

- **Vendor: Microsoft**
- **Exam Code: MB-330**
- **Exam Name: Microsoft Dynamics 365 for Finance and Operations, Supply Chain Management**
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#### **QUESTION 345**

##### **Case Study 5 - Alpine Ski Background**

Alpine Ski House sells a variety of ski and outdoor equipment, including apparel and digital content to retailers and wholesalers located in the United States. The central distribution center, accounting and customer service center are located in the company's headquarters building in the state of Colorado. The company also has an additional warehouse in the state of New York. The company is known for its customer-friendly policies.

##### **Current environment**

Alpine Ski House currently has an outdated accounting system that is not connected to the New York warehouse. The warehouse system contains inventory quantities, but does not have costing, therefore the FIFO principles are applied through spreadsheet calculations at month end.

Alpine Ski House has worked to create a future state roadmap as a foundation for growth. They have decided to implement Dynamics 365 cloud applications and must limit the amount of on premises hardware as they are not staffed for support. They are expecting to implement required devices for warehouse applications to support WMS only. The customer service center places phone orders on behalf of wholesalers and retailers.

The customer service team provides concierge services to the top 20 largest customers. Each customer service team member is assigned to 5 customers as the customer's dedicated customer service representative.

The call center has a phone system that records calls and stores the call duration.

Data is a combination of systems that are disconnected to include warehouse and accounting. Customer records and consumer records are stored in the call center third-party system. Excel spreadsheets are used for consolidated reporting from these systems.

Alpine Ski House must enable business partners to place their own B2B orders on the web as well as manage their own users.

The company has decided to expand distribution to Banff, Alberta and create a new operating legal entity in Canada. This expansion must be planned for as part of the solution, as it will be up and running six months after the initial US company is operating on the new applications.

##### **Requirements**

##### **Applications and environment**

Required applications must align to the future state roadmap.

Business partners must have the ability to onboard their own users for placing orders on the web.

The Canadian company must use the same base data as the US operating company and must be set up in the same instance.

Sales order history data must not be imported. All current and future orders must be migrated to the new system.

Master data for customers must be migrated from both the call center third-party system as well as the accounting system. You identify the following requirements:

- The mapping fields for customer records in both systems are the same, except the accounting system which has three additional fields that must be mapped.
- Duplicate records must not be imported.

##### **Cutover plan**

- User1 reports that sales orders will be open and not shipped at the time of cutover to production. There are 20 orders expected to be open.

##### **Customer service**

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**General**

Concierge customer service reps must be able to access customer records for all customers in their customer group. Customer service reps must be able to organize how information is presented when they sign into the new system. Security must be applied to the customer service reps as a group and must not be applied at the individual level.

**Return policies**

Sporting equipment is warranted by the manufacturer and must not be returned to Alpine Ski House warehouse. Alpine Ski House does not strictly enforce this policy. Exceptions to the policy are allowed with manager approval.

Customer service must track reported issues with sporting equipment to identify trends.

Customers can exchange apparel, but refunds must not be permitted. Any consumer exchanges must occur directly through Alpine's call center and cannot be returned to a physical store.

**Exchange policies**

All consumer calls must be logged for tracking purposes. The customer service representative will determine if there is an exchange, or if the consumer should be redirected to the manufacturer. Digital content is final sale only. All complaints must still be tracked.

Returns and replacement orders must be processed through the warehouse. Consumer information for returns and replacement orders does not need to be stored.

A record of the location where the consumer purchased the product must be stored for tracking purpose.

The customer service reps must be able to view the order status for delayed shipments or orders that have been shipped but not invoiced. They need to have shortcuts to view this information.

Returns or credits for a concierge customer that are not from a consumer do not require notifications to the concierge representative.

Web orders must be limited to B2B, and consumers web access must not be required for order placement.

The call center must track the call minutes in the phone system by customer number.

The system must send the following notifications:

- Dedicated concierge representative must be automatically notified when an exchanged product has shipped. The concierge representative must set up the alert.

- External customers must be notified of the new consumer exchanges. The notification must integrate into the customer's third party dashboard and must not be sent as an email notification.

**Customer Service**

The customer service center is overloaded with frequently asked questions (FAQ's) that are consuming resources and creating issues with customer service levels.

Alpine Ski House has decided to deploy an automated FAQ website because they do not have sufficient staff resources to manage customer interactions. All automated interactions must be stored for 30 days.

The company has decided to extend its concierge program to the top 25 customers. A new representative has been hired and requires the same screen layout as other team members.

When new customers are created in the system, the customer number must automatically pass to the call center phone system.

**Implementation**

The implementation is expected to take 12 months. Alpine Ski House wants to ensure that when they go live, they are on the most current available update of Dynamics 365. Testing must occur in the various stages of the implementation.

You identify the following testing requirements:

- Platform updates will be applied, and business processes will be verified to perform as expected, either manual or automated where possible against stored task recordings.

- Development must be completed by the 10th month. Developers must perform initial testing code that they create.

- When development is completed, all processes in the system must be tested by the user group.

Due to competing demands for the project team, the company wants to automate as much of the testing as possible.

The project manager is concerned that a critical field must have validation scripts run against it during automated testing. The developers will be required to write the custom validation script. The user creating the test script must document the step in the test script that the specific validation script must be run for the developers.

The project manager wants to put a control in place to ensure that once the automated testing is established the test scripts are not modified or overwritten.

**Question**

You need to determine which applications are required for the Alpine Ski House solution.

Which Dynamics 365 apps should you use?

- A. Dynamics 365 Finance, Dynamics 365 Supply Chain Management, and Dynamics Project Operations
- B. Dynamics 365 Finance, Dynamics 365 Supply Chain Management, and Dynamics 365

Commerce

- C. Dynamics 365 Finance and Dynamics 363 Supply Chain Management
- D. Dynamics 365 Supply Chain Management and Dynamics 365 Commerce
- E. Dynamics 365 Finance, Dynamics 365 Project Operations, and Dynamics 365 Commerce

**Answer: B**

**Explanation:**

Required applications must align to the future state roadmap.

\* Dynamics 365 Finance

Includes budgeting, project management, financials, and accounting for large, international companies.

\* Dynamics 365 Supply Chain Management

A supply chain solution developed to evolve the trade, manufacturing, and supply chain processes.

\* Dynamics 365 Commerce

To cover Customer Service etc.

#### **QUESTION 346**

##### **Case Study 5 - Alpine Ski**

##### **Background**

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##### **Requirements**

##### **Applications and environment**

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Cutover plan

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##### **Customer service**

##### **General**

**One Time!**

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**Customer Service**

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The project manager wants to put a control in place to ensure that once the automated testing is established the test scripts are not modified or overwritten.

**Question**

You must meet the requirements for frequently asked Questions (FAQs).

Which two features are required? Each correct answer presents part of the solution.

NOTE: Cacti correct selection is worth one point.

- A. Power Apps app
- B. Remote assist
- C. Power Virtual Agents



- D. Microsoft Dataverse
- E. Azure Data Lake

**Answer:** AC

**Explanation:**

Power Virtual Agents lets you create powerful chatbots that can answer questions posed by your customers, other employees, or visitors to your website or service.

Manage how long to keep bot's conversation transcripts:

1. By default, a pre-configured bulk delete job will remove all conversation transcripts older than a month. To retain the transcripts for longer, you need to disable the existing system job and create a new job.
2. In the <https://www.powerapps.com>, click on the Settings cog (top-right menu) and click on Advanced settings.
3. After clicking on Advanced settings, you are redirected to the Dynamics 365 portal.
4. On the Settings menu, select Data Management.
5. On the Data Management screen, select Bulk Record Deletion.
6. On the Bulk Record Deletion screen, expand the View dropdown and select Recurring Bulk Deletion System Jobs.
7. Select the pre-configured bulk delete job called Bulk Delete Conversation Transcript Records Older Than 1 Month.

Note:

- The customer service center is overloaded with frequently asked questions (FAQ's) that are consuming resources and creating issues with customer service levels.

- Alpine Ski House has decided to deploy an automated FAQ website because they do not have sufficient staff resources to manage customer interactions. All automated interactions must be stored for 30 days.

Reference:

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

<https://powervirtualagents.microsoft.com/en-us/blog/view-export-and-manage-retention-time-of-your-bot-conversation-transcripts/>

**QUESTION 347**

**Case Study 5 - Alpine Ski**

**Background**

Alpine Ski House sells a variety of ski and outdoor equipment, including apparel and digital content to retailers and wholesalers located in the United States. The central distribution center, accounting and customer service center are located in the company's headquarters building in the state of Colorado. The company also has an additional warehouse in the state of New York. The company is known for its customer-friendly policies.

**Current environment**

Alpine Ski House currently has an outdated accounting system that is not connected to the New York warehouse. The warehouse system contains inventory quantities, but does not have costing, therefore the FIFO principles are applied through spreadsheet calculations at month end.

Alpine Ski House has worked to create a future state roadmap as a foundation for growth. They have decided to implement Dynamics 365 cloud applications and must limit the amount of on premises hardware as they are not staffed for support. They are expecting to implement required devices for warehouse applications to support WMS only.

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The call center has a phone system that records calls and stores the call duration.

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Alpine Ski House must enable business partners to place their own B2B orders on the web as well as manage their own users.

The company has decided to expand distribution to Banff, Alberta and create a new operating legal entity in Canada. This expansion must be planned for as part of the solution, as it will be up and running six months after the initial US company is operating on the new applications.

**Requirements**

**Applications and environment**

Required applications must align to the future state roadmap.

Business partners must have the ability to onboard their own users for placing orders on the web.

The Canadian company must use the same base data as the US operating company and must be set up in the same instance.

Sales order history data must not be imported. All current and future orders must be migrated to the new system. Master data for customers must be migrated from both the call center third-party system as well as the accounting system. You identify the following requirements:

- The mapping fields for customer records in both systems are the same, except the accounting system which has three additional fields that must be mapped.
- Duplicate records must not be imported.

Cutover plan

- User1 reports that sales orders will be open and not shipped at the time of cutover to production. There are 20 orders expected to be open.

**Customer service****General**

Concierge customer service reps must be able to access customer records for all customers in their customer group. Customer service reps must be able to organize how information is presented when they sign into the new system. Security must be applied to the customer service reps as a group and must not be applied at the individual level.

**Return policies**

Sporting equipment is warranted by the manufacturer and must not be returned to Alpine Ski House warehouse. Alpine Ski House does not strictly enforce this policy. Exceptions to the policy are allowed with manager approval. Customer service must track reported issues with sporting equipment to identify trends. Customers can exchange apparel, but refunds must not be permitted. Any consumer exchanges must occur directly through Alpine's call center and cannot be returned to a physical store.

**Exchange policies**

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When new customers are created in the system, the customer number must automatically pass to the call center phone system.

**Implementation**

The implementation is expected to take 12 months. Alpine Ski House wants to ensure that when they go live, they are on the most current available update of Dynamics 365. Testing must occur in the various stages of the implementation. You identify the following testing requirements:

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The project manager wants to put a control in place to ensure that once the automated testing is established the test scripts are not modified or overwritten.

**Question**

Which two features should you use to meet the customer exchange requirements? Each correct answer presents part of the solution.

NOTE: Each correct selection is worth one point.

- A. Case management
- B. Customer credit
- C. Document handling
- D. Quality order

**Answer: A**

**Explanation:**

A case typically represents a situation or incident that's reported by a customer and that requires a resolution. Cases are designed to track the process from the initial intake of an incident, through the remediation process, to the final resolution. From a customer service standpoint, a case can represent several items.

You can use document management, also known as document handling, to attach notes, documents, or document references to records. You can also use Office Add-ins for Microsoft Dynamics AX to integrate with document management and create Microsoft Word and Microsoft Excel documents or document templates that use Microsoft Dynamics AX data.

Reference:

<https://docs.microsoft.com/en-us/learn/modules/managing-cases-with-dynamics-365/1-case-management-overview>

<https://docs.microsoft.com/en-us/dynamicsax-2012/appuser-itpro/configure-document-management>

**QUESTION 348**

**Case Study 5 - Alpine Ski**

**Background**

Alpine Ski House sells a variety of ski and outdoor equipment, including apparel and digital content to retailers and wholesalers located in the United States. The central distribution center, accounting and customer service center are located in the company's headquarters building in the state of Colorado. The company also has an additional warehouse in the state of New York. The company is known for its customer-friendly policies.

**Current environment**

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**Requirements**

**Applications and environment**

Required applications must align to the future state roadmap.

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scripts are not modified or overwritten.

**Question**

Hotspot Question

You must perform the data migration for User1 to meet the application and environment requirements.

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

NOTE: Each correct selection is worth one point.

**Answer Area****Action**

Define data type

**Option**

Master
Transactional
Parametric

Select migration method

Manual only
Import only
Manual or import

Answer:

**Answer Area****Action**

Define data type

**Option**

Master
Transactional
Parametric

Select migration method

Manual only
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**Explanation:**

Box 1: Transactional -

\* Sales order history data must not be imported. All current and future orders must be migrated to the new system.

\* Cutover plan

User1 reports that sales orders will be open and not shipped at the time of cutover to production. There are 20 orders expected to be open.

Box 2: Manual only

**QUESTION 349****Case Study 5 - Alpine Ski****Background**

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Customers can exchange apparel, but refunds must not be permitted. Any consumer exchanges must occur directly through Alpine's call center and cannot be returned to a physical store.

**Exchange policies**

All consumer calls must be logged for tracking purposes. The customer service representative will determine if there is an exchange, or if the consumer should be redirected to the manufacturer. Digital content is final sale only. All complaints must still be tracked.

Returns and replacement orders must be processed through the warehouse. Consumer information for returns and

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replacement orders does not need to be stored.

A record of the location where the consumer purchased the product must be stored for tracking purpose

The customer service reps must be able to view the order status for delayed shipments or orders that have been shipped but not invoiced. They need to have shortcuts to view this information.

Returns or credits for a concierge customer that are not from a consumer do not require notifications to the concierge representative.

Web orders must be limited to B2B, and consumers web access must not be required for order placement.

The call center must track the call minutes in the phone system by customer number.

The system must send the following notifications:

- Dedicated concierge representative must be automatically notified when an exchanged product has shipped. The concierge representative must set up the alert.

- External customers must be notified of the new consumer exchanges. The notification must integrate into the customer's third party dashboard and must not be sent as an email notification.

### **Customer Service**

The customer service center is overloaded with frequently asked questions (FAQ's) that are consuming resources and creating issues with customer service levels.

Alpine Ski House has decided to deploy an automated FAQ website because they do not have sufficient staff resources to manage customer interactions. All automated interactions must be stored for 30 days.

The company has decided to extend its concierge program to the top 25 customers. A new representative has been hired and requires the same screen layout as other team members.

When new customers are created in the system, the customer number must automatically pass to the call center phone system.

### **Implementation**

The implementation is expected to take 12 months. Alpine Ski House wants to ensure that when they go live, they are on the most current available update of Dynamics 365. Testing must occur in the various stages of the implementation.

You identify the following testing requirements:

- Platform updates will be applied, and business processes will be verified to perform as expected, either manual or automated where possible against stored task recordings.

- Development must be completed by the 10th month. Developers must perform initial testing code that they create.

- When development is completed, all processes in the system must be tested by the user group.

Due to competing demands for the project team, the company wants to automate as much of the testing as possible.

The project manager is concerned that a critical field must have validation scripts run against it during automated testing. The developers will be required to write the custom validation scrip. The user creating the test script must document the step in the test script that the specific validation script must be run for the developers.

The project manager wants to put a control in place to ensure that once the automated testing is established the test scripts are not modified or overwritten.

### **Question**

Hotspot Question

You need to determine the testing type for the activities.

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

NOTE: Each correct selection is worth one point.

**Answer Area**

**Testing**

**Type**

Requirement 1:

Unit
Regression
End to end

Requirement 2:

Unit
Regression
Functional
End to end

Requirement 3:

Unit
Regression
End to end

**Answer:**



**Answer Area**

**Testing**

**Type**

Requirement 1:

Unit
Regression
End to end

Requirement 2:

Unit
Regression
Functional
End to end

Requirement 3:

Unit
Regression
End to end

**Explanation:**

Box 1: Regression

You identify the following testing requirements:

\* Platform updates will be applied, and business processes will be verified to perform as expected, either manual or automated where possible against stored task recordings.

Protection against regression:

Regression defects are defects that are introduced when a change is made to the application. It is common for testers to not only test their new feature but also features that existed beforehand in order to verify that previously implemented features still function as expected.

Box 2: Unit

You identify the following testing requirements:

\* Development must be completed by the 10th month. Developers must perform initial testing code that they create.

A unit test is used to check whether a specific function or feature of your app is working correctly.

Incorrect, Not Functional: Functional tests are expensive. They typically involve opening up the application and performing a series of steps that you (or someone else), must follow in order to validate the expected behavior. These steps may not always be known to the tester, which means they will have to reach out to someone more knowledgeable in the area in order to carry out the test.

Box 3: End to end

You identify the following testing requirements:

\* When development is completed, all processes in the system must be tested by the user group.

End-to-end tests are used to check whether the overall solution runs correctly. This is important because even if all unit tests function correctly, the integration between two units can potentially fail. These tests are done by following a test scenario that's close to the use case of the actual business process.

Reference:

<https://docs.microsoft.com/en-us/dotnet/core/testing/unit-testing-best-practices>

<https://docs.microsoft.com/en-us/powerapps/guidance/planning/testing-phase>

**QUESTION 350**

**Case Study 5 - Alpine Ski**

**Background**

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**One Time!**

Alpine Ski House sells a variety of ski and outdoor equipment, including apparel and digital content to retailers and wholesalers located in the United States. The central distribution center, accounting and customer service center are located in the company's headquarters building in the state of Colorado. The company also has an additional warehouse in the state of New York. The company is known for its customer-friendly policies.

**Current environment**

Alpine Ski House currently has an outdated accounting system that is not connected to the New York warehouse. The warehouse system contains inventory quantities, but does not have costing, therefore the FIFO principles are applied through spreadsheet calculations at month end.

Alpine Ski House has worked to create a future state roadmap as a foundation for growth. They have decided to implement Dynamics 365 cloud applications and must limit the amount of on premises hardware as they are not staffed for support. They are expecting to implement required devices for warehouse applications to support WMS only. The customer service center places phone orders on behalf of wholesalers and retailers.

The customer service team provides concierge services to the top 20 largest customers. Each customer service team member is assigned to 5 customers as the customer's dedicated customer service representative.

The call center has a phone system that records calls and stores the call duration.

Data is a combination of systems that are disconnected to include warehouse and accounting. Customer records and consumer records are stored in the call center third-party system. Excel spreadsheets are used for consolidated reporting from these systems.

Alpine Ski House must enable business partners to place their own B2B orders on the web as well as manage their own users.

The company has decided to expand distribution to Banff, Alberta and create a new operating legal entity in Canada. This expansion must be planned for as part of the solution, as it will be up and running six months after the initial US company is operating on the new applications.

**Requirements****Applications and environment**

Required applications must align to the future state roadmap.

Business partners must have the ability to onboard their own users for placing orders on the web.

The Canadian company must use the same base data as the US operating company and must be set up in the same instance.

Sales order history data must not be imported. All current and future orders must be migrated to the new system.

Master data for customers must be migrated from both the call center third-party system as well as the accounting system. You identify the following requirements:

- The mapping fields for customer records in both systems are the same, except the accounting system which has three additional fields that must be mapped.
- Duplicate records must not be imported.

**Cutover plan**

- User1 reports that sales orders will be open and not shipped at the time of cutover to production. There are 20 orders expected to be open.

**Customer service****General**

Concierge customer service reps must be able to access customer records for all customers in their customer group.

Customer service reps must be able to organize how information is presented when they sign into the new system.

Security must be applied to the customer service reps as a group and must not be applied at the individual level.

**Return policies**

Sporting equipment is warranted by the manufacturer and must not be returned to Alpine Ski House warehouse. Alpine Ski House does not strictly enforce this policy. Exceptions to the policy are allowed with manager approval.

Customer service must track reported issues with sporting equipment to identify trends.

Customers can exchange apparel, but refunds must not be permitted. Any consumer exchanges must occur directly through Alpine's call center and cannot be returned to a physical store.

**Exchange policies**

All consumer calls must be logged for tracking purposes. The customer service representative will determine if there is an exchange, or if the consumer should be redirected to the manufacturer. Digital content is final sale only. All complaints must still be tracked.

Returns and replacement orders must be processed through the warehouse. Consumer information for returns and replacement orders does not need to be stored.

A record of the location where the consumer purchased the product must be stored for tracking purpose

The customer service reps must be able to view the order status for delayed shipments or orders that have been shipped but not invoiced. They need to have shortcuts to view this information.

Returns or credits for a concierge customer that are not from a consumer do not require notifications to the concierge

representative.

Web orders must be limited to B2B, and consumers web access must not be required for order placement.

The call center must track the call minutes in the phone system by customer number.

The system must send the following notifications:

- Dedicated concierge representative must be automatically notified when an exchanged product has shipped. The concierge representative must set up the alert.
- External customers must be notified of the new consumer exchanges. The notification must integrate into the customer's third party dashboard and must not be sent as an email notification.

#### **Customer Service**

The customer service center is overloaded with frequently asked questions (FAQ's) that are consuming resources and creating issues with customer service levels.

Alpine Ski House has decided to deploy an automated FAQ website because they do not have sufficient staff resources to manage customer interactions. All automated interactions must be stored for 30 days.

The company has decided to extend its concierge program to the top 25 customers. A new representative has been hired and requires the same screen layout as other team members.

When new customers are created in the system, the customer number must automatically pass to the call center phone system.

#### **Implementation**

The implementation is expected to take 12 months. Alpine Ski House wants to ensure that when they go live, they are on the most current available update of Dynamics 365. Testing must occur in the various stages of the implementation.

You identify the following testing requirements:

- Platform updates will be applied, and business processes will be verified to perform as expected, either manual or automated where possible against stored task recordings.
- Development must be completed by the 10th month. Developers must perform initial testing code that they create.
- When development is completed, all processes in the system must be tested by the user group.

Due to competing demands for the project team, the company wants to automate as much of the testing as possible.

The project manager is concerned that a critical field must have validation scripts run against it during automated testing. The developers will be required to write the custom validation scrip. The user creating the test script must document the step in the test script that the specific validation script must be run for the developers.

The project manager wants to put a control in place to ensure that once the automated testing is established the test scripts are not modified or overwritten.

#### **Question**

Hotspot Question

You need to meet the project manager's requirements for testing.

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

NOTE: Each correct selection is worth one point.

**Answer Area**

**Requirement**

**Configuration**

Document step

Add developer placeholder
RSAT optional settings
Preferred value instruction
User-supplied value label

Required control

RSAT configurations
Azure DevOps settings
Task recorder edit step
Hide this step

**Answer:**

**Answer Area**

**Requirement**

**Configuration**

Document step

Add developer placeholder
RSAT optional settings
Preferred value instruction
User-supplied value label

Required control

RSAT configurations
Azure DevOps settings
Task recorder edit step
Hide this step

**Explanation:**

Box 1: Add developer placeholder

Note: The user creating the test script must document the step in the test script that the specific validation script must be run for the developers.

Add developer placeholder lets the user add a placeholder step to the list of recorded steps. This placeholder step doesn't appear when the task guide is viewed, and it isn't run during maintenance of a recording. It's used only by the Regression suite automation tool (RSAT) or the X++ code generator that enables an X++ test to be created from a task recording. When the code generator creates an X++ test, it automatically adds a method stub to the generated code.

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The developer can then add X++ code into this method stub. The automated code will call the validation when the generated test is run at the point in the recording where this placeholder was added.

Note: The project manager is concerned that a critical field must have validation scripts run against it during automated testing. The developers will be required to write the custom validation script. The user creating the test script must document the step in the test script that the specific validation script must be run for the developers.

Box 2: Task Recorder Edit Step

Note: The developers will be required to write the custom validation script.

Enriching steps in a recording

There are various options for enriching a step in a recording. For example, you can adjust the text that is associated with a step and add information about a specific step. This section describes the step enrichment capabilities that are available. To access these options, click the Edit step button on a specific step of a recording.

Reference:

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

## **QUESTION 351**

### **Case Study 5 - Alpine Ski**

#### **Background**

Alpine Ski House sells a variety of ski and outdoor equipment, including apparel and digital content to retailers and wholesalers located in the United States. The central distribution center, accounting and customer service center are located in the company's headquarters building in the state of Colorado. The company also has an additional warehouse in the state of New York. The company is known for its customer-friendly policies.

#### **Current environment**

Alpine Ski House currently has an outdated accounting system that is not connected to the New York warehouse. The warehouse system contains inventory quantities, but does not have costing, therefore the FIFO principles are applied through spreadsheet calculations at month end.

Alpine Ski House has worked to create a future state roadmap as a foundation for growth. They have decided to implement Dynamics 365 cloud applications and must limit the amount of on premises hardware as they are not staffed for support. They are expecting to implement required devices for warehouse applications to support WMS only.

The customer service center places phone orders on behalf of wholesalers and retailers.

The customer service team provides concierge services to the top 20 largest customers. Each customer service team member is assigned to 5 customers as the customer's dedicated customer service representative.

The call center has a phone system that records calls and stores the call duration.

Data is a combination of systems that are disconnected to include warehouse and accounting. Customer records and consumer records are stored in the call center third-party system. Excel spreadsheets are used for consolidated reporting from these systems.

Alpine Ski House must enable business partners to place their own B2B orders on the web as well as manage their own users.

The company has decided to expand distribution to Banff, Alberta and create a new operating legal entity in Canada. This expansion must be planned for as part of the solution, as it will be up and running six months after the initial US company is operating on the new applications.

#### **Requirements**

##### **Applications and environment**

Required applications must align to the future state roadmap.

Business partners must have the ability to onboard their own users for placing orders on the web.

The Canadian company must use the same base data as the US operating company and must be set up in the same instance.

Sales order history data must not be imported. All current and future orders must be migrated to the new system.

Master data for customers must be migrated from both the call center third-party system as well as the accounting system. You identify the following requirements:

- The mapping fields for customer records in both systems are the same, except the accounting system which has three additional fields that must be mapped.
- Duplicate records must not be imported.

Cutover plan

- User1 reports that sales orders will be open and not shipped at the time of cutover to production. There are 20 orders expected to be open.

#### **Customer service**

##### **General**

Concierge customer service reps must be able to access customer records for all customers in their customer group.

Customer service reps must be able to organize how information is presented when they sign into the new system.

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Security must be applied to the customer service reps as a group and must not be applied at the individual level.

**Return policies**

Sporting equipment is warranted by the manufacturer and must not be returned to Alpine Ski House warehouse. Alpine Ski House does not strictly enforce this policy. Exceptions to the policy are allowed with manager approval.

Customer service must track reported issues with sporting equipment to identify trends.

Customers can exchange apparel, but refunds must not be permitted. Any consumer exchanges must occur directly through Alpine's call center and cannot be returned to a physical store.

**Exchange policies**

All consumer calls must be logged for tracking purposes. The customer service representative will determine if there is an exchange, or if the consumer should be redirected to the manufacturer. Digital content is final sale only. All complaints must still be tracked.

Returns and replacement orders must be processed through the warehouse. Consumer information for returns and replacement orders does not need to be stored.

A record of the location where the consumer purchased the product must be stored for tracking purpose

The customer service reps must be able to view the order status for delayed shipments or orders that have been shipped but not invoiced. They need to have shortcuts to view this information.

Returns or credits for a concierge customer that are not from a consumer do not require notifications to the concierge representative.

Web orders must be limited to B2B, and consumers web access must not be required for order placement.

The call center must track the call minutes in the phone system by customer number.

The system must send the following notifications:

- Dedicated concierge representative must be automatically notified when an exchanged product has shipped. The concierge representative must set up the alert.
- External customers must be notified of the new consumer exchanges. The notification must integrate into the customer's third party dashboard and must not be sent as an email notification.

**Customer Service**

The customer service center is overloaded with frequently asked questions (FAQ's) that are consuming resources and creating issues with customer service levels.

Alpine Ski House has decided to deploy an automated FAQ website because they do not have sufficient staff resources to manage customer interactions. All automated interactions must be stored for 30 days.

The company has decided to extend its concierge program to the top 25 customers. A new representative has been hired and requires the same screen layout as other team members.

When new customers are created in the system, the customer number must automatically pass to the call center phone system.

**Implementation**

The implementation is expected to take 12 months. Alpine Ski House wants to ensure that when they go live, they are on the most current available update of Dynamics 365. Testing must occur in the various stages of the implementation.

You identify the following testing requirements:

- Platform updates will be applied, and business processes will be verified to perform as expected, either manual or automated where possible against stored task recordings.
- Development must be completed by the 10th month. Developers must perform initial testing code that they create.
- When development is completed, all processes in the system must be tested by the user group.

Due to competing demands for the project team, the company wants to automate as much of the testing as possible.

The project manager is concerned that a critical field must have validation scripts run against it during automated testing. The developers will be required to write the custom validation scrip. The user creating the test script must document the step in the test script that the specific validation script must be run for the developers.

The project manager wants to put a control in place to ensure that once the automated testing is established the test scripts are not modified or overwritten.

**Question**

You need to configure the Canadian company's Dynamics 365 Finance system to meet the applications and environment requirements.

How should you create the configuration?

- A. Rebuild and update
- B. Data management copy into legal entity
- C. Data management export and import
- D. Lifecycle Services (LCS) export and import

**Answer:** B

**Explanation:**

The Canadian company must use the same base data as the US operating company and must be set up in the same instance." MS DOC says "To move data from one legal entity to another legal entity in the same instance, you can use the Copy into legal entity feature.

**QUESTION 352**

**Case Study 5 - Alpine Ski**

**Background**

Alpine Ski House sells a variety of ski and outdoor equipment, including apparel and digital content to retailers and wholesalers located in the United States. The central distribution center, accounting and customer service center are located in the company's headquarters building in the state of Colorado. The company also has an additional warehouse in the state of New York. The company is known for its customer-friendly policies.

**Current environment**

Alpine Ski House currently has an outdated accounting system that is not connected to the New York warehouse. The warehouse system contains inventory quantities, but does not have costing, therefore the FIFO principles are applied through spreadsheet calculations at month end.

Alpine Ski House has worked to create a future state roadmap as a foundation for growth. They have decided to implement Dynamics 365 cloud applications and must limit the amount of on premises hardware as they are not staffed for support. They are expecting to implement required devices for warehouse applications to support WMS only.

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The company has decided to expand distribution to Banff, Alberta and create a new operating legal entity in Canada. This expansion must be planned for as part of the solution, as it will be up and running six months after the initial US company is operating on the new applications.

**Requirements**

**Applications and environment**

Required applications must align to the future state roadmap.

Business partners must have the ability to onboard their own users for placing orders on the web.

The Canadian company must use the same base data as the US operating company and must be set up in the same instance.

Sales order history data must not be imported. All current and future orders must be migrated to the new system.

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**Cutover plan**

- User1 reports that sales orders will be open and not shipped at the time of cutover to production. There are 20 orders expected to be open.

**Customer service**

**General**

Concierge customer service reps must be able to access customer records for all customers in their customer group.

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**Exchange policies**

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The project manager wants to put a control in place to ensure that once the automated testing is established the test scripts are not modified or overwritten.

#### **Question**

You must meet the call center phone system requirements for new customers.

What should you use?

- A. Workflow
- B. Guides
- C. Remote assist
- D. Power Automate

**Answer: D**

#### **QUESTION 353**

##### **Case Study 5 - Alpine Ski**

##### **Background**

Alpine Ski House sells a variety of ski and outdoor equipment, including apparel and digital content to retailers and wholesalers located in the United States. The central distribution center, accounting and customer service center are located in the company's headquarters building in the state of Colorado. The company also has an additional warehouse in the state of New York. The company is known for its customer-friendly policies.



### **Current environment**

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### **Requirements**

#### **Applications and environment**

Required applications must align to the future state roadmap.

Business partners must have the ability to onboard their own users for placing orders on the web.

The Canadian company must use the same base data as the US operating company and must be set up in the same instance.

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- The mapping fields for customer records in both systems are the same, except the accounting system which has three additional fields that must be mapped.
- Duplicate records must not be imported.

#### **Cutover plan**

- User1 reports that sales orders will be open and not shipped at the time of cutover to production. There are 20 orders expected to be open.

### **Customer service**

#### **General**

Concierge customer service reps must be able to access customer records for all customers in their customer group.

Customer service reps must be able organize how information is presented when they sign into the new system.

Security must be applied to the customer service reps as a group and must not be applied at the individual level.

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#### **Exchange policies**

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The call center must track the call minutes in the phone system by customer number.

The system must send the following notifications:

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- Dedicated concierge representative must be automatically notified when an exchanged product has shipped. The concierge representative must set up the alert.
- External customers must be notified of the new consumer exchanges. The notification must integrate into the customer's third party dashboard and must not be sent as an email notification.

**Customer Service**

The customer service center is overloaded with frequently asked questions (FAQ's) that are consuming resources and creating issues with customer service levels.

Alpine Ski House has decided to deploy an automated FAQ website because they do not have sufficient staff resources to manage customer interactions. All automated interactions must be stored for 30 days.

The company has decided to extend its concierge program to the top 25 customers. A new representative has been hired and requires the same screen layout as other team members.

When new customers are created in the system, the customer number must automatically pass to the call center phone system.

**Implementation**

The implementation is expected to take 12 months. Alpine Ski House wants to ensure that when they go live, they are on the most current available update of Dynamics 365. Testing must occur in the various stages of the implementation.

You identify the following testing requirements:

- Platform updates will be applied, and business processes will be verified to perform as expected, either manual or automated where possible against stored task recordings.
- Development must be completed by the 10th month. Developers must perform initial testing code that they create.
- When development is completed, all processes in the system must be tested by the user group.

Due to competing demands for the project team, the company wants to automate as much of the testing as possible.

The project manager is concerned that a critical field must have validation scripts run against it during automated testing. The developers will be required to write the custom validation scrip. The user creating the test script must document the step in the test script that the specific validation script must be run for the developers.

The project manager wants to put a control in place to ensure that once the automated testing is established the test scripts are not modified or overwritten.

**Question**

You need to configure the customer service representative's screen to meet the requirements.

Which three features must be configured? Each correct answer presents part of the solution.

NOTE: Each correct selection is worth one point.

- A. Funnel
- B. Favorites
- C. Charts
- D. Workspaces
- E. Security

**Answer:** ACE

**QUESTION 354****Case Study 5 - Alpine Ski****Background**

Alpine Ski House sells a variety of ski and outdoor equipment, including apparel and digital content to retailers and wholesalers located in the United States. The central distribution center, accounting and customer service center are located in the company's headquarters building in the state of Colorado. The company also has an additional warehouse in the state of New York. The company is known for its customer-friendly policies.

**Current environment**

Alpine Ski House currently has an outdated accounting system that is not connected to the New York warehouse. The warehouse system contains inventory quantities, but does not have costing, therefore the FIFO principles are applied through spreadsheet calculations at month end.

Alpine Ski House has worked to create a future state roadmap as a foundation for growth. They have decided to implement Dynamics 365 cloud applications and must limit the amount of on premises hardware as they are not staffed for support. They are expecting to implement required devices for warehouse applications to support WMS only.

The customer service center places phone orders on behalf of wholesalers and retailers.

The customer service team provides concierge services to the top 20 largest customers. Each customer service team member is assigned to 5 customers as the customer's dedicated customer service representative.

The call center has a phone system that records calls and stores the call duration.

Data is a combination of systems that are disconnected to include warehouse and accounting. Customer records and consumer records are stored in the call center third-party system. Excel spreadsheets are used for consolidated reporting from these systems.

Alpine Ski House must enable business partners to place their own B2B orders on the web as well as manage their own users.

The company has decided to expand distribution to Banff, Alberta and create a new operating legal entity in Canada. This expansion must be planned for as part of the solution, as it will be up and running six months after the initial US company is operating on the new applications.

**Requirements****Applications and environment**

Required applications must align to the future state roadmap.

Business partners must have the ability to onboard their own users for placing orders on the web.

The Canadian company must use the same base data as the US operating company and must be set up in the same instance.

Sales order history data must not be imported. All current and future orders must be migrated to the new system.

Master data for customers must be migrated from both the call center third-party system as well as the accounting system. You identify the following requirements:

- The mapping fields for customer records in both systems are the same, except the accounting system which has three additional fields that must be mapped.
- Duplicate records must not be imported.

**Cutover plan**

- User1 reports that sales orders will be open and not shipped at the time of cutover to production. There are 20 orders expected to be open.

**Customer service****General**

Concierge customer service reps must be able to access customer records for all customers in their customer group.

Customer service reps must be able to organize how information is presented when they sign into the new system.

Security must be applied to the customer service reps as a group and must not be applied at the individual level.

**Return policies**

Sporting equipment is warranted by the manufacturer and must not be returned to Alpine Ski House warehouse. Alpine Ski House does not strictly enforce this policy. Exceptions to the policy are allowed with manager approval.

Customer service must track reported issues with sporting equipment to identify trends.

Customers can exchange apparel, but refunds must not be permitted. Any consumer exchanges must occur directly through Alpine's call center and cannot be returned to a physical store.

**Exchange policies**

All consumer calls must be logged for tracking purposes. The customer service representative will determine if there is an exchange, or if the consumer should be redirected to the manufacturer. Digital content is final sale only. All complaints must still be tracked.

Returns and replacement orders must be processed through the warehouse. Consumer information for returns and replacement orders does not need to be stored.

A record of the location where the consumer purchased the product must be stored for tracking purpose

The customer service reps must be able to view the order status for delayed shipments or orders that have been shipped but not invoiced. They need to have shortcuts to view this information.

Returns or credits for a concierge customer that are not from a consumer do not require notifications to the concierge representative.

Web orders must be limited to B2B, and consumers web access must not be required for order placement.

The call center must track the call minutes in the phone system by customer number.

The system must send the following notifications:

- Dedicated concierge representative must be automatically notified when an exchanged product has shipped. The concierge representative must set up the alert.
- External customers must be notified of the new consumer exchanges. The notification must integrate into the customer's third party dashboard and must not be sent as an email notification.

**Customer Service**

The customer service center is overloaded with frequently asked questions (FAQ's) that are consuming resources and creating issues with customer service levels.

Alpine Ski House has decided to deploy an automated FAQ website because they do not have sufficient staff resources to manage customer interactions. All automated interactions must be stored for 30 days.

The company has decided to extend its concierge program to the top 25 customers. A new representative has been hired and requires the same screen layout as other team members.

When new customers are created in the system, the customer number must automatically pass to the call center phone system.

**Implementation**

The implementation is expected to take 12 months. Alpine Ski House wants to ensure that when they go live, they are on the most current available update of Dynamics 365. Testing must occur in the various stages of the implementation. You identify the following testing requirements:

- Platform updates will be applied, and business processes will be verified to perform as expected, either manual or automated where possible against stored task recordings.
- Development must be completed by the 10th month. Developers must perform initial testing code that they create.
- When development is completed, all processes in the system must be tested by the user group.

Due to competing demands for the project team, the company wants to automate as much of the testing as possible. The project manager is concerned that a critical field must have validation scripts run against it during automated testing. The developers will be required to write the custom validation scrip. The user creating the test script must document the step in the test script that the specific validation script must be run for the developers.

The project manager wants to put a control in place to ensure that once the automated testing is established the test scripts are not modified or overwritten.

**Question**

Hotspot Question

You must configure the master data for customers import to meet the applications and environment requirements. How should the master data for customers' import be configured? To answer, select the appropriate options in the answer area.

NOTE: Fact correct selection is worth one point.

**Answer Area****Requirement****Configuration**

Number of entity mappings

1
2
3

Duplicate records

View staging data execution summary
Copy data to target
Skip staging

**Answer:**



**Answer Area**

**Requirement**

Number of entity mappings

1  
2  
3

Duplicate records

View staging data execution summary  
Copy data to target  
Skip staging

**Explanation:**

Box 1: 3

One entity mapping for each of three fields.

Note: Master data for customers must be migrated from both the call center third-party system as well as the accounting system. You identify the following requirements:

- \* The mapping fields for customer records in both systems are the same, except the accounting system which has three additional fields that must be mapped.
- \* Duplicate records must not be imported.

Box 2: View staging data execution summary

Note:

- \* Duplicate records must not be imported.

Reference:

<https://github.com/MicrosoftDocs/power-platform/blob/main/power-platform/admin/data-integrator.md>

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

**QUESTION 355**

**Case Study 5 - Alpine Ski**

**Background**

Alpine Ski House sells a variety of ski and outdoor equipment, including apparel and digital content to retailers and wholesalers located in the United States. The central distribution center, accounting and customer service center are located in the company's headquarters building in the state of Colorado. The company also has an additional warehouse in the state of New York. The company is known for its customer-friendly policies.

**Current environment**

Alpine Ski House currently has an outdated accounting system that is not connected to the New York warehouse. The warehouse system contains inventory quantities, but does not have costing, therefore the FIFO principles are applied through spreadsheet calculations at month end.

Alpine Ski House has worked to create a future state roadmap as a foundation for growth. They have decided to implement Dynamics 365 cloud applications and must limit the amount of on premises hardware as they are not staffed for support. They are expecting to implement required devices for warehouse applications to support WMS only. The customer service center places phone orders on behalf of wholesalers and retailers.

The customer service team provides concierge services to the top 20 largest customers. Each customer service team member is assigned to 5 customers as the customer's dedicated customer service representative.

The call center has a phone system that records calls and stores the call duration.

Data is a combination of systems that are disconnected to include warehouse and accounting. Customer records and consumer records are stored in the call center third-party system. Excel spreadsheets are used for consolidated reporting from these systems.

Alpine Ski House must enable business partners to place their own B2B orders on the web as well as manage their own users.

The company has decided to expand distribution to Banff, Alberta and create a new operating legal entity in Canada. This expansion must be planned for as part of the solution, as it will be up and running six months after the initial US

company is operating on the new applications.

**Requirements****Applications and environment**

Required applications must align to the future state roadmap.

Business partners must have the ability to onboard their own users for placing orders on the web.

The Canadian company must use the same base data as the US operating company and must be set up in the same instance.

Sales order history data must not be imported. All current and future orders must be migrated to the new system.

Master data for customers must be migrated from both the call center third-party system as well as the accounting system. You identify the following requirements:

- The mapping fields for customer records in both systems are the same, except the accounting system which has three additional fields that must be mapped.
- Duplicate records must not be imported.

**Cutover plan**

- User1 reports that sales orders will be open and not shipped at the time of cutover to production. There are 20 orders expected to be open.

**Customer service****General**

Concierge customer service reps must be able to access customer records for all customers in their customer group.

Customer service reps must be able to organize how information is presented when they sign into the new system.

Security must be applied to the customer service reps as a group and must not be applied at the individual level.

**Return policies**

Sporting equipment is warranted by the manufacturer and must not be returned to Alpine Ski House warehouse. Alpine Ski House does not strictly enforce this policy. Exceptions to the policy are allowed with manager approval.

Customer service must track reported issues with sporting equipment to identify trends.

Customers can exchange apparel, but refunds must not be permitted. Any consumer exchanges must occur directly through Alpine's call center and cannot be returned to a physical store.

**Exchange policies**

All consumer calls must be logged for tracking purposes. The customer service representative will determine if there is an exchange, or if the consumer should be redirected to the manufacturer. Digital content is final sale only. All complaints must still be tracked.

Returns and replacement orders must be processed through the warehouse. Consumer information for returns and replacement orders does not need to be stored.

A record of the location where the consumer purchased the product must be stored for tracking purpose

The customer service reps must be able to view the order status for delayed shipments or orders that have been shipped but not invoiced. They need to have shortcuts to view this information.

Returns or credits for a concierge customer that are not from a consumer do not require notifications to the concierge representative.

Web orders must be limited to B2B, and consumers web access must not be required for order placement.

The call center must track the call minutes in the phone system by customer number.

The system must send the following notifications:

- Dedicated concierge representative must be automatically notified when an exchanged product has shipped. The concierge representative must set up the alert.
- External customers must be notified of the new consumer exchanges. The notification must integrate into the customer's third party dashboard and must not be sent as an email notification.

**Customer Service**

The customer service center is overloaded with frequently asked questions (FAQ's) that are consuming resources and creating issues with customer service levels.

Alpine Ski House has decided to deploy an automated FAQ website because they do not have sufficient staff resources to manage customer interactions. All automated interactions must be stored for 30 days.

The company has decided to extend its concierge program to the top 25 customers. A new representative has been hired and requires the same screen layout as other team members.

When new customers are created in the system, the customer number must automatically pass to the call center phone system.

**Implementation**

The implementation is expected to take 12 months. Alpine Ski House wants to ensure that when they go live, they are on the most current available update of Dynamics 365. Testing must occur in the various stages of the implementation.

You identify the following testing requirements:

- Platform updates will be applied, and business processes will be verified to perform as expected, either manual or

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automated where possible against stored task recordings.

- Development must be completed by the 10th month. Developers must perform initial testing code that they create.
- When development is completed, all processes in the system must be tested by the user group.

Due to competing demands for the project team, the company wants to automate as much of the testing as possible. The project manager is concerned that a critical field must have validation scripts run against it during automated testing. The developers will be required to write the custom validation scrip. The user creating the test script must document the step in the test script that the specific validation script must be run for the developers.

The project manager wants to put a control in place to ensure that once the automated testing is established the test scripts are not modified or overwritten.

**Question**

Hotspot Question

You need to configure the alert rules for notification 2.

Which alert rule configuration should you use? To answer, select the appropriate options in the answer area.

NOTE: Each correct selection is worth one point.

**Answer Area****Alert rule****Configuration**

Organization wide

Yes

No

Send externally

Yes

No

Format

Business events

SMTP settings

Get certificate

**Answer:**

**Answer Area****Alert rule****Configuration**

Organization wide

Yes

No

Send externally

Yes

No

Format

Business events

SMTP settings

Get certificate

**Explanation:**

Box 1: Yes

Note: External customers must be notified of the new consumer exchanges. The notification must integrate into the customer's third party dashboard and must not be sent as an email notification.

Box 2: Yes

Box 3: Business events

Business events provide a mechanism that lets external systems receive notifications from Finance and Operations applications. In this way, the systems can perform business actions in response to the business events.

Reference:

<https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/business-events/home-page>

**QUESTION 356****Case Study 5 - Alpine Ski****Background**

Alpine Ski House sells a variety of ski and outdoor equipment, including apparel and digital content to retailers and wholesalers located in the United States. The central distribution center, accounting and customer service center are located in the company's headquarters building in the state of Colorado. The company also has an additional warehouse in the state of New York. The company is known for its customer-friendly policies.

**Current environment**

Alpine Ski House currently has an outdated accounting system that is not connected to the New York warehouse. The warehouse system contains inventory quantities, but does not have costing, therefore the FIFO principles are applied through spreadsheet calculations at month end.

Alpine Ski House has worked to create a future state roadmap as a foundation for growth. They have decided to implement Dynamics 365 cloud applications and must limit the amount of on premises hardware as they are not staffed for support. They are expecting to implement required devices for warehouse applications to support WMS only. The customer service center places phone orders on behalf of wholesalers and retailers.

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The customer service team provides concierge services to the top 20 largest customers. Each customer service team member is assigned to 5 customers as the customer's dedicated customer service representative.

The call center has a phone system that records calls and stores the call duration.

Data is a combination of systems that are disconnected to include warehouse and accounting. Customer records and consumer records are stored in the call center third-party system. Excel spreadsheets are used for consolidated reporting from these systems.

Alpine Ski House must enable business partners to place their own B2B orders on the web as well as manage their own users.

The company has decided to expand distribution to Banff, Alberta and create a new operating legal entity in Canada. This expansion must be planned for as part of the solution, as it will be up and running six months after the initial US company is operating on the new applications.

### **Requirements**

#### **Applications and environment**

Required applications must align to the future state roadmap.

Business partners must have the ability to onboard their own users for placing orders on the web.

The Canadian company must use the same base data as the US operating company and must be set up in the same instance.

Sales order history data must not be imported. All current and future orders must be migrated to the new system.

Master data for customers must be migrated from both the call center third-party system as well as the accounting system. You identify the following requirements:

- The mapping fields for customer records in both systems are the same, except the accounting system which has three additional fields that must be mapped.
- Duplicate records must not be imported.

#### **Cutover plan**

- User1 reports that sales orders will be open and not shipped at the time of cutover to production. There are 20 orders expected to be open.

### **Customer service**

#### **General**

Concierge customer service reps must be able to access customer records for all customers in their customer group.

Customer service reps must be able to organize how information is presented when they sign into the new system.

Security must be applied to the customer service reps as a group and must not be applied at the individual level.

#### **Return policies**

Sporting equipment is warranted by the manufacturer and must not be returned to Alpine Ski House warehouse. Alpine Ski House does not strictly enforce this policy. Exceptions to the policy are allowed with manager approval.

Customer service must track reported issues with sporting equipment to identify trends.

Customers can exchange apparel, but refunds must not be permitted. Any consumer exchanges must occur directly through Alpine's call center and cannot be returned to a physical store.

#### **Exchange policies**

All consumer calls must be logged for tracking purposes. The customer service representative will determine if there is an exchange, or if the consumer should be redirected to the manufacturer. Digital content is final sale only. All complaints must still be tracked.

Returns and replacement orders must be processed through the warehouse. Consumer information for returns and replacement orders does not need to be stored.

A record of the location where the consumer purchased the product must be stored for tracking purpose

The customer service reps must be able to view the order status for delayed shipments or orders that have been shipped but not invoiced. They need to have shortcuts to view this information.

Returns or credits for a concierge customer that are not from a consumer do not require notifications to the concierge representative.

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The call center must track the call minutes in the phone system by customer number.

The system must send the following notifications:

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### **Customer Service**

The customer service center is overloaded with frequently asked questions (FAQ's) that are consuming resources and creating issues with customer service levels.

Alpine Ski House has decided to deploy an automated FAQ website because they do not have sufficient staff resources



to manage customer interactions. All automated interactions must be stored for 30 days.

The company has decided to extend its concierge program to the top 25 customers. A new representative has been hired and requires the same screen layout as other team members.

When new customers are created in the system, the customer number must automatically pass to the call center phone system.

#### **Implementation**

The implementation is expected to take 12 months. Alpine Ski House wants to ensure that when they go live, they are on the most current available update of Dynamics 365. Testing must occur in the various stages of the implementation. You identify the following testing requirements:

- Platform updates will be applied, and business processes will be verified to perform as expected, either manual or automated where possible against stored task recordings.

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- When development is completed, all processes in the system must be tested by the user group.

Due to competing demands for the project team, the company wants to automate as much of the testing as possible.

The project manager is concerned that a critical field must have validation scripts run against it during automated testing. The developers will be required to write the custom validation scrip. The user creating the test script must document the step in the test script that the specific validation script must be run for the developers.

The project manager wants to put a control in place to ensure that once the automated testing is established the test scripts are not modified or overwritten.

#### **Question**

Hotspot Question

You need to configure the alert configurations for notification1.

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

NOTE: Each correct selection is worth one point.

#### **Answer Area**

##### **Alert configuration**

Event type

##### **Value**

Create and delete
Update
Due date

Conditions

Current selected record
All records

**Answer:**

### Answer Area

#### Alert configuration

Event type

Value

Create and delete

Update

Due date

Conditions

Current selected record

All records

#### QUESTION 357

A company that sells, rents, and services heating, ventilation, and air conditioning (HVAC) systems implements Dynamics 365 Supply Chain Management.

When a maintenance request is created for a condenser unit, the request must be reviewed and approved before a work order is created. You must send both an email message and a text message to the reviewer for each maintenance request.

You need to configure the system.

Which two options should you configure? Each answer represents part of the solution.

NOTE: Each correct selection is worth one point.

- A. Power Apps apps
- B. Business events
- C. Workspaces
- D. Power Automate flows
- E. Standard workflows

**Answer:** BE

**Explanation:**

Business events provide a mechanism that lets external systems receive notifications from finance and operations applications. In this way, the systems can perform business actions in response to the business events.

Business events occur when a business process is run. During a business process, users who participate in it perform business actions to complete the tasks that make up the business process.

A business action that a user performs can be either a workflow action or a non-workflow action. Approval of a purchase requisition is an example of a workflow action, whereas confirmation of a purchase order is an example of a non-workflow action. Both types of actions can generate business events that external systems can use in integration and notification scenarios.

Some organizations require that purchase requisitions and purchase orders are approved by a user other than the person who entered the transaction. To set up an approval process, you can create a workflow.

Reference:

<https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/business-events/home-page>

<https://docs.microsoft.com/en-us/dynamics365/supply-chain/procurement/procurement-sourcing-workflows>

#### QUESTION 358

You are implement Dynamic 365 Finance.

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You must initiate a custom process when a new invoice journal is posted. The custom must complete actions in external systems.

You need to select a business event to trigger the custom process.

What should you use?

- A. Microsoft Dataverse
- B. Dynamics 365 Customer Engagement
- C. Azure DevOps
- D. Power Automate

**Answer: D**

#### **QUESTION 359**

A company is using dual-write to synchronize customer data between Dynamics 365 Sales and Dynamics 365 Finance. During an unplanned maintenance window for Dynamics 365 Finance, synchronization of customer data was interrupted. The interruption caused multiple errors and a loss of new requests.

You need to prevent errors and data loss from recurring.

What should you do?

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

**Answer: B**

#### **Explanation:**

Clicking on the individual project will show you the direction in which the sync failed (Finance and Operations app to Dataverse or vice-versa) and details of why it failed. You can choose to fix the underlying issues and then select Re-run execution which retries the entire execution, along with the records that failed or errored out in the last sync. Once this completes, initial sync is completed and the table returns to the Running state.

Reference:

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

#### **QUESTION 360**

A company is implementing Dynamics 365 Finance.

You must load configuration data from a previous version of Dynamics 365 Finance. You extract data from the previous system into a Microsoft Excel workbook.

Each worksheet contains setup and configuration data that correlates to a specific data entity.

You load sites and warehouses from the worksheets into the data entities.

Another user makes changes to the workbook.

You need to load the updated version of the workbook into the current data project.

What should you do?

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

**Answer: A**

#### **Explanation:**

You can use the Resequence button to update any entities that you've selected.

Reference:

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

#### **QUESTION 361**

You are a Dynamics 365 Finance system administrator.

A user is reporting an issue with the Sales Order form. The UI for the form is not loading properly, and there are some

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performance issues. The object was working fine until the most recent update release. The who personalized this form is using Microsoft Edge. No other users are reporting issues.  
You need to resolve the issue.  
What should you do?

- A. Delete the sales from project in the usage data form.
- B. Export, delete, then reimport the usage data for the sales form object.
- C. Disable and then re-enable the user.
- D. Switch to Microsoft Edge instead of internet Explorer 11.

**Answer: D**

**QUESTION 362**

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

**Answer: AD**

**QUESTION 363**

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

**Answer: B**

**QUESTION 364**

You are implement 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

**Answer: D**

**QUESTION 365**

You are the administrator of a Dynamic 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

**Answer: B**

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

#### **QUESTION 366**

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. .dat
- C. .xml
- D. Microsoft Excel
- E. Pipe delimited

**Answer: ACD**

#### **QUESTION 367**

A company is implementing Finance and Operations apps.

All required Microsoft implementation tools are being used for project tracking for standardized Microsoft FastTrack and Support visibility.

You need to view the official critical milestone dates for completing the analysis phase.

Which tool should you use?

- A. Microsoft Planner
- B. Microsoft Teams
- C. Dynamic 365 Project module
- D. Lifecycle Services

**Answer: D**

**Explanation:**

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

#### **QUESTION 368**

A company is implementing Dynamics 365 Finance.

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

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

What should you use?

- A. Dual-write



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

**Answer: C**

**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-bi-integration-entity-store>

#### **QUESTION 369**

A company implements cymes 365 Finance on-premises. The company uses Microsoft Offer 2007. The country/region address verifies a 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 Busmen Document Management (BDM).

Which Two actions should you perform? Each correct answer present 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

**Answer: AE**

#### **QUESTION 370**

Drag and Drop Question

An organization is implementing Dynamic 365 Finance.

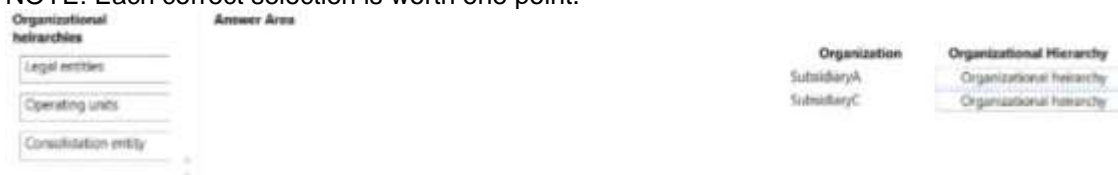
The organization is comprised of a parent named Company1 and the following fully-owned subsidiary, SubsidiaryB, and SubsidiarC.

The organization is comprised of a parent company named Company1 and the following fully-owned subsidiaries: SubsidiaryA, SubsidiaryB, and SubsidiaryC. SubsidiaryC uses Canadian dollars to report financials.

You need to configure the system.

Which organization hierarchy should you use? To answer, drag the appropriate organizational hierarchy to the correct organization. Each organization hierarchy may be used once, more than once, or not 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:**



#### **QUESTION 371**

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 372

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 tanked to Doth the customer and vendor records.
- B. Create a single contact that is scared between the customer and vendor record.
- C. Create separate parry records for both the customer and vendor records.
- D. Create separate party records with a single relationship defined between them

**Answer: A**

### QUESTION 373

Drag and Drop Question

A company is implementing Dynamics 365 Finance.

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

**Answer:**

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

**Explanation:**

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**Box 1: Expense management**

The Expense management mobile workspace.

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

**Box 2: Project time entry**

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

Reference:

<https://docs.microsoft.com/en-us/dynamics365/project-operations/expense/expense-using-mobile>

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

**QUESTION 374**

Drag and Drop Question

A company uses Dynamics 365 Supply Chain Management.

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

You need to configure case management.

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

NOTE: Each correct selection is worth one point.

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

**Answer:**

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

**Explanation:**

Box 1: Case Process

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

Box 2: Case category security

Case category security by role

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

Box 3: Case workflow

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

Reference:

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

**QUESTION 375**

Hotspot Question

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

The company has the following requirements:

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

You need to determine which technologies meet the requirements.

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

NOTE: Each correct selection is worth one point.

**Answer Area**

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

**Answer:**

**Answer Area**

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

**Explanation:**

Box 1: Power Apps

Use Power Apps canvas apps for simple UI handling cases.

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Box 2: Power Automate

You can customize emails for Power Automate flows.

Box 3: Power BI

Power BI can produce reports.

Reference:

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

### QUESTION 376

Hotspot Question

You are configure a new Dynamic 365 app deployment for a company.

The company has the following requirements:

- Create a rewards program for customers.
- Manage long-term relationship with customers through clienteling.
- Manage customer ledger entries to reconcile payments.

You need to select the appropriate app to use.

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

NOTE: Each correct selection is worth one point.

#### Answer Area

##### Requirement

Create a rewards program for customers.

Manage long-term relationships with customers.

Manage customer ledger entries to reconcile payments.

##### App

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

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

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

**Answer:**

**Answer Area**

**Requirement**

Create a rewards program for customers.

Manage long-term relationships with customers.

Manage customer ledger entries to reconcile payments.

**App**

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

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

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

**Explanation:**

Box 1: Dynamics 365 Commerce

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

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

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

Box 2: Dynamics 365 Commerce

You can manage clienteling in Dynamics 365 Commerce.

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

Box 3: Dynamics 365 Finance

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

Reference:

<https://docs.microsoft.com/en-us/dynamics365/commerce/set-up-customer-loyalty-program>

<https://docs.microsoft.com/en-us/learn/modules/manage-clienteling/>

**QUESTION 377**

Drag and Drop Question

You design flow control for a complex expense workflow.

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

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

You need to design the workflow.

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

NOTE: Each correct selection is worth one point.

**Flow control shapes**

Conditional decision
Manual decision
Parallel activity
Subworkflow

**Answer Area**

**Requirement**

**Flow control shape**

Run several processes simultaneously.

--

Evaluate total amount for expense report.

--

**Answer:**

**Flow control shapes**

Manual decision
Subworkflow

**Answer Area**

**Requirement**

**Flow control shape**

Run several processes simultaneously.

Parallel activity
-------------------

Evaluate total amount for expense report.

Conditional decision
----------------------

**Explanation:**

Box 1: Parallel activity

Box 2: Conditional decision

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

Reference:

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

**QUESTION 378**

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

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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 379

Drag and Drop Question

A client wants to automate approvals for various business processes.

You need to use workflow configuration to meet the requirements.

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

NOTE: Each correct selection is worth one point.

Configurations	Requirement	Configuration
Hierarchy	When a purchase requisition is submitted, it should go to the employee's manager.	
User	When an expense report is submitted, it should go to a user group of managers.	
Participant		
Workflow user		

Answer:

Configurations	Requirement	Configuration
User	When a purchase requisition is submitted, it should go to the employee's manager.	Hierarchy
Workflow user	When an expense report is submitted, it should go to a user group of managers.	Participant

### Explanation:

Box 1: Hierarchy

Hierarchy: Users in a specific organizational hierarchy.

1. After you select Hierarchy, on the Hierarchy selection tab, in the Hierarchy type list, select the type of hierarchy to assign the step to.

2. The system must retrieve a range of user names from the hierarchy. These names represent users that the step can be assigned to.

Box 2: Participant

Participant: Users who are assigned to a specific group or role.

After you select Participant, on the Role based tab, in the Type of participant list, select the type of group or role to assign the step to.

In the Participant list, select the group or role to assign the step to.

Reference:

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

**QUESTION 380**

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.

**Answer: CE**

**Explanation:**

You can set up rules to separate tasks that must be performed by different users. This concept is named segregation of duties.

Reference:

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

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