Microsoft

MB-300

Microsoft Dynamics 365 Unified Operations Core Exam

QUESTION & ANSWERS

QUESTION 1

Case Study	Number of Questions	Total Question
Case Study: 1	11	1 – 11
Case Study: 2	14	12 – 25
Case Study: 3	8	26 - 33
Case Study: 4	10	34 - 43
Case Study: 5	202	44 - 245
	Total	245

Case Study: 1

Relecloud Case

Current environment: System and IT

Current environment: Customer Service

Current environment: Technical Support/IT

Current environment: Account Representatives

Current environment: Finance

Requirements: Technical support/IT

Requirements: Account representatives

Requirements: Financials

Issues

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.

Question: No, 1

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.

Correct Answer: A,D

QUESTION 2

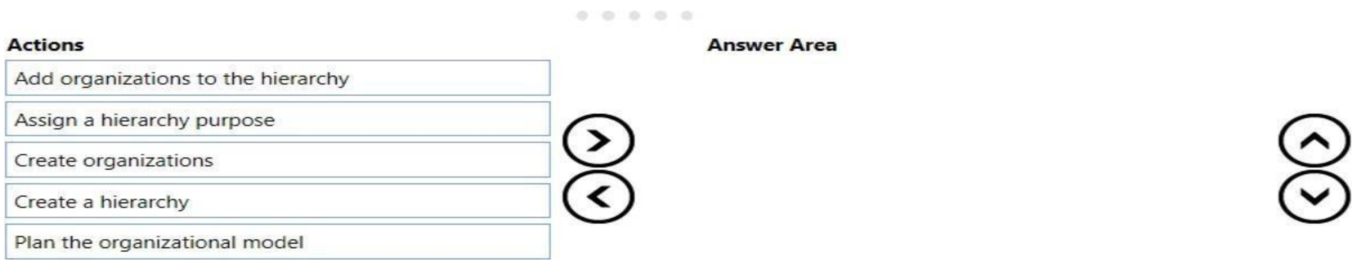
you need 10 determine the different entities that sales managers can use to import data rto an initial Excel template. What are two possible ways to achieve this goal? Each correct answer presents a complete solution. NOTE: Each correct selection is worth one point

A. Explore the Dynamics 365 database schema
B. Explore the Data distribution framework jobs.
C. Explore the Excel Workbook Designer records.
D. Explore the data entities in the Data Management Workspace.

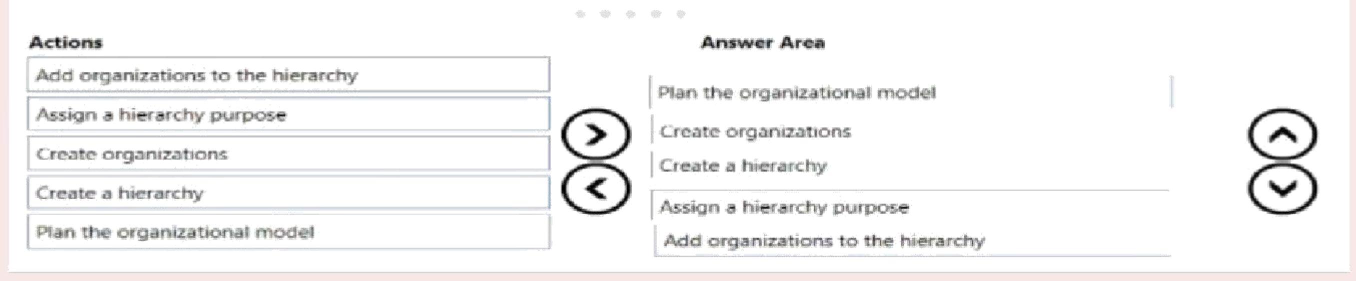
Correct Answer: B,D

QUESTION 3

A multinational company has many legal entities and a complex organizational structure. The management of the company wants to set up an organizational hierarchy to help improve efficiency.
You need to help create the organizational hierarchy.
In which order should you recommend that actions be performed to create an organizational hierarchy? To answer, move all actions from the list of actions to the answer area and arrange them in the correct order.



Correct Answer:



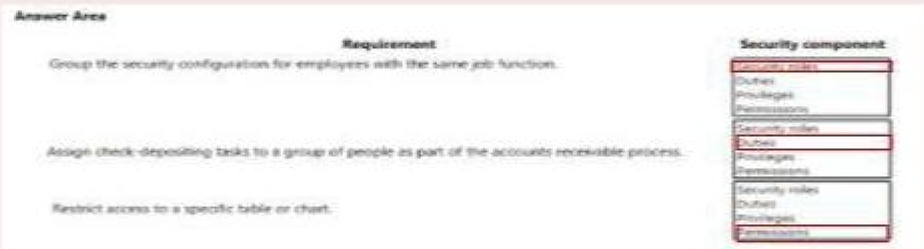
QUESTION 4

A company plans to use Dynamics 365 Finance.
You need to implement the security architecture.
Which component should you use for each requirement? To answer, select the appropriate security component in the answer area.
NOTE: Each correct selection is worth one point.

Answer Area

Requirement	Security component
Group the security configuration for employees with the same job function.	Security roles Duties Privileges Permissions
Assign check-depositing tasks to a group of people as part of the accounts receivable process.	Security roles Duties Privileges Permissions
Restrict access to a specific table or chart.	Security roles Duties Privileges Permissions

Correct Answer:



QUESTION 5

You are a Dynamics 365 for Finance and Operations system administrator for a United States-based corporation that is expanding to other regions.
You set up a new legal entity for Brazil.
You need to enable localization for Brazil in the new legal entity.
What should you do?

A. Create a new Lifecycle Services project.
B. Create a new entity with your corporate address in the system, and then update the address to the Brazil office address.
C. Create a new legal entity with the Brazil office address in the system, and then set preferences

according to the user.
D. Create a new configuration key and associate it with the Brazil localization.
E. Create a new entity in the system with your corporate address and set the user language preferences for Brazil.

Correct Answer: B

QUESTION 6

You have the following Dynamics 365 Finance instances:

Instance	Comments
1	Contains configuration data for a company named CompanyA
2	Contains a blank setup for a company named CompanyB

You must copy the configuration data from CompanyA to CompanyB.
Solution: Use Copy into legal entity. Does the solution meet the goal?

A. Yes
B. No

Correct Answer: A

QUESTION 7

Note: This question is part of a series of questions that present the same scenario. Each question in the series contains a unique solution that might meet the stated goals. Some question sets might have more than one correct solution, while others might not have a correct solution.
After you answer a question in this section, you will NOT be able to return to it. As a result, these questions will not appear in the review screen.
A company's Dynamics 365 Commerce production instance is updated monthly as new versions of the software are released.
The company needs to identify any potential issues in new releases. They do not have developers to help with this initiative.
You need to implement a way to regression test scenarios.
Solution: Use the Acceptance Test Library (ATL) framework to create regression test scenarios for critical business processes that do not require any X++ code changes. Does the solution meet the goal?

A. Yes
B. No

Correct Answer: B

Explanation/Reference:

Explanation:
https://ellipsesolutions.com/acceptance-test-library-for-dynamics-365-for-finance-and-operations-or-when-rsat-is-not-enough/

QUESTION 8

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

A. Reset all the usage data for the user.
B. Switch to Microsoft Edge instead of Internet Explorer 11.
C. Reimport and compile the AOT object causing issues.
D. Open the form in a new Microsoft Edge InPrivate session.

Correct Answer: A

Explanation/Reference:

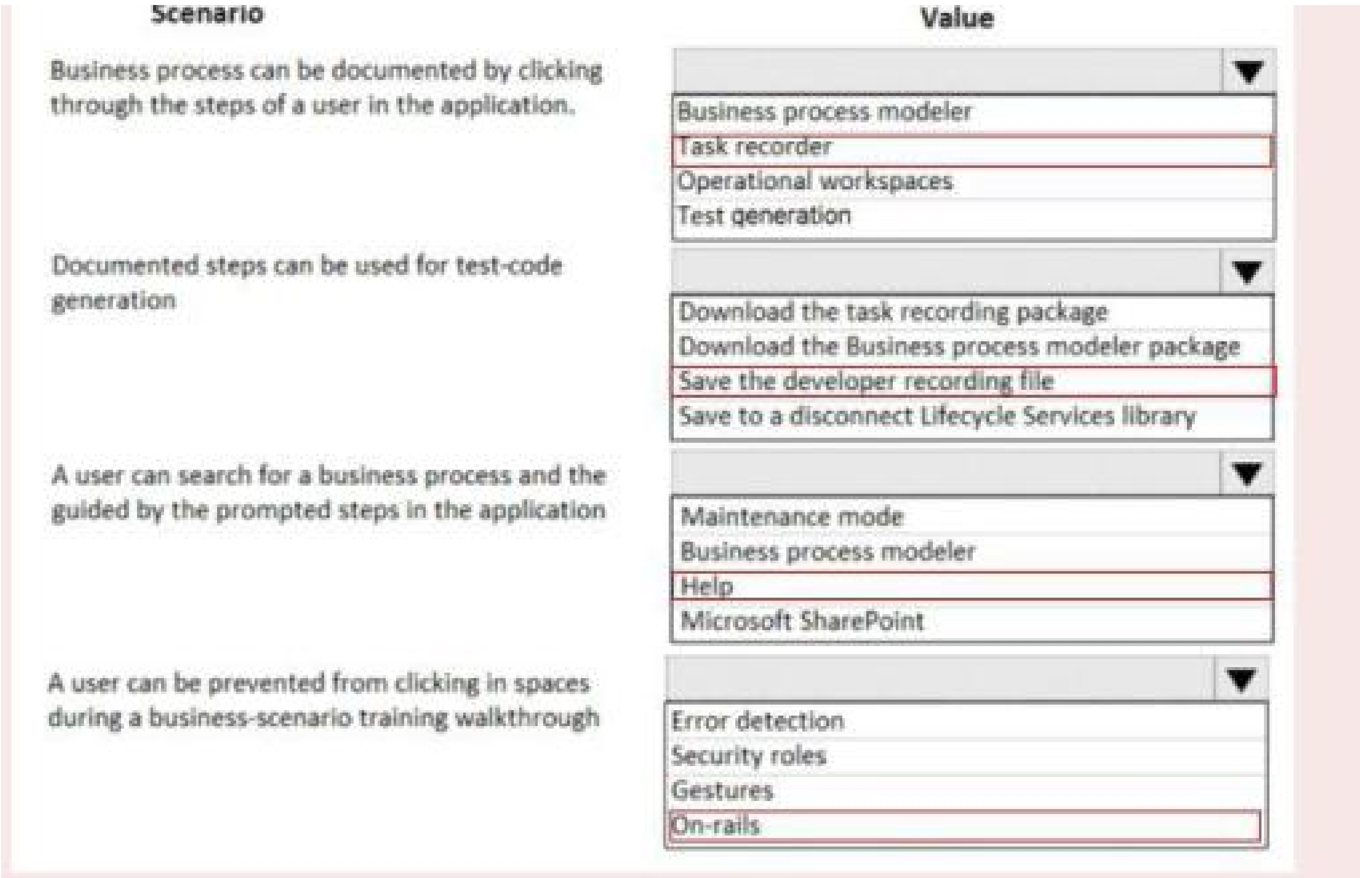
Explanation:
https://stoneridgesoftware.com/how-to-clear-usage-data-or-personalizations-in-dynamics-365-finance-andoperations/

QUESTION 9

You are a Dynamics 365 for Finance and Operations system administrator.
You need to configure the system to support several new use case scenarios.
Which features should you use? To answer, select the appropriate options in the answer area.
NOTE: Each correct selection is worth one point.

Scenario	Value
Business process can be documented by clicking through the steps of a user in the application.	Business process modeler Task recorder Operational workspaces Test generation
Documented steps can be used for test-code generation	Download the task recording package Download the Business process modeler package Save the developer recording file Save to a disconnect Lifecycle Services library
A user can search for a business process and the guided by the prompted steps in the application	Maintenance mode Business process modeler Help Microsoft SharePoint
A user can be prevented from clicking in spaces during a business-scenario training walkthrough	Error detection Security roles Gestures On-rails

Correct Answer:



QUESTION 10

You need to design the security roles to assign user teams.
What should you do?

A. Use a single security role but use two different duties with two different privileges for the table that containsthe commission restrictions.
B. Use segregation of duties for the security roles assigned to the two sales teams.
C. Use two separate versions of the sales order form for the two different teams.
D. Use two different security policies for the internal sales team and the Adventure Works Cyclesadministrative sales team security roles.
E. Use two different security roles for the internal sales team and the Adventure Works Cycles administrativesales team.

Correct Answer: D

Explanation/Reference:

https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/sysadmin/extensible-data-security-policies
This is a case study. Case studied are not timed separately. You can use at much exam time as you would like to complete each case. However, there may be additional case studies and sections on this

exam. You must manage your lime to ensure that you are able to complete all questions included on this exam in the time provided.
To answer the Questions included in a case study, you will need to reference information that is provided in the case study. Case studies might contain exhibits and other resources that provide more information about the scenario that is described m the case study. Each question is independent of the other questions in this case study.
At the end of this case study, a review screen will appear, this screen allows you to review your answers and to make changes before you move to the next section of the exam. After you begin a new section, you cannot return to this section.
To start the case study
To display the first question in this case study, click the Next button. Use the buttons in the left pane to explore the content of the case study before you answer the questions. Clicking these buttons displays information such as business requirements, existing environment, and problem statements.
If the case study has an All Information tab. note that the information displayed is identical to the information displayed on the subsequent tabs. When you ate ready to answer a question, click the Question button to return to the question.
Background
Wide World Importers (WWI) is an importer and supplier of fair trade, handmade home goods to independent retailers in North America.
One of WWI's products was recently featured on several major television talk shows and has become very popular. As a result, WWI is expanding their prospective sales operations to new markets as well as engaging current customers in a more direct manner.

QUESTION 11

A company implements Dynamics 365 for Finance and Operations.
They need additional information and want a subledger to record information for additional reporting rather
than customizing all reports.
You need to set up the posting to accommodate the need for a subledger.
Which three actions should you take? Each answer presents part of the solution.

A. Update existing reports to prevent data in the identified area from reporting
B. Create posting profiles to post to the identified area as needed for the request
C. Create posting definitions to post to the identified area as needed for the request
D. Update existing reports to add data in the identified area
E. Identify an area of the chart of accounts to record to as the subledger

Correct Answer: B,D,E

QUESTION 12

A multinational company plans to implement centralized procurement using purchase requisition workflows.
Multiple workflows must be of the same type. Each region must use its own purchase requisition workflow.
You need to implement the workflows.

What should you do?

A. Configure Instructions for users
B. Configure the workflow owner
C. Configure automated tasks
D. Configure manual tasks
E. Add a condition for running the workflow

Correct Answer: E

QUESTION 13

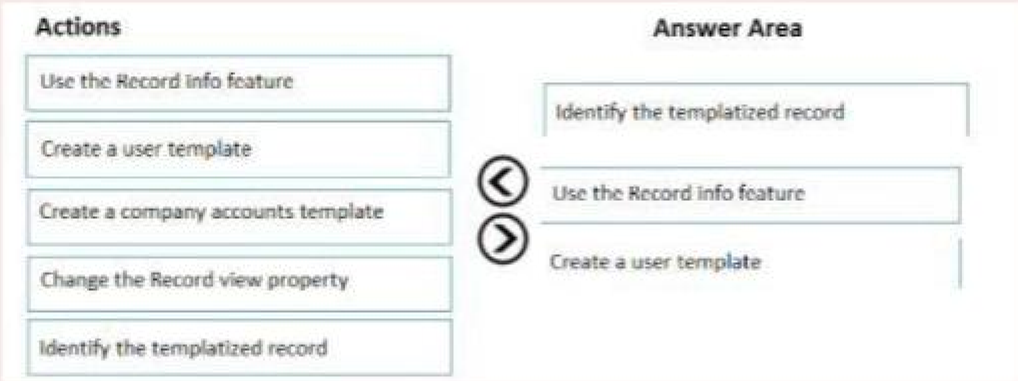
A company plans to use record templates in its implementation.
You need to set up and use record templates.
Which three actions should you perform in sequence to create the record templates? To answer, move the appropriate actions from the list of actions to the answer area and arrange them in the correct order.

Actions

- Use the Record info feature
- Create a user template
- Create a company accounts template
- Change the Record view property
- Identify the templatized record

Answer Area

Correct Answer:



QUESTION 14

A company is migrating to Dynamics 365 for Finance and Operations from a legacy system. The company is creating new questionnaires for customers.
When the survey responses come in, the company wants to provide ratings as a foundation for a further discussion.
You set up questionnaire types, question types, and questionnaire parameters.
You need to design the questionnaire.
In which order should you perform the actions? To answer, move all actions to the answer area and arrange them in the correct order.

Correct Answer:

Actions

- Attach questions to the questionnaire
- Set up the questionnaire
- Set up questions and their association
- Set up answer groups and answers

Answer Area

- Set up answer groups and answers
- Set up questions and their association
- Set up the questionnaire
- Attach questions to the questionnaire

QUESTION 15

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

Answer Area

Correct Answer:

Actions

- Install the Document Routing 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 the 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 print server.
- Register the Document Routing Agent with Dynamics 365 Finance and Operations.

Answer Area

- Install the Document Routing Agent on the client machines where users will be printing the checks
- Enter the 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:

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

QUESTION 16

You manage a Dynamics 365 for Finance and Operations environment.
In preparation for being migrated into a new environment, data packages are being numbered in alignment with the default numbering formats in Lifecycle Services. A package is named 03.01.002.
You need to identify what this package contains. To answer, select the appropriate option in the answer area.
NOTE: Each correct selection is worth one point.

Segment	Component
03	The environment The module The data type The month
01	The module The month The sequence number The data type
002	The sequence number The data package version The data entity The data type reference

Correct Answer: 

QUESTION 17

You are a systems administrator for a Dynamics 365 for Finance and Operations environment.
You must notify the person responsible for deliveries that production could be delayed if deliveries are postponed.
You need to configure the alert.
What object should you configure the alert on?

A. Inventory control
B. Inventory location
C. Purchase order
D. ProductReferences:https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/fin-ops/get-started/alerts-overview

Correct Answer: C

QUESTION 18

You are asked to trigger a Power Automate flow for an approval for a business process that is not in the business events list.
You need to trigger the Power Automate flow without any code.
What are two possible ways to trigger the Power Automate workflow? Each correct answer presents a complete solution.
NOTE: Each correct selection is worth one point.

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

Correct Answer: A,B

Explanation/Reference:

Explanation:
https://docs.microsoft.com/en-us/power-automate/connection-dynamics365
https://dynamics-tips.com/how-to-use-alerts-d365-finance-and-operations/

QUESTION 19

You need to identify the features that support the expansion.
Which feature should you use? To answer, select the appropriate options in the answer area.
NOTE: Each correct selection is worth one point.

Requirement	Feature
Resolve the concerns about payments and invoices.	Microsoft Office Business document management Electronic reporting Document Routing Agent
Use existing assets for the international compliance solution.	Microsoft Excel Entities Common Data Service Configuration provider
Generate the document templates for the countries.	Document Routing Agent Power BI Electronic reporting Business document management

Correct Answer:

Explanation/Reference:

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

QUESTION 20

You are a Dynamics 365 Finance system administrator.
Use's report that purchase order numbers are being generated in a non-continuous configuration Outing bulk purchase order creation.
You need :o determine how to improve performance.
Solution: Run the automatic cleanup of number sequences job
Does the solution meet the goal?

A. Yes
B. No

Correct Answer: B

QUESTION 21

You are a Dynamics 365 for Finance and Operations system administrator.
A company named Contoso Ltd. is creating a new legal entity that will be similar to an existing legal entity. Team members copy key entities to the new legal entity using the Data management workspace. They indicate that there were already-configured pieces of data unique to the new legal

entity before they ran the Copy into legal entity process.
The data import/export framework settings are listed in the table below:

Setting	Current value
Ignore error	Yes
Create error file	Yes
Remove duplicates	Yes

You need to determine what happened to the already-configured pieces of dat a.
What happened to the data?

A. Any source legal entity data that already exists in the destination legal entity will be updated.
B. Any destination legal entity data will be deleted, and the source data will be inserted.
C. Any source legal entity data that already exists in the destination legal entity will be ignored.
D. Any source legal entity data that already exists in the destination legal entity will be displayed as an error for user action in the Data management workspace.

Correct Answer: C