ITTEST

QUESTION & ANSWER

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Exam   :   MB-300

Title   :   Microsoft Dynamics 365: Core Finance and Operations

Version :   DEMO

1. Topic 1, Relecloud Case

Background

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

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

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

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

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

Current environment: Account Representatives

✑ Each customer is assigned a single account representative.

✑ Account representatives use multiple devices.

✑ Only account representatives have the ability to approve credits.

✑ All email to customers come through their own Outlook instance.

Current environment: Finance

✑ Customers do not have invoice accounts.

✑ Only finance resources have the ability to enter credits.

✑ Credits can be entered by any of the four finance resources assigned the Credits and Refunds security role.

✑ If the request has not been updated in four days, the request is escalated to the Controller. The account representative must be alerted when this occurs.

Requirements: Technical support/IT

✑ Support technicians must use Microsoft's existing knowledge base to resolve open issues.

✑ If an issue exists, support technicians must report the status of the issue on a weekly basis.

✑ If there is no existing support request, support technicians must create one for Microsoft evaluation.

✑ All software must be installed centrally when possible.

✑ The Dynamics 365 Finance and Operations production environment must have an update cadence of every second Saturday from 4-7 A.M. EST.

✑ Updates must be tested in separate environment.

Requirements: Account representatives

✑ Account representatives must be able to see only the relevant customer fields and records automatically from their dashboard.

✑ Account representatives must be able to export the list of customers to Microsoft Excel.

✑ Account representatives must be able to navigate to the customer master record for any editing or record entry tasks.

✑ The forms must be relevant based on each account representative's needs.

✑ Account representatives need a centralized location to see multiple data components.

✑ Account representatives require an offline list of their current customers in Excel with only the fields they need.

✑ The IT Director must reassign all instances of an account representative's customer contacts if the representative leaves the company.

✑ An alert must be sent automatically to an account representative when a credit is issued or any data is changed on a customer's record.

Requirements: Financials

✑ Any refund must be printed as a physical check.

✑ All printers must be exclusive to the financial legal entity.

Issues

✑ Typing 'pickle' in the search box yields no returned results for the account representative.

☞ After the latest update, an account representative reports that he is no longer receiving alert notifications when a customer's contact is changed.

☞ An account representative has recently resigned.

You need to detail a business process for streaming the customer editing process for account representatives.

Which two actions should you perform? Each correct answer presents a partial solution. NOTE: Each correct selection is worth one point.

A. Navigate to the All Customer form for the Accounts receivable module and select the appropriate customer account.

B. Navigate to the account representative's workspace and select the appropriate customer account.

C. Select the form and then select Hide.

D. Hide Invoice account from the view.

Answer: AD

2.You need to determine why the sales associate is not able to see Munson's in the search results.

What is the cause of the issue?

A. The search criteria is searching for only names that are exactly 'pickles'.

B. The search criteria is only able to search by the shortened search name of the customer.

C. The search criteria is searching for all customer names that start with 'pickles'.

D. The search criteria is case sensitive.

Answer: C

Explanation:

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

3.You need to configure the system for account representatives.

Which two actions should you perform? Each correct answer presents a partial solution. NOTE: Each correct selection is worth one point.

A. Recreate the job alert as a change-based alert.

B. Enable change-based alerts.

C. Increase the batch job running frequency.

D. Specify the batch server for the alert notifications job.

Answer: A, C

4.You need to connect the Excel instance to the Relecloud production instance.

What should you do?

A. Set the server URL to Microsoft.Dynamics.Platform.Integration.Office.UrlViewerApplet.

B. Set the server URL to https://relecloud-prod.operations.dynamics.com.

C. Set the App Correlation ID to https://relecloud-prod.operations.dynamics.com.

D. Set the App Correlation ID to the App Id in the Dynamics 365 Office App Parameters.

Answer: B

Explanation:

Reference: https://docs.microsoft.com/en-us/dynamics365/unified-operations/dev-itpro/office-integration/use-

excel-add-in

5.DRAG DROP

You need to configure check printing for Munson's.

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

Actions

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

Navigate to the legal entity and enable the printer

Select the legal entities for the printer to be available

Discover and add the check printer from the Document Routing Agent

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

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

Install the Document Routing Agent on the corporate printserver

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

Answer Area

Answer:

Actions

Install the Document Rouing Agent on the client machines where users will be printing the checks
Navigate to the legal entity and enable the printer
Select the legal entities for the printer to be available
Discover and add the check printer from the Document Routing Agent
Enter he Dynamics 365 Finance and Operations configurations in the Document Routing Agent
Discover and add the check printer to the system from Dynamics 365 Finance and Operations
Install the Document Routing Agent on the corporate printserver
Register the Document Routing Agent with Dynamics 365 Finance and Operations.

Answer Area

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

Explanation:

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