- Submits orders by using email or call-in because pricing and terms must be negotiated.

An Adventure Works Cycles administrative sales team

- Has same responsibilities and activities as the internal sales team.

- Coordinates the management activities of the B2B and B2C teams.

## Products -

Before new bike models are unveiled through social media, it can be difficult for the street team representatives to show customers and retailers the new products with the most up-to-date information because the product is still being manufactured.

Often the data and images for the products are out of date.

The internal sales team uses the Dynamics 365 Supply Chain Management product from to show this information to customers.

For questions about bike-specific warranties and service level agreements, consumers can contact Adventure Works Cycles directly through the active

Adventure Works Cycles social media pages. The company expansion will put a strain on the manual interactions of answering questions.

Information and attributes change often.

## International compliance -

Sales are currently restricted to the US only.

## Requirements -

### General -

No coding is in scope for the project.

Change management operations need to be implemented.

A One Version strategy needs to be implemented.

The most critical business processes must never break when the software updates to the newest version.

No third-party testing tools will be used. Adventure Works Cycles wants to use everything in the Microsoft stack if there is an option available.

Because the company is at capacity with the overwhelming demand, the testing process must be done without users running through the processes every time the software updates.

With the different bike configurations, Adventure Works Cycles would like to use a single business process but test against 10 different data configurations to streamline errors against data variations in the manufacturing process.

## Data administrator -

A single person, the Adventure Works Cycle data administrator, will be tasked with owning all reporting and data tasks.

This one person will need to intimately know all entities and fields, in addition to any changes in the new versions of the software.

Adventure Works Cycles users will inquire with the data administrator about certain data they need to view. The data administrator needs to quickly search data entities by field names and advise users on how to extract data into their own Excel templates for ad hoc reporting and data management tasks.

## Data migration -

The data cleansing and loading into Dynamics 365 will be done by the Adventure Works Cycles data administrator.

With the many changes for the products and data, imports for the data loads must be repeatable and consistent.

The different data loading components will all be done at one time.

After the import order and cadence is done correctly in a test environment, that same process must be reliably replicable for the golden configuration, in addition to any environment refreshes going forward.

Any errors on the data loading must identify the issue for the person to address and fix for future loads.

## Sales -

The sales street team must be able to view and edit (only product descriptions) near real-time information from the Dynamics 365 system about products on their personal mobile phones.

No street team representatives will have access to the Dynamics 365 Supply Chain Management application, but they must be able to enter orders and update customer information into the system without Adventure Works Cycles assistance.

The Adventure Works Cycles internal sales support team must be able to see all street team sales orders entered to provide support, but the internal team should not see any information around the commissions configured on the orders.

The sales support team must be able to see all orders and fields for the different sales teams. No other security differences from a Dynamics perspective are needed.

## Products -

Warranty and Service Level Agreements stored in Dynamics 365 for the different products must not be exposed directly to sales representatives.

The representatives must be able to pose questions from customers and retailers and get answers back almost immediately.

Any opportunity to extend this type of product inquiry and support mechanism to customers and retailers must be evaluated.

The data for all of the product information must be easily extractable back into Excel.

International compliance -

Payments and invoices inbound and outbound must be converted or translated to the correct localized format

Regardless of regulatory compliance, the customer-facing business documents must have a unique template for each country that can be designed within

Microsoft Office applications. These documents must be embedded in Dynamics 365 forms for data export and configurable by non-developers.

### Question

HOTSPOT -

You need to identify technologies to help with the new release requirements.

Which technologies should you use? To answer, select the appropriate options in the answer area.

NOTE: Each correct selection is worth one point.

Hot Area:

### Answer Area

Action	Technology
Store the most critical business processes for future testing.	<input type="checkbox"/> Microsoft Teams <input type="checkbox"/> Azure DevOps <input type="checkbox"/> RSAT desktop application <input type="checkbox"/> Microsoft Word
Regression test the new version of the software.	<input type="checkbox"/> Acceptance test library <input type="checkbox"/> RSAT desktop application <input type="checkbox"/> Dynamics 365 Supply Chain Management <input type="checkbox"/> Azure DevOps

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Reference:

<https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/perf-test/rsat/rsat-install-configure>

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### Question

You need to implement the testing feature to address the manufacturing business process concerns.

Which feature should you use?

- A. Derived
- B. Assignment
- C. Operators
- D. Channel
- E. Snapshot

### Correct Answer: A

With the different bike configurations, Adventure Works Cycles would like to use a single business process but test against 10 different data configurations to streamline errors against data variations in the manufacturing process.

Derived test cases -

The Regression suite automation tool (RSAT) lets you use the same task recording with multiple test cases, so that you can run a task with different data configurations. Select a test case in the Regression suite automation tool and then select New > Create Derived Test Case. This creates a child test case in Azure DevOps. The resulting derived test case is linked to its parent test case in Azure DevOps. It has an Excel parameters file attached but no recording file. The derived test case will appear in the Regression suite automation tool grid under the same test suite with the Derived column selected. By default, derived test cases are named after their parent test case with a numeric suffix.

Reference:

<https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/perf-test/rsat-derived-test-cases>

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Background -

Alpine Ski House sells a variety of ski and outdoor equipment, including apparel and digital content to retailers and wholesalers located in the United States. The central distribution center, accounting and customer service center are located in the company's headquarters building in the state of Colorado. The company also has an additional warehouse in the state of New York. The company is known for its customer-friendly policies.

Current environment -

Alpine Ski House currently has an outdated accounting system that is not connected to the New York warehouse.

The warehouse system contains inventory quantities, but does not have costing, therefore the FIFO principles are applied through spreadsheet calculations at month end.

Alpine Ski House has worked to create a future state roadmap as a foundation for growth. They have decided to implement Dynamics 365 cloud applications and must limit the amount of on premises hardware as they are not staffed for support. They are expecting to implement required devices for warehouse applications to support WMS only.

The customer service center places phone orders on behalf of wholesalers and retailers.

The customer service team provides concierge services to the top 20 largest customers. Each customer service team member is assigned to 5 customers as the customer's dedicated customer service representative.

The call center has a phone system that records calls and stores the call duration.

Data is a combination of systems that are disconnected to include warehouse and accounting. Customer records and consumer records are stored in the call center third-party system. Excel spreadsheets are used for consolidated reporting from these systems.

Alpine Ski House must enable business partners to place their own B2B orders on the web as well as manage their own users.

The company has decided to expand distribution to Banff, Alberta and create a new operating legal entity in Canada. This expansion must be planned for as part of the solution, as it will be up and running six months after the initial US company is operating on the new applications.

Requirements -

Applications and environment -

Required applications must align to the future state roadmap.

Business partners must have the ability to onboard their own users for placing orders on the web.

The Canadian company must use the same base data as the US operating company and must be set up in the same instance.

Sales order history data must not be imported. All current and future orders must be migrated to the new system.

Master data for customers must be migrated from both the call center third-party system as well as the accounting system. You identify the following requirements:

- The mapping fields for customer records in both systems are the same, except the accounting system which has three additional fields that must be mapped.
- Duplicate records must not be imported.

## Cutover plan

- User1 reports that sales orders will be open and not shipped at the time of cutover to production. There are 20 orders expected to be open.

## Customer service -

### General -

Concierge customer service reps must be able to access customer records for all customers in their customer group.

Customer service reps must be able organize how information is presented when they sign into the new system.

Security must be applied to the customer service reps as a group and must not be applied at the individual level.

### Return policies -

Sporting equipment is warranted by the manufacturer and must not be returned to Alpine Ski House warehouse. Alpine Ski House does not strictly enforce this policy. Exceptions to the policy are allowed with manager approval.

Customer service must track reported issues with sporting equipment to identify trends.

Customers can exchange apparel, but refunds must not be permitted. Any consumer exchanges must occur directly through Alpine's call center and cannot be returned to a physical store.

### Exchange policies -

All consumer calls must be logged for tracking purposes. The customer service representative will determine if there is an exchange, or if the consumer should be redirected to the manufacturer. Digital content is final sale only. All complaints must still be tracked.

Returns and replacement orders must be processed through the warehouse. Consumer information for returns and replacement orders does not need to be stored.

A record of the location where the consumer purchased the product must be stored for tracking purpose

- The customer service reps must be able to view the order status for delayed shipments or orders that have been shipped but not invoiced. They need to have shortcuts to view this information.

Returns or credits for a concierge customer that are not from a consumer do not require notifications to the concierge representative.

Web orders must be limited to B2B, and consumers web access must not be required for order placement.

The call center must track the call minutes in the phone system by customer number.

The system must send the following notifications:

- Dedicated concierge representative must be automatically notified when an exchanged product has shipped. The concierge representative must set up the alert.

- External customers must be notified of the new consumer exchanges. The notification must integrate into the customer's third party dashboard and must not be sent as an email notification.

## Customer Service -

The customer service center is overloaded with frequently asked questions (FAQ's) that are consuming resources and creating issues with customer service levels.

Alpine Ski House has decided to deploy an automated FAQ website because they do not have sufficient staff resources to manage customer interactions. All automated interactions must be stored for 30 days.

The company has decided to extend its concierge program to the top 25 customers. A new representative has been hired and requires the same screen layout as other team members.

When new customers are created in the system, the customer number must automatically pass to the call center phone system.

## Implementation -

The implementation is expected to take 12 months. Alpine Ski House wants to ensure that when they go live, they are on the most current available update of

Dynamics 365. Testing must occur in the various stages of the implementation. You identify the following testing requirements:

- Platform updates will be applied, and business processes will be verified to perform as expected, either manual or automated where possible against stored task recordings.

- Development must be completed by the 10th month. Developers must perform initial testing code that they create.

- When development is completed, all processes in the system must be tested by the user group.

Due to competing demands for the project team, the company wants to automate as much of the testing as possible.

The project manager is concerned that a critical field must have validation scripts run against it during automated testing. The developers will be required to write the custom validation script. The user creating the test script must document the step in the test script that the specific validation script must be run for the developers.

The project manager wants to put a control in place to ensure that once the automated testing is established the test scripts are not modified or overwritten.

**Question**

HOTSPOT -

You need to determine the testing type for the activities.

Which testing type should you use? To answer, select the appropriate options in the answer area.

NOTE: Each correct selection is worth one point.

Hot Area:

**Answer Area****Testing                          Type****Requirement 1:**

Unit
Regression
End to end

**Requirement 2:**

Unit
Regression
Functional
End to end

**Requirement 3:**

Unit
Regression
End to end

**Answer Area****Testing                          Type****Requirement 1:**

Unit
Regression
End to end

**Correct Answer:****Requirement 2:**

Unit
Regression
Functional
End to end

**Requirement 3:**

Unit
Regression
End to end

Box 1: Regression -

You identify the following testing requirements:

\* Platform updates will be applied, and business processes will be verified to perform as expected, either manual or automated where possible

against stored task recordings.

Protection against regression:

Regression defects are defects that are introduced when a change is made to the application. It is common for testers to not only test their new feature but also features that existed beforehand in order to verify that previously implemented features still function as expected.

Box 2: Unit -

You identify the following testing requirements:

\* Development must be completed by the 10th month. Developers must perform initial testing code that they create.

A unit test is used to check whether a specific function or feature of your app is working correctly.

Incorrect, Not Functional: Functional tests are expensive. They typically involve opening up the application and performing a series of steps that you (or someone else), must follow in order to validate the expected behavior. These steps may not always be known to the tester, which means they will have to reach out to someone more knowledgeable in the area in order to carry out the test.

Box 3: End to end -

You identify the following testing requirements:

\* When development is completed, all processes in the system must be tested by the user group.

End-to-end tests are used to check whether the overall solution runs correctly. This is important because even if all unit tests function correctly, the integration between two units can potentially fail. These tests are done by following a test scenario that's close to the use case of the actual business process.

Reference:

<https://docs.microsoft.com/en-us/dotnet/core/testing/unit-testing-best-practices> <https://docs.microsoft.com/en-us/powerapps/guidance/planning/testing-phase>

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## Question

**HOTSPOT -**

You need to meet the project manager's requirements for testing.

What should you do? To answer, select the appropriate options in the answer area.

NOTE: Each correct selection is worth one point.

Hot Area:

**Answer Area**

Requirement	Configuration
Document step	<ul style="list-style-type: none"><li>Add developer placeholder</li><li>RSAT optional settings</li><li>Preferred value instruction</li><li>User-supplied value label</li></ul>
Required control	<ul style="list-style-type: none"><li>RSAT configurations</li><li>Azure DevOps settings</li><li>Task recorder edit step</li><li>Hide this step</li></ul>

**Answer Area**

Requirement	Configuration
Document step	<ul style="list-style-type: none"><li>Add developer placeholder</li><li>RSAT optional settings</li><li>Preferred value instruction</li><li>User-supplied value label</li></ul>
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Box 1: Add developer placeholder.

Note: The user creating the test script must document the step in the test script that the specific validation script must be run for the developers.

Add developer placeholder lets the user add a placeholder step to the list of recorded steps. This placeholder step doesn't appear when the task guide is viewed, and it isn't run during maintenance of a recording. It's used only by the Regression suite automation tool (RSAT) or the X++ code generator that enables an X++ test to be created from a task recording. When the code generator creates an X++ test, it automatically adds a method stub to the generated code. The developer can then add X++ code into this method stub. The automated code will call the validation when the generated test is run at the point in the recording where this placeholder was added.

Note: The project manager is concerned that a critical field must have validation scripts run against it during automated testing. The developers will be required to write the custom validation script. The user creating the test script must document the step in the test script that the specific validation script must be run for the developers.

Box 2: Task Recorder Edit Step -

Note: The developers will be required to write the custom validation script.

#### Enriching steps in a recording -

There are various options for enriching a step in a recording. For example, you can adjust the text that is associated with a step and add information about a specific step. This section describes the step enrichment capabilities that are available. To access these options, click the Edit step button on a specific step of a recording.

Reference:

<https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/user-interface/task-recorder>

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### Current environment -

Alpine Ski House currently has an outdated accounting system that is not connected to the New York warehouse.

The warehouse system contains inventory quantities, but does not have costing, therefore the FIFO principles are applied through spreadsheet calculations at month end.

Alpine Ski House has worked to create a future state roadmap as a foundation for growth. They have decided to implement Dynamics 365 cloud applications and must limit the amount of on premises hardware as they are not staffed for support. They are expecting to implement required devices for warehouse applications to support WMS only.

The customer service center places phone orders on behalf of wholesalers and retailers.

The customer service team provides concierge services to the top 20 largest customers. Each customer service team member is assigned to 5 customers as the customer's dedicated customer service representative.

The call center has a phone system that records calls and stores the call duration.

Data is a combination of systems that are disconnected to include warehouse and accounting. Customer records and consumer records are stored in the call center third-party system. Excel spreadsheets are used for consolidated reporting from these systems.

Alpine Ski House must enable business partners to place their own B2B orders on the web as well as manage their own users.

The company has decided to expand distribution to Banff, Alberta and create a new operating legal entity in Canada. This expansion must be planned for as part of the solution, as it will be up and running six months after the initial US company is operating on the new applications.

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## Question

You need to configure the Canadian company's Dynamics 365 Finance system to meet the applications and environment requirements.

How should you create the configuration?

- A. Rebuild and update
- B. Data management copy into legal entity
- C. Data management export and import
- D. Lifecycle Services (LCS) export and import

**Correct Answer:** C

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## Question

You must meet the call center phone system requirements for new customers.

What should you use?

- A. Workflow
- B. Guides
- C. Remote assist
- D. Power Automate

**Correct Answer:** C

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## Question

You need to configure the customer service representative's screen to meet the requirements.

Which three features must be configured? Each correct answer presents part of the solution.

NOTE: Each correct selection is worth one point.

- A. Funnel
- B. Favorites
- C. Charts
- D. Workspaces
- E. Security

**Correct Answer: ACE**

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Background -

Liberty's Delightful Sinful Bakery & Caf© is a baked goods company headquartered in Denver, Colorado. The company has 200 locations around the United

States.

Contoso, Ltd. purchases a majority stake in Liberty's. As part of this acquisition, Contoso, Ltd. plans to implement Dynamics 365 Finance, Dynamics 365 Supply

Chain Management, and Dynamics 365 Retail to support the rapid future growth. Streamlined business processes will be implemented to replace manual processes and Microsoft Excel.

Contoso, Ltd. already has 10 legal entities that use all Dynamics 365 modules in a single tenant. Liberty's will exist within the Contoso, Ltd. tenant as its own legal entity and Lifecycle Services (LCS) project. All environments are cloud based.

Current environment: General -

Contoso, Ltd. uses One Version for detailed regression test planning. The testing plan is fully automated by using the Regression Suite Automation Tool (RSAT).

There is a standardized set of core business processes in a single Business Process Library and functionality-specific business process libraries for the various

Contoso, Ltd. businesses.

Current environment: Environments

The following links are used to connect to Contoso, Ltd.'s environments:

Microsoft SharePoint: <https://Libertys.sharepoint.com>

Dynamics 365: <https://LibertysAos.cloudax.dynamics.com>

Microsoft Azure Dev Ops: <https://Libertys.visualstudio.com>

Microsoft Office 365: <https://Libertys-my.sharepoint.com>

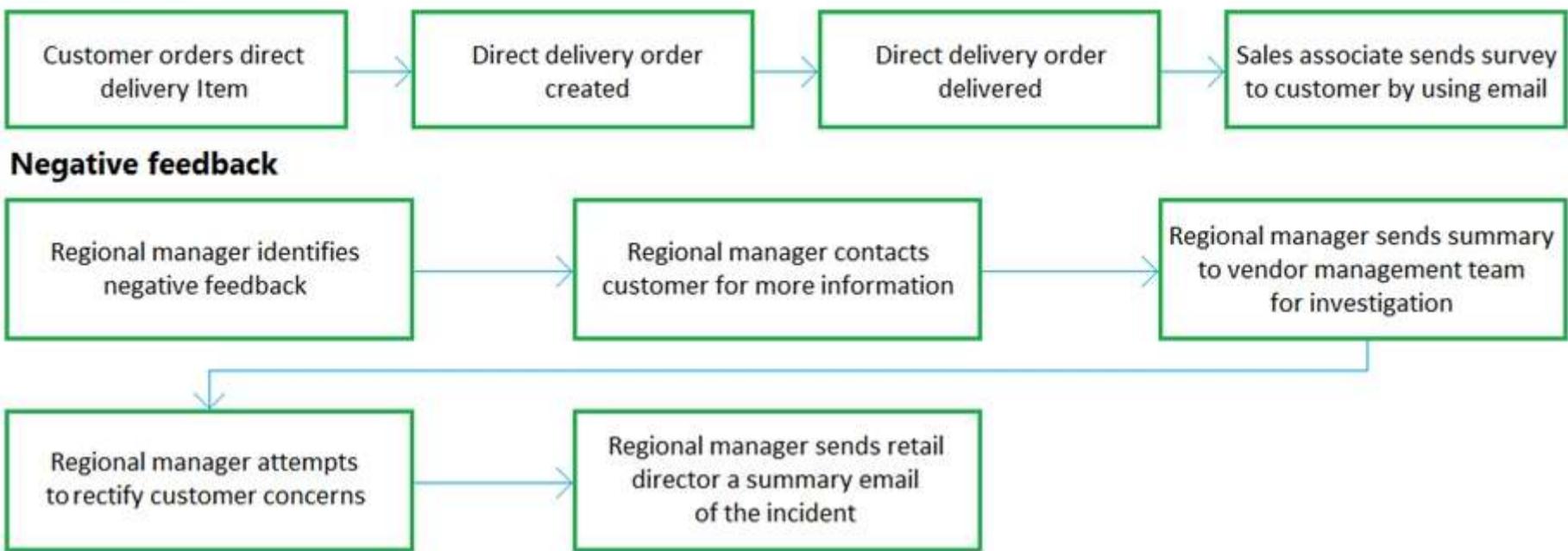
The company uses the following Dynamics 365 version: 10.0.6/Update 30.

Current environment: Operations -

Excel is used extensively by Liberty's and there are many experienced Excel users in the organization. Many users have altered the existing Excel sheets for their own purposes. There is no standard Excel workbook template.

Current environment: Current Workflows

## Direct delivery



Requirements: Business Processes/LCS

Liberty's needs to leverage as many existing Contoso, Ltd.'s business processes as possible to shorten the implementation lifecycle and create similarities between the organizations. There will be one master business process library for Liberty's. There are 100 user acceptance testing scripts. Fourth Coffee is one of Contoso, Ltd.'s legal entities.

Liberty's has a business process library that contains a specific set of functionality. Liberty's would like to use as an existing node in their core business process library.

Sales discounts for high-volume customers must be calculated by using predefined Excel templates. Sales team members must be able to access the template directly from the sales order form.

Requirements: Data Import/Export

Any Excel templates need to be standardized and easily accessible. The integrity of shared templates must be strictly maintained.

After the implementation, the core Liberty's team needs to be empowered to further identify future value-add opportunities for interacting and manipulating their data as future phase initiatives. Once they understand the data structures and capabilities, they need to start creating their own templates that meet their specific needs.

Requirements: Workflow -

A workflow to streamline the feedback of the customer experience is critical. Any negative experience needs to be quickly addressed. Any steps to rectify the customer concerns are handled offline at the discretion of regional managers.

As the company grows, customer history of vendor direct delivery performance must be documented to assure stakeholders that the company is monitoring vendor performance. Any actions to rectify the customer concerns must be approved prior to execution.

Requirements: Go Live/Cutover -

Go Live date: October 1.

Cutover: Seven days before go live with daily delta imports occurring nightly. This process has been fully vetted and is operating properly.

Data Packages to migrate: Two.

Data Imports: Six hours total for all imports.

Performance testing: Liberty's team system administrator reports that they are not planning to conduct performance testing.

Requirements: Software updates -

The customer cannot take updates during their busy season from November 1 - December 31. Any system downtime requires a notification to the users through the proper application management tool. 100% of user acceptance testing is required for any system update.

The first official update to the live software will be the third week of October.

Requirements: Regression testing

There will be no dedicated regression testing team after going live. They are dedicated prior to go live and anything that can be done to virtually eliminate the overhead of regression testing will be done prior to go live.

Requirements: Workspaces -

A standard workspace will be assigned to each regional manager. The workspace will show the following information for stores associated with a regional manager:

Single detailed view of multiple components of their sales data

KPIs for regional sales goals

Drill down capabilities to inquire about the data

Any direct delivery special orders

Any negative inventory items

Regional managers may personalize workspaces as needed.

**Issues -**

The current Open in Excel templates option on the All Customers form is missing several fields. It also contains several additional fields. This form must be replaced.

There was an issue with agreeing upon a supplemental organizational hierarchy used for sales reporting at go live. This hierarchy is exclusively for reporting purposes.

Customer surveys are conducted by using open-ended emails or in store comment cards from the regional managers at random. This process makes it difficult to consistently analyze satisfaction metrics.

There is a concern that there will be something that pops up stopping the go live. A list must be compiled describing notable risk points.

A regional manager is asked to review a direct delivery sales order to determine whether it was created correctly in a test environment. The regional manager trainer cannot see the sales order in question by using the direct delivery sales order link in the user's workspace.

Liberty's instance goes live successfully. In preparation for the first update, several business scenarios were reported as failing in the validation testing. You are working with Microsoft support and reviewing potential fixes to address the issues.

**Question**

You need to recommend a solution to meet the regional manager's workspace reporting requirements.

What should you use?

- A. Inquiry form
- B. Power BI
- C. Power Apps
- D. Record Grid

**Correct Answer: C**

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All Information tab, note that the information displayed is identical to the information displayed on the subsequent tabs. When you are ready to answer a question, click the Question button to return to the question.

Background -

Liberty's Delightful Sinful Bakery & Caf© is a baked goods company headquartered in Denver, Colorado. The company has 200 locations around the United States.

Contoso, Ltd. purchases a majority stake in Liberty's. As part of this acquisition, Contoso, Ltd. plans to implement Dynamics 365 Finance, Dynamics 365 Supply

Chain Management, and Dynamics 365 Retail to support the rapid future growth. Streamlined business processes will be implemented to replace manual processes and Microsoft Excel.

Contoso, Ltd. already has 10 legal entities that use all Dynamics 365 modules in a single tenant. Liberty's will exist within the Contoso, Ltd. tenant as its own legal entity and Lifecycle Services (LCS) project. All environments are cloud based.

Current environment: General -

Contoso, Ltd. uses One Version for detailed regression test planning. The testing plan is fully automated by using the Regression Suite Automation Tool (RSAT).

There is a standardized set of core business processes in a single Business Process Library and functionality-specific business process libraries for the various

Contoso, Ltd. businesses.

Current environment: Environments

The following links are used to connect to Contoso, Ltd.'s environments:

Microsoft SharePoint: <https://Libertys.sharepoint.com>

Dynamics 365: <https://LibertysAos.cloudax.dynamics.com>

Microsoft Azure Dev Ops: <https://Libertys.visualstudio.com>

Microsoft Office 365: <https://Libertys-my.sharepoint.com>

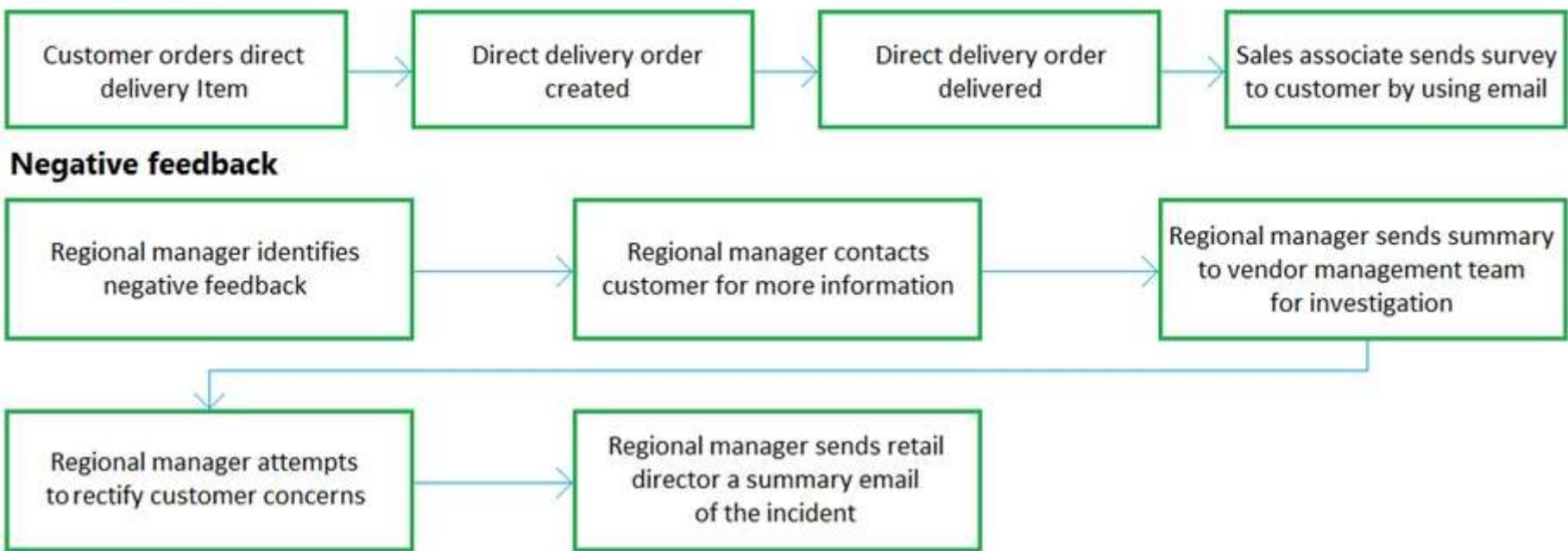
The company uses the following Dynamics 365 version: 10.0.6/Update 30.

Current environment: Operations -

Excel is used extensively by Liberty's and there are many experienced Excel users in the organization. Many users have altered the existing Excel sheets for their own purposes. There is no standard Excel workbook template.

Current environment: Current Workflows

## Direct delivery



Requirements: Business Processes/LCS

Liberty's needs to leverage as many existing Contoso, Ltd.'s business processes as possible to shorten the implementation lifecycle and create similarities between the organizations. There will be one master business process library for Liberty's. There are 100 user acceptance testing scripts. Fourth Coffee is one of Contoso, Ltd.'s legal entities.

Liberty's has a business process library that contains a specific set of functionality. Liberty's would like to use as an existing node in their core business process library.

Sales discounts for high-volume customers must be calculated by using predefined Excel templates. Sales team members must be able to access the template directly from the sales order form.

Requirements: Data Import/Export

Any Excel templates need to be standardized and easily accessible. The integrity of shared templates must be strictly maintained.

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**Question**

HOTSPOT -

You need to configure the workflows.

What should you do? To answer, select the appropriate options in the answer area.

NOTE: Each correct selection is worth one point.

Hot Area:

**Answer Area**

**Workflow requirement**

**Action**

Direct Delivery Sales Order is delivered.

- Create an alert that is triggered to send externally.
- Create a Dynamics 365 workflow that is triggered to send external notifications.
- Trigger a Power App embedded within Dynamics 365 to send a survey.

Reach out to the customer for feedback.

- Use an automatic email from the manager.
- Use Forms Pro connection.
- Use an SMS text message.

**Correct Answer:**

**Answer Area**

**Workflow requirement**

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Background -

Current environment -

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The limited-edition bicycles are the most successful. They have high margins, are in high demand, and have a fervent following with the younger bicycle community that wants to make a social statement. Most consumers become aware of the other Adventure Works Cycles bicycles through these limited editions.

Adventure Works Cycles wants to triple its manufacturing capabilities and expand to countries/regions in South America, Western Europe, and United Arab

Emirates (UAE) over the next few years.

General -

To facilitate these expansions, Adventure Works Cycles has decided to invest in Dynamics 365 Finance, Dynamics 365 Supply Chain Management, and the

Power Platform products to digitally innovate from a custom-built enterprise resource plan (ERP), and Microsoft Excel worksheets.

Adventure Works Cycles sells only to North America and Canada but still cannot keep up with current demand. Over time, market expansion will be the only way to remain profitable.

Expansion has been limited in the past due to legal requirements and regulations around document formatting and the lack of a developer.

Adventure Work Cycles has no capabilities or budget to undertake any development past the Excel formula-level tasks.

There are no formal change management procedures.

Sales -

There are three distinct sales teams:

An internal sales team (B2B)

- Sells to retailers.

- Submits orders via EDI, email, or call-in.

A street sales team (B2C)

- Sells directly to high profile or social media influencer consumers.

- Provides customers with discounts or has marketing arrangements in exchange for driving sales to retailer-direct sales channels

- Submits orders by using email or call-in because pricing and terms must be negotiated.

An Adventure Works Cycles administrative sales team

- Has same responsibilities and activities as the internal sales team.

- Coordinates the management activities of the B2B and B2C teams.

## Products -

Before new bike models are unveiled through social media, it can be difficult for the street team representatives to show customers and retailers the new products with the most up-to-date information because the product is still being manufactured.

Often the data and images for the products are out of date.

The internal sales team uses the Dynamics 365 Supply Chain Management product from to show this information to customers.

For questions about bike-specific warranties and service level agreements, consumers can contact Adventure Works Cycles directly through the active

Adventure Works Cycles social media pages. The company expansion will put a strain on the manual interactions of answering questions.

Information and attributes change often.

## International compliance -

Sales are currently restricted to the US only.

## Requirements -

### General -

No coding is in scope for the project.

Change management operations need to be implemented.

A One Version strategy needs to be implemented.

The most critical business processes must never break when the software updates to the newest version.

No third-party testing tools will be used. Adventure Works Cycles wants to use everything in the Microsoft stack if there is an option available. Because the company is at capacity with the overwhelming demand, the testing process must be done without users running through the processes every time the software updates.

With the different bike configurations, Adventure Works Cycles would like to use a single business process but test against 10 different data configurations to streamline errors against data variations in the manufacturing process.

## Data administrator -

A single person, the Adventure Works Cycle data administrator, will be tasked with owning all reporting and data tasks.

This one person will need to intimately know all entities and fields, in addition to any changes in the new versions of the software.

Adventure Works Cycles users will inquire with the data administrator about certain data they need to view. The data administrator needs to quickly search data entities by field names and advise users on how to extract data into their own Excel templates for ad hoc reporting and data management tasks.

## Data migration -

The data cleansing and loading into Dynamics 365 will be done by the Adventure Works Cycles data administrator.

With the many changes for the products and data, imports for the data loads must be repeatable and consistent.

The different data loading components will all be done at one time.

After the import order and cadence is done correctly in a test environment, that same process must be reliably replicable for the golden configuration, in addition to any environment refreshes going forward.

Any errors on the data loading must identify the issue for the person to address and fix for future loads.

## Sales -

The sales street team must be able to view and edit (only product descriptions) near real-time information from the Dynamics 365 system about products on their personal mobile phones.

No street team representatives will have access to the Dynamics 365 Supply Chain Management application, but they must be able to enter orders and update customer information into the system without Adventure Works Cycles assistance.

The Adventure Works Cycles internal sales support team must be able to see all street team sales orders entered to provide support, but the internal team should not see any information around the commissions configured on the orders.

The sales support team must be able to see all orders and fields for the different sales teams. No other security differences from a Dynamics perspective are needed.

## Products -

Warranty and Service Level Agreements stored in Dynamics 365 for the different products must not be exposed directly to sales representatives.

The representatives must be able to pose questions from customers and retailers and get answers back almost immediately.

Any opportunity to extend this type of product inquiry and support mechanism to customers and retailers must be evaluated.

The data for all of the product information must be easily extractable back into Excel.

International compliance -

Payments and invoices inbound and outbound must be converted or translated to the correct localized format

Regardless of regulatory compliance, the customer-facing business documents must have a unique template for each country that can be designed within

Microsoft Office applications. These documents must be embedded in Dynamics 365 forms for data export and configurable by non-developers.

### Question

You need to extend the warranty and SLAs to meet the requirements.

What should you do?

- A. Integrate the solution with a Dynamics 365 Data Entity.
- B. Configure a Power Automate flow for the solution.
- C. Configure the solution for a Power Virtual Agents channel.
- D. Integrate the solution into a Power Apps integrated social media platform.

**Correct Answer: C**

Reference:

<https://docs.microsoft.com/en-us/dynamics365/customer-service/configure-bot-virtual-agent>

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### Question

HOTSPOT -

You need to design the street team mobile application for creating sales orders in the mobile application.

Which technologies should you use? To answer, select the appropriate options in the answer area.

NOTE: Each correct selection is worth one point.

Hot Area:

### Answer Area

Requirement	Technology				
Store product information for use in the mobile application.	<table border="1"><tr><td>Common Data Service</td></tr><tr><td>Dynamics 365 Supply Chain Management</td></tr><tr><td>Mobile App SQL lite database</td></tr><tr><td>Power Apps</td></tr></table>	Common Data Service	Dynamics 365 Supply Chain Management	Mobile App SQL lite database	Power Apps
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Any errors on the data loading must identify the issue for the person to address and fix for future loads.

Sales -

The sales street team must be able to view and edit (only product descriptions) near real-time information from the Dynamics 365 system about products on their personal mobile phones.

No street team representatives will have access to the Dynamics 365 Supply Chain Management application, but they must be able to enter orders and update customer information into the system without Adventure Works Cycles assistance.

The Adventure Works Cycles internal sales support team must be able to see all street team sales orders entered to provide support, but the internal team should not see any information around the commissions configured on the orders.

The sales support team must be able to see all orders and fields for the different sales teams. No other security differences from a Dynamics perspective are needed.

Products -

Warranty and Service Level Agreements stored in Dynamics 365 for the different products must not be exposed directly to sales representatives.

The representatives must be able to pose questions from customers and retailers and get answers back almost immediately.

Any opportunity to extend this type of product inquiry and support mechanism to customers and retailers must be evaluated.

The data for all of the product information must be easily extractable back into Excel.

International compliance -

Payments and invoices inbound and outbound must be converted or translated to the correct localized format

Regardless of regulatory compliance, the customer-facing business documents must have a unique template for each country that can be designed within Microsoft Office applications. These documents must be embedded in Dynamics 365 forms for data export and configurable by non-developers.

### Question

HOTSPOT -

You need to identify the features that support the expansion.

Which feature should you use? To answer, select the appropriate options in the answer area.

NOTE: Each correct selection is worth one point.

Hot Area:

### Answer Area

#### Requirement

Resolve the concerns about payments and invoices.

#### Feature

Microsoft Office
Business document management
Electronic reporting
Document Routing Agent

Use existing assets for the international compliance solution.

Microsoft Excel
Entities
Common Data Service
Configuration provider

Generate the document templates for the countries.

Document Routing Agent
Power BI
Electronic reporting
Business document management

### Answer Area

#### Requirement

Resolve the concerns about payments and invoices.

#### Feature

Microsoft Office
Business document management
Electronic reporting
Document Routing Agent

Correct Answer: Use existing assets for the international compliance solution.

Microsoft Excel
Entities
Common Data Service
Configuration provider

Generate the document templates for the countries.

Document Routing Agent
Power BI
Electronic reporting
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Reference:

<https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/analytics/general-electronic-reporting> <https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/analytics/er-business-document-management>

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Background -

Current environment -

Adventure Works Cycles is a high-end bicycle manufacturer in North America founded in 2010. The company has standard bicycles available year round in addition to limited-edition bicycle models released domestically several times per year to boutique retailers.

The limited-edition bicycles are the most successful. They have high margins, are in high demand, and have a fervent following with the younger bicycle community that wants to make a social statement. Most consumers become aware of the other Adventure Works Cycles bicycles through these limited editions.

Adventure Works Cycles wants to triple its manufacturing capabilities and expand to countries/regions in South America, Western Europe, and United Arab

Emirates (UAE) over the next few years.

General -

To facilitate these expansions, Adventure Works Cycles has decided to invest in Dynamics 365 Finance, Dynamics 365 Supply Chain Management, and the

Power Platform products to digitally innovate from a custom-built enterprise resource plan (ERP), and Microsoft Excel worksheets.

Adventure Works Cycles sells only to North America and Canada but still cannot keep up with current demand. Over time, market expansion will be the only way to remain profitable.

Expansion has been limited in the past due to legal requirements and regulations around document formatting and the lack of a developer.

Adventure Work Cycles has no capabilities or budget to undertake any development past the Excel formula-level tasks.

There are no formal change management procedures.

Sales -

There are three distinct sales teams:

An internal sales team (B2B)

- Sells to retailers.

- Submits orders via EDI, email, or call-in.

A street sales team (B2C)

- Sells directly to high profile or social media influencer consumers.

- Provides customers with discounts or has marketing arrangements in exchange for driving sales to retailer-direct sales channels

- Submits orders by using email or call-in because pricing and terms must be negotiated.

An Adventure Works Cycles administrative sales team

- Has same responsibilities and activities as the internal sales team.

- Coordinates the management activities of the B2B and B2C teams.

Products -

Before new bike models are unveiled through social media, it can be difficult for the street team representatives to show customers and retailers the new products with the most up-to-date information because the product is still being manufactured.

Often the data and images for the products are out of date.

The internal sales team uses the Dynamics 365 Supply Chain Management product from to show this information to customers.

For questions about bike-specific warranties and service level agreements, consumers can contact Adventure Works Cycles directly through the active

Adventure Works Cycles social media pages. The company expansion will put a strain on the manual interactions of answering questions.

Information and attributes change often.

International compliance -

Sales are currently restricted to the US only.

Requirements -

General -

No coding is in scope for the project.

Change management operations need to be implemented.

A One Version strategy needs to be implemented.

The most critical business processes must never break when the software updates to the newest version.

No third-party testing tools will be used. Adventure Works Cycles wants to use everything in the Microsoft stack if there is an option available.

Because the company is at capacity with the overwhelming demand, the testing process must be done without users running through the processes every time the software updates.

With the different bike configurations, Adventure Works Cycles would like to use a single business process but test against 10 different data configurations to streamline errors against data variations in the manufacturing process.

Data administrator -

A single person, the Adventure Works Cycle data administrator, will be tasked with owning all reporting and data tasks.

This one person will need to intimately know all entities and fields, in addition to any changes in the new versions of the software.

Adventure Works Cycles users will inquire with the data administrator about certain data they need to view. The data administrator needs to quickly search data entities by field names and advise users on how to extract data into their own Excel templates for ad hoc reporting and data management tasks.

Data migration -

The data cleansing and loading into Dynamics 365 will be done by the Adventure Works Cycles data administrator.

With the many changes for the products and data, imports for the data loads must be repeatable and consistent.

The different data loading components will all be done at one time.

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**Question**

DRAG DROP -

You need to identify which Microsoft features will accomplish the actions.

Which features should you use? To answer, drag the appropriate features to the correct actions. Each feature may be used once, more than once, or not at all.

You may need to drag the split bar between panes or scroll to view content.

NOTE: Each correct selection is worth one point.

Select and Place:

### Answer Area

Actions	Action	Feature
OData		
Dual-write	Enable the street sales team to respond to inquiries on products.	
Business Events	Use the street team mobile application for sales order creation.	
Power Automate		

### Answer Area

Actions	Action	Feature
OData		
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#### Question

DRAG DROP -

You need to configure the system to meet the requirements for the sales street team representatives.

Which products should you use? To answer, drag the appropriate products to the correct requirements. Each product may be used once, more than once, or not at all. You may need to drag the split bar between panes or scroll to view content.

NOTE: Each correct selection is worth one point.

Select and Place:

#### Answer Area

Products	Requirement	Product
Dynamics 365 Supply Chain Management		
Power Apps	Manage sales orders.	
Power Automate	Answer questions about the Warranties and Service Level Agreements.	
Power Virtual Agents		

#### Answer Area

Products	Requirement	Product
Dynamics 365 Supply Chain Management		
Correct Answer: Power Automate	Manage sales orders.	Power Apps
	Answer questions about the Warranties and Service Level Agreements.	Power Virtual Agents

Reference:

<https://docs.microsoft.com/en-us/power-virtual-agents/fundamentals-what-is-power-virtual-agents>

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Background -

Alpine Ski House sells a variety of ski and outdoor equipment, including apparel and digital content to retailers and wholesalers located in the United States. The central distribution center, accounting and customer service center are located in the company's headquarters building in the state of Colorado. The company also has an additional warehouse in the state of New York. The company is known for its customer-friendly policies.

Current environment -

Alpine Ski House currently has an outdated accounting system that is not connected to the New York warehouse.

The warehouse system contains inventory quantities, but does not have costing, therefore the FIFO principles are applied through spreadsheet calculations at month end.

Alpine Ski House has worked to create a future state roadmap as a foundation for growth. They have decided to implement Dynamics 365 cloud applications and must limit the amount of on premises hardware as they are not staffed for support. They are expecting to implement required devices for warehouse applications to support WMS only.

The customer service center places phone orders on behalf of wholesalers and retailers.

The customer service team provides concierge services to the top 20 largest customers. Each customer service team member is assigned to 5 customers as the customer's dedicated customer service representative.

The call center has a phone system that records calls and stores the call duration.

Data is a combination of systems that are disconnected to include warehouse and accounting. Customer records and consumer records are stored in the call center third-party system. Excel spreadsheets are used for consolidated reporting from these systems.

Alpine Ski House must enable business partners to place their own B2B orders on the web as well as manage their own users.

The company has decided to expand distribution to Banff, Alberta and create a new operating legal entity in Canada. This expansion must be planned for as part of the solution, as it will be up and running six months after the initial US company is operating on the new applications.

Requirements -

Applications and environment -

Required applications must align to the future state roadmap.

Business partners must have the ability to onboard their own users for placing orders on the web.

The Canadian company must use the same base data as the US operating company and must be set up in the same instance.

Sales order history data must not be imported. All current and future orders must be migrated to the new system.

Master data for customers must be migrated from both the call center third-party system as well as the accounting system. You identify the following requirements:

- The mapping fields for customer records in both systems are the same, except the accounting system which has three additional fields that must be mapped.
- Duplicate records must not be imported.

## Cutover plan

- User1 reports that sales orders will be open and not shipped at the time of cutover to production. There are 20 orders expected to be open.

## Customer service -

### General -

Concierge customer service reps must be able to access customer records for all customers in their customer group.

Customer service reps must be able organize how information is presented when they sign into the new system.

Security must be applied to the customer service reps as a group and must not be applied at the individual level.

### Return policies -

Sporting equipment is warranted by the manufacturer and must not be returned to Alpine Ski House warehouse. Alpine Ski House does not strictly enforce this policy. Exceptions to the policy are allowed with manager approval.

Customer service must track reported issues with sporting equipment to identify trends.

Customers can exchange apparel, but refunds must not be permitted. Any consumer exchanges must occur directly through Alpine's call center and cannot be returned to a physical store.

### Exchange policies -

All consumer calls must be logged for tracking purposes. The customer service representative will determine if there is an exchange, or if the consumer should be redirected to the manufacturer. Digital content is final sale only. All complaints must still be tracked.

Returns and replacement orders must be processed through the warehouse. Consumer information for returns and replacement orders does not need to be stored.

A record of the location where the consumer purchased the product must be stored for tracking purpose

The customer service reps must be able to view the order status for delayed shipments or orders that have been shipped but not invoiced. They need to have shortcuts to view this information.

Returns or credits for a concierge customer that are not from a consumer do not require notifications to the concierge representative.

Web orders must be limited to B2B, and consumers web access must not be required for order placement.

The call center must track the call minutes in the phone system by customer number.

The system must send the following notifications:

- Dedicated concierge representative must be automatically notified when an exchanged product has shipped. The concierge representative must set up the alert.

- External customers must be notified of the new consumer exchanges. The notification must integrate into the customer's third party dashboard and must not be sent as an email notification.

## Customer Service -

The customer service center is overloaded with frequently asked questions (FAQ's) that are consuming resources and creating issues with customer service levels.

Alpine Ski House has decided to deploy an automated FAQ website because they do not have sufficient staff resources to manage customer interactions. All automated interactions must be stored for 30 days.

The company has decided to extend its concierge program to the top 25 customers. A new representative has been hired and requires the same screen layout as other team members.

When new customers are created in the system, the customer number must automatically pass to the call center phone system.

## Implementation -

The implementation is expected to take 12 months. Alpine Ski House wants to ensure that when they go live, they are on the most current available update of

Dynamics 365. Testing must occur in the various stages of the implementation. You identify the following testing requirements:

- Platform updates will be applied, and business processes will be verified to perform as expected, either manual or automated where possible against stored task recordings.

- Development must be completed by the 10th month. Developers must perform initial testing code that they create.

- When development is completed, all processes in the system must be tested by the user group.

Due to competing demands for the project team, the company wants to automate as much of the testing as possible.

The project manager is concerned that a critical field must have validation scripts run against it during automated testing. The developers will be required to write the custom validation script. The user creating the test script must document the step in the test script that the specific validation script must be run for the developers.

The project manager wants to put a control in place to ensure that once the automated testing is established the test scripts are not modified or overwritten.

### Question

You must meet the requirements for frequently asked questions (FAQs).

Which two features are required? Each correct answer presents part of the solution.

NOTE: Each correct selection is worth one point.

A. Microsoft Dataverse

B. Power Apps app

C. Azure Data Lake

D. Power Virtual Agents

E. Remote assist

#### Correct Answer: BD

Power Virtual Agents lets you create powerful chatbots that can answer questions posed by your customers, other employees, or visitors to your website or service.

Manage how long to keep bot's conversation transcripts:

1. By default, a pre-configured bulk delete job will remove all conversation transcripts older than a month. To retain the transcripts for longer, you need to disable the existing system job and create a new job.
2. In the <https://www.powerapps.com>, click on the Settings cog (top-right menu) and click on Advanced settings.
3. After clicking on Advanced settings, you are redirected to the Dynamics 365 portal.
4. On the Settings menu, select Data Management.
5. On the Data Management screen, select Bulk Record Deletion.
6. On the Bulk Record Deletion screen, expand the View dropdown and select Recurring Bulk Deletion System Jobs.
7. Select the pre-configured bulk delete job called Bulk Delete Conversation Transcript Records Older Than 1 Month.

Note:

☞ The customer service center is overloaded with frequently asked questions (FAQ's) that are consuming resources and creating issues with customer service levels.

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The call center must track the call minutes in the phone system by customer number.

The system must send the following notifications:

- Dedicated concierge representative must be automatically notified when an exchanged product has shipped. The concierge representative must set up the alert.
- External customers must be notified of the new consumer exchanges. The notification must integrate into the customer's third party dashboard and must not be sent as an email notification.

### Customer Service -

The customer service center is overloaded with frequently asked questions (FAQ's) that are consuming resources and creating issues with customer service levels.

Alpine Ski House has decided to deploy an automated FAQ website because they do not have sufficient staff resources to manage customer interactions. All automated interactions must be stored for 30 days.

The company has decided to extend its concierge program to the top 25 customers. A new representative has been hired and requires the same screen layout as other team members.

When new customers are created in the system, the customer number must automatically pass to the call center phone system.

### Implementation -

The implementation is expected to take 12 months. Alpine Ski House wants to ensure that when they go live, they are on the most current available update of

Dynamics 365. Testing must occur in the various stages of the implementation. You identify the following testing requirements:

- Platform updates will be applied, and business processes will be verified to perform as expected, either manual or automated where possible against stored task recordings.
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- When development is completed, all processes in the system must be tested by the user group.

Due to competing demands for the project team, the company wants to automate as much of the testing as possible.

The project manager is concerned that a critical field must have validation scripts run against it during automated testing. The developers will be required to write the custom validation script. The user creating the test script must document the step in the test script that the specific validation script must be run for the developers.

The project manager wants to put a control in place to ensure that once the automated testing is established the test scripts are not modified or overwritten.

## Question

**HOTSPOT -**

You must configure the master data for customers import to meet the applications and environment requirements.

How should the master data for customers' import be configured? To answer, select the appropriate options in the answer area.

NOTE: Fact correct selection is worth one point.

Hot Area:

**Answer Area**

Requirement	Configuration			
Number of entity mappings	<table border="1"><tr><td>1</td></tr><tr><td>2</td></tr><tr><td>3</td></tr></table>	1	2	3
1				
2				
3				
Duplicate records	<table border="1"><tr><td>View staging data execution summary</td></tr><tr><td>Copy data to target</td></tr><tr><td>Skip staging</td></tr></table>	View staging data execution summary	Copy data to target	Skip staging
View staging data execution summary				
Copy data to target				
Skip staging				

Correct Answer:

**Answer Area**

Requirement	Configuration			
Number of entity mappings	<table border="1"><tr><td>1</td></tr><tr><td>2</td></tr><tr><td>3</td></tr></table>	1	2	3
1				
2				
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View staging data execution summary				
Copy data to target				
Skip staging				

Box 1: 3 -

One entity mapping for each of three fields.

Note: Master data for customers must be migrated from both the call center third-party system as well as the accounting system. You identify the following requirements:

- \* The mapping fields for customer records in both systems are the same, except the accounting system which has three additional fields that must be mapped.
- \* Duplicate records must not be imported.

Box 2: View staging data execution summary

Note:

- \* Duplicate records must not be imported.

Reference:

<https://github.com/MicrosoftDocs/power-platform/blob/main/power-platform/admin/data-integrator.md> <https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/data-entities/data-entities>

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### Current environment -

Alpine Ski House currently has an outdated accounting system that is not connected to the New York warehouse.

The warehouse system contains inventory quantities, but does not have costing, therefore the FIFO principles are applied through spreadsheet calculations at month end.

Alpine Ski House has worked to create a future state roadmap as a foundation for growth. They have decided to implement Dynamics 365 cloud applications and must limit the amount of on premises hardware as they are not staffed for support. They are expecting to implement required devices for warehouse applications to support WMS only.

The customer service center places phone orders on behalf of wholesalers and retailers.

The customer service team provides concierge services to the top 20 largest customers. Each customer service team member is assigned to 5 customers as the customer's dedicated customer service representative.

The call center has a phone system that records calls and stores the call duration.

Data is a combination of systems that are disconnected to include warehouse and accounting. Customer records and consumer records are stored in the call center third-party system. Excel spreadsheets are used for consolidated reporting from these systems.

Alpine Ski House must enable business partners to place their own B2B orders on the web as well as manage their own users.

The company has decided to expand distribution to Banff, Alberta and create a new operating legal entity in Canada. This expansion must be planned for as part of the solution, as it will be up and running six months after the initial US company is operating on the new applications.

### Requirements -

#### Applications and environment -

Required applications must align to the future state roadmap.

Business partners must have the ability to onboard their own users for placing orders on the web.

The Canadian company must use the same base data as the US operating company and must be set up in the same instance.

Sales order history data must not be imported. All current and future orders must be migrated to the new system.

Master data for customers must be migrated from both the call center third-party system as well as the accounting system. You identify the following requirements:

- The mapping fields for customer records in both systems are the same, except the accounting system which has three additional fields that must be mapped.
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#### Cutover plan

- User1 reports that sales orders will be open and not shipped at the time of cutover to production. There are 20 orders expected to be open.

## Customer service -

### General -

Concierge customer service reps must be able to access customer records for all customers in their customer group.

Customer service reps must be able organize how information is presented when they sign into the new system.

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### Return policies -

Sporting equipment is warranted by the manufacturer and must not be returned to Alpine Ski House warehouse. Alpine Ski House does not strictly enforce this policy. Exceptions to the policy are allowed with manager approval.

Customer service must track reported issues with sporting equipment to identify trends.

Customers can exchange apparel, but refunds must not be permitted. Any consumer exchanges must occur directly through Alpine's call center and cannot be returned to a physical store.

### Exchange policies -

All consumer calls must be logged for tracking purposes. The customer service representative will determine if there is an exchange, or if the consumer should be redirected to the manufacturer. Digital content is final sale only. All complaints must still be tracked.

Returns and replacement orders must be processed through the warehouse. Consumer information for returns and replacement orders does not need to be stored.

A record of the location where the consumer purchased the product must be stored for tracking purpose

The customer service reps must be able to view the order status for delayed shipments or orders that have been shipped but not invoiced. They need to have shortcuts to view this information.

Returns or credits for a concierge customer that are not from a consumer do not require notifications to the concierge representative.

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The system must send the following notifications:

- Dedicated concierge representative must be automatically notified when an exchanged product has shipped. The concierge representative must set up the alert.
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The customer service center is overloaded with frequently asked questions (FAQ's) that are consuming resources and creating issues with customer service levels.

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The company has decided to extend its concierge program to the top 25 customers. A new representative has been hired and requires the same screen layout as other team members.

When new customers are created in the system, the customer number must automatically pass to the call center phone system.

### Implementation -

The implementation is expected to take 12 months. Alpine Ski House wants to ensure that when they go live, they are on the most current available update of

Dynamics 365. Testing must occur in the various stages of the implementation. You identify the following testing requirements:

- Platform updates will be applied, and business processes will be verified to perform as expected, either manual or automated where possible against stored task recordings.
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The project manager wants to put a control in place to ensure that once the automated testing is established the test scripts are not modified or overwritten.

## Question

**HOTSPOT -**

You need to configure the alert rules for notification 2.

Which alert rule configuration should you use? To answer, select the appropriate options in the answer area.

NOTE: Each correct selection is worth one point.

Hot Area:

**Answer Area**

<b>Alert rule</b>	<b>Configuration</b>
Organization wide	<input type="checkbox"/> Yes <input type="checkbox"/> No
Send externally	<input type="checkbox"/> Yes <input type="checkbox"/> No
Format	<input type="checkbox"/> Business events <input type="checkbox"/> SMTP settings <input type="checkbox"/> Get certificate

**Answer Area**

<b>Alert rule</b>	<b>Configuration</b>
Organization wide	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Send externally	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Format	<input type="checkbox"/> Business events <input type="checkbox"/> SMTP settings <input type="checkbox"/> Get certificate

Box 1: Yes -

Note: External customers must be notified of the new consumer exchanges. The notification must integrate into the customer's third party dashboard and must not be sent as an email notification.

Box 2: Yes -

Box 3: Business events -

Business events provide a mechanism that lets external systems receive notifications from Finance and Operations applications. In this way,

the systems can perform business actions in response to the business events.

Reference:

<https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/business-events/home-page>

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The project manager wants to put a control in place to ensure that once the automated testing is established the test scripts are not modified or overwritten.

## Question

You need to determine which applications are required for the Alpine Ski House solution.

Which Dynamics 365 apps should you use?

- A. Dynamics 365 Finance, Dynamics 365 Supply Chain Management, and Dynamics 365 Project Operations
- B. Dynamics 365 Finance, Dynamics 365 Supply Chain Management, and Dynamics 365 Commerce**
- C. Dynamics 365 Supply Chain Management and Dynamics 365 Commerce
- D. Dynamics 365 Finance and Dynamics 365 Supply Chain Management
- E. Dynamics 365 Finance, Dynamics 365 Project Operations, and Dynamics 365 Commerce

**Correct Answer: B**

Required applications must align to the future state roadmap.

\* Dynamics 365 Finance

Includes budgeting, project management, financials, and accounting for large, international companies.

\* Dynamics 365 Supply Chain Management

A supply chain solution developed to evolve the trade, manufacturing, and supply chain processes.

\* Dynamics 365 Commerce

To cover Customer Service etc.

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Background -

Relecloud is a cloud point of sale (POS) software company specializing in direct to consumer food stands. They have multiple business units using their new

Dynamics 365 Finance implementation including customer-facing representatives for account management, technical support, customer service, and finance.

There are two legal entities, one for operations and one for financials. Customers pay for the Relecloud POS software monthly and everything is deployed in the cloud. The Dynamics instance URL is <https://relecloud-prod.operations.dynamics.com>.

Munson's Pickles and Preserves Farm is a company that uses Relecloud's cloud POS software to sell their produce in farmers markets. Munson's was one of

Relecloud's first customers, and Relecloud stocks their employee lunchroom with Munson's products. Munson's has also been subcontracting their employees to

Relecloud to help functionally build a best-in-breed solution. Munson's employees assume multiple organizational positions. Each employee has only a single email address by which people can contact them.

Current environment: System and IT

Dynamics 365 Finance was recently updated.

All recurring batch jobs in the system were removed and recreated.

The alert notification batch processing was recently changed from every 10 minutes to once every two hours.

Real-time reporting of the information is not needed.

Current environment: Customer Service

Customer credit requests are entered through the customer service team.

All requests must contain a date, time, reason for request, and customer service notes on initial recommendations for credit action.

Customers have multiple points of contact who can enter support tickets to the Relecloud portal.

Tickets are automatically generated in the support team's third-party system when they are created by support technicians.

The Dynamics 365 email client mail is used to correspond with customers.

Current environment: Technical Support/IT

The technical support team gets involved when technical issues arise with the Relecloud software. Service tickets are entered and get escalated to the team, depending on the issue.

Microsoft Flow is used for automating different workstreams.

Workflows are not configured for the technical support request flows in Dynamics 365 Finance.

Management and history of technical support tickets are handled in a third-party issue management solution.

The technical service team manages issues related to the Relecloud POS as well as the Dynamics 365 application.

Current environment: Account Representatives

Each customer is assigned a single account representative.

Account representatives use multiple devices.

Only account representatives have the ability to approve credits.

All emails to customers come through their own Outlook instance.

Current environment: Finance -

Customers do not have invoice accounts.

Only finance resources have the ability to enter credits.

Credits can be entered by any of the four finance resources assigned the Credits and Refunds security role.

If the request has not been updated in four days, the request is escalated to the Controller. The account representative must be alerted when this occurs.

Requirements: Technical support/IT

Support technicians must use Microsoft's existing knowledge base to resolve open issues.

If an issue exists, support technicians must report the status of the issue on a weekly basis.

If there is no existing support request, support technicians must create one for Microsoft evaluation.

All software must be installed centrally when possible.

The Dynamics 365 Finance production environment must have an update cadence of every second Saturday from 4-7 A.M. EST.

Updates must be tested in a separate environment.

Requirements: Account representatives

Account representatives must be able to see only the relevant customer fields and records automatically from their dashboard.

Account representatives must be able to export the list of customers to Microsoft Excel.

Account representatives must be able to navigate to the customer master record for any editing or record entry tasks.

The forms must be relevant based on each account representative's needs.

Account representatives need a centralized location to see multiple data components.

Account representatives require an offline list of their current customers in Excel with only the fields they need.

The IT Director must reassign all instances of an account representative's customer contacts if the representative leaves the company.

An alert must be sent automatically to an account representative when a credit is issued or any data is changed on a customer's record.

Requirements: Financials -

Any refund must be printed as a physical check.

All printers must be exclusive to the financial legal entity.

Issues -

Typing 'pickle' in the search box yields no returned results for the account representative.

After the latest update, an account representative reports that he is no longer receiving alert notifications when a customer's contact is changed.

An account representative has recently resigned.

### Question

You need to detail a business process for streamlining the customer editing process for account representatives.

Which two actions should you perform? Each correct answer presents a partial solution.

NOTE: Each correct selection is worth one point.

- A. Navigate to the All Customer form from the Accounts receivable module and select the appropriate customer account.
- B. Navigate to the account representative's workspace and select the appropriate customer account.
- C. Select the form and then select Hide.
- D. Hide Invoice account from the view.

**Correct Answer: AD**

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An account representative has recently resigned.

### Question

You need to configure the system for account representatives.

Which two actions should you perform? Each correct answer presents a complete solution.

NOTE: Each correct selection is worth one point.

- A. Recreate the job alert as a change-based alert.
- B. Enable change-based alerts.
- C. Increase the batch job running frequency.
- D. Specify the batch server for the alert notifications job.

**Correct Answer: AC**

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Background -

Relecloud is a cloud point of sale (POS) software company specializing in direct to consumer food stands. They have multiple business units using their new

Dynamics 365 Finance implementation including customer-facing representatives for account management, technical support, customer service, and finance.

There are two legal entities, one for operations and one for financials. Customers pay for the Relecloud POS software monthly and everything is deployed in the cloud. The Dynamics instance URL is <https://relecloud-prod.operations.dynamics.com>.

Munson's Pickles and Preserves Farm is a company that uses Relecloud's cloud POS software to sell their produce in farmers markets. Munson's was one of

Relecloud's first customers, and Relecloud stocks their employee lunchroom with Munson's products. Munson's has also been subcontracting their employees to

Relecloud to help functionally build a best-in-breed solution. Munson's employees assume multiple organizational positions. Each employee has only a single email address by which people can contact them.

Current environment: System and IT

Dynamics 365 Finance was recently updated.

All recurring batch jobs in the system were removed and recreated.

The alert notification batch processing was recently changed from every 10 minutes to once every two hours.

Real-time reporting of the information is not needed.

Current environment: Customer Service

Customer credit requests are entered through the customer service team.

All requests must contain a date, time, reason for request, and customer service notes on initial recommendations for credit action.

Customers have multiple points of contact who can enter support tickets to the Relecloud portal.

Tickets are automatically generated in the support team's third-party system when they are created by support technicians.

The Dynamics 365 email client mail is used to correspond with customers.

Current environment: Technical Support/IT

The technical support team gets involved when technical issues arise with the Relecloud software. Service tickets are entered and get escalated to the team, depending on the issue.

Microsoft Flow is used for automating different workstreams.

Workflows are not configured for the technical support request flows in Dynamics 365 Finance.

Management and history of technical support tickets are handled in a third-party issue management solution.

The technical service team manages issues related to the Relecloud POS as well as the Dynamics 365 application.

Current environment: Account Representatives

Each customer is assigned a single account representative.

Account representatives use multiple devices.

Only account representatives have the ability to approve credits.

All emails to customers come through their own Outlook instance.

Current environment: Finance -

Customers do not have invoice accounts.

Only finance resources have the ability to enter credits.

Credits can be entered by any of the four finance resources assigned the Credits and Refunds security role.

If the request has not been updated in four days, the request is escalated to the Controller. The account representative must be alerted when this occurs.

Requirements: Technical support/IT

Support technicians must use Microsoft's existing knowledge base to resolve open issues.

If an issue exists, support technicians must report the status of the issue on a weekly basis.

If there is no existing support request, support technicians must create one for Microsoft evaluation.

All software must be installed centrally when possible.

The Dynamics 365 Finance production environment must have an update cadence of every second Saturday from 4-7 A.M. EST.

Updates must be tested in a separate environment.

Requirements: Account representatives

Account representatives must be able to see only the relevant customer fields and records automatically from their dashboard.

Account representatives must be able to export the list of customers to Microsoft Excel.

Account representatives must be able to navigate to the customer master record for any editing or record entry tasks.

The forms must be relevant based on each account representative's needs.

Account representatives need a centralized location to see multiple data components.

Account representatives require an offline list of their current customers in Excel with only the fields they need.

The IT Director must reassign all instances of an account representative's customer contacts if the representative leaves the company.

An alert must be sent automatically to an account representative when a credit is issued or any data is changed on a customer's record.

Requirements: Financials -

Any refund must be printed as a physical check.

All printers must be exclusive to the financial legal entity.

Issues -

Typing 'pickle' in the search box yields no returned results for the account representative.

After the latest update, an account representative reports that he is no longer receiving alert notifications when a customer's contact is changed.

An account representative has recently resigned.

### Question

You need to connect the Excel instance to the Relecloud production instance.

What should you do?

A. Set the server URL to Microsoft.Dynamics.Platform.Integration.Office.UrlViewerApplet.

B. Set the server URL to https://relecloud-prod.operations.dynamics.com.

C. Set the App Correlation ID to https://relecloud-prod.operations.dynamics.com.

D. Set the App Correlation ID to the App Id in the Dynamics 365 Office App Parameters.

**Correct Answer: B**

Reference:

<https://docs.microsoft.com/en-us/dynamics365/unified-operations/dev-itpro/office-integration/use-excel-add-in>

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Background -

Liberty's Delightful Sinful Bakery & Caf© is a baked goods company headquartered in Denver, Colorado. The company has 200 locations around the United States.

Contoso, Ltd. purchases a majority stake in Liberty's. As part of this acquisition, Contoso, Ltd. plans to implement Dynamics 365 Finance, Dynamics 365 Supply

Chain Management, and Dynamics 365 Retail to support the rapid future growth. Streamlined business processes will be implemented to replace manual processes and Microsoft Excel.

Contoso, Ltd. already has 10 legal entities that use all Dynamics 365 modules in a single tenant. Liberty's will exist within the Contoso, Ltd. tenant as its own legal entity and Lifecycle Services (LCS) project. All environments are cloud based.

Current environment: General -

Contoso, Ltd. uses One Version for detailed regression test planning. The testing plan is fully automated by using the Regression Suite Automation Tool (RSAT).

There is a standardized set of core business processes in a single Business Process Library and functionality-specific business process libraries for the various

Contoso, Ltd. businesses.

Current environment: Environments

The following links are used to connect to Contoso, Ltd.'s environments:

Microsoft SharePoint: <https://Libertys.sharepoint.com>

Dynamics 365: <https://LibertysAos.cloudax.dynamics.com>

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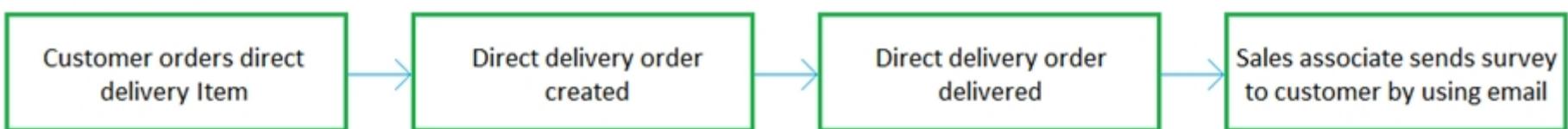
The company uses the following Dynamics 365 version: 10.0.6/Update 30.

Current environment: Operations -

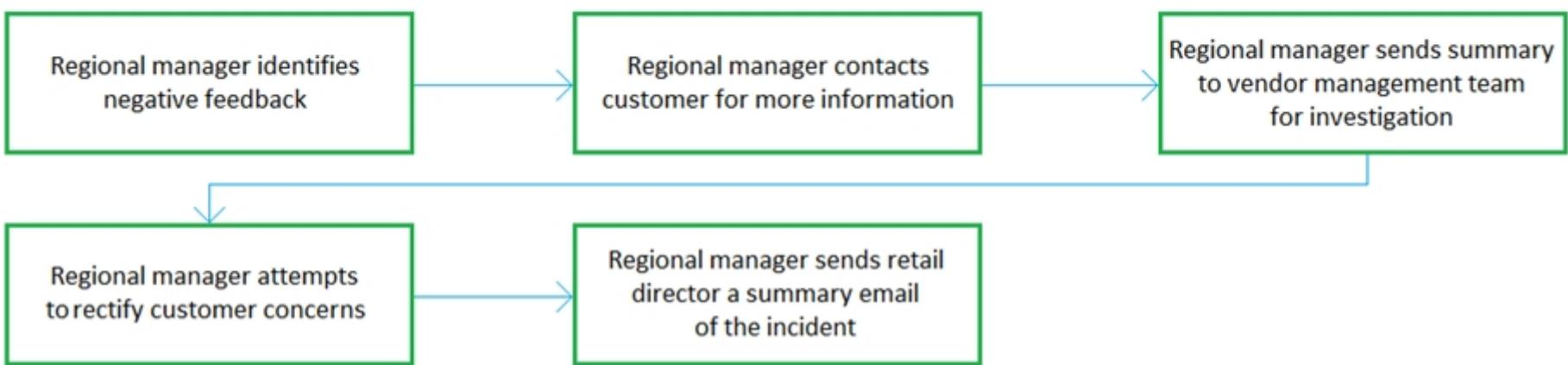
Excel is used extensively by Liberty's and there are many experienced Excel users in the organization. Many users have altered the existing Excel sheets for their own purposes. There is no standard Excel workbook template.

Current environment: Current Workflows

## Direct delivery



## Negative feedback



Requirements: Business Processes/LCS

Liberty's needs to leverage as many existing Contoso, Ltd.'s business processes as possible to shorten the implementation lifecycle and create similarities between the organizations. There will be one master business process library for Liberty's. There are 100 user acceptance testing scripts. Fourth Coffee is one of Contoso, Ltd.'s legal entities.

Liberty's has a business process library that contains a specific set of functionality. Liberty's would like to use as an existing node in their core business process library.

Sales discounts for high-volume customers must be calculated by using predefined Excel templates. Sales team members must be able to access the template directly from the sales order form.

Requirements: Data Import/Export

Any Excel templates need to be standardized and easily accessible. The integrity of shared templates must be strictly maintained.

After the implementation, the core Liberty's team needs to be empowered to further identify future value-add opportunities for interacting and manipulating their data as future phase initiatives. Once they understand the data structures and capabilities, they need to start creating their own templates that meet their specific needs.

Requirements: Workflow -

A workflow to streamline the feedback of the customer experience is critical. Any negative experience needs to be quickly addressed. Any steps to rectify the customer concerns are handled offline at the discretion of regional managers.

As the company grows, customer history of vendor direct delivery performance must be documented to assure stakeholders that the company is monitoring vendor performance. Any actions to rectify the customer concerns must be approved prior to execution.

Requirements: Go Live/Cutover -

Go Live date: October 1.

Cutover: Seven days before go live with daily delta imports occurring nightly. This process has been fully vetted and is operating properly.

Data Packages to migrate: Two.

Data Imports: Six hours total for all imports.

Performance testing: Liberty's team system administrator reports that they are not planning to conduct performance testing.

Requirements: Software updates -

The customer cannot take updates during their busy season from November 1 - December 31. Any system downtime requires a notification to the users through the proper application management tool. 100% of user acceptance testing is required for any system update.

The first official update to the live software will be the third week of October.

Requirements: Regression testing

There will be no dedicated regression testing team after going live. They are dedicated prior to go live and anything that can be done to virtually eliminate the overhead of regression testing will be done prior to go live.

Requirements: Workspaces -

A standard workspace will be assigned to each regional manager. The workspace will show the following information for stores associated with a regional manager:

Single detailed view of multiple components of their sales data

KPIs for regional sales goals

Drill down capabilities to inquire about the data

Any direct delivery special orders

Any negative inventory items

Regional managers may personalize workspaces as needed.

#### Issues -

The current Open in Excel templates option on the All Customers form is missing several fields. It also contains several additional fields. This form must be replaced.

There was an issue with agreeing upon a supplemental organizational hierarchy used for sales reporting at go live. This hierarchy is exclusively for reporting purposes.

Customer surveys are conducted by using open-ended emails or in store comment cards from the regional managers at random. This process makes it difficult to consistently analyze satisfaction metrics.

There is a concern that there will be something that pops up stopping the go live. A list must be compiled describing notable risk points.

A regional manager is asked to review a direct delivery sales order to determine whether it was created correctly in a test environment. The regional manager trainer cannot see the sales order in question by using the direct delivery sales order link in the user's workspace.

Liberty's instance goes live successfully. In preparation for the first update, several business scenarios were reported as failing in the validation testing. You are working with Microsoft support and reviewing potential fixes to address the issues.

#### Question

HOTSPOT -

You need to configure integration with Excel.

How should you complete the configuration? To answer, select the appropriate options in the answer area.

NOTE: Each correct selection is worth one point.

Hot Area:

#### Answer Area

##### Requirement

Link the Excel add-in to the Dynamics 365 instance.

##### Location

<a href="https://LibertysAos.cloudax.dynamics.com">https://LibertysAos.cloudax.dynamics.com</a>
<a href="https://Libertys-my.sharepoint.com">https://Libertys-my.sharepoint.com</a>
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Dynamics 365
Visual Studio
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Correct Answer:

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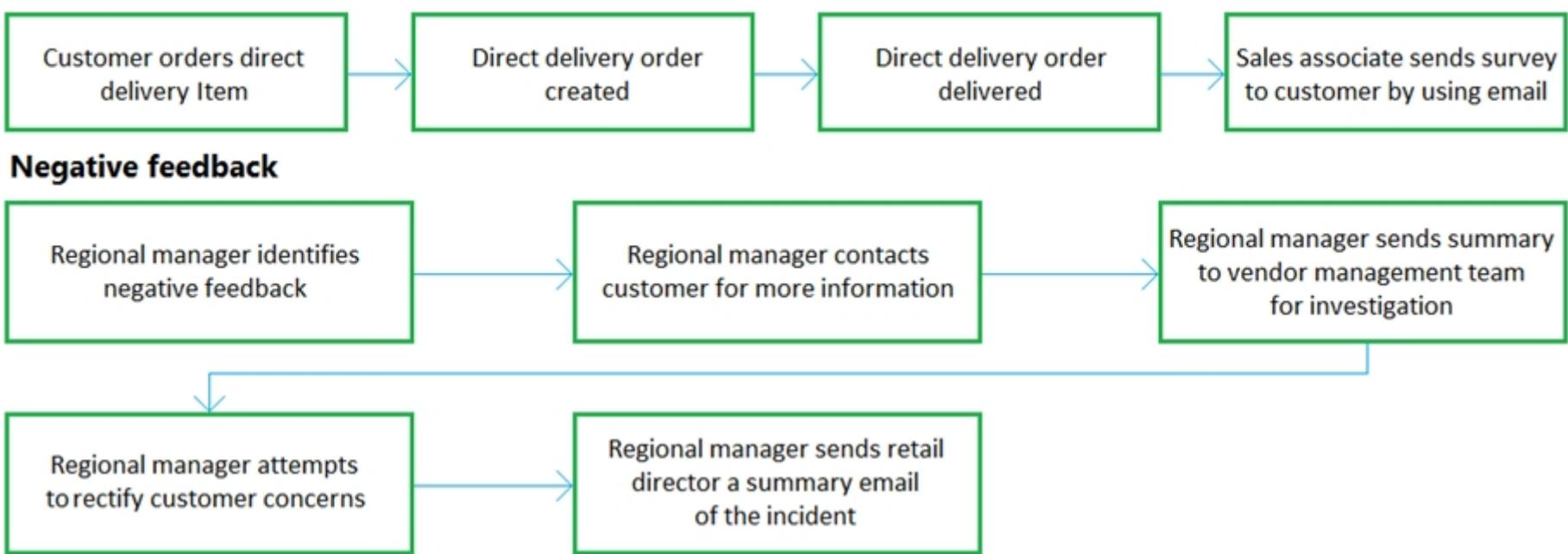
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**Question**

You need to configure the system to meet the workflow requirements.

What should you use?

- A. Document Management Notes and Power Automate
- B. Power Automate and workflow
- C. Vendor Score Cards and Power Automate
- D. Case Management and workflows

**Correct Answer: C**

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Background -

Wide World Importers (WWI) is an importer and supplier of fair trade, handmade home goods to independent retailers in North America.

One of WWI's products was recently featured on several major television talk shows and has become very popular. As a result, WWI is expanding their prospective sales operations to new markets as well as engaging current customers in a more direct manner.

Current environment -

Sales representatives -

Sales representatives are highly competent users of this Dynamics 365 Finance implementation.

They typically operate independently, but due to the recent high sales volume they must work together as a team.

Sales representatives are not available to test the new business processes and security roles being introduced.

Customer and prospect data is currently stored in Excel spreadsheets.

Requirements: Functional requirements

A mechanism to facilitate an interactive step-by-step training guide within the Dynamics 365 application must be implemented.

Tips and hints for data entry in the interactive training guide must also be included because most sales representatives will not be available for training prior to

▪ implementation of the new functionality. They need to be able to use the functionality as soon as it is implemented.

Sales representatives must be able to see all report and form data for specific sales and inventory reports and forms.

Many sales representatives have applied individual changes to forms and reports, such as moved, added, and hidden fields. These changes are critical to the sales representatives' efficiencies and must remain in place.

New processes must be standardized and documented according to current standards.

Several sales representatives run custom queries on SSRS reports. Sales representatives must be able to see the default data as well as their custom queries for those reports.

Requirements: Power Apps initiative

A Power Apps also must be created and embedded on the customer form. The form displays other prospects who reside within a certain radius of the current customer. This functionality will be distributed on a per-request basis.

A Power Apps app must be embedded in a feedback form within the Sales order form in Dynamics 365 Finance. The form must display questions for a sales representative to ask customers while reviewing their previous sales orders.

Requirements: Data import and export

WWI must consolidate and migrate all their data currently in Excel spreadsheets into the Dynamics 365 system.

Sales managers must cleanse their region's prospects and bring them into the Dynamics 365 system by a specified date for final analysis.

Sales manager's data sheet templates must include the most recent data from the Dynamics 365 system. The managers must check for duplicate data.

The data templates used for data import must be intuitively located within the Dynamics 365 forms where the data primarily resides.

For any other core data that must be imported, all test imports must be as repeatable and consistent as possible while data validation errors are

identified and addressed.

Requirements: Technical requirements

The implementation must be done as quickly as possible with no development needed.

A tool for project workstream, task management, and work stories must be implemented for the rapid deployment sprints, issues, and feature backlogs that will result from the implementation.

The solution must also facilitate automation of regression testing for the One Version business continuity initiatives.

Basic entity templates must be acceptable for imports.

Issues -

The Dynamics 365 Commerce customer data cannot currently be accessed by a Power Apps data source.

Several sales representatives have applied individual changes to forms, preventing the new business processes. All representatives should use the same form layouts.

Sales representatives report errors on a few existing sales reports. You identify that the criteria used to generate the reports is the root cause for the errors.

### Question

You need to resolve the form personalization issues.

What should you do?

- A. Clear the sales associate users' browser cache and site settings for the Dynamics 365 instance.
- B. Disable and then re-enable the sales associate users.
- C. Clear the personalization for each form.
- D. Reset all usage data.
- E. Redeploy the form.

**Correct Answer: C**

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Background -

Current environment -

Adventure Works Cycles is a high-end bicycle manufacturer in North America founded in 2010. The company has standard bicycles available year round in addition to limited-edition bicycle models released domestically several times per year to boutique retailers.

The limited-edition bicycles are the most successful. They have high margins, are in high demand, and have a fervent following with the younger bicycle community that wants to make a social statement. Most consumers become aware of the other Adventure Works Cycles bicycles through these limited editions.

Adventure Works Cycles wants to triple its manufacturing capabilities and expand to countries/regions in South America, Western Europe, and United Arab

Emirates (UAE) over the next few years.

General -

To facilitate these expansions, Adventure Works Cycles has decided to invest in Dynamics 365 Finance, Dynamics 365 Supply Chain Management, and the

Power Platform products to digitally innovate from a custom-built enterprise resource plan (ERP), and Microsoft Excel worksheets.

Adventure Works Cycles sells only to North America and Canada but still cannot keep up with current demand. Over time, market expansion will be the only way to remain profitable.

Expansion has been limited in the past due to legal requirements and regulations around document formatting and the lack of a developer.

Adventure Work Cycles has no capabilities or budget to undertake any development past the Excel formula-level tasks.

There are no formal change management procedures.

Sales -

There are three distinct sales teams:

An internal sales team (B2B)

- Sells to retailers.

- Submits orders via EDI, email, or call-in.

A street sales team (B2C)

- Sells directly to high profile or social media influencer consumers.

- Provides customers with discounts or has marketing arrangements in exchange for driving sales to retailer-direct sales channels

- Submits orders by using email or call-in because pricing and terms must be negotiated.

An Adventure Works Cycles administrative sales team

- Has same responsibilities and activities as the internal sales team.

- Coordinates the management activities of the B2B and B2C teams.

## Products -

Before new bike models are unveiled through social media, it can be difficult for the street team representatives to show customers and retailers the new products with the most up-to-date information because the product is still being manufactured.

Often the data and images for the products are out of date.

The internal sales team uses the Dynamics 365 Supply Chain Management product from to show this information to customers.

For questions about bike-specific warranties and service level agreements, consumers can contact Adventure Works Cycles directly through the active

Adventure Works Cycles social media pages. The company expansion will put a strain on the manual interactions of answering questions.

Information and attributes change often.

## International compliance -

Sales are currently restricted to the US only.

## Requirements -

### General -

No coding is in scope for the project.

Change management operations need to be implemented.

A One Version strategy needs to be implemented.

The most critical business processes must never break when the software updates to the newest version.

No third-party testing tools will be used. Adventure Works Cycles wants to use everything in the Microsoft stack if there is an option available. Because the company is at capacity with the overwhelming demand, the testing process must be done without users running through the processes every time the software updates.

With the different bike configurations, Adventure Works Cycles would like to use a single business process but test against 10 different data configurations to streamline errors against data variations in the manufacturing process.

## Data administrator -

A single person, the Adventure Works Cycle data administrator, will be tasked with owning all reporting and data tasks.

This one person will need to intimately know all entities and fields, in addition to any changes in the new versions of the software.

Adventure Works Cycles users will inquire with the data administrator about certain data they need to view. The data administrator needs to quickly search data entities by field names and advise users on how to extract data into their own Excel templates for ad hoc reporting and data management tasks.

## Data migration -

The data cleansing and loading into Dynamics 365 will be done by the Adventure Works Cycles data administrator.

With the many changes for the products and data, imports for the data loads must be repeatable and consistent.

The different data loading components will all be done at one time.

After the import order and cadence is done correctly in a test environment, that same process must be reliably replicable for the golden configuration, in addition to any environment refreshes going forward.

Any errors on the data loading must identify the issue for the person to address and fix for future loads.

## Sales -

The sales street team must be able to view and edit (only product descriptions) near real-time information from the Dynamics 365 system about products on their personal mobile phones.

No street team representatives will have access to the Dynamics 365 Supply Chain Management application, but they must be able to enter orders and update customer information into the system without Adventure Works Cycles assistance.

The Adventure Works Cycles internal sales support team must be able to see all street team sales orders entered to provide support, but the internal team should not see any information around the commissions configured on the orders.

The sales support team must be able to see all orders and fields for the different sales teams. No other security differences from a Dynamics perspective are needed.

## Products -

Warranty and Service Level Agreements stored in Dynamics 365 for the different products must not be exposed directly to sales representatives.

The representatives must be able to pose questions from customers and retailers and get answers back almost immediately.

Any opportunity to extend this type of product inquiry and support mechanism to customers and retailers must be evaluated.

The data for all of the product information must be easily extractable back into Excel.

International compliance -

Payments and invoices inbound and outbound must be converted or translated to the correct localized format

Regardless of regulatory compliance, the customer-facing business documents must have a unique template for each country that can be designed within

Microsoft Office applications. These documents must be embedded in Dynamics 365 forms for data export and configurable by non-developers.

#### Question

DRAG DROP -

You need to implement commission restrictions.

What should you use to meet each requirement? To answer, drag the appropriate components to the correct requirements. Each component may be used once, more than once, or not at all. You may need to drag the split bar between panes or scroll to view content.

NOTE: Each correct selection is worth one point.

Select and Place:

#### Answer Area

Components	Requirement	Component
Permissions	Restrict commissions functionality based on requirements.	
Privileges		
Duties	Assign the restrictions to affect system functionality for the sales representatives.	
Security policies		

#### Answer Area

Components	Requirement	Component
Correct Answer:	Permissions	
	Restrict commissions functionality based on requirements.	Security policies
	Privileges	
	Duties	Permissions
	Security policies	

Reference:

<https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/sysadmin/role-based-security>

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### Background -

#### Current environment -

Adventure Works Cycles is a high-end bicycle manufacturer in North America founded in 2010. The company has standard bicycles available year round in addition to limited-edition bicycle models released domestically several times per year to boutique retailers.

The limited-edition bicycles are the most successful. They have high margins, are in high demand, and have a fervent following with the younger bicycle community that wants to make a social statement. Most consumers become aware of the other Adventure Works Cycles bicycles through these limited editions.

Adventure Works Cycles wants to triple its manufacturing capabilities and expand to countries/regions in South America, Western Europe, and United Arab Emirates (UAE) over the next few years.

#### General -

To facilitate these expansions, Adventure Works Cycles has decided to invest in Dynamics 365 Finance, Dynamics 365 Supply Chain Management, and the

Power Platform products to digitally innovate from a custom-built enterprise resource plan (ERP), and Microsoft Excel worksheets.

Adventure Works Cycles sells only to North America and Canada but still cannot keep up with current demand. Over time, market expansion will be the only way to remain profitable.

Expansion has been limited in the past due to legal requirements and regulations around document formatting and the lack of a developer.

Adventure Work Cycles has no capabilities or budget to undertake any development past the Excel formula-level tasks.

There are no formal change management procedures.

#### Sales -

There are three distinct sales teams:

An internal sales team (B2B)

- Sells to retailers.

- Submits orders via EDI, email, or call-in.

A street sales team (B2C)

- Sells directly to high profile or social media influencer consumers.

- Provides customers with discounts or has marketing arrangements in exchange for driving sales to retailer-direct sales channels

- Submits orders by using email or call-in because pricing and terms must be negotiated.

An Adventure Works Cycles administrative sales team

- Has same responsibilities and activities as the internal sales team.

- Coordinates the management activities of the B2B and B2C teams.

#### Products -

Before new bike models are unveiled through social media, it can be difficult for the street team representatives to show customers and retailers the new products with the most up-to-date information because the product is still being manufactured.

Often the data and images for the products are out of date.

The internal sales team uses the Dynamics 365 Supply Chain Management product from to show this information to customers.

For questions about bike-specific warranties and service level agreements, consumers can contact Adventure Works Cycles directly through the active

Adventure Works Cycles social media pages. The company expansion will put a strain on the manual interactions of answering questions.

Information and attributes change often.

International compliance -

Sales are currently restricted to the US only.

Requirements -

General -

No coding is in scope for the project.

Change management operations need to be implemented.

A One Version strategy needs to be implemented.

The most critical business processes must never break when the software updates to the newest version.

No third-party testing tools will be used. Adventure Works Cycles wants to use everything in the Microsoft stack if there is an option available.

Because the company is at capacity with the overwhelming demand, the testing process must be done without users running through the processes every time the software updates.

With the different bike configurations, Adventure Works Cycles would like to use a single business process but test against 10 different data configurations to streamline errors against data variations in the manufacturing process.

Data administrator -

A single person, the Adventure Works Cycle data administrator, will be tasked with owning all reporting and data tasks.

This one person will need to intimately know all entities and fields, in addition to any changes in the new versions of the software.

Adventure Works Cycles users will inquire with the data administrator about certain data they need to view. The data administrator needs to quickly search data entities by field names and advise users on how to extract data into their own Excel templates for ad hoc reporting and data management tasks.

Data migration -

The data cleansing and loading into Dynamics 365 will be done by the Adventure Works Cycles data administrator.

With the many changes for the products and data, imports for the data loads must be repeatable and consistent.

The different data loading components will all be done at one time.

After the import order and cadence is done correctly in a test environment, that same process must be reliably replicable for the golden configuration, in addition to any environment refreshes going forward.

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Products -

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### Question

You need to recommend a tool to identify the Dynamics 365 components required for the data administrator to perform their tasks.

Which tool should you use?

- A. Docs.microsoft.com
- B. Entity Store
- C. Dynamics 365 Help documentation
- D. Database Schema
- E. Technical reference reports

### Correct Answer: E

Reference:

[https://docs.microsoft.com/en-us/dynamics/s-e/global/axtechrefrep\\_61](https://docs.microsoft.com/en-us/dynamics/s-e/global/axtechrefrep_61)

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### Question

You need to design the security roles to assign user teams.

What should you do?

- A. Use a single security role but use two different duties with two different privileges for the table that contains the commission restrictions.
- B. Use segregation of duties for the security roles assigned to the two sales teams.
- C. Use two separate versions of the sales order form for the two different teams.
- D. Use two different security policies for the internal sales team and the Adventure Works Cycles administrative sales team security roles.
- E. Use two different security roles for the internal sales team and the Adventure Works Cycles administrative sales team.

**Correct Answer:** D

Reference:

<https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/sysadmin/extensible-data-security-policies>

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Background -

Alpine Ski House sells a variety of ski and outdoor equipment, including apparel and digital content to retailers and wholesalers located in the United States. The central distribution center, accounting and customer service center are located in the company's headquarters building in the state of Colorado. The company also has an additional warehouse in the state of New York. The company is known for its customer-friendly policies.

Current environment -

Alpine Ski House currently has an outdated accounting system that is not connected to the New York warehouse.

The warehouse system contains inventory quantities, but does not have costing, therefore the FIFO principles are applied through spreadsheet calculations at month end.

Alpine Ski House has worked to create a future state roadmap as a foundation for growth. They have decided to implement Dynamics 365 cloud applications and must limit the amount of on premises hardware as they are not staffed for support. They are expecting to implement required devices for warehouse applications to support WMS only.

The customer service center places phone orders on behalf of wholesalers and retailers.

The customer service team provides concierge services to the top 20 largest customers. Each customer service team member is assigned to 5 customers as the customer's dedicated customer service representative.

The call center has a phone system that records calls and stores the call duration.

Data is a combination of systems that are disconnected to include warehouse and accounting. Customer records and consumer records are stored in the call center third-party system. Excel spreadsheets are used for consolidated reporting from these systems.

Alpine Ski House must enable business partners to place their own B2B orders on the web as well as manage their own users.

The company has decided to expand distribution to Banff, Alberta and create a new operating legal entity in Canada. This expansion must be planned for as part of the solution, as it will be up and running six months after the initial US company is operating on the new applications.

Requirements -

Applications and environment -

Required applications must align to the future state roadmap.

Business partners must have the ability to onboard their own users for placing orders on the web.

The Canadian company must use the same base data as the US operating company and must be set up in the same instance.

Sales order history data must not be imported. All current and future orders must be migrated to the new system.

Master data for customers must be migrated from both the call center third-party system as well as the accounting system. You identify the following requirements:

- The mapping fields for customer records in both systems are the same, except the accounting system which has three additional fields that must be mapped.
- Duplicate records must not be imported.

## Cutover plan

- User1 reports that sales orders will be open and not shipped at the time of cutover to production. There are 20 orders expected to be open.

## Customer service -

### General -

Concierge customer service reps must be able to access customer records for all customers in their customer group.

Customer service reps must be able organize how information is presented when they sign into the new system.

Security must be applied to the customer service reps as a group and must not be applied at the individual level.

### Return policies -

Sporting equipment is warranted by the manufacturer and must not be returned to Alpine Ski House warehouse. Alpine Ski House does not strictly enforce this policy. Exceptions to the policy are allowed with manager approval.

Customer service must track reported issues with sporting equipment to identify trends.

Customers can exchange apparel, but refunds must not be permitted. Any consumer exchanges must occur directly through Alpine's call center and cannot be returned to a physical store.

### Exchange policies -

All consumer calls must be logged for tracking purposes. The customer service representative will determine if there is an exchange, or if the consumer should be redirected to the manufacturer. Digital content is final sale only. All complaints must still be tracked.

Returns and replacement orders must be processed through the warehouse. Consumer information for returns and replacement orders does not need to be stored.

A record of the location where the consumer purchased the product must be stored for tracking purpose

- The customer service reps must be able to view the order status for delayed shipments or orders that have been shipped but not invoiced. They need to have shortcuts to view this information.

Returns or credits for a concierge customer that are not from a consumer do not require notifications to the concierge representative.

Web orders must be limited to B2B, and consumers web access must not be required for order placement.

The call center must track the call minutes in the phone system by customer number.

The system must send the following notifications:

- Dedicated concierge representative must be automatically notified when an exchanged product has shipped. The concierge representative must set up the alert.

- External customers must be notified of the new consumer exchanges. The notification must integrate into the customer's third party dashboard and must not be sent as an email notification.

## Customer Service -

The customer service center is overloaded with frequently asked questions (FAQ's) that are consuming resources and creating issues with customer service levels.

Alpine Ski House has decided to deploy an automated FAQ website because they do not have sufficient staff resources to manage customer interactions. All automated interactions must be stored for 30 days.

The company has decided to extend its concierge program to the top 25 customers. A new representative has been hired and requires the same screen layout as other team members.

When new customers are created in the system, the customer number must automatically pass to the call center phone system.

## Implementation -

The implementation is expected to take 12 months. Alpine Ski House wants to ensure that when they go live, they are on the most current available update of

Dynamics 365. Testing must occur in the various stages of the implementation. You identify the following testing requirements:

- Platform updates will be applied, and business processes will be verified to perform as expected, either manual or automated where possible against stored task recordings.

- Development must be completed by the 10th month. Developers must perform initial testing code that they create.

- When development is completed, all processes in the system must be tested by the user group.

Due to competing demands for the project team, the company wants to automate as much of the testing as possible.

The project manager is concerned that a critical field must have validation scripts run against it during automated testing. The developers will be required to write the custom validation script. The user creating the test script must document the step in the test script that the specific validation script must be run for the developers.

The project manager wants to put a control in place to ensure that once the automated testing is established the test scripts are not modified or overwritten.

**Question**

HOTSPOT -

You need to configure the alert configurations for notification 1.

Which alert configurations should you use? To answer, select the appropriate options in the answer area.

NOTE: Each correct selection is worth one point.

Hot Area:

**Answer Area****Alert configuration****Event type****Value**

Create and delete
Update
Due date

**Conditions**

Current selected record
All records

Correct Answer:

**Answer Area****Alert configuration****Event type****Value**

Create and delete
Update
Due date

**Conditions**

Current selected record
All records

Box 1: Update -

The system must send the following notifications:

\* Dedicated concierge representative must be automatically notified when an exchanged product has shipped. The concierge representative must set up the alert.

\* External customers must be notified of the new consumer exchanges. The notification must integrate into the customer's third party dashboard and must not be sent as an email notification.

Box 2: Current selected record