

- **Vendor: Microsoft**
- **Exam Code: MB-300**
- **Exam Name: Microsoft Dynamics 365: Core Finance and Operations**
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### QUESTION 208

#### 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.

##### Requirements: Data import and export

- WWI must consolidate and migrate all their data currently in Excel spreadsheets into the Dynamics 365 system.
- Sales managers must cleanse their region's prospects and bring them into the Dynamics 365 system by a specified date for final analysis.
- Sales manager's data sheet templates must include the most recent data from the Dynamics 365 system. The managers must check for duplicate data.
- The data templates used for data import must be intuitively located within the Dynamics 365 forms where the data primarily resides.

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• For any other core data that must be imported, all test imports must be as repeatable and consistent as possible while data validation errors are identified and addressed.

**Requirements: Technical requirements**

- The implementation must be done as quickly as possible with no development needed.
- A tool for project workstream, task management, and work stories must be implemented for the rapid deployment sprints, issues, and feature backlogs that will result from the implementation.
- The solution must also facilitate automation of regression testing for the One Version business continuity initiatives.
- Basic entity templates must be acceptable for imports.

**Issues**

- The Dynamics 365 Commerce customer data cannot currently be accessed by a Power Apps data source.
- Several sales representatives have applied individual changes to forms, preventing the new business processes. All representatives should use the same form layouts.
- Sales representatives report errors on a few existing sales reports. You identify that the criteria used to generate the reports is the root cause for the errors.

You need to troubleshoot the source of and reason for the errors reported by the sales representative.

Which tool should you use?

- A. Alert Service
- B. System diagnostics
- C. Environment History
- D. Azure Monitor
- E. Microsoft Azure Virtual Machine

**Answer:** C

**QUESTION 209**

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Hotspot Question

You need to implement a solution for the project task management.

Which tool or tools support the solution? To answer, select the appropriate options in the answer area.

NOTE: Each correct selection is worth one point.

**Answer Area**

Requirement	Tool
Manage workstreams and project tasks.	<div style="border: 1px solid gray; padding: 2px;"> <div style="text-align: right; padding-right: 5px;">▼</div> <div style="padding: 2px;">Microsoft Tasks</div> <div style="padding: 2px;">Visual Studio</div> <div style="padding: 2px;">Microsoft Project</div> <div style="padding: 2px;">Azure DevOps</div> </div>
Recommend the task solution for future One Version initiatives.	<div style="border: 1px solid gray; padding: 2px;"> <div style="text-align: right; padding-right: 5px;">▼</div> <div style="padding: 2px;">Azure Active Directory Integration</div> <div style="padding: 2px;">Lifecycle Services Integration</div> <div style="padding: 2px;">Dual-Write Integration</div> <div style="padding: 2px;">Dynamics 365 Finance Integration</div> </div>

**Answer:**

**Answer Area**

Requirement	Tool
Manage workstreams and project tasks.	<div style="border: 1px solid gray; padding: 2px;"> <div style="background-color: #f0f0f0; padding: 2px; display: flex; justify-content: space-between; align-items: center;"> <span>▼</span> </div> <div style="padding: 2px;"> <p>Microsoft Tasks</p> <p>Visual Studio</p> <p>Microsoft Project</p> <p style="background-color: #c8e6c9;">Azure DevOps</p> </div> </div>
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- Sales representatives report errors on a few existing sales reports. You identify that the criteria used to generate the reports is the root cause for the errors.

**Hotspot Question**

You need to resolve the sales representatives' report data issue.

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

NOTE: Each correct selection is worth one point.

**Answer Area**

**Inquiry**

**Action**

How to resolve the issue

▼
Delete the usage data for all of the users.
Remove the Report Selections data for the users.
Remove the saved queries for the users.
Delete then add the users back into the system.

Where to find the issue

▼
Navigate to the Usage Data for each user.
Navigate to the SSRS report query object in Visual Studio.
Navigate to the report filter criteria.
Navigate the system-level personalization from for each user.

**Answer:**

## Answer Area

Inquiry	Action
How to resolve the issue	<div style="border: 1px solid black; padding: 2px;"> <div style="background-color: #e0e0e0; padding: 2px;">▼</div> <div style="padding: 2px;">Delete the usage data for all of the users.</div> <div style="padding: 2px;">Remove the Report Selections data for the users.</div> <div style="padding: 2px; background-color: #d9ead3;">Remove the saved queries for the users.</div> <div style="padding: 2px;">Delete then add the users back into the system.</div> </div>
Where to find the issue	<div style="border: 1px solid black; padding: 2px;"> <div style="background-color: #e0e0e0; padding: 2px;">▼</div> <div style="padding: 2px;">Navigate to the Usage Data for each user.</div> <div style="padding: 2px;">Navigate to the SSRS report query object in Visual Studio.</div> <div style="padding: 2px; background-color: #d9ead3;">Navigate to the report filter criteria.</div> <div style="padding: 2px;">Navigate the system-level personalization from for each user.</div> </div>

### QUESTION 211

#### 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.

##### Products

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- 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 Work 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.

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- 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.
- 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:**

<https://docs.microsoft.com/en-us/dynamics365/customer-service/configure-bot-virtual-agent>

**QUESTION 212**

**Case Study 4 - Adventure Works Cycles**

**Background**

**Current environment**

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The limited-edition bicycles are the most successful. They have high margins, are in high demand, and have a fervent following with the younger bicycle community that wants to make a social statement. Most consumers become aware of the other Adventure Works Cycles bicycles through these limited editions.

Adventure Works Cycles wants to triple its manufacturing capabilities and expand to countries/regions in South America, Western Europe, and United Arab Emirates (UAE) over the next few years.

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#### **Requirements**

##### **General**

No coding is in scope for the project.

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- A One Version strategy needs to be implemented.
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- 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.

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- 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

**Answer: C**

**Explanation:**

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

**QUESTION 213**

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- 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 Work 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.

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**<https://www.braindump2go.com/mb-300.html>**

- 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.

**Hotspot Question**

You need to design the street team mobile application for creating sales orders in the mobile application.

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

NOTE: Each correct selection is worth one point.

**Answer Area**

Requirement	Technology				
Store product information for use in the mobile application.	<div style="border: 1px solid gray; padding: 2px;"> <div style="background-color: #f0f0f0; padding: 2px; text-align: right;">▼</div> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td>Common Data Service</td></tr> <tr><td>Dynamics 365 Supply Chain Management</td></tr> <tr><td>Mobile App SQL lite database</td></tr> <tr><td>Power Apps</td></tr> </table> </div>	Common Data Service	Dynamics 365 Supply Chain Management	Mobile App SQL lite database	Power Apps
Common Data Service					
Dynamics 365 Supply Chain Management					
Mobile App SQL lite database					
Power Apps					
Integrate sales orders from the mobile app to Dynamics 365.	<div style="border: 1px solid gray; padding: 2px;"> <div style="background-color: #f0f0f0; padding: 2px; text-align: right;">▼</div> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td>Common Data Service</td></tr> <tr><td>Dual-write</td></tr> <tr><td>Virtual Entities</td></tr> <tr><td>Data Integration APIs</td></tr> </table> </div>	Common Data Service	Dual-write	Virtual Entities	Data Integration APIs
Common Data Service					
Dual-write					
Virtual Entities					
Data Integration APIs					

Answer:

**Answer Area**

Requirement	Technology				
Store product information for use in the mobile application.	<div style="border: 1px solid gray; padding: 2px;"> <div style="background-color: #f0f0f0; padding: 2px; text-align: right;">▼</div> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td>Common Data Service</td></tr> <tr style="background-color: #e0ffe0;"><td>Dynamics 365 Supply Chain Management</td></tr> <tr><td>Mobile App SQL lite database</td></tr> <tr><td>Power Apps</td></tr> </table> </div>	Common Data Service	Dynamics 365 Supply Chain Management	Mobile App SQL lite database	Power Apps
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Common Data Service					
Dual-write					
Virtual Entities					
Data Integration APIs					

**QUESTION 214**

**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.

### **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 Work 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.
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#### **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.

#### **Hotspot Question**

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.

## Answer Area

Requirement	Feature										
Resolve the concerns about payments and invoices.	<table border="1"> <tr><td> </td><td>▼</td></tr> <tr><td>Microsoft Office</td><td></td></tr> <tr><td>Business document management</td><td></td></tr> <tr><td>Electronic reporting</td><td></td></tr> <tr><td>Document Routing Agent</td><td></td></tr> </table>		▼	Microsoft Office		Business document management		Electronic reporting		Document Routing Agent	
	▼										
Microsoft Office											
Business document management											
Electronic reporting											
Document Routing Agent											
Use existing assets for the international compliance solution.	<table border="1"> <tr><td> </td><td>▼</td></tr> <tr><td>Microsoft Excel</td><td></td></tr> <tr><td>Entities</td><td></td></tr> <tr><td>Common Data Service</td><td></td></tr> <tr><td>Configuration provider</td><td></td></tr> </table>		▼	Microsoft Excel		Entities		Common Data Service		Configuration provider	
	▼										
Microsoft Excel											
Entities											
Common Data Service											
Configuration provider											
Generate the document templates for the countries.	<table border="1"> <tr><td> </td><td>▼</td></tr> <tr><td>Document Routing Agent</td><td></td></tr> <tr><td>Power BI</td><td></td></tr> <tr><td>Electronic reporting</td><td></td></tr> <tr><td>Business document management</td><td></td></tr> </table>		▼	Document Routing Agent		Power BI		Electronic reporting		Business document management	
	▼										
Document Routing Agent											
Power BI											
Electronic reporting											
Business document management											

Answer:

## Answer Area

Requirement	Feature
Resolve the concerns about payments and invoices.	<div style="border: 1px solid gray; padding: 2px;"> <div style="background-color: #f0f0f0; padding: 2px; text-align: right;">▼</div> <div style="padding: 2px;">Microsoft Office</div> <div style="padding: 2px;">Business document management</div> <div style="padding: 2px; background-color: #d9ead3;">Electronic reporting</div> <div style="padding: 2px;">Document Routing Agent</div> </div>
Use existing assets for the international compliance solution.	<div style="border: 1px solid gray; padding: 2px;"> <div style="background-color: #f0f0f0; padding: 2px; text-align: right;">▼</div> <div style="padding: 2px; background-color: #d9ead3;">Microsoft Excel</div> <div style="padding: 2px;">Entities</div> <div style="padding: 2px;">Common Data Service</div> <div style="padding: 2px;">Configuration provider</div> </div>
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**Explanation:**

<https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/analytics/general-electronic-reporting>  
<https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/analytics/er-business-document-management>

**QUESTION 215**

**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**

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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 Work 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.
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- Any errors on the data loading must identify the issue for the person to address and fix for future loads.

##### **Sales**

- The sales street team must be able to view and edit (only product descriptions) near real-time information from the Dynamics 365 system about products on their personal mobile phones.

- No street team representatives will have access to the Dynamics 365 Supply Chain Management application, but they must be able to enter orders and update customer information into the system without Adventure Works Cycles assistance.
- The Adventure Works Cycles internal sales support team must be able to see all street team sales orders entered to provide support, but the internal team should not see any information around the commissions configured on the orders.
- The sales support team must be able to see all orders and fields for the different sales teams. No other security differences from a Dynamics perspective are needed.

**Products**

- Warranty and Service Level Agreements stored in Dynamics 365 for the different products must not be exposed directly to sales representatives.
- The representatives must be able to pose questions from customers and retailers and get answers back almost immediately.
- Any opportunity to extend this type of product inquiry and support mechanism to customers and retailers must be evaluated.
- The data for all of the product information must be easily extractable back into Excel.

**International compliance**

- Payments and invoices inbound and outbound must be converted or translated to the correct localized format
- Regardless of regulatory compliance, the customer-facing business documents must have a unique template for each country that can be designed within Microsoft Office applications. These documents must be embedded in Dynamics 365 forms for data export and configurable by non-developers.

**Drag and Drop Question**

You need to identify which Microsoft features will accomplish the actions.

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

NOTE: Each correct selection is worth one point.

**Answer Area**

Actions	Action	Feature
OData	Enable the street sales team to respond to inquiries on products.	
Dual-write	Use the street team mobile application for sales order creation.	
Business Events		
Power Automate		

**Answer:**

### Answer Area

Actions	Action	Feature
OData	Enable the street sales team to respond to inquiries on products.	Business Events
Dual-write		Power Automate
	Use the street team mobile application for sales order creation.	

**QUESTION 216**

**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.
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**Sales**

There are three distinct sales teams:

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  - Sells to retailers.
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- 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 Work 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**

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##### **Sales**

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**International compliance**

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Drag and Drop Question

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.

**Answer Area**

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

Answer:

**Answer Area**

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

**Explanation:**

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

**QUESTION 217**

**Case Study 4 - Adventure Works Cycles**

**Background**

**Current environment**

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The limited-edition bicycles are the most successful. They have high margins, are in high demand, and have a fervent following with the younger bicycle community that wants to make a social statement. Most consumers become aware of the other Adventure Works Cycles bicycles through these limited editions.

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#### **Sales**

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#### **Products**

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- Often the data and images for the products are out of date.
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- 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.
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- 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 Work 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.

**Hotspot Question**

You need to identify technologies to help with the new release requirements.

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

NOTE: Each correct selection is worth one point.

**Answer Area**

Action	Technology
Store the most critical business processes for future testing.	<div style="border: 1px solid black; padding: 2px;"> <div style="background-color: #f0f0f0; padding: 2px; text-align: right;">▼</div> <div style="padding: 2px;">Microsoft Teams</div> <div style="padding: 2px;">Azure DevOps</div> <div style="padding: 2px;">RSAT desktop application</div> <div style="padding: 2px;">Microsoft Word</div> </div>
Regression test the new version of the software.	<div style="border: 1px solid black; padding: 2px;"> <div style="background-color: #f0f0f0; padding: 2px; text-align: right;">▼</div> <div style="padding: 2px;">Acceptance test library</div> <div style="padding: 2px;">RSAT desktop application</div> <div style="padding: 2px;">Dynamics 365 Supply Chain Management</div> <div style="padding: 2px;">Azure DevOps</div> </div>

Answer:

**Answer Area**

Action	Technology
Store the most critical business processes for future testing.	<div style="border: 1px solid black; padding: 2px;"> <div style="background-color: #f0f0f0; padding: 2px; text-align: right;">▼</div> <div style="padding: 2px;">Microsoft Teams</div> <div style="padding: 2px; background-color: #d9ead3;">Azure DevOps</div> <div style="padding: 2px;">RSAT desktop application</div> <div style="padding: 2px;">Microsoft Word</div> </div>
Regression test the new version of the software.	<div style="border: 1px solid black; padding: 2px;"> <div style="background-color: #f0f0f0; padding: 2px; text-align: right;">▼</div> <div style="padding: 2px;">Acceptance test library</div> <div style="padding: 2px; background-color: #d9ead3;">RSAT desktop application</div> <div style="padding: 2px;">Dynamics 365 Supply Chain Management</div> <div style="padding: 2px;">Azure DevOps</div> </div>

**Explanation:**

<https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/perf-test/rsat/rsat-install-configure>

**QUESTION 218**

You are asked to trigger a Power Automate flow for an approval for a business process that is not in the business events list.

You need to trigger the Power Automate flow without any code.

What are two possible ways to trigger the Power Automate workflow? Each correct answer presents a complete solution.

NOTE: Each correct selection is worth one point.

- A. from a due date alert
- B. from a change-based alert
- C. from a component in the Dynamics 365 Finance Workflow Designer
- D. from an application business event
- E. from a user's personalization functionality

**Answer:** AB

**Explanation:**

<https://docs.microsoft.com/en-us/power-automate/connection-dynamics365>

<https://dynamics-tips.com/how-to-use-alerts-d365-finance-and-operations/>