Vendor: Microsoft

Exam Code: MB-300

Exam Name: Microsoft Dynamics 365: Core Finance and Operations

Version: DEMO

QUESTION 1
Case Study 1 - Relecloud
Background
Relecloud is a cloud point of sale (POS) software company specializing in direct to consumer food stands. They have multiple business units using their new Dynamics 365 Finance implementation including customer-facing representatives for account management, technical support, customer service, and finance. There are two legal entities, one for operations and one for financials. Customers pay for the Relecloud POS software monthly and everything is deployed in the cloud. The Dynamics instance URL is https://relecloud-prod.operations.dynamics.com.

Munson’s Pickles and Preserves Farm is a company that uses Relecloud’s cloud POS software to sell their produce in farmers markets. Munson's was one of Relecloud's first customers, and Relecloud stocks their employee lunchroom with Munson's products. Munson's has also been subcontracting their employees to Relecloud to help functionally build a best-in-breed solution. Munson's employees assume multiple organizational positions. Each employee has only a single email address by which people can contact them.

Current environment: System and IT
- Dynamics 365 for Finance was recently updated.
- All recurring batch jobs in the system were removed and recreated.
- The alert notification batch processing was recently changed from every 10 minutes to once every two hours.
- Real-time reporting of the information is not needed.

Current environment: Customer Service
- Customer credit requests are entered through the customer service team.
- All requests must contain a date, time, reason for request, and customer service notes on initial recommendations for credit action.
- Customers have multiple points of contact who can enter support tickets to the Relecloud portal.
- Tickets are automatically generated in the support team's third-party system when they are created by support technicians.
- The Dynamics 365 email client mail is used to correspond with customers.

Current environment: Technical Support/IT
- The technical support team gets involved when technical issues arise with the Relecloud software. Service tickets are entered and get escalated to the team, depending on the issue.
- Microsoft Flow is used for automating different workstreams.
- Workflows are not configured for the technical support request flows in Dynamics 365 Finance.
- Management and history of technical support tickets are handled in a third-party issue management solution.
- The technical service team manages issues related to the Relecloud POS as well as the Dynamics 365 application.

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

Answer: BCD
Explanation:
"Workflows are not configured for the technical support request flows in Dynamics 365 Finance." Which rules out Workflow handling.
"Management and history of technical support tickets are handled in a third-party issue management solution." which involves Business Events and External feeds.

QUESTION 2
Case Study 2 - Liberty
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.

Hotspot Question

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.

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:

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.

Explanation:
Create an alert that is triggered to send externally to yes, and then active business event of alert, setup flow(Power automate) to trigger this event alert, once triggered, this flow will connect to Microsoft Forms Pro (Customer voice) survey and get feedback from customer.
https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/business-events/how-to/FormsPro

QUESTION 3
Case Study 3 - Wide World Importers (WWI)
Background
Wide World Importers (WWI) is an importer and supplier of fair trade, handmade home goods to independent retailers in North America.

One of WWI's products was recently featured on several major television talk shows and has become very popular. As a result, WWI is expanding their prospective sales operations to new markets as well as engaging current customers in a more direct manner.

Current environment
Sales representatives

- Sales representatives are highly competent users of this Dynamics 365 Finance implementation.
- They typically operate independently, but due to the recent high sales volume they must work together as a team.
- Sales representatives are not available to test the new business processes and security roles being introduced.
- Customer and prospect data is currently stored in Excel spreadsheets.

Requirements: Functional requirements

- A mechanism to facilitate an interactive step-by-step training guide within the Dynamics 365 application must be implemented.
- Tips and hints for data entry in the interactive training guide must also be included because most sales representatives will not be available for training prior to implementation of the new functionality. They need to be able to use the functionality as soon as it is implemented.
- Sales representatives must be able to see all report and form data for specific sales and inventory reports and forms.
- Many sales representatives have applied individual changes to forms and reports, such as moved, added, and hidden fields. These changes are critical to the sales representatives' efficiencies and must remain in place.
- New processes must be standardized and documented according to current standards.
- Several sales representatives run custom queries on SSRS reports. Sales representatives must be able to see the default data as well as their custom queries for those reports.

Requirements: Power Apps initiative

- A Power Apps also must be created and embedded on the customer form. The form displays other prospects who reside within a certain radius of the current customer. This functionality will be distributed on a per-request basis.
- A Power Apps app must be embedded in a feedback form within the Sales order form in Dynamics 365 Finance. The form must display questions for a sales representative to ask customers while reviewing their previous sales orders.

You need to implement a solution for importing core system data.

Which two tools should you use? Each correct answer presents part of the solution.

NOTE: Each correct selection is worth one point.

A. Data Validation checklist workspace
B. Record templates
C. Multiple data templates for each entity
D. Lifecycle Services Work items
E. Data Task Automation

Answer: AE
Explanation:
https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/user-interface/data-validation-workspace
https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/data-entities/data-task-automation

QUESTION 4
Case Study 4 - Adventure Works Cycles
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.

You need to extend the warranty and SLAs to meet the requirements.

What should you do?

A. Integrate the solution with a Dynamics 365 Data Entity.
B. Configure a Power Automate flow for the solution.
C. Configure the solution for a Power Virtual Agents channel.
D. Integrate the solution into a Power Apps integrated social media platform.

Answer: C
Explanation:
Warranty and Service Level Agreements stored in Dynamics 365 /not be exposed directly to sales representatives.
For questions about bike-specific warranties and SLA, consumers can contact Adventure Works Cycles directly through social media pages. Then chatbot AI is the solution and put chat agent in the social media.
https://docs.microsoft.com/en-us/dynamics365/customer-service/configure-bot-virtual-agent

QUESTION 5
SIMULATION

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

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

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

A. See explanation below

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

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

QUESTION 6
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.

Answer: C
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/batch-abort

QUESTION 7
You set up Dynamics 365 Finance.
Your organization will use email with the application.

You need to ensure that email will be sent using typical secure settings.
What setting must be set up as specified?

A. Information rights management is enabled.
B. Retention policies are enabled.
C. Encryption between on-premises servers and Exchange Online Archiving is enabled.
D. Specify if SSL is required is selected.

Answer: D
Explanation:
SMTP settings tab.
On the Email parameters page, note the following settings on the SMTP settings tab.
Server information
SSL required - Determines whether secure transport is used. Typically, this is Yes, except for internal or troubleshooting scenarios.
Etc.
Reference:
https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/fin-ops/organization-administration/configure-email

QUESTION 8
A hospital plans to deploy a new instance of Dynamics 365 Finance. New users are created regularly.
You must add all employees as users of the system and assign the appropriate role to users.
Employees who have the initials M.D. after their name must be added to the Medical Doctors role.
You schedule the automatic role assignment batch job.
You need to complete the role assignment.
What should you do?

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

Answer: A
Explanation:
You can assign users to roles automatically, based on rules and business data, exclude users from automatic role assignment, or add users to roles manually.
Note: Automatically assign users to roles
This procedure explains how system administrators can automatically assign users to roles, based on business data.
1. Go to Navigation pane > Modules > System administration > Security > Assign users to roles.
2. In the tree, select 'Accounting supervisor'. Select the role that you want to configure the rule for. In this example, select Accounting supervisor.
3. Select Add rule to open the dialog menu.
4. In the Select a query list, find and select the desired record. Select the query to use for this rule.
5. In the Membership rule name list, click the link in the selected row.
6. Select Edit query. Edit the query, as needed.
7. Select OK.
8. Select Run automatic role assignment.
9. Go to Navigation pane > Modules > System administration > Users > Users (ideally in a separate browser tab).

10.Review the roles assigned to various users to confirm that the role assignment query was correct. Adjust and re-run if needed.
Reference:
https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/sysadmin/tasks/assign-users-security-roles

QUESTION 9
You are preparing to migrate data into Dynamics 365 Finance from an older system.
You must assign customers to specific receivables accounts by region.
A custom field within the older system exists to assign the customer to a region.
You need to map the customer data.
What should you do?

A. 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 36S finance.
D. Map the value from the custom field in the older system to the customer segment field in Dynamics 365 Finance

Answer: B
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-customer-group

QUESTION 10
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

Answer: C
Explanation:
Verify that user role assignments comply with new rules for segregation of duties
Go to System administration > Security > Segregation of duties > Verify compliance of user-role assignments.
Select OK. A notification displays the results of the validation. Conflicts are logged on the Segregation of duties unresolved conflicts page.
https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/sysadmin/tasks/security-diagstics-task-recordings

QUESTION 11
Your company has Dynamics 365 Finance system.

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

How should you add the credit check step?

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

Answer: C
Explanation:
The Add info step gesture lets you insert a step and supply your own text for it. This feature is useful primarily for creating task guides. An informational step (or info step for short) is a task guide step where the instruction text for the step is user-specified. Info steps are useful for describing actions that are a part of the scenario but must occur outside the client. For example, a scenario might require the user to search for item inventory or check an email for information. You can specify where an info step should appear in the task guide. The info step can point to a control on the page, if the step is associated with the control. Alternatively, the info step can appear in the upper right of the page, if the step is external to the client, or if it's an explanation that applies to the whole page.

QUESTION 12
Users import huge amounts of data into the system every day. You want to optimize the performance for the imports.

You enable change tracking for the data entities.

Has your objective been met?

A. Yes
B. No

Answer: B
Explanation:
Change tracking enables incremental export of data from finance and operations apps by using Data management. In an incremental export, only records that have changed are exported.
https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/sysadmin/optimize-data-migration

QUESTION 13
You are preparing to migrate to a Dynamics 365 Finance environment from Dynamics AX 2009.

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

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

A. It identifies tasks that you should do to prepare the AX 2012 environment.
B. It produces an upgraded version of your code and a report about the remaining conflicts that must

be resolved.

C. It helps you find and fill gaps between the table schemas for each version, as well as helping you move your data.
D. It creates a staging table for each entity in the Microsoft Dynamics AX database where the target table resides, where you can validate the data, and perform any clean up or conversion that is needed.

Answer: D
Explanation:
The Data Import/Export Framework creates a staging table for each entity in the Microsoft Dynamics AX database where the target table resides. Data that is being migrated is first moved to the staging table. There, you can verify the data, and perform any cleanup or conversion that is required. You can then move the data to the target table or export it.
-https://docs.microsoft.com/en-us/dynamicsax-2012/appuser-itpro/data-import-export-framework-user-guide-dixf-dmf#architecture

QUESTION 14
Your company uses Dynamics 365 Finance.

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

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

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

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

Answer: A
Explanation:
Types of participants
You can assign an approval step to the following groups of participants.
TYPES OF PARTICIPANTS
User group Description
Participant Assign the approval step to members of a group or role.
Hierarchy Assign the approval step to users in a specific organizational hierarchy.
Workflow user Assign the approval step to users of this workflow.
Queue Assign the approval step to a work item queue.
User Assign the approval step to specific users.
https://docs.microsoft.com/en-us/dynamics365/supply-chain/procurement/procurement-sourcing-workflows

QUESTION 15
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 Finance by entering the Application ID in Dynamics 365 Finance.

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.

Answer: ACE
Explanation:
1. The user who completes this procedure must have Admin rights for the tenant to register applications.
2. Sign in into Azure Portal and go to Azure Active Directory > App registrations > New application registration.
3. Create a new app using Name, Application type as Web app/API and Sign-on URL as the base URL of d365 FO online client
4. Copy application id and grant permission to Power BI Service API, also copy application key.
5. On D365FO, open the Power BI configuration page, enable power BI and provide application id and application key.
6. Refresh the browser and open a workspace to see the Power BI section
https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/analytics/configure-power-bi-integration

QUESTION 16
You are the Dynamics 365 Finance and Operation administrator. You have servers that are located in different time zones.
You need to segregate batch jobs to balance the workload and optimize latency.
What should you do?

A. Use enhanced batch forms to segregate batch jobs.
B. Set up batch alerts.
C. Create and configure a batch group.
D. Set up recurrence.

Answer: C
Explanation:
You should create and configure batch groups. Batch groups are used to direct batch tasks to the batch servers defined in the batch group configuration.
You should not set up batch alerts. Batch alerts are used to show notifications about batch job completion, errors, or cancellation.
You should not use enhanced batch forms for segregating batch jobs. Enhanced batch forms only provide a header to summarize tasks in the selected batch job.
You should not set up recurrence. Setting up recurrence will only allow you to schedule the specific batch job to run periodically. This setup will not impact the workload or latency optimization.

QUESTION 17
You are a Dynamics 365 Finance system administrator.

Data is being migrated from a customized version of a legacy application to Dynamics 365 Finance. Some of the fields in the entity are the same, and some are different.

As a starting point, you need to automatically map as many fields as possible within Dynamics 365 Finance.

Which feature or tool should you use?

A. Use the Mapping visualization tool
B. Generate source mapping
C. Use Data templates
D. Use the Data task automation tool
E. Copy configuration data

Answer: B
Explanation:
Mapping is always automatic. The visualization shows the automatically generated mapping which you can modify. You use the 'Generate Source Mapping' functionality only if you have changed the contents of the import file to re-generate a mapping.

QUESTION 18
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)

Answer: C
Explanation:
You can use the Microsoft Dynamics AX 2009 Data migration tool (DMT) to migrate your data from AX 2009 to Finance and Operations. Using the DMT is the only supported upgrade path from AX 2009.
Data Import Export Framework wasn't introduced until AX2012.

QUESTION 19
A client uses Dynamics 365 Finance.
You need to configure a workflow to allow users to approve or deny workflow tasks from outside the system.
What should you configure?

A. a business event and a Microsoft PowerApps workflow
B. a standard notification in workflows
C. a standard date-based alert
D. a business event a Microsoft Flow workflow
E. a standard changed-based alert

Answer: D
Explanation:
Business Event and Microsoft Flow/ Microsoft power automate is the right way.