

- **Vendor: Microsoft**
- **Exam Code: MB-800**
- **Exam Name: Microsoft Dynamics 365 Business Central Functional Consultant**
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QUESTION 48

Case Study 1 - Cash and Carry

Current environment

Cash and carry sales

- When a customer makes a purchase at the company's cash and carry desk, the sale is handwritten on a three-part form.
- The cash and carry associate retrieves the items listed on the order from the warehouse.
- Special prices and discounts are used to move products that will expire soon or that are overstocked.
- Cash is accepted for payments.
- The cash drawer is balanced at the end of every day. A deposit is created for the cash and given to the accountant.

Brokered sales orders

- Brokered sales are called in to customer service by the brokers and sometimes directly by customers. The sales are entered into QuickBooks.

Because inventory is not tracked in QuickBooks, the generic item **Brokered Item** is used.

- Two copies of the packing slip and printed from QuickBooks and sent to the warehouse.

Order picking

- The warehouse manager provides a container and the two copies of the packing slip to a picker.
- Items that are out of stock are marked on both copies of the packing slip.
- The shipping amount is determined and written on the packing slips.
- One copy of the completed packing slip is placed in a basket for customer service.
- Completed orders are boxed up with a copy of the invoice and shipped to customers.

Order invoicing

- Throughout the day, the customer service manager collects the packing slip copies and updates the invoices in QuickBooks.
- The customer service manager adds a line for shipping with the amount provided by the packer.
- The customer service manager prints a copy of the final invoice and sends it to the warehouse.
- The accountant uses Microsoft Word to create weekly invoices for all shipments invoiced in QuickBooks during the week for some customers.

Cash and carry sales

- One-line sales invoices are saved in QuickBooks for each cash and carry sale to a miscellaneous customer.
- Customer details for cash and carry sales are not kept in QuickBooks.

Deposits

- The accountant receives the deposit bag from the cash and carry sales desk at the end of every day.
- Receipts are recorded in QuickBooks against cash and carry and brokered sales based on the deposit slips.

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Brokers commission

- Brokers fees are paid as a percentage of sales.
- A Sales by Product/Service Summary report is run in QuickBooks every month for Brokered Item to calculate what is owned.

Requirements

Customers

- Users with permission must be able to quickly add new customers.
- The original source of all customers in the accounting system must be identified to be from cash and carry or brokered sales.
- The company needs to keep a record of special price promotions given to specific customers.
- Customers must be identified with a unique general business posting group so that the correct freight G/L account is used in sales transactions.

Sales

- The customer source must be used to identify the business line, and the customer source must be indicated on every sales transactions.
- Customer service and cash and carry desk associates must be able to enter sales into Dynamics 365 Business Central by customer.
- Excess paper must be eliminated, and paper management must be reduced.
- If a customer is not already listed in the system, a cash and carry associate or customer service associate must be able to quickly add the new customer in the process of recording the first sale.
- A point-of-sale system is not needed, but users must be able to record which items are purchased by customers, accept and record their payment, and print receipts indicating paid in full.

Items

- The sales manager and warehouse manager must be able to set a specific timeframe for special promotion discounts on items.
- For special promotions, discounts must be consistent for all items in a product line using a single discount calculation.
- Special pricing may be given to a retail chain or buying group. This pricing must be automatically applied when an order is taken for any of these customers. The original price must be recorded with each sale.
- Customers must always be charged the lowest amount for an item at the time of the sale. For example, an overstocked olive oil has a regular price of \$20 per unit. Customers in a buying group for restaurants can buy it for \$18 per unit. There is an autumn promotion price for the item at \$19 per unit. However, on a specific day only, there is an overstock special at a 15 percent discount off the regular price.

Sales invoices

- Warehouse workers must be able to indicate the following in the system for each order:
 1. the items picked
 2. the shipping charges
 3. notifications, if any, that customer service needs to provide to the customer
- Items sold at a discount must show the original price, discount, and net amount on each line of the invoice. Invoices must be posted at the cash and carry desk at the time of sale. For orders, accounting must post invoices and send them to customers.
- Warehouse employees must be able to indicate what has been shipped on an order. They will use the G/L account for shipping charges. They need to use the correct G/L account for sales versus cost through proper assignment of sales and purchase accounts in the general posting setup.
- Some of the brokered customers require one invoice per week regardless of the number of orders or shipments.

Accounts

- Payment terms vary by customer.
- The amount paid to brokers must be calculated from sales after invoice discounts.
- Broker vendors must be easily identifiable from other vendors in lists
- Commission paid on sales not collected within 120 days must be deducted from brokers' next compensation payment.

Reporting

Wide World Importers requires reporting on the following:

- the overall profitability of each line of business at any time for any given period
- the cost of outbound shipping in the overall profitability of sales by business line in all related reports
- freight sales and cost by account in the trial balance

- the cost of brokers' compensation in reporting the overall profitability of sales by business line
- the effect of item discount promotions in financial statements.

Issues

Pricing

- Spreadsheets are used to maintain special item pricing and discounts. The only source of product line discount information is a whiteboard in the warehouse. The price charged is frequently incorrect.
- Customers complain when they think they have not received the best price available. Promotions are sometimes applied in error after a special pricing event ends, for example, when discounts are offered temporarily to reduce overstock.
- Management cannot see original versus actual price on all sales. Discounts given by brokers requires spreadsheets and comparison between price list and price on sales invoice. Management needs to be able to quickly see the discount given on each sale.

Payment terms

- Agreed-upon payment terms are frequently entered incorrectly on orders, causing cashflow issues.
 - Invoices already paid in full exist on the sales aging reports. The frequent cause of this issue is that sales from the cash and carry desk are not indicated as cash sales and are not posted as paid in full.
- Some buying groups require that all invoices sent during a month be due on the 20th of the following month.

Invoicing

- Paperwork is frequently misplaced between the warehouse, customer service, and accounting.
- Invoices that are posted in the accounting system based on shipments and invoices that are sent to customers weekly do not match due to errors transferring the data from one document to another.
- Users are selecting the incorrect freight type (expense versus sales) on purchase and sales transactions, making it difficult to reconcile freight costs.
- Sales placed from the cash and carry desk by customers originally acquired through a broker are not being recognized with the correct customer source. Reporting by business line is inaccurate.

Accounts

- Users often forget which fields to use to enter information when they add new customers to QuickBooks. This results in errors and inconsistencies in data and affects sales reporting. Confidence in sales reporting accuracy is low.
- Adding new brokers is a different process than adding other purchase vendors. Users often forget which fields to select and how to correctly assign the vendor number to add new brokers.
- Manual entries to certain G/L accounts cause reconciliation issues.

You need to configure the new customer creation process.

Which two areas must you configure? Each correct answer presents part of the solution

NOTE: Each correct selection is worth one point.

- A. Responsibility center
- B. Configuration worksheet
- C. Configuration template
- D. Permissions

Answer: CD

Explanation:

<https://usedynamics.com/business-central/sales/create-customer-templates/>

QUESTION 49

Case Study 1 - Cash and Carry

Current environment

Cash and carry sales

- When a customer makes a purchase at the company's cash and carry desk, the sale is handwritten on a three-part form.
- The cash and carry associate retrieves the items listed on the order from the warehouse.
- Special prices and discounts are used to move products that will expire soon or that are overstocked.
- Cash is accepted for payments.
- The cash drawer is balanced at the end of every day. A deposit is created for the cash and given to the accountant.

Brokered sales orders

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Because inventory is not tracked in QuickBooks, the generic item **Brokered Item** is used.

▪ Two copies of the packing slip and printed from QuickBooks and sent to the warehouse.

Order picking

▪ The warehouse manager provides a container and the two copies of the packing slip to a picker.

▪ Items that are out of stock are marked on both copies of the packing slip.

▪ The shipping amount is determined and written on the packing slips.

▪ One copy of the completed packing slip is placed in a basket for customer service.

▪ Completed orders are boxed up with a copy of the invoice and shipped to customers.

Order invoicing

▪ Throughout the day, the customer service manager collects the packing slip copies and updates the invoices in QuickBooks.

▪ The customer service manager adds a line for shipping with the amount provided by the packer.

▪ The customer service manager prints a copy of the final invoice and sends it to the warehouse.

▪ The accountant uses Microsoft Word to create weekly invoices for all shipments invoiced in QuickBooks during the week for some customers.

Cash and carry sales

▪ One-line sales invoices are saved in QuickBooks for each cash and carry sale to a miscellaneous customer.

▪ Customer details for cash and carry sales are not kept in QuickBooks.

Deposits

▪ The accountant receives the deposit bag from the cash and carry sales desk at the end of every day.

▪ Receipts are recorded in QuickBooks against cash and carry and brokered sales based on the deposit slips.

Brokers commission

▪ Brokers fees are paid as a percentage of sales.

▪ A Sales by Product/Service Summary report is run in QuickBooks every month for Brokered Item to calculate what is owned.

Requirements

Customers

▪ Users with permission must be able to quickly add new customers.

▪ The original source of all customers in the accounting system must be identified to be from cash and carry or brokered sales.

▪ The company needs to keep a record of special price promotions given to specific customers.

▪ Customers must be identified with a unique general business posting group so that the correct freight G/L account is used in sales transactions.

Sales

▪ The customer source must be used to identify the business line, and the customer source must be indicated on every sales transactions.

▪ Customer service and cash and carry desk associates must be able to enter sales into Dynamics 365 Business Central by customer.

▪ Excess paper must be eliminated, and paper management must be reduced.

▪ If a customer is not already listed in the system, a cash and carry associate or customer service associate must be able to quickly add the new customer in the process of recording the first sale.

▪ A point-of-sale system is not needed, but users must be able to record which items are purchased by customers, accept and record their payment, and print receipts indicating paid in full.

Items

▪ The sales manager and warehouse manager must be able to set a specific timeframe for special promotion discounts on items.

▪ For special promotions, discounts must be consistent for all items in a product line using a single discount calculation.

▪ Special pricing may be given to a retail chain or buying group. This pricing must be automatically applied when an order is taken for any of these customers. The original price must be recorded with each sale.

▪ Customers must always be charged the lowest amount for an item at the time of the sale. For example, an overstocked olive oil has a regular price of \$20 per unit. Customers in a buying group for restaurants can buy it for \$18

per unit. There is an autumn promotion price for the item at \$19 per unit. However, on a specific day only, there is an overstock special at a 15 percent discount off the regular price.

Sales invoices

• Warehouse workers must be able to indicate the following in the system for each order:

1. the items picked
2. the shipping charges
3. notifications, if any, that customer service needs to provide to the customer

• Items sold at a discount must show the original price, discount, and net amount on each line of the invoice. Invoices must be posted at the cash and carry desk at the time of sale. For orders, accounting must post invoices and send them to customers.

• Warehouse employees must be able to indicate what has been shipped on an order. They will use the G/L account for shipping charges. They need to use the correct G/L account for sales versus cost through proper assignment of sales and purchase accounts in the general posting setup.

• Some of the brokered customers require one invoice per week regardless of the number of orders or shipments.

Accounts

• Payment terms vary by customer.

• The amount paid to brokers must be calculated from sales after invoice discounts.

• Broker vendors must be easily identifiable from other vendors in lists

• Commission paid on sales not collected within 120 days must be deducted from brokers' next compensation payment.

Reporting

Wide World Importers requires reporting on the following:

- the overall profitability of each line of business at any time for any given period
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- the cost of brokers' compensation in reporting the overall profitability of sales by business line
- the effect of item discount promotions in financial statements.

Issues

Pricing

• Spreadsheets are used to maintain special item pricing and discounts. The only source of product line discount information is a whiteboard in the warehouse. The price charged is frequently incorrect.

• Customers complain when they think they think they have not received the best price available. Promotions are sometimes applied in error after a special pricing event ends, for example, when discounts are offered temporarily to reduce overstock.

• Management cannot see original versus actual price on all sales. Discounts given by brokers requires spreadsheets and comparison between price list and price on sales invoice. Management needs to be able to quickly see the discount given on each sale.

Payment terms

• Agreed-upon payment terms are frequently entered incorrectly on orders, causing cashflow issues.

• Invoices already paid in full exist on the sales aging reports. The frequent cause of this issue is that sales from the cash and carry desk are not indicated as cash sales and are not posted as paid in full.

Some buying groups require that all invoices sent during a month be due on the 20th of the following month.

Invoicing

• Paperwork is frequently misplaced between the warehouse, customer service, and accounting.

• Invoices that are posted in the accounting system based on shipments and invoices that are sent to customers weekly do not match due to errors transferring the data from one document to another.

• Users are selecting the incorrect freight type (expense versus sales) on purchase and sales transactions, making it difficult to reconcile freight costs.

• Sales placed from the cash and carry desk by customers originally acquired through a broker are not being recognized with the correct customer source. Reporting by business line is inaccurate.

Accounts

• Users often forget which fields to use to enter information when they add new customers to QuickBooks. This results in errors and inconsistencies in data and affects sales reporting. Confidence in sales reporting accuracy is low.

• Adding new brokers is a different process than adding other purchase vendors. Users often forget which fields to select and how to correctly assign the vendor number to add new brokers.

• Manual entries to certain G/L accounts cause reconciliation issues.

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You need to set up payment terms for buying groups.

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

NOTE: Each correct selection is worth one point.

- A. Set up payment terms with a value of CM+20D for the due date calculation.
- B. Assign the payment terms to the customer price group.
- C. Assign the payment terms to the customer.
- D. Assign the payment terms to the customer posting group.
- E. Set up payment terms with a value of D20 for the due date calculation.

Answer: AC

QUESTION 50

Case Study 1 - Cash and Carry

Current environment

Cash and carry sales

- When a customer makes a purchase at the company's cash and carry desk, the sale is handwritten on a three-part form.
- The cash and carry associate retrieves the items listed on the order from the warehouse.
- Special prices and discounts are used to move products that will expire soon or that are overstocked.
- Cash is accepted for payments.
- The cash drawer is balanced at the end of every day. A deposit is created for the cash and given to the accountant.

Brokered sales orders

▪ Brokered sales are called in to customer service by the brokers and sometimes directly by customers. The sales are entered into QuickBooks.

Because inventory is not tracked in QuickBooks, the generic item **Brokered Item** is used.

- Two copies of the packing slip are printed from QuickBooks and sent to the warehouse.

Order picking

- The warehouse manager provides a container and the two copies of the packing slip to a picker.
- Items that are out of stock are marked on both copies of the packing slip.
- The shipping amount is determined and written on the packing slips.
- One copy of the completed packing slip is placed in a basket for customer service.
- Completed orders are boxed up with a copy of the invoice and shipped to customers.

Order invoicing

▪ Throughout the day, the customer service manager collects the packing slip copies and updates the invoices in QuickBooks.

- The customer service manager adds a line for shipping with the amount provided by the packer.
- The customer service manager prints a copy of the final invoice and sends it to the warehouse.
- The accountant uses Microsoft Word to create weekly invoices for all shipments invoiced in QuickBooks during the week for some customers.

Cash and carry sales

- One-line sales invoices are saved in QuickBooks for each cash and carry sale to a miscellaneous customer.
- Customer details for cash and carry sales are not kept in QuickBooks.

Deposits

- The accountant receives the deposit bag from the cash and carry sales desk at the end of every day.
- Receipts are recorded in QuickBooks against cash and carry and brokered sales based on the deposit slips.

Brokers commission

- Brokers fees are paid as a percentage of sales.
- A Sales by Product/Service Summary report is run in QuickBooks every month for Brokered Item to calculate what is owned.

Requirements

Customers

- Users with permission must be able to quickly add new customers.

- The original source of all customers in the accounting system must be identified to be from cash and carry or brokered sales.
- The company needs to keep a record of special price promotions given to specific customers.
- Customers must be identified with a unique general business posting group so that the correct freight G/L account is used in sales transactions.

Sales

- The customer source must be used to identify the business line, and the customer source must be indicated on every sales transactions.
- Customer service and cash and carry desk associates must be able to enter sales into Dynamics 365 Business Central by customer.
- Excess paper must be eliminated, and paper management must be reduced.
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Items

- The sales manager and warehouse manager must be able to set a specific timeframe for special promotion discounts on items.
- For special promotions, discounts must be consistent for all items in a product line using a single discount calculation.
- Special pricing may be given to a retail chain or buying group. This pricing must be automatically applied when an order is taken for any of these customers. The original price must be recorded with each sale.
- Customers must always be charged the lowest amount for an item at the time of the sale. For example, an overstocked olive oil has a regular price of \$20 per unit. Customers in a buying group for restaurants can buy it for \$18 per unit. There is an autumn promotion price for the item at \$19 per unit. However, on a specific day only, there is an overstock special at a 15 percent discount off the regular price.

Sales invoices

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 1. the items picked
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- Some of the brokered customers require one invoice per week regardless of the number of orders or shipments.

Accounts

- Payment terms vary by customer.
- The amount paid to brokers must be calculated from sales after invoice discounts.
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Reporting

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Invoicing

- Paperwork is frequently misplaced between the warehouse, customer service, and accounting.
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- Sales placed from the cash and carry desk by customers originally acquired through a broker are not being recognized with the correct customer source. Reporting by business line is inaccurate.

Accounts

- Users often forget which fields to use to enter information when they add new customers to QuickBooks. This results in errors and inconsistencies in data and affects sales reporting. Confidence in sales reporting accuracy is low.
- Adding new brokers is a different process than adding other purchase vendors. Users often forget which fields to select and how to correctly assign the vendor number to add new brokers.
- Manual entries to certain G/L accounts cause reconciliation issues.

A customer in the restaurant buying group purchases olive oil on the date of the overstock special. You need to verify the sales price of the product for the customer.

Which price will the system generate?

- A. \$15.30
- B. \$16.15
- C. \$17.00
- D. \$18.00

Answer: C

Explanation:

An overstocked olive oil has a regular price of \$20 per unit. However, on a specific day only, there is an overstock special at a 15 percent discount off the regular price. The 15% is deducted from the 'regular' price (\$20), not the special price that the restaurant buying group pay (\$18).

QUESTION 51

Case Study 1 - Cash and Carry

Current environment

Cash and carry sales

- When a customer makes a purchase at the company's cash and carry desk, the sale is handwritten on a three-part form.
- The cash and carry associate retrieves the items listed on the order from the warehouse.
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Order invoicing

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Deposits

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Brokers commission

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Payment terms

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 - Invoices already paid in full exist on the sales aging reports. The frequent cause of this issue is that sales from the cash and carry desk are not indicated as cash sales and are not posted as paid in full.
- Some buying groups require that all invoices sent during a month be due on the 20th of the following month.

Invoicing

- Paperwork is frequently misplaced between the warehouse, customer service, and accounting.
- Invoices that are posted in the accounting system based on shipments and invoices that are sent to customers weekly do not match due to errors transferring the data from one document to another.
- Users are selecting the incorrect freight type (expense versus sales) on purchase and sales transactions, making it difficult to reconcile freight costs.
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- Adding new brokers is a different process than adding other purchase vendors. Users often forget which fields to select and how to correctly assign the vendor number to add new brokers.
- Manual entries to certain G/L accounts cause reconciliation issues.

You need to configure sales invoicing.

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. Combine Shipments
- B. Get Shipment Lines from Sales Order
- C. Sales Order Shipping
- D. Sales Order Invoicing
- E. Get Shipment Lines from Sales Invoice

Answer: BD

Explanation:

<https://usedynamics.com/business-central/sales/import-shipment-lines/>

QUESTION 52

Case Study 1 - Cash and Carry

Current environment

Cash and carry sales

- When a customer makes a purchase at the company's cash and carry desk, the sale is handwritten on a three-part form.
- The cash and carry associate retrieves the items listed on the order from the warehouse.
- Special prices and discounts are used to move products that will expire soon or that are overstocked.
- Cash is accepted for payments.
- The cash drawer is balanced at the end of every day. A deposit is created for the cash and given to the accountant.

Brokered sales orders

▪ Brokered sales are called in to customer service by the brokers and sometimes directly by customers. The sales are entered into QuickBooks.

Because inventory is not tracked in QuickBooks, the generic item **Brokered Item** is used.

- Two copies of the packing slip are printed from QuickBooks and sent to the warehouse.

Order picking

- The warehouse manager provides a container and the two copies of the packing slip to a picker.
- Items that are out of stock are marked on both copies of the packing slip.
- The shipping amount is determined and written on the packing slips.
- One copy of the completed packing slip is placed in a basket for customer service.
- Completed orders are boxed up with a copy of the invoice and shipped to customers.

Order invoicing

- Throughout the day, the customer service manager collects the packing slip copies and updates the invoices in QuickBooks.
- The customer service manager adds a line for shipping with the amount provided by the packer.
- The customer service manager prints a copy of the final invoice and sends it to the warehouse.
- The accountant uses Microsoft Word to create weekly invoices for all shipments invoiced in QuickBooks during the week for some customers.

Cash and carry sales

- One-line sales invoices are saved in QuickBooks for each cash and carry sale to a miscellaneous customer.
- Customer details for cash and carry sales are not kept in QuickBooks.

Deposits

- The accountant receives the deposit bag from the cash and carry sales desk at the end of every day.
- Receipts are recorded in QuickBooks against cash and carry and brokered sales based on the deposit slips.

Brokers commission

- Brokers fees are paid as a percentage of sales.
- A Sales by Product/Service Summary report is run in QuickBooks every month for Brokered Item to calculate what is owned.

Requirements

Customers

- Users with permission must be able to quickly add new customers.
- The original source of all customers in the accounting system must be identified to be from cash and carry or brokered sales.
- The company needs to keep a record of special price promotions given to specific customers.

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- Customers must be identified with a unique general business posting group so that the correct freight G/L account is used in sales transactions.

Sales

- The customer source must be used to identify the business line, and the customer source must be indicated on every sales transactions.
- Customer service and cash and carry desk associates must be able to enter sales into Dynamics 365 Business Central by customer.
- Excess paper must be eliminated, and paper management must be reduced.
- If a customer is not already listed in the system, a cash and carry associate or customer service associate must be able to quickly add the new customer in the process of recording the first sale.
- A point-of-sale system is not needed, but users must be able to record which items are purchased by customers, accept and record their payment, and print receipts indicating paid in full.

Items

- The sales manager and warehouse manager must be able to set a specific timeframe for special promotion discounts on items.
- For special promotions, discounts must be consistent for all items in a product line using a single discount calculation.
- Special pricing may be given to a retail chain or buying group. This pricing must be automatically applied when an order is taken for any of these customers. The original price must be recorded with each sale.
- Customers must always be charged the lowest amount for an item at the time of the sale. For example, an overstocked olive oil has a regular price of \$20 per unit. Customers in a buying group for restaurants can buy it for \$18 per unit. There is an autumn promotion price for the item at \$19 per unit. However, on a specific day only, there is an overstock special at a 15 percent discount off the regular price.

Sales invoices

- Warehouse workers must be able to indicate the following in the system for each order:
 1. the items picked
 2. the shipping charges
 3. notifications, if any, that customer service needs to provide to the customer
- Items sold at a discount must show the original price, discount, and net amount on each line of the invoice. Invoices must be posted at the cash and carry desk at the time of sale. For orders, accounting must post invoices and send them to customers.
- Warehouse employees must be able to indicate what has been shipped on an order. They will use the G/L account for shipping charges. They need to use the correct G/L account for sales versus cost through proper assignment of sales and purchase accounts in the general posting setup.
- Some of the brokered customers require one invoice per week regardless of the number of orders or shipments.

Accounts

- Payment terms vary by customer.
- The amount paid to brokers must be calculated from sales after invoice discounts.
- Broker vendors must be easily identifiable from other vendors in lists
- Commission paid on sales not collected within 120 days must be deducted from brokers' next compensation payment.

Reporting

Wide World Importers requires reporting on the following:

- the overall profitability of each line of business at any time for any given period
- the cost of outbound shipping in the overall profitability of sales by business line in all related reports
- freight sales and cost by account in the trial balance
- the cost of brokers' compensation in reporting the overall profitability of sales by business line
- the effect of item discount promotions in financial statements.

Issues

Pricing

- Spreadsheets are used to maintain special item pricing and discounts. The only source of product line discount information is a whiteboard in the warehouse. The price charged is frequently incorrect.
- Customers complain when they think they think they have not received the best price available. Promotions are sometimes applied in error after a special pricing event ends, for example, when discounts are offered temporarily to reduce overstock.

- Management cannot see original versus actual price on all sales. Discounts given by brokers requires spreadsheets and comparison between price list and price on sales invoice. Management needs to be able to quickly see the discount given on each sale.

Payment terms

- Agreed-upon payment terms are frequently entered incorrectly on orders, causing cashflow issues.
- Invoices already paid in full exist on the sales aging reports. The frequent cause of this issue is that sales from the cash and carry desk are not indicated as cash sales and are not posted as paid in full.

Some buying groups require that all invoices sent during a month be due on the 20th of the following month.

Invoicing

- Paperwork is frequently misplaced between the warehouse, customer service, and accounting.
- Invoices that are posted in the accounting system based on shipments and invoices that are sent to customers weekly do not match due to errors transferring the data from one document to another.
- Users are selecting the incorrect freight type (expense versus sales) on purchase and sales transactions, making it difficult to reconcile freight costs.
- Sales placed from the cash and carry desk by customers originally acquired through a broker are not being recognized with the correct customer source. Reporting by business line is inaccurate.

Accounts

- Users often forget which fields to use to enter information when they add new customers to QuickBooks. This results in errors and inconsistencies in data and affects sales reporting. Confidence in sales reporting accuracy is low.
- Adding new brokers is a different process than adding other purchase vendors. Users often forget which fields to select and how to correctly assign the vendor number to add new brokers.
- Manual entries to certain G/L accounts cause reconciliation issues.

Drag and Drop Question

You need to ensure that any transaction that uses a customer account always includes the customer source dimension. Which five actions should you perform in sequence? To answer, move the appropriate actions from the list of actions to the answer area and arrange them in the correct order.

Actions	Answer Area
Select the Search icon, enter Chart of Accounts , and then select the related link.	<div style="display: flex; justify-content: space-around; align-items: center;"> <div style="text-align: center;"> ⏪ ⏩ </div> <div style="text-align: center;"> ⏴ ⏵ </div> </div>
From the Dimension Code, select the Account Type Default Dimension list.	
Create a dimension code to identify the customer source.	
Set the Value Posting to Code Mandatory .	
Add the Customer table.	
Create dimension values for the customer source dimension code.	
Select the Dimension Value Code that is used for the customer source.	
Select the Search icon, enter Customers , and then select the related link.	

Answer:

Actions

Create a dimension code to identify the customer source.

Add the Customer table.

Select the Search icon, enter **Customers**, and then select the related link.

Answer Area

Create dimension values for the customer source dimension code.

Select the Search icon, enter **Chart of Accounts**, and then select the related link.

From the Dimension Code, select the Account Type Default Dimension list.

Select the Dimension Value Code that is used for the customer source.

Set the Value Posting to **Code Mandatory**.

Explanation:

<https://stoneridgesoftware.com/how-to-set-up-required-dimensions-in-dynamics-365-business-edition/>

QUESTION 53

Case Study 1 - Cash and Carry

Current environment

Cash and carry sales

- When a customer makes a purchase at the company's cash and carry desk, the sale is handwritten on a three-part form.
- The cash and carry associate retrieves the items listed on the order from the warehouse.
- Special prices and discounts are used to move products that will expire soon or that are overstocked.
- Cash is accepted for payments.
- The cash drawer is balanced at the end of every day. A deposit is created for the cash and given to the accountant.

Brokered sales orders

- Brokered sales are called in to customer service by the brokers and sometimes directly by customers. The sales are entered into QuickBooks.

Because inventory is not tracked in QuickBooks, the generic item **Brokered Item** is used.

- Two copies of the packing slip and printed from QuickBooks and sent to the warehouse.

Order picking

- The warehouse manager provides a container and the two copies of the packing slip to a picker.
- Items that are out of stock are marked on both copies of the packing slip.
- The shipping amount is determined and written on the packing slips.
- One copy of the completed packing slip is placed in a basket for customer service.
- Completed orders are boxed up with a copy of the invoice and shipped to customers.

Order invoicing

- Throughout the day, the customer service manager collects the packing slip copies and updates the invoices in QuickBooks.
- The customer service manager adds a line for shipping with the amount provided by the packer.
- The customer service manager prints a copy of the final invoice and sends it to the warehouse.
- The accountant uses Microsoft Word to create weekly invoices for all shipments invoiced in QuickBooks during the week for some customers.

Cash and carry sales

- One-line sales invoices are saved in QuickBooks for each cash and carry sale to a miscellaneous customer.

- Customer details for cash and carry sales are not kept in QuickBooks.

Deposits

- The accountant receives the deposit bag from the cash and carry sales desk at the end of every day.
- Receipts are recorded in QuickBooks against cash and carry and brokered sales based on the deposit slips.

Brokers commission

- Brokers fees are paid as a percentage of sales.
- A Sales by Product/Service Summary report is run in QuickBooks every month for Brokered Item to calculate what is owned.

Requirements

Customers

- Users with permission must be able to quickly add new customers.
- The original source of all customers in the accounting system must be identified to be from cash and carry or brokered sales.
- The company needs to keep a record of special price promotions given to specific customers.
- Customers must be identified with a unique general business posting group so that the correct freight G/L account is used in sales transactions.

Sales

- The customer source must be used to identify the business line, and the customer source must be indicated on every sales transactions.
- Customer service and cash and carry desk associates must be able to enter sales into Dynamics 365 Business Central by customer.
- Excess paper must be eliminated, and paper management must be reduced.
- If a customer is not already listed in the system, a cash and carry associate or customer service associate must be able to quickly add the new customer in the process of recording the first sale.
- A point-of-sale system is not needed, but users must be able to record which items are purchased by customers, accept and record their payment, and print receipts indicating paid in full.

Items

- The sales manager and warehouse manager must be able to set a specific timeframe for special promotion discounts on items.
- For special promotions, discounts must be consistent for all items in a product line using a single discount calculation.
- Special pricing may be given to a retail chain or buying group. This pricing must be automatically applied when an order is taken for any of these customers. The original price must be recorded with each sale.
- Customers must always be charged the lowest amount for an item at the time of the sale. For example, an overstocked olive oil has a regular price of \$20 per unit. Customers in a buying group for restaurants can buy it for \$18 per unit. There is an autumn promotion price for the item at \$19 per unit. However, on a specific day only, there is an overstock special at a 15 percent discount off the regular price.

Sales invoices

- Warehouse workers must be able to indicate the following in the system for each order:
 1. the items picked
 2. the shipping charges
 3. notifications, if any, that customer service needs to provide to the customer
- Items sold at a discount must show the original price, discount, and net amount on each line of the invoice. Invoices must be posted at the cash and carry desk at the time of sale. For orders, accounting must post invoices and send them to customers.
- Warehouse employees must be able to indicate what has been shipped on an order. They will use the G/L account for shipping charges. They need to use the correct G/L account for sales versus cost through proper assignment of sales and purchase accounts in the general posting setup.
- Some of the brokered customers require one invoice per week regardless of the number of orders or shipments.

Accounts

- Payment terms vary by customer.
- The amount paid to brokers must be calculated from sales after invoice discounts.
- Broker vendors must be easily identifiable from other vendors in lists
- Commission paid on sales not collected within 120 days must be deducted from brokers' next compensation payment.

Reporting

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Wide World Importers requires reporting on the following:

- the overall profitability of each line of business at any time for any given period
- the cost of outbound shipping in the overall profitability of sales by business line in all related reports
- freight sales and cost by account in the trial balance
- the cost of brokers' compensation in reporting the overall profitability of sales by business line
- the effect of item discount promotions in financial statements.

Issues

Pricing

- Spreadsheets are used to maintain special item pricing and discounts. The only source of product line discount information is a whiteboard in the warehouse. The price charged is frequently incorrect.
- Customers complain when they think they have not received the best price available. Promotions are sometimes applied in error after a special pricing event ends, for example, when discounts are offered temporarily to reduce overstock.
- Management cannot see original versus actual price on all sales. Discounts given by brokers requires spreadsheets and comparison between price list and price on sales invoice. Management needs to be able to quickly see the discount given on each sale.

Payment terms

- Agreed-upon payment terms are frequently entered incorrectly on orders, causing cashflow issues.
- Invoices already paid in full exist on the sales aging reports. The frequent cause of this issue is that sales from the cash and carry desk are not indicated as cash sales and are not posted as paid in full. Some buying groups require that all invoices sent during a month be due on the 20th of the following month.

Invoicing

- Paperwork is frequently misplaced between the warehouse, customer service, and accounting.
- Invoices that are posted in the accounting system based on shipments and invoices that are sent to customers weekly do not match due to errors transferring the data from one document to another.
- Users are selecting the incorrect freight type (expense versus sales) on purchase and sales transactions, making it difficult to reconcile freight costs.
- Sales placed from the cash and carry desk by customers originally acquired through a broker are not being recognized with the correct customer source. Reporting by business line is inaccurate.

Accounts

- Users often forget which fields to use to enter information when they add new customers to QuickBooks. This results in errors and inconsistencies in data and affects sales reporting. Confidence in sales reporting accuracy is low.
- Adding new brokers is a different process than adding other purchase vendors. Users often forget which fields to select and how to correctly assign the vendor number to add new brokers.
- Manual entries to certain G/L accounts cause reconciliation issues.

Drag and Drop Question

You need to design a process to resolve the broker issues for Accounts.

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

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

Actions	Answer Area
Create the Data template.	
Define the No. Series on the configuration template.	
Create a No. Series.	
Configure the Vendor Table on the configuration package.	⏪
Create a configuration package.	⏩
Define the No. Series Relationships.	⏴
Define No. Series Lines.	⏵

Answer:

Actions	Answer Area
	Create a No. Series.
	Create the Data template.
	Define the No. Series on the configuration template.
Configure the Vendor Table on the configuration package.	
Create a configuration package.	
Define the No. Series Relationships.	
Define No. Series Lines.	

Explanation:

<https://docs.microsoft.com/en-gb/dynamics365/business-central/ui-create-number-series>
<https://docs.microsoft.com/en-gb/dynamics365/business-central/admin-use-templates-to-prepare-customer-data-for-migration>

QUESTION 54

Case Study 2 - Deliveries

Current environment

Deliveries

- The company receives daily truckloads of products from their vendors, warehouses the products briefly, and then ships orders based on a weekly delivery cycle to each customer’s store.
- Customers have regular standing orders that are revised and finished one week prior to delivery.
- Best for You Organics has a fleet of trucks that make deliveries according to planned routes.
- The company also has a floating route for trucks to deliver rush orders. The route is being used more often by customers and has overwhelmed the warehouse with exception processing.

Duties

The company wants to provide greater separation of duties between activities in the office and activities in the warehouse.

The accounting team enters orders for the sales team, sends pick tickers back to the warehouse, and organizes shipping documents. The accounting team invoices the orders when they receive instructions from the warehouse that an order shipped.

Employees have expressed frustration because they need to work longer hours to accommodate the increase in sales. The company does not use the Advanced Warehousing function.

Requirements

Salespeople

- Salespeople must be able to manage opportunities that are converted to quotes.
- Salespeople must be able to release orders to the warehouse to be fulfilled once a quote is final.
- Salespeople must be trained on how to determine if inventory is available when they are completing the quote to avoid promising inventory that is not on hand because all orders are processed one week in advance of delivery.

Team responsibilities

Deliveries must be shipped daily by employees in the warehouse. The office must be responsible for completing the invoicing process.

The current team responsibilities are shown in the following graphic:



The required team responsibilities are shown in the following graphic:



Vendor management

- The company contracts with each vendor for regular discounts at the invoice level.
- The company requires a pre-set discount percentage to calculate automatically when the purchaser completes a purchase order.
- The company must be able to see a copy of the completed purchase order in the system when they have new contract negotiations with their vendors.

Customer and inventory management

- Sales invoices must be automatically emailed by the system to customers.
- A template must be used for emails sent to customers. The template must not be altered.
- Customers who pre-pay their invoices must not receive a copy of their invoices.
- The company warehouses all products as Case quantities. The company has difficulty recording accurate costs for product returns. The company wants to expand their capabilities for managing returns by setting up all inventory in a quantity of Each.

Reporting

The company must be able to answer two key questions when they report financial results:

- Which customers are buying which items?
- Which salespeople are selling in which regions?

When discussing customers, the company must refer to each Customer Group as follows:

- Big Box
- Franchise
- Private

When discussing items, the company must refer to each Item Group as follows:

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- Fair Trade
- Free Range
- Grass Fed
- Heirloom
- Organic

Salesperson names that must be used are:

- SalespersonA
- SalespersonB
- SalespersonC
- SalespersonD

Region names that must be used are:

- North
- South
- East
- West

Commission

- The company must be able to track salesperson performance within certain regions to calculate commission.
- Each salesperson must be assigned only to a single region.
- This commission data is currently recorded inconsistently, resulting in incorrect combinations that require manual correction. The company must have some level of automation to manage this.

Issues

Issue 1

The accounting team needs an improved process for reconciling inventory to the general ledger.

- Posted transactions are changing financial reporting in periods that have been closed.
- Unexpected changes in inventory cost for previous months are causing costing inaccuracies.
- The system must restrict the adjustment of costs for closed months.
- The new policy will be to restrict all users to posting in the current month only, with the exception of a few employees from the accounting team.
- The calendar fiscal year for company must begin on June 1.

Issue 2

The accounting team uses a complex manual accrual process to determine the accounting impact of items received but not invoiced. The system must streamline the item accrual process.

Issue 3

The company often receives a higher quantity of produce items than what they order because vendors allow for spoilage or damage of produce in transit. The company does not want to allow over receipt on non-produce items.

Issue 4

The company has received comments from their auditors that invoices are not being properly compared to received inventory documents before they are posted. The company does not use warehouse management and always handles processes directly from the purchase order. The company always has the following documents:

- purchase order from the procurement department
- receiving document from the warehouse
- electronic invoice from the vendor

You need to enforce restrictions for salespeople and regions to meet the requirements for Commission.

What should you do?

- A. Set Salesperson and Region dimensions to Limited.
- B. Assign Default Dimension Priorities to list Salesperson first.
- C. Set the dimension combination between the Salesperson and the Region to Blocked.
- D. Add Default Dimensions for Salesperson on Customer Cards.

Answer: A

Explanation:

<https://docs.microsoft.com/en-gb/dynamics365/business-central/finance-dimensions>

QUESTION 55

Case Study 2 - Deliveries

Current environment

Deliveries

- The company receives daily truckloads of products from their vendors, warehouses the products briefly, and then ships orders based on a weekly delivery cycle to each customer's store.
- Customers have regular standing orders that are revised and finished one week prior to delivery.
- Best for You Organics has a fleet of trucks that make deliveries according to planned routes.
- The company also has a floating route for trucks to deliver rush orders. The route is being used more often by customers and has overwhelmed the warehouse with exception processing.

Duties

The company wants to provide greater separation of duties between activities in the office and activities in the warehouse.

The accounting team enters orders for the sales team, sends pick tickers back to the warehouse, and organizes shipping documents. The accounting team invoices the orders when they receive instructions from the warehouse that an order shipped.

Employees have expressed frustration because they need to work longer hours to accommodate the increase in sales. The company does not use the Advanced Warehousing function.

Requirements

Salespeople

- Salespeople must be able to manage opportunities that are converted to quotes.
- Salespeople must be able to release orders to the warehouse to be fulfilled once a quote is final.
- Salespeople must be trained on how to determine if inventory is available when they are completing the quote to avoid promising inventory that is not on hand because all orders are processed one week in advance of delivery.

Team responsibilities

Deliveries must be shipped daily by employees in the warehouse. The office must be responsible for completing the invoicing process.

The current team responsibilities are shown in the following graphic:



The required team responsibilities are shown in the following graphic:



Vendor management

- The company contracts with each vendor for regular discounts at the invoice level.
- The company requires a pre-set discount percentage to calculate automatically when the purchaser completes a purchase order.
- The company must be able to see a copy of the completed purchase order in the system when they have new contract negotiations with their vendors.

Customer and inventory management

- Sales invoices must be automatically emailed by the system to customers.
- A template must be used for emails sent to customers. The template must not be altered.
- Customers who pre-pay their invoices must not receive a copy of their invoices.
- The company warehouses all products as Case quantities. The company has difficulty recording accurate costs for product returns. The company wants to expand their capabilities for managing returns by setting up all inventory in a quantity of Each.

Reporting

The company must be able to answer two key questions when they report financial results:

- Which customers are buying which items?
- Which salespeople are selling in which regions?

When discussing customers, the company must refer to each Customer Group as follows:

- Big Box
- Franchise
- Private

When discussing items, the company must refer to each Item Group as follows:

- Fair Trade
- Free Range
- Grass Fed
- Heirloom
- Organic

Salesperson names that must be used are:

- SalespersonA
- SalespersonB
- SalespersonC
- SalespersonD

Region names that must be used are:

- North
- South
- East
- West

Commission

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- The company must be able to track salesperson performance within certain regions to calculate commission.
- Each salesperson must be assigned only to a single region.
- This commission data is currently recorded inconsistently, resulting in incorrect combinations that require manual correction. The company must have some level of automation to manage this.

Issues

Issue 1

The accounting team needs an improved process for reconciling inventory to the general ledger.

- Posted transactions are changing financial reporting in periods that have been closed.
- Unexpected changes in inventory cost for previous months are causing costing inaccuracies.
- The system must restrict the adjustment of costs for closed months.
- The new policy will be to restrict all users to posting in the current month only, with the exception of a few employees from the accounting team.
- The calendar fiscal year for company must begin on June 1.

Issue 2

The accounting team uses a complex manual accrual process to determine the accounting impact of items received but not invoiced. The system must streamline the item accrual process.

Issue 3

The company often receives a higher quantity of produce items than what they order because vendors allow for spoilage or damage of produce in transit. The company does not want to allow over receipt on non-produce items.

Issue 4

The company has received comments from their auditors that invoices are not being properly compared to received inventory documents before they are posted. The company does not use warehouse management and always handles processes directly from the purchase order. The company always has the following documents:

- purchase order from the procurement department
- receiving document from the warehouse
- electronic invoice from the vendor

You need to configure the system to meet the requirements for sending invoices.

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

NOTE: Each correct selection is worth one point.

- A. Set Email to Yes (Use Default Settings).
- B. Allow Sender Substitution for SMTP Mail Setup.
- C. Set Email to Yes (Prompt for Settings).
- D. Assign a Document Sending Profile to the Customer where Email is set to No.
- E. Apply Office Server Settings to the SMTP Mail Setup.
- F. Assign a Document Sending Profile to the Customer where Email is set to Yes.

Answer: AEF

Explanation:

<https://docs.microsoft.com/en-gb/dynamics365/business-central/sales-how-setup-document-send-profiles>

QUESTION 56

Case Study 2 - Deliveries

Current environment

Deliveries

- The company receives daily truckloads of products from their vendors, warehouses the products briefly, and then ships orders based on a weekly delivery cycle to each customer's store.
- Customers have regular standing orders that are revised and finished one week prior to delivery.
- Best for You Organics has a fleet of trucks that make deliveries according to planned routes.
- The company also has a floating route for trucks to deliver rush orders. The route is being used more often by customers and has overwhelmed the warehouse with exception processing.

Duties

The company wants to provide greater separation of duties between activities in the office and activities in the warehouse.

The accounting team enters orders for the sales team, sends pick tickers back to the warehouse, and organizes shipping documents. The accounting team invoices the orders when they receive instructions from the warehouse that an order shipped.

Employees have expressed frustration because they need to work longer hours to accommodate the increase in sales. The company does not use the Advanced Warehousing function.

Requirements

Salespeople

- Salespeople must be able to manage opportunities that are converted to quotes.
- Salespeople must be able to release orders to the warehouse to be fulfilled once a quote is final.
- Salespeople must be trained on how to determine if inventory is available when they are completing the quote to avoid promising inventory that is not on hand because all orders are processed one week in advance of delivery.

Team responsibilities

Deliveries must be shipped daily by employees in the warehouse. The office must be responsible for completing the invoicing process.

The current team responsibilities are shown in the following graphic:



The required team responsibilities are shown in the following graphic:



Vendor management

- The company contracts with each vendor for regular discounts at the invoice level.
- The company requires a pre-set discount percentage to calculate automatically when the purchaser completes a purchase order.
- The company must be able to see a copy of the completed purchase order in the system when they have new contract negotiations with their vendors.

Customer and inventory management

- Sales invoices must be automatically emailed by the system to customers.

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- A template must be used for emails sent to customers. The template must not be altered.
- Customers who pre-pay their invoices must not receive a copy of their invoices.
- The company warehouses all products as Case quantities. The company has difficulty recording accurate costs for product returns. The company wants to expand their capabilities for managing returns by setting up all inventory in a quantity of Each.

Reporting

The company must be able to answer two key questions when they report financial results:

- Which customers are buying which items?
- Which salespeople are selling in which regions?

When discussing customers, the company must refer to each Customer Group as follows:

- Big Box
- Franchise
- Private

When discussing items, the company must refer to each Item Group as follows:

- Fair Trade
- Free Range
- Grass Fed
- Heirloom
- Organic

Salesperson names that must be used are:

- SalespersonA
- SalespersonB
- SalespersonC
- SalespersonD

Region names that must be used are:

- North
- South
- East
- West

Commission

- The company must be able to track salesperson performance within certain regions to calculate commission.
- Each salesperson must be assigned only to a single region.
- This commission data is currently recorded inconsistently, resulting in incorrect combinations that require manual correction. The company must have some level of automation to manage this.

Issues

Issue 1

The accounting team needs an improved process for reconciling inventory to the general ledger.

- Posted transactions are changing financial reporting in periods that have been closed.
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- The system must restrict the adjustment of costs for closed months.
- The new policy will be to restrict all users to posting in the current month only, with the exception of a few employees from the accounting team.
- The calendar fiscal year for company must begin on June 1.

Issue 2

The accounting team uses a complex manual accrual process to determine the accounting impact of items received but not invoiced. The system must streamline the item accrual process.

Issue 3

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Issue 4

The company has received comments from their auditors that invoices are not being properly compared to received inventory documents before they are posted. The company does not use warehouse management and always handles processes directly from the purchase order. The company always has the following documents:

- purchase order from the procurement department

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- receiving document from the warehouse
- electronic invoice from the vendor

You need to set up units of measure for an item to meet the requirements.

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

NOTE: Each correct selection is worth one point.

- A. Set a Unit of Measure for case to a Qty. of 10.
- B. Set a Qty. per Unit of Measure to 1 in the Item Units of Measure table.
- C. Set a Unit of Measure for case to a Qty. of 1.
- D. Add a Code and Description to the Units of Measure table.

Answer: AD

Explanation:

<https://docs.microsoft.com/en-gb/dynamics365/business-central/inventory-how-setup-units-of-measure>

QUESTION 57

Case Study 2 - Deliveries

Current environment

Deliveries

- The company receives daily truckloads of products from their vendors, warehouses the products briefly, and then ships orders based on a weekly delivery cycle to each customer's store.
- Customers have regular standing orders that are revised and finished one week prior to delivery.
- Best for You Organics has a fleet of trucks that make deliveries according to planned routes.
- The company also has a floating route for trucks to deliver rush orders. The route is being used more often by customers and has overwhelmed the warehouse with exception processing.

Duties

The company wants to provide greater separation of duties between activities in the office and activities in the warehouse.

The accounting team enters orders for the sales team, sends pick tickers back to the warehouse, and organizes shipping documents. The accounting team invoices the orders when they receive instructions from the warehouse that an order shipped.

Employees have expressed frustration because they need to work longer hours to accommodate the increase in sales. The company does not use the Advanced Warehousing function.

Requirements

Salespeople

- Salespeople must be able to manage opportunities that are converted to quotes.
- Salespeople must be able to release orders to the warehouse to be fulfilled once a quote is final.
- Salespeople must be trained on how to determine if inventory is available when they are completing the quote to avoid promising inventory that is not on hand because all orders are processed one week in advance of delivery.

Team responsibilities

Deliveries must be shipped daily by employees in the warehouse. The office must be responsible for completing the invoicing process.

The current team responsibilities are shown in the following graphic:



The required team responsibilities are shown in the following graphic:



Vendor management

- The company contracts with each vendor for regular discounts at the invoice level.
- The company requires a pre-set discount percentage to calculate automatically when the purchaser completes a purchase order.
- The company must be able to see a copy of the completed purchase order in the system when they have new contract negotiations with their vendors.

Customer and inventory management

- Sales invoices must be automatically emailed by the system to customers.
- A template must be used for emails sent to customers. The template must not be altered.
- Customers who pre-pay their invoices must not receive a copy of their invoices.
- The company warehouses all products as Case quantities. The company has difficulty recording accurate costs for product returns. The company wants to expand their capabilities for managing returns by setting up all inventory in a quantity of Each.

Reporting

The company must be able to answer two key questions when they report financial results:

- Which customers are buying which items?
- Which salespeople are selling in which regions?

When discussing customers, the company must refer to each Customer Group as follows:

- Big Box
- Franchise
- Private

When discussing items, the company must refer to each Item Group as follows:

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- Fair Trade
- Free Range
- Grass Fed
- Heirloom
- Organic

Salesperson names that must be used are:

- SalespersonA
- SalespersonB
- SalespersonC
- SalespersonD

Region names that must be used are:

- North
- South
- East
- West

Commission

- The company must be able to track salesperson performance within certain regions to calculate commission.
- Each salesperson must be assigned only to a single region.
- This commission data is currently recorded inconsistently, resulting in incorrect combinations that require manual correction. The company must have some level of automation to manage this.

Issues

Issue 1

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- Posted transactions are changing financial reporting in periods that have been closed.
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- The system must restrict the adjustment of costs for closed months.
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Issue 2

The accounting team uses a complex manual accrual process to determine the accounting impact of items received but not invoiced. The system must streamline the item accrual process.

Issue 3

The company often receives a higher quantity of produce items than what they order because vendors allow for spoilage or damage of produce in transit. The company does not want to allow over receipt on non-produce items.

Issue 4

The company has received comments from their auditors that invoices are not being properly compared to received inventory documents before they are posted. The company does not use warehouse management and always handles processes directly from the purchase order. The company always has the following documents:

- purchase order from the procurement department
- receiving document from the warehouse
- electronic invoice from the vendor

You need to configure the system to meet the requirements for received items.

What should you do?

- A. Set the default costing method to Standard
- B. Turn on Automatic Cost Posting
- C. Turn on Expected Cost Posting
- D. Set the value of the Automatic Cost Adjustment option to Always

Answer: C

Explanation:

<https://docs.microsoft.com/en-gb/dynamics365/business-central/design-details-expected-cost-posting>

QUESTION 58

Case Study 2 - Deliveries

Current environment

Deliveries

- The company receives daily truckloads of products from their vendors, warehouses the products briefly, and then ships orders based on a weekly delivery cycle to each customer's store.
- Customers have regular standing orders that are revised and finished one week prior to delivery.
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Salesperson names that must be used are:

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Commission

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Issue 4

The company has received comments from their auditors that invoices are not being properly compared to received inventory documents before they are posted. The company does not use warehouse management and always handles processes directly from the purchase order. The company always has the following documents:

- purchase order from the procurement department
 - receiving document from the warehouse
 - electronic invoice from the vendor
- You need to configure the system for receiving produce from the vendors.
What should you do?

- A. Configure an Over-Receipt code with Tolerance percentage.
- B. Set up a Payment Tolerance percentage.
- C. Apply a Default Deferral template.
- D. Set the Dampener Quantity to a value greater than zero.

Answer: A

Explanation:

<https://docs.microsoft.com/en-us/dynamics365-release-plan/2020wave1/dynamics365-business-central/receive-more-items-than-ordered>

QUESTION 59

Case Study 2 - Deliveries

Current environment

Deliveries

- The company receives daily truckloads of products from their vendors, warehouses the products briefly, and then ships orders based on a weekly delivery cycle to each customer's store.
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Requirements

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Team responsibilities

Deliveries must be shipped daily by employees in the warehouse. The office must be responsible for completing the invoicing process.

The current team responsibilities are shown in the following graphic:



The required team responsibilities are shown in the following graphic:



Vendor management

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• The company warehouses all products as Case quantities. The company has difficulty recording accurate costs for product returns. The company wants to expand their capabilities for managing returns by setting up all inventory in a quantity of Each.

Reporting

The company must be able to answer two key questions when they report financial results:

- Which customers are buying which items?
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- Fair Trade
- Free Range
- Grass Fed
- Heirloom
- Organic

Salesperson names that must be used are:

- SalespersonA
- SalespersonB
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- South
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Drag and Drop Question

You need to advise the company on how to process existing sales orders.

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

Actions	Answer Area
A warehouse employee performs Post and Ship.	
A warehouse employee performs Post, Ship, and Invoice.	
A warehouse employee performs Post and Invoice only.	
An office employee adds an External Document No. to the Sales Order.	
A warehouse employee changes the Posting Date to match the actual shipping date.	
An office employee performs Post and Invoice only.	
An office employee performs Post, Ship and Invoice.	

Answer:

Actions	Answer Area
A warehouse employee performs Post, Ship, and Invoice.	A warehouse employee performs Post and Ship.
A warehouse employee performs Post and Invoice only.	An office employee adds an External Document No. to the Sales Order.
	An office employee performs Post and Invoice only.
A warehouse employee changes the Posting Date to match the actual shipping date.	
An office employee performs Post, Ship and Invoice.	

Explanation:

<https://docs.microsoft.com/en-us/learn/modules/ship-invoice-items-dynamics-365-business-central/1-ship>
<https://docs.microsoft.com/en-us/learn/modules/ship-invoice-items-dynamics-365-business-central/2-invoice>

QUESTION 60

Case Study 2 - Deliveries

Current environment

Deliveries

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- Salespeople must be able to manage opportunities that are converted to quotes.
- Salespeople must be able to release orders to the warehouse to be fulfilled once a quote is final.

- Salespeople must be trained on how to determine if inventory is available when they are completing the quote to avoid promising inventory that is not on hand because all orders are processed one week in advance of delivery.

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The current team responsibilities are shown in the following graphic:



The required team responsibilities are shown in the following graphic:



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- The company warehouses all products as Case quantities. The company has difficulty recording accurate costs for product returns. The company wants to expand their capabilities for managing returns by setting up all inventory in a quantity of Each.

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- Which customers are buying which items?

- Which salespeople are selling in which regions?

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- Private

When discussing items, the company must refer to each Item Group as follows:

- Fair Trade
- Free Range
- Grass Fed
- Heirloom
- Organic

Salesperson names that must be used are:

- SalespersonA
- SalespersonB
- SalespersonC
- SalespersonD

Region names that must be used are:

- North
- South
- East
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Commission

- The company must be able to track salesperson performance within certain regions to calculate commission.
- Each salesperson must be assigned only to a single region.
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Issue 4

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- purchase order from the procurement department
- receiving document from the warehouse
- electronic invoice from the vendor

Hotspot Question

You need to create the process for salespeople.

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

NOTE: Each correct selection is worth one point.

Answer Area

Requirement	Action
Deliver on a specific customer date.	<input type="text"/> View the Item Availability by Periods. Change the Requested Delivery Date. Check the Catalog on the Sales Line Details. View the Location Code for available inventory.
Process quotes.	<input type="text"/> Choose Make Order. Choose Make Invoice. Choose Copy Document. Choose Release.

Answer:
Answer Area

Requirement	Action
Deliver on a specific customer date.	<input type="text"/> View the Item Availability by Periods. Change the Requested Delivery Date. Check the Catalog on the Sales Line Details. View the Location Code for available inventory.
Process quotes.	<input type="text"/> Choose Make Order. Choose Make Invoice. Choose Copy Document. Choose Release.

Explanation:

<https://docs.microsoft.com/en-gb/dynamics365/business-central/inventory-how-availability-overview>
<https://docs.microsoft.com/en-gb/dynamics365/business-central/sales-how-make-offers>

QUESTION 61
Case Study 2 - Deliveries
Current environment
Deliveries

- The company receives daily truckloads of products from their vendors, warehouses the products briefly, and then ships orders based on a weekly delivery cycle to each customer's store.
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Team responsibilities

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The current team responsibilities are shown in the following graphic:



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Vendor management

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- The company requires a pre-set discount percentage to calculate automatically when the purchaser completes a purchase order.
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- Sales invoices must be automatically emailed by the system to customers.
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The company must be able to answer two key questions when they report financial results:

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- Private

When discussing items, the company must refer to each Item Group as follows:

- Fair Trade
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- electronic invoice from the vendor

Drag and Drop Question

You need to configure the system to address the costing adjustment concerns.

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

You create and enable an approval workflow. You configure the workflow to use the approver limit type Approver Chain.

To test the workflow, User1 creates a purchase order for \$1,100 and runs the Send Approval Request function. You need to identify the actions that occur when the workflow runs.

Which set of actions occurs?

- A. User4 will receive an approval request.
Once approved, the purchase order is released.
- B. User3 receives an approval request.
Once User3 approves the request, the purchase order is released.
- C. User2 will receive an approval request.
Once User2 approves the request, User3 will receive an approval request.
Once User2 and User3 approve the request, the purchase order is released.
- D. User1 will receive an approval request.
Once User1 approves the request, User2 must approve the request.
Once User2 approves the request, User3 must approve the request.
Once User3 approves the request, the purchase order is released.
- E. User3 will receive an approval request.
Once User3 approves the request, the request is routed to User4 for approval.
Once User4 approves the request, the purchase order is released.

Answer: E

Explanation:

<https://docs.microsoft.com/en-gb/dynamics365/business-central/across-how-to-set-up-approval-users>

<https://dynamics.tensoft.com/approval-user-setup-in-microsoft-dynamics-365-business-central/>