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Exam Code: MB-300
Exam Name: Microsoft Dynamics 365 Unified Operations Core



01 - Describe finance and operations apps, and extend apps by using Microsoft Power Platform technologies

QUESTION 1

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

	▼
Workspace filter	
Section filter	
Grid column filter	

Look for stores in Illinois from a view of stores

	▼
Workspace filter	
Section filter	
Grid column filter	

Answer Area:

Answer Area

Desired result

Filter retail stores by region from an all up workspace

Look for stores in Illinois from a view of stores

UI filter

	▼
Workspace filter	
Section filter	
Grid column filter	

	▼
Workspace filter	
Section filter	
Grid column filter	

Section:

Explanation:

Reference:

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

QUESTION 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

Option	Value
Category to use	<div style="border: 1px solid gray; padding: 2px;">▼</div> <div style="border: 1px solid gray; padding: 2px;">General and Production</div> <div style="border: 1px solid gray; padding: 2px;">Service and Product change</div>
Service department in which employees create cases	<div style="border: 1px solid gray; padding: 2px;">▼</div> <div style="border: 1px solid gray; padding: 2px;">General</div> <div style="border: 1px solid gray; padding: 2px;">Production</div> <div style="border: 1px solid gray; padding: 2px;">Service</div> <div style="border: 1px solid gray; padding: 2px;">Product change</div>
Call center in which employees create cases	<div style="border: 1px solid gray; padding: 2px;">▼</div> <div style="border: 1px solid gray; padding: 2px;">General</div> <div style="border: 1px solid gray; padding: 2px;">Production</div> <div style="border: 1px solid gray; padding: 2px;">Service</div> <div style="border: 1px solid gray; padding: 2px;">Product change</div>

Answer Area:

Answer Area

Option	Value
Category to use	<div style="border: 1px solid gray; padding: 2px;">▼</div> <div style="border: 1px solid gray; padding: 2px; background-color: #e0ffe0;">General and Production</div> <div style="border: 1px solid gray; padding: 2px;">Service and Product change</div>
Service department in which employees create cases	<div style="border: 1px solid gray; padding: 2px;">▼</div> <div style="border: 1px solid gray; padding: 2px;">General</div> <div style="border: 1px solid gray; padding: 2px;">Production</div> <div style="border: 1px solid gray; padding: 2px;">Service</div> <div style="border: 1px solid gray; padding: 2px; background-color: #e0ffe0;">Product change</div>
Call center in which employees create cases	<div style="border: 1px solid gray; padding: 2px;">▼</div> <div style="border: 1px solid gray; padding: 2px;">General</div> <div style="border: 1px solid gray; padding: 2px;">Production</div> <div style="border: 1px solid gray; padding: 2px; background-color: #e0ffe0;">Service</div> <div style="border: 1px solid gray; padding: 2px;">Product change</div>



Section:

Explanation:

QUESTION 3

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	Work item	Module
Accounts payable	Purchase order	Module
Accounts receivable	Invoice	Module
Inventory management	Vendor invoice	Module
Credit and collections	Transfer order	Module

Correct Answer:

Modules	Work item	Module
Accounts payable	Purchase order	Accounts payable
Accounts receivable	Invoice	Accounts receivable
Inventory management	Vendor invoice	Accounts payable
Credit and collections	Transfer order	Inventory management

Section:

Explanation:

QUESTION 4

HOTSPOT

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

Your 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	<input type="checkbox"/> Understand the current state of the light task activity to support informed decisions <input type="checkbox"/> Display deep information supporting complex task execution
Workspace definition	<input type="checkbox"/> An initial overview for a specific role to increase productivity <input type="checkbox"/> A view of complex activities requiring interaction across different roles

Answer Area:
Answer Area

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

Section:
Explanation:

QUESTION 5

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: C, D, E

Section:

Explanation:

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

QUESTION 6

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	Presentation
View the number of sales orders that took place within the past seven days for a specific group of customers.	<input type="checkbox"/> Tiles <input type="checkbox"/> Links <input type="checkbox"/> Favorites <input type="checkbox"/> FactBoxes
Provide direct access to forms commonly used by workspace users.	<input type="checkbox"/> Charts <input type="checkbox"/> Links <input type="checkbox"/> Favorites <input type="checkbox"/> FactBoxes

Answer Area:

Answer Area

Task	Presentation
View the number of sales orders that took place within the past seven days for a specific group of customers.	<ul style="list-style-type: none"> Tiles Links Favorites FactBoxes
Provide direct access to forms commonly used by workspace users.	<ul style="list-style-type: none"> Charts Links Favorites FactBoxes

Section:

Explanation:

QUESTION 7

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:

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



Section:

Explanation:

References:

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

QUESTION 8

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

Section:

QUESTION 9

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	Scenario	Feature or functionality
	Stage the aggregate data for use by the reports.	<div style="border: 1px solid black; padding: 2px;">▼</div> <div style="border: 1px solid black; padding: 2px;">Dynamics 365 system administration settings</div> <div style="border: 1px solid black; padding: 2px;">Power BI desktop client</div> <div style="border: 1px solid black; padding: 2px;">Lifecycle Services</div>
	Set the data source to use DirectQuery.	<div style="border: 1px solid black; padding: 2px;">▼</div> <div style="border: 1px solid black; padding: 2px;">Dynamics 365 system administration settings</div> <div style="border: 1px solid black; padding: 2px;">Power BI desktop client</div> <div style="border: 1px solid black; padding: 2px;">Lifecycle Services</div>
	Publish the new reports to the production environment.	<div style="border: 1px solid black; padding: 2px;">▼</div> <div style="border: 1px solid black; padding: 2px;">Dynamics 365 system administration settings</div> <div style="border: 1px solid black; padding: 2px;">Power BI desktop client</div> <div style="border: 1px solid black; padding: 2px;">Lifecycle Services</div>
	Configure the data refresh rate for periodic updating.	<div style="border: 1px solid black; padding: 2px;">▼</div> <div style="border: 1px solid black; padding: 2px;">Dynamics 365 system administration settings</div> <div style="border: 1px solid black; padding: 2px;">Power BI desktop client</div> <div style="border: 1px solid black; padding: 2px;">Lifecycle Services</div>

Answer Area:

Answer Area	Scenario	Feature or functionality
	Stage the aggregate data for use by the reports.	<ul style="list-style-type: none"> Dynamics 365 system administration settings Power BI desktop client Lifecycle Services
	Set the data source to use DirectQuery.	<ul style="list-style-type: none"> Dynamics 365 system administration settings Power BI desktop client Lifecycle Services
	Publish the new reports to the production environment.	<ul style="list-style-type: none"> Dynamics 365 system administration settings Power BI desktop client Lifecycle Services
	Configure the data refresh rate for periodic updating.	<ul style="list-style-type: none"> Dynamics 365 system administration settings Power BI desktop client Lifecycle Services

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Section:

Explanation:

References:

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

<https://docs.microsoft.com/en-us/power-bi/desktop-use-directquery>

QUESTION 10

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

Navigation icons: ⏪ ⏩

Correct Answer:

Actions

-
-
- Create a company accounts template
- Change the Record view property
-

Answer Area

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

Navigation icons: ⏪ ⏩

vdumps

Section:

Explanation:

Reference:

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

QUESTION 11

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

Section:

Explanation:

Reference:

QUESTION 12

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	Requirement	Reporting type
Form-based	Add fields that can be viewed and filtered as an end user.	
Report-based	Customize the view as an end user.	
	Leverage the batch framework.	

Correct Answer:

Answer Area

Reporting types	Requirement	Reporting type
Form-based	Add fields that can be viewed and filtered as an end user.	Form-based
Report-based	Customize the view as an end user.	Form-based
	Leverage the batch framework.	Report-based

Section:

Explanation:

QUESTION 13

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: A, C, E

Section:

Explanation:

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

QUESTION 14

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.

A.

Correct Answer: A

Section:

Explanation:

Answer: A

Explanation:

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.

QUESTION 15

A company plans to create a global address book and additional address book 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: B, D

Section:

Explanation:

Reference:

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

QUESTION 16

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	App type
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.	<input type="text"/> 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.	<input type="text"/> Canvas Model-driven

Answer Area:

Answer Area

Requirement	App type
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.	<input type="text"/> 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.	<input type="text"/> Canvas Model-driven

Section:

Explanation:

QUESTION 17

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

- Configure Electronic Reporting parameters.
- Import the Electronic Reporting configurations.
- Create and activate Electronic Reporting Framework providers.

Answer Area

Correct Answer:

Actions

-
-
-

Answer Area

- Configure Electronic Reporting parameters.
- Create and activate Electronic Reporting Framework providers.
- Import the Electronic Reporting configurations.

Section:

Explanation:

Reference:

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

QUESTION 18

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 bat 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
<input type="text" value="Customer"/>		
<input type="text" value="Prospect"/>	Purchases goods and services produced by individuals	<input type="text"/>
<input type="text" value="Vendor"/>	Purchases goods and services produced by companies	<input type="text"/>
<input type="text" value="Competitor"/>	Potentially provides legal entities with a service or benefit	<input type="text"/>
<input type="text" value="Worker"/>	Supplies legal entities with products in exchange for payment	<input type="text"/>
<input type="text" value="User"/>	Provides goods or services similar to what your company provides	<input type="text"/>
<input type="text" value="Contact"/>		

Correct Answer:

Party roles	Description	Party role
Customer		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		

Section:

Explanation:

Reference:

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

QUESTION 19

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: A, D

Section:

Explanation:

Reference:

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

QUESTION 20

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: A, B, C

Section:

Explanation:

Reference:

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

QUESTION 21

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

Disired 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	



Answer Area:

Answer Area

Disired result	Filter expression
Is circle or is equal to circle	<input type="text"/> ▼ circle circle* circle.. ..circle
Does not contain Texas	<input type="text"/> ▼ !*Texas* "!Texas "Texas" >Texas
After metal	<input type="text"/> ▼ >metal metal.. metal* <metal
Less than or equal to zebra	<input type="text"/> ▼ ..zebra >zebra zebra* <zebra

Section:

Explanation:

Reference:

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

QUESTION 22

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: A, C, E

Section:

Explanation:

Reference:

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

QUESTION 23

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

Section:

Explanation:

Reference:

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

QUESTION 24

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

Section:

Explanation:

Reference:

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



QUESTION 25

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

Section:

Explanation:

Reference:

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

02 - Describe finance and operations apps, and extend apps by using Microsoft Power Platform technologies

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.

To answer the questions included in a case study, you will need to reference information that is provided in the case study. Case studies might contain exhibits and other resources that provide more information about the scenario that is described in the case study. Each question is independent of the other questions in this case study.

At the end of this case study, a review screen will appear. This screen allows you to review your answers and to make changes before you move to the next section of the exam. After you begin a new section, you cannot return to this section.

To start the case study

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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 1

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

Look for Microsoft submitted support requests that might match the issue in question.

Solution

	▼
Issue Search	
Open work items	
Release Notes	
Support Issues	

Search criteria for the open Microsoft tickets.

	▼
alert notification	
"alert notification"	
alert+notification	
'alert notification'	

Issue status update method.

	▼
Notifications	
Alert Service	
Manage Incidents	
Announcements	

Answer Area:



Answer Area

Action

Solution

Look for Microsoft submitted support requests that might match the issue in question.

- ▼
- Issue Search
- Open work items
- Release Notes
- Support Issues

Search criteria for the open Microsoft tickets.

- ▼
- alert notification
- "alert notification"
- alert+notification
- 'alert notification'

Issue status update method.

- ▼
- Notifications
- Alert Service
- Manage Incidents
- Announcements

Section:

Explanation:

QUESTION 2

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:

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**.

Answer Area

Three empty rectangular boxes with red borders, intended for the user to provide answers to the actions listed on the left.



Correct Answer:

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 **Tile**.

On the workspace list, apply filters for **Advanced filter or sort**.

Answer Area

On the All Customers grid, hide/remove fields via **Personalize this form**.

On the All Customers grid, apply filters for **Advanced filter or sort**.

Add the form to a workspace as a list.



Section:

Explanation:

QUESTION 3

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

Section:

Explanation:

Reference:

<https://docs.microsoft.com/en-us/dynamics365/customer-engagement/basics/search-records>

QUESTION 4

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

Section:

Explanation:

03 - Describe finance and operations apps, and extend apps by using Microsoft Power Platform technologies

Case study

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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



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 1

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
Section:

QUESTION 2

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

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.	

Answer Area:

Answer Area

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.	

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Section:

Explanation:

02 - Configure administrative features and workflows

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Current environment: System and IT

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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.

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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 1

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: A, D

Section:

QUESTION 2

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: A, C

Section:

QUESTION 3

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

Section:

Explanation:

Reference: <https://docs.microsoft.com/en-us/dynamics365/unified-operations/dev-itpro/office-integration/use-excel-add-in>

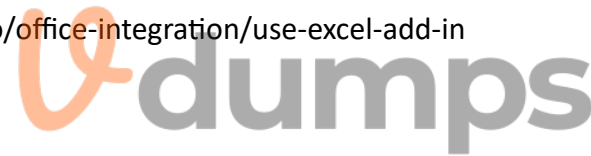
QUESTION 4

DRAG DROP

You need to configure check printing for Munson's.

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

Install the Document Routing Agent on the client machines where users will be printing the checks.

Navigate to the legal entity and enable the printer.

Select the legal entities for the printer to be available.

Discover and add the check printer from the Document Routing Agent.

Enter the Dynamics 365 Finance and Operations configurations in the Document Routing Agent.

Discover and add the check printer to the system from Dynamics 365 Finance and Operations.

Install the Document Routing Agent on the corporate print server.

Register the Document Routing Agent with Dynamics 365 Finance and Operations.



Correct Answer:

Actions

-
- Navigate to the legal entity and enable the printer.
- Select the legal entities for the printer to be available.
-
-
-
- Install the Document Routing Agent on the corporate print server.
- Register the Document Routing Agent with Dynamics 365 Finance and Operations.

Answer Area

- Install the Document Routing Agent on the client machines where users will be printing the checks.
- Enter the Dynamics 365 Finance and Operations configurations in the Document Routing Agent.
- Discover and add the check printer from the Document Routing Agent.
- Discover and add the check printer to the system from Dynamics 365 Finance and Operations.

Section:

Explanation:

Reference:

<https://docs.microsoft.com/en-us/dynamics365/unified-operations/dev-itpro/analytics/install-document-routing-agent>

QUESTION 5

You need to trigger a Flow when a technical service order request is created.

Which three objects can you use? Each correct answer presents a complete solution.

NOTE: Each correct selection is worth one point.

- A. Work items
- B. Change-based alerts
- C. Business Events
- D. External feeds
- E. Workflow

Correct Answer: B, C, D

Section:

QUESTION 6

DRAG DROP

You need to enable interactive email providers for the different groups in the organization.



Which email providers should you enable? To answer, drag the appropriate email provider IDs to the correct groups. Each email provider ID 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:

Email Provider ID	Answer Area
EML	
Exchange	
SMTP	
IMAP	

Group	Email Provider ID
Customer Service	
Account Representative	

Correct Answer:

Email Provider ID	Answer Area
Exchange	
IMAP	

Group	Email Provider ID
Customer Service	SMTP
Account Representative	EML

Section:

Explanation:

QUESTION 7

HOTSPOT

You need to ensure that the customer service representatives are able to initiate a refund request.

Which workflow elements 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

Workflow configurations

Elements

Element to use

	▼
Approval steps	
Manual task	
Automated task	
Approval processes	

Assignment type

	▼
Participant	
Workflow user	
Hierarchy	
User	

Notifications

	▼
Delegate	
Request change	
Escalate	
Complete	

Answer Area:



Answer Area

Workflow configurations

Elements

Element to use

	▼
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Assignment type

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Participant	
Workflow user	
Hierarchy	
User	

Notifications

	▼
Delegate	
Request change	
Escalate	
Complete	

Section:

Explanation:

QUESTION 8

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:



Action

Solution

Look for Microsoft submitted support requests that might match the issue in question.

-
- Issue Search
- Open work items
- Release Notes
- Support Issues

Search criteria for the open Microsoft tickets.

-
- alert notification
- "alert notification"
- alert+notification
- 'alert notification'

Issue status update method.

-
- Notifications
- Alert Service
- Manage Incidents
- Announcements

Answer Area:

Action

Solution



Look for Microsoft submitted support requests that might match the issue in question.

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- Issue Search
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Search criteria for the open Microsoft tickets.

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03 - Configure administrative features and workflows

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Negative feedback



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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 1

HOTSPOT

You need to resolve issues with the default Excel templates. 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	Option
Configure a usable Excel template from the sales order form.	▼
	Update the existing Customer form document template.
	Upload a modified document template.
	Delete and replace the existing base document template.
Assign the document template.	Create a new Customer entity for the form.
	▼
	Customer Entity for the form
	Customer Form
	Customer template for the form

Answer Area:

Answer Area

Requirement

Configure a usable Excel template from the sales order form.

Option

	▼
Update the existing Customer form document template.	
Upload a modified document template.	
Delete and replace the existing base document template.	
Create a new Customer entity for the form.	

Assign the document template.

	▼
Customer Entity for the form	
Customer Form	
Customer template for the form	

Section:

Explanation:

Reference:

<https://docs.microsoft.com/en-us/dynamics365/sales-professional/manage-excel-templates>

QUESTION 2

You need to determine the root cause for the regional manager's issue.
What is the root cause?

- A. The sales order was not created.
- B. The user does not have the proper permissions.
- C. There is a filter on the grid.
- D. The user is in the wrong environment.

Correct Answer: D

Section:

QUESTION 3

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	Location
Link the Excel add-in to the Dynamics 365 instance.	<ul style="list-style-type: none"> https://LibertysAos.cloudax.dynamics.com https://Libertys-my.sharepoint.com https://Libertys.visualstudio.com https://Libertys.sharepoint.com
Centrally store the finished templates.	<ul style="list-style-type: none"> Dynamics 365 Visual Studio OneDrive for Business

Answer Area:

Answer Area



Requirement	Location
Link the Excel add-in to the Dynamics 365 instance.	<ul style="list-style-type: none"> https://LibertysAos.cloudax.dynamics.com https://Libertys-my.sharepoint.com https://Libertys.visualstudio.com https://Libertys.sharepoint.com
Centrally store the finished templates.	<ul style="list-style-type: none"> Dynamics 365 Visual Studio OneDrive for Business

Section:

Explanation:

QUESTION 4

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

Section:

Explanation:

05 - Configure administrative features and workflows

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.

To answer the questions included in a case study, you will need to reference information that is provided in the case study. Case studies might contain exhibits and other resources that provide more information about the scenario that is described in the case study. Each question is independent of the other questions in this case study.

At the end of this case study, a review screen will appear. This screen allows you to review your answers and to make changes before you move to the next section of the exam. After you begin a new section, you cannot return to this section.

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

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 1

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		

Correct Answer:

Answer Area		
Components	Requirement	Component
	Restrict commissions functionality based on requirements.	Security policies
Privileges		
Duties	Assign the restrictions to affect system functionality for the sales representatives.	Permissions

Section:

Explanation:

Reference:

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

QUESTION 2

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

Section:

Explanation:

Reference:

https://docs.microsoft.com/en-us/dynamics/s-e/global/axtechrefrep_61

QUESTION 3

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

Section:

Explanation:

Reference:

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

The logo for Vdumps.com, featuring a stylized orange 'V' followed by the word 'dumps' in a grey, lowercase, sans-serif font.

01 - Manage Finance and Operations Data

QUESTION 1

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	<ul style="list-style-type: none"> Custom Service Data Management Pipeline Dual-write OData APIs
Dynamics 365 mobile app	<ul style="list-style-type: none"> Custom Service Data Management Pipeline Dual-write OData APIs
Interactive file-based import/export	<ul style="list-style-type: none"> Custom Service Data Management Pipeline Dual-write OData APIs
Recurring files	<ul style="list-style-type: none"> Custom Service Data Management Pipeline Dual-write OData APIs
Recurring queues	<ul style="list-style-type: none"> Custom Service Data Management Pipeline Dual-write OData APIs



Answer Area:

Answer Area

Data stores	Integration technology
Microsoft Office	<ul style="list-style-type: none"> Custom Service Data Management Pipeline Dual-write OData APIs
Dynamics 365 mobile app	<ul style="list-style-type: none"> Custom Service Data Management Pipeline Dual-write OData APIs
Interactive file-based import/export	<ul style="list-style-type: none"> Custom Service Data Management Pipeline Dual-write OData APIs
Recurring files	<ul style="list-style-type: none"> Custom Service Data Management Pipeline Dual-write OData APIs
Recurring queues	<ul style="list-style-type: none"> Custom Service Data Management Pipeline Dual-write OData APIs



Section:

Explanation:

Reference:

<https://www.axug.com/blogs/shilpi-thakur1/2020/05/20/dm-tools-concepts-in-d365-fo-and-lcs-part3>

QUESTION 2

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

Section:

Explanation:

Reference:

<https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/data-entities/data-import-export-job>

QUESTION 3

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	Answer Area	Component
Data entities only	Scenario 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.	Data entities only
Composite data entities only		Data entities only
Data entities and composite data entities		Data entities and composite data entities
		Data entities only

Section:

Explanation:

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>

QUESTION 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

Section:

Explanation:

Reference:

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

QUESTION 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 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 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

Section:

QUESTION 6

HOTSPOT

A company implements Dynamics 365 for Finance and Operations.

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 Data Management tool interface. The breadcrumb navigation is 'System administration > Workspaces > Data management'. The main area is titled 'Export' and shows 'JOB DETAILS' for a 'Conference Room Pilot'. The 'Source data format' is set to 'AX'. The 'Entity name' dropdown is empty. The 'Skip staging' toggle is set to 'No'. The 'Default refresh type' is set to 'Incremental push only'. The 'Generate data package' toggle is set to 'Yes'. The 'SELECTED FILES AND ENTITIES' section shows a list of entities: 'Customer invoice', 'Customer V3', 'Customer groups', and 'Customer paramet...'. Each entity has a red 'X' icon next to it, indicating that it is not selected or is unavailable. A watermark 'VCEplus.io' is visible across the interface.

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, Customer 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 need to import all customer data. What should you do?

▼
Set the entity order to Customer parameters, Customer groups, Customer 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:

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, Customer 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 need to import all customer data. What should you do?

▼
Set the entity order to Customer parameters, Customer groups, Customer V3, Customer invoicing journal
Set Default refresh type to Full push only
Set Skip staging to Yes
Set Generate data package to No

Section:

Explanation:

QUESTION 7

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 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

Answer 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	

Section:

Explanation:

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>

QUESTION 8

You are a Dynamics 365 for Finance and Operations system administrator.

Data is being migrated from a customized version of a legacy application to Dynamics 365 for Finance and Operations. 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 for Finance and Operations.

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

Section:

Explanation:

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>

QUESTION 9

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

Section:

Explanation:

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

QUESTION 10

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	Object
Data packages need to be used in automated testing. Where are they stored?	<div style="border: 1px solid gray; padding: 2px;"> <ul style="list-style-type: none"> File imports Data tasks Data projects Data entities </div>
You need to add a new task in the automation steps. Where do you add it?	<div style="border: 1px solid gray; padding: 2px;"> <ul style="list-style-type: none"> XML manifests Lifecycle Services projects Data task automation manager Data projects </div>
There were errors that need to be viewed. Where can you view them?	<div style="border: 1px solid gray; padding: 2px;"> <ul style="list-style-type: none"> Data task automation manager Data validation project page Data validation checklist workspace Lifecycle Services project </div>

Answer Area:

Scenario	Object
Data packages need to be used in automated testing. Where are they stored?	<ul style="list-style-type: none">File importsData tasksData projectsData entities
You need to add a new task in the automation steps. Where do you add it?	<ul style="list-style-type: none">XML manifestsLifecycle Services projectsData task automation managerData projects
There were errors that need to be viewed. Where can you view them?	<ul style="list-style-type: none">Data task automation managerData validation project pageData validation checklist workspaceLifecycle Services project

Section:

Explanation:

QUESTION 11

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.

A.

Correct Answer: A

Section:

Explanation:

Answer: A

Explanation:

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.

QUESTION 12

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.

A.

Correct Answer: A

Section:

Explanation:

Answer: A

Explanation:

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.



QUESTION 13

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

Section:

QUESTION 14

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
Section:

QUESTION 15

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
Section:

QUESTION 16

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
Section:

QUESTION 17

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:

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



Section:

Explanation:

Reference:

<https://docs.microsoft.com/en-us/dynamics365/unified-operations/dev-itpro/lcs-solutions/process-data-packages-lcs-solutions>

QUESTION 18

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

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.

Answer Area



Correct Answer:

Actions

Disable the Run business validation option from the data entities.

Enable set-based processing for the data entities.

Answer Area

In Data management, open Configure entity export to database

Select the connection string of the Azure SQL database.

Publish the data entities to be exported.



Section:

Explanation:

References:

<https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/analytics/export-entities-to-your-own-database>

QUESTION 19

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:

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

Correct Answer:

Actions

In SQL Server Management Studio, use the SQL Server Integration Services import wizard.

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.

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.



Section:

Explanation:

QUESTION 20

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

Section:

Explanation:

Reference:

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

QUESTION 21

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\.

A.

Correct Answer: A

Section:

Explanation:

Answer: A

Explanation:

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.

QUESTION 22

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	Component
Implement the feature used to synchronize the data.	<input type="text" value=""/> ▼ Classic Data Integration Data management Dual-write OData
Identify the data to synchronize.	<input type="text" value=""/> ▼ Custom Query Table Entity Database

Answer Area:

Answer Area

Requirement	Component
Implement the feature used to synchronize the data.	<ul style="list-style-type: none"> Classic Data Integration Data management Dual-write OData
Identify the data to synchronize.	<ul style="list-style-type: none"> Custom Query Table Entity Database

Section:

Explanation:

Reference:

<https://docs.microsoft.com/en-us/power-platform/admin/replicate-data-microsoft-azure-sql-database>



QUESTION 23

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	<input type="text"/>
Parameter	Accounting currency	<input type="text"/>
Transaction		

Correct Answer:

Answer Area

Entity types	Data	Entity types
<input type="checkbox"/> Master		
<input type="checkbox"/>	Units of measure	<input type="checkbox"/> Reference
<input type="checkbox"/>	Accounting currency	<input type="checkbox"/> Parameter
<input type="checkbox"/> Transaction		

Section:

Explanation:

Reference:

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

QUESTION 24

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: B, C, D

Section:

Explanation:

Reference:

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

QUESTION 25

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	<input type="checkbox"/> Create a separate customer per subsidiary. <input type="checkbox"/> Create one customer with multiple ship-to addresses. <input type="checkbox"/> Create a customer for each location. Link each customer to an invoice account.
CustomerB	<input type="checkbox"/> Create a separate customer per subsidiary. <input type="checkbox"/> Create one invoice customer per location. <input type="checkbox"/> Create a customer for each location. Link each customer to an invoice account.
CustomerC	<input type="checkbox"/> Create a separate customer per subsidiary. <input type="checkbox"/> Create one customer with multiple ship-to addresses. <input type="checkbox"/> Create a customer for each location. Link each customer to an invoice account.

Answer Area:

Answer Area	
	Migration strategy
CustomerA	<input checked="" type="checkbox"/> Create a separate customer per subsidiary. <input type="checkbox"/> Create one customer with multiple ship-to addresses. <input type="checkbox"/> Create a customer for each location. Link each customer to an invoice account.
CustomerB	<input type="checkbox"/> Create a separate customer per subsidiary. <input type="checkbox"/> Create one invoice customer per location. <input checked="" type="checkbox"/> Create a customer for each location. Link each customer to an invoice account.
CustomerC	<input type="checkbox"/> Create a separate customer per subsidiary. <input checked="" type="checkbox"/> Create one customer with multiple ship-to addresses. <input type="checkbox"/> Create a customer for each location. Link each customer to an invoice account.

Section:

Explanation:

QUESTION 26

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	



Correct Answer:

Answer Area

Entity categories

Source data

Entity category

Accounts receivable configurations

Parameter

Methods of payment

Reference

Customers

Master

Sales orders

Document

Payment vouchers

Transaction

Section:

Explanation:

Reference:

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

QUESTION 27

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	

Correct Answer:

Answer Area		
Start imports	Entity	Start import
	Sales tax code names	Immediately
	Sales tax code values	After Sales tax code names
	Sales tax code limits	After Sales tax code values
	Sales tax exempt numbers	After Sales tax limits
	Sales tax reporting codes	After Sales tax exempt numbers

Section:

Explanation:

Reference:

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

QUESTION 28

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

Section:

QUESTION 29

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

Sequential order

Order options

Data category

▼
Master, reference, transaction
Reference, master, transaction
Transaction, reference, master
Transaction, master, reference

Data entity

▼
Ledger journal, 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

Answer Area:

Answer Area

Sequential order

Order options

Data category

▼
Master, reference, transaction
Reference, master, transaction
Transaction, reference, master
Transaction, master, reference

Data entity

▼
Ledger journal, 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

Section:

Explanation:

QUESTION 30

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\.

A.

Correct Answer: A

Section:

Explanation:

Answer: A

Explanation:

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.

QUESTION 31

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.

A.

Correct Answer: A

Section:

Explanation:

Answer: A

Explanation:

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.



QUESTION 32

You plan the migration from a Dynamic 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: B, D, E

Section:

Explanation:

References:

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

QUESTION 33

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 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

Section:

QUESTION 34

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

Section:

Explanation:

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>

QUESTION 35

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



Section:

Explanation:

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>

QUESTION 36

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

Section:

Explanation:

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>

QUESTION 37

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 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

Section:

QUESTION 38

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 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

Section:

QUESTION 39

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:

The screenshot shows a table with two columns: 'Requirement' and 'Tool'. There are two rows of requirements. The first row's requirement is 'Synchronize customer data between Dynamics 365 Customer Engagement and Dynamics 365 Finance.' The second row's requirement is 'Import fixed assets from an existing system.' The 'Tool' column contains two dropdown menus. The first dropdown menu is open, showing three options: 'Dual-write', 'Data import export framework', and 'Microsoft Excel add-in'. The second dropdown menu is also open, showing three options: 'Dual-write', 'Data import export framework', and 'Lifecycle Services'. A large watermark 'VCEplus.io' is visible across the table, and a 'Vdumps' logo is overlaid on the right side of the image.

Requirement	Tool
Synchronize customer data between Dynamics 365 Customer Engagement and Dynamics 365 Finance.	<ul style="list-style-type: none">Dual-writeData import export frameworkMicrosoft Excel add-in
Import fixed assets from an existing system.	<ul style="list-style-type: none">Dual-writeData import export frameworkLifecycle Services

Answer Area:

Requirement	Tool
Synchronize customer data between Dynamics 365 Customer Engagement and Dynamics 365 Finance.	<ul style="list-style-type: none"> Dual-write Data import export framework Microsoft Excel add-in
Import fixed assets from an existing system.	<ul style="list-style-type: none"> Dual-write Data import export framework Lifecycle Services

Section:

Explanation:

Reference:

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

QUESTION 40

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: A, D

Section:

Explanation:

Reference:

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

QUESTION 41

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.	<div style="border: 1px solid black; padding: 2px;"> <div style="text-align: right;">▼</div> <div style="padding: 2px;">Composite entity</div> <div style="padding: 2px;">Data entity</div> <div style="padding: 2px;">Configuration data project</div> </div>
Ensure that all legal entities contain the same setup data.	<div style="border: 1px solid black; padding: 2px;"> <div style="text-align: right;">▼</div> <div style="padding: 2px;">Composite entity</div> <div style="padding: 2px;">Data entity</div> <div style="padding: 2px;">Copy into legal entity</div> <div style="padding: 2px;">Configuration data project</div> </div>

Answer Area:

Answer Area

Requirement	Option
Import the sales order header and lines by using a single entity.	<div style="border: 1px solid black; padding: 2px;"> <div style="text-align: right;">▼</div> <div style="padding: 2px; background-color: #e0ffe0;">Composite entity</div> <div style="padding: 2px;">Data entity</div> <div style="padding: 2px;">Configuration data project</div> </div>
Ensure that all legal entities contain the same setup data.	<div style="border: 1px solid black; padding: 2px;"> <div style="text-align: right;">▼</div> <div style="padding: 2px;">Composite entity</div> <div style="padding: 2px;">Data entity</div> <div style="padding: 2px;">Copy into legal entity</div> <div style="padding: 2px; background-color: #e0ffe0;">Configuration data project</div> </div>



Section:

Explanation:

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>

QUESTION 42

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

Section:

Explanation:

Reference:

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



02 - Manage Finance and Operations Data

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.

To answer the questions included in a case study, you will need to reference information that is provided in the case study. Case studies might contain exhibits and other resources that provide more information about the scenario that is described in the case study. Each question is independent of the other questions in this case study.

At the end of this case study, a review screen will appear. This screen allows you to review your answers and to make changes before you move to the next section of the exam. After you begin a new section, you cannot return to this section.

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

Liberty's Delightful Sinful Bakery & Café 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



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 1

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: A, D

Section:

Explanation:

04 - Perform data migration

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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When you are ready to answer a question, click the Question button to return to the question.

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 1

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

Section:

Explanation:

Reference:

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

Exam J

QUESTION 1

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

Section:

Explanation:



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

QUESTION 2

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

Section:

Explanation:

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

QUESTION 3

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

Section:

Explanation:

Reference: <https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/dev-tools/exclude-test-packages>

QUESTION 4

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	<ul style="list-style-type: none"> Task guide Power Automate Workflow Business Process Modeler
Send information about a new vendor to a purchasing manager for approval	<ul style="list-style-type: none"> Workflow Business Process Modeler Data task automation Regression suite automation tool
Send the purchasing manager an email every Friday with new vendor information	<ul style="list-style-type: none"> Power Automate Workflow Data task automation

Answer Area:

Answer Area	Requirement	Tool
	Assist a new purchasing agent with vendor creation	<ul style="list-style-type: none"> Task guide Power Automate Workflow Business Process Modeler
	Send information about a new vendor to a purchasing manager for approval	<ul style="list-style-type: none"> Workflow Business Process Modeler Data task automation Regression suite automation tool
	Send the purchasing manager an email every Friday with new vendor information	<ul style="list-style-type: none"> Power Automate Workflow Data task automation

Section:

Explanation:

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-approvalprocess-workflow>

QUESTION 5

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	<ul style="list-style-type: none">Activate the account structuresActivate the chart of accountsReimport the account structuresReimport the chart of accounts
Workflow error	<ul style="list-style-type: none">Adjust the version number of the workflowChange the workflow owner to admin prior to exportChange the workflow owner to admin prior to importSet the workflow status to Draft before export

Answer Area:

Answer Area	
Error	Action
Account structures	<ul style="list-style-type: none">Activate the account structuresActivate the chart of accountsReimport the account structuresReimport the chart of accounts
Workflow error	<ul style="list-style-type: none">Adjust the version number of the workflowChange the workflow owner to admin prior to exportChange the workflow owner to admin prior to importSet the workflow status to Draft before export



Section:

Explanation:

Reference: <https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/data-entities/copy-configuration>

QUESTION 6

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:

Auto-Generated	Auto Default	Source field	Staging field
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	<input type="checkbox"/> JournalNo, ItemCode, SalesPrice <input type="checkbox"/> JournalNumber, ItemNumber, Price <input type="checkbox"/> JournalNo, ItemCode, Auto, SalesPrice, Default <input type="checkbox"/> JournalNumber, ItemNumber, LineNumber, Price, CurrencyCode
Field calculated by the system	<input type="checkbox"/> LineNumber <input type="checkbox"/> JournalNumber <input type="checkbox"/> ItemNumber <input type="checkbox"/> CurrencyCode
Field fixed to a single value	<input type="checkbox"/> CurrencyCode <input type="checkbox"/> JournalNumber <input type="checkbox"/> ItemNumber <input type="checkbox"/> LineNumber

Answer Area:

Answer Area

Source	Field
Fields in the Excel file	<ul style="list-style-type: none"> JournalNo, ItemCode, SalesPrice JournalNumber, ItemNumber, Price JournalNo, ItemCode, Auto, SalesPrice, Default JournalNumber, ItemNumber, LineNumber, Price, CurrencyCode
Field calculated by the system	<ul style="list-style-type: none"> LineNumber JournalNumber ItemNumber CurrencyCode
Field fixed to a single value	<ul style="list-style-type: none"> CurrencyCode JournalNumber ItemNumber LineNumber

Section:

Explanation:

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

QUESTION 7

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	Answer Area
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	

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

Section:

Explanation:

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>

QUESTION 8

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:

Tools	Answer Area 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:



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	



Section:

Explanation:

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

QUESTION 9

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:

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:

Test types	Requirement	Test type
Component test	Ensure that a singular function within the application works with real objects from other classes	Unit test
	Ensure that the latency of the application meets acceptability metrics for users	Performance test
	Ensure that as new capabilities are added, old capabilities are not broken	Regression test

Section:

Explanation:

QUESTION 10

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	<div data-bbox="1121 667 1846 970"><ul style="list-style-type: none">Microsoft Azure DevOpsMicrosoft Azure Test PlansSeleniumTask Recorder</div>
Maintain data to use in test cases	<div data-bbox="1121 1033 1846 1348"><ul style="list-style-type: none">Microsoft Azure DevOpsDynamics 365Microsoft ExcelTask Recorder</div>

Answer Area:

Answer Area

Requirement	Technology
Replay test cases click by click	<ul style="list-style-type: none"> Microsoft Azure DevOps Microsoft Azure Test Plans Selenium Task Recorder
Maintain data to use in test cases	<ul style="list-style-type: none"> Microsoft Azure DevOps Dynamics 365 Microsoft Excel Task Recorder

Section:

Explanation:

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>

QUESTION 11

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	
Task	Solution
Create the business process test scripts	<ul style="list-style-type: none"> Task management Task recorder Test plans Test recorder
Store the tests and parameters for future use	<ul style="list-style-type: none"> Azure DevOps Azure SQL Database Microsoft Dataverse Shared asset library
Run the acceptance tests without manual interactions	<ul style="list-style-type: none"> Data task automation Regression suite automation tool SysTest Framework Visual Studio Test Explorer

Answer Area:

Task	Solution
Create the business process test scripts	<ul style="list-style-type: none"> Task management Task recorder Test plans Test recorder
Store the tests and parameters for future use	<ul style="list-style-type: none"> Azure DevOps Azure SQL Database Microsoft Dataverse Shared asset library
Run the acceptance tests without manual interactions	<ul style="list-style-type: none"> Data task automation Regression suite automation tool SysTest Framework Visual Studio Test Explorer

Section:

Explanation:

QUESTION 12

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

Section:

Explanation:

Reference:

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

QUESTION 13

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

Section:

Explanation:

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

QUESTION 14

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

Section:

QUESTION 15

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

Section:

Explanation:

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

QUESTION 16

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

Section:

QUESTION 17

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

Section:

Explanation:

Reference:

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

QUESTION 18

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

Section:

Explanation:

Reference:



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

QUESTION 19

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: A, B, C

Section:

QUESTION 20

DRAG DROP

You are integrating Dynamic 365 Supply chain Management with data from external system.

You need to select component for various integration scenarios.

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

Select and Place:

Components

- Data entities only
- Composite data entities only
- Data entities and composite data entities

Answer Area

Scenario

- 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.

Component

- Component
- Component
- Component
- Component

Correct Answer:

Components

- Data entities only
- Composite data entities only
- Data entities and composite data entities

Answer Area

Scenario

- 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.

Component

- Data entities only
- Data entities only
- Composite data entities only
- Data entities only

Section:

Explanation:

QUESTION 21

A company is using dual-write to synchronize customer data between Dynamic 365 and Dynamic 365 Finance.

During an unplanned maintenance windows for Dynamics 365 Finance synchronization of customer data was interrupted. The interrupted caused multiple errors and a loss of new requests.

You need to prevent errors and data loss from recurring.
What should you do?

- A. Use catch-up errors.
- B. Select re-run execution.
- C. Skip initial sync.
- D. Enable an alert condition.

Correct Answer: D

Section:

QUESTION 22

A company is implementing Dynamic 365 Finance.

You must load configuration data from a previous version of Dynamic 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.

- A. Select the Resequence button
- B. Use the existing entities.
- C. Run the Run project option.
- D. Replace the existing entities.

Correct Answer: A

Section:



QUESTION 23

You design flow control for a complex expense workflow.

The workflow must run the approval process for expense 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:

A screenshot of the 'Select and Place' interface. On the left, under 'Flow control shapes', there are four buttons: 'Conditional decision', 'Manual decision', 'Parallel activity', and 'Subworkflow'. On the right, under 'Requirement', there is a text box: 'Run several processes simultaneously. Evaluate total amount for expense report.' To the right of the requirement is a 'Flow control shape' column with two empty slots for dragging shapes.

Correct Answer:

A screenshot of the 'Correct Answer' interface. It shows the same 'Flow control shapes' and 'Requirement' as the previous screenshot. In the 'Flow control shape' column, the 'Parallel activity' shape is dragged into the top slot and the 'Manual decision' shape is dragged into the bottom slot.

Section:

Explanation:

QUESTION 24

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 warehouse workers.

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

NOTE: Each correct selection is worth one point.

Answer: A

Select and Place:

The screenshot shows a drag-and-drop interface. On the left, there is a list of apps: Dynamics 365 Finance, Dynamics 365 Project Operations, and Dynamics 365 Supply Chain Management. On the right, there are two requirements: 'Set up work templates and location directives for warehouses.' and 'Assign month-end closing tasks to team members and track progress.'. On the far right, there are two empty boxes labeled 'App' for placing the selected apps.

Correct Answer:

The screenshot shows the same interface as above, but with the correct answers placed in the 'App' boxes. 'Dynamics 365 Supply Chain Management' is placed in the first 'App' box, and 'Dynamics 365 Finance' is placed in the second 'App' box.

Section:

Explanation:



QUESTION 25

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. Power Apps
- B. Business Events
- C. Dynamics 365 Finance workflow
- D. Power Automate

Correct Answer: A, D

Section:

QUESTION 26

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.

Which mobile workspaces should you use? 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 to drag the split bar between panes or scroll to view content.

NOTE: Each correct selection is worth one point.

Mobile workspaces

- Expense management
- Cost controlling
- My team
- Project time entry

Answer Area

Requirement

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

Mobile workspace

- Mobile workspace
- Mobile workspace

A.

Answer Area

Requirement

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

Mobile workspace

- Expense management
- Project time entry

Answer: A

Select and Place:

Mobile workspaces

- Expense management
- Cost controlling
- My team
- Project time entry

Answer Area

Requirement

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

Mobile workspace

- Mobile workspace
- Mobile workspace

Correct Answer:

Mobile workspaces

- Expense management
- Cost controlling
- My team
- Project time entry

Answer Area

Requirement

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

Mobile workspace

- Expense management
- Project time entry

Section:

Explanation:

QUESTION 27

A parts suppliers 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. AJAX
- B. Data management framework
- C. Dual-write
- D. OData APIs

Correct Answer: B

Section:

QUESTION 28

You are implementing Dynamics 365 Finance.

Data must be imported and exported by using the data management framework.

You need to identify which data management scenario is supported by using the data management framework.

Which scenario is supported?

- A. Data upgrade
- B. Package deployment
- C. Data expansion
- D. Data migration

Correct Answer: D

Section:

QUESTION 29

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. Attachment size limits
- B. Email throttling
- C. Email distributor batch job
- D. Throttling priority mappings

Correct Answer: B

Section:

Explanation:

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/financeoperations/finance-operations-crossapp-capabilities/email-throttling>

QUESTION 30

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. .Zip
- B. .Clat
- C. .xml
- D. Microsoft Excel
- E. Pipe delimited

Correct Answer: A, C, D

Section:



QUESTION 31

A company is implementing Dynamics 365 Finance.

The company wants to use Power BI as a reporting solution. The reporting 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. Bring your own database (BYOD)
- C. Entity store
- D. Data management

Correct Answer: C

Section:

Explanation:

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-biintegration-entity-store>

QUESTION 32

A company implements Dynamics 365 Finance on-premises. The company uses Microsoft Office 2007.

The country/region address verification document originates must be included in the tower of Documents. Users must be able to edit the address for a document by using Microsoft Word Online.

You need to implement Business Document Management (BDM).

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

- A. Create a Power Automate cloud flow for each BDM template.
- B. Upgrade Office 2007 to Microsoft Office 2019.
- C. Migrate the on-premises deployment to the cloud.
- D. Upgrade Office 2007 to Microsoft Office 365.
- E. Create a business process flow for each BDM template.



Correct Answer: A, E

Section:

QUESTION 33

You are preparing to migrate data into Dynamics 365 Finance from an older system.

You must assign customer to specific receivables accounts by region. A custom field within the older system exists to assign the customer to a region.

You need to migrate the customer data.

What should you do?

- A. Add a field in Dynamics 365 Finance to mirror the older system configuration.
- 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. Map the value from the custom field in the older system to the customer segment field in Dynamics 365 Finance.

Correct Answer: B

Section:

Explanation:

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.

Reference: <https://docs.microsoft.com/en-us/dynamicsax-2012/appuser-itpro/create-a-customergroup>

QUESTION 34

You implement Dynamics 365 Supply Chain Management. You have over 2,000 vendor records. You configure vendor groups to differentiate international vendor's from domestic vendors. You need to locate vendors in France with payment terms of 30 days.

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

Correct Answer: D

Section:

QUESTION 35

A company is implementing Dynamics 365 Supply Chain Management.

The company has a customer who is also a vendor. If the customer's address changes the company must make a single change. The change must be reflected for both the customer and vendor records.

You need to configure the system for the customer and vendor address.

What should you do?

- A. Create a single party record linked to both the customer and vendor records.
- B. Create a single contact that is shared between the customer and vendor record.
- C. Create separate party records for both the customer and vendor records.
- D. Create separate party records with a single relationship defined between them



Correct Answer: C

Section:

QUESTION 36

A company uses Dynamics 365 Finance. The company uses a number sequence named GenJnl_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: B, D

Section:

Explanation:

When the number sequence in Dynamics AX has reached the highest number, an error message will occur, "number sequence has been exceeded." This can occur with any process done in Dynamics AX that uses a number sequence. The example below occurred when a sales order was trying to be confirmed. Due to the number sequence reaching the highest number, the system will not allow the sales order conformation to be completed. To fix the issue, you will first need to look up the number sequence that will need to be changed.

1. Go to Accounts receivables> Accounts Receivables Parameters
2. Look for Conformation
3. Right-click view details on number sequence code (Sales_31)
4. Click edit
5. Add another # in an alphanumeric segment that will extend the value field
6. Add another 9 in the largest field
7. Click edit again to save

Reference: <https://stoneridgesoftware.com/how-to-resolve-number-sequence-exceeded-error-indynamics-ax/>

QUESTION 37

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?

- A. Create an escalation path for the Approve travel requisition step of the travel requisition workflow.
- B. Configure an activation condition on the travel requisition workflow to prevent activation for managers.
- C. Set the value of the Disallow approval by submitter option to Yes.
- D. Configure a condition to prevent the approval step from running when the originator is a manager.

Correct Answer: C

Section:

Explanation:

Specify a final approver

You can designate a final approver for scenarios where the approver is the person who submitted the document for approval and the "disallow approval by submitter" is being used. Follow these steps to specify a final approver.

In the workflow editor, right-click the approval element, and then select Properties to open the Properties form.

In the left pane, click Advanced settings.

Select the Use final approver check box.

In the list, select a user to be the final approver.

Reference: <https://learn.microsoft.com/en-us/dynamics365/fin-ops-core/fin-ops/organizationadministration/configure-approval-process-workflow>

<https://learn.microsoft.com/en-us/dynamics365/fin-ops-core/fin-ops/organizationadministration/configure-approval-step-workflow>

QUESTION 38

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

Section:

Explanation:

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/batchabort>

QUESTION 39

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: B, C

Section:

Explanation:

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/devitpro/sysadmin/tasks/assign-users-security-roles>

<https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/sysadmin/tasks/set-upsegregation-duties>

QUESTION 40

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. ODataAPIs
- C. ADO.NET
- D. Data management framework

Correct Answer: B

Section:

Explanation:

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

QUESTION 41

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

Section:

Explanation:

Reference:

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

QUESTION 42

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

Section:

Explanation:

User acceptance testing (UAT) can be used in Tiers 2-5 sandbox.

Note: 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.

Reference: <https://learn.microsoft.com/en-us/dynamics365/fin-ops-core/devitpro/deployment/cloud-deployment-overview>

