

MB-200

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Perform Discovery, Planning, and Analysis

Question Set 1

QUESTION 1

You are a Dynamics 365 Customer Service system administrator.

Compliance standards require that entities and fields with Auditing set to On are recorded. You have configured all settings to the default settings and have set Global Auditing to On.

You need to verify compliance standards. Which data items will be included in the audit log?



<https://vceplus.com/>

- A. Microsoft Office 365 activities
- B. all entities and fields
- C. entities and fields with auditing enabled
- D. user access information only

Correct Answer: C

Section: (none)

Explanation

Explanation/Reference:

QUESTION 2

A company identifies a new opportunity.

Sales associates must collaborate to convert the opportunity to a sale. All associates have access to Microsoft SharePoint, but some associates do not have access to Dynamics 365 for Sales.

You need to ensure that users can collaborate on a single platform that directly integrates with Dynamics 365 data.

Which tool should you use?

- A. Microsoft OneDrive for Business
- B. Microsoft Skype for Business
- C. Microsoft Office 365 Delve
- D. Yammer
- E. Microsoft Office 365 Groups

Correct Answer: E

Section: (none)

Explanation

Explanation/Reference:

References: <https://docs.microsoft.com/en-us/dynamics365/customer-engagement/basics/collaborate-with-colleagues-using-office-365-groups>

QUESTION 3

You are a Dynamics 365 for Customer Service system administrator.

A user experiences slow performance when using Dynamics 365.

You need to check the latency of the environment.

What should you do?

- A. Use the organization Insights tool.
- B. View the Health section of Microsoft Office 365 Admin portal.
- C. View the Power platform Admin center.
- D. Run the Dynamics 365 Diagnostics tool.

Correct Answer: D

Section: (none)

Explanation

Explanation/Reference:

References:

<https://community.dynamics.com/365/customerservice/f/763/t/285347>

QUESTION 4

You are a Dynamics 365 for Customer Service system administrator.

You need to implement a Dynamics 365 portal that allows customers to perform the following tasks:

- Post product experience information to forums.
 - Enter issues in an online support center. ▪
- Enter ideas for future products.

Which type of portal should you implement?

- A. Partner
- B. Customer Self-Service
- C. Employee Self-Service
- D. Community
- E. Custom



Correct Answer: B

Section: (none)

Explanation

Explanation/Reference:

Perform Discovery, Planning, and Analysis

Testlet 2

Case study

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Background

- Contoso Suites is a hotel chain that is in the process of implementing Dynamics 365 Customer Service to manage their events and front desk registrations. ▪
- Guest stay types consist of business, personal, and conference.
- Each guest stay follows the same stages: Reservation, Check-in, Stay, and Check-out.
- The majority of the system configuration is completed, and testing is in progress.
- There are three Dynamics 365 environments: Sandbox, QA, and Production. System settings are the same for the three environments.
- All emails are configured for Production.
- The company partners with a third-party service that provides weather forecasts and flight arrivals information for the places where they have hotels.

Current environment. Security

- Security roles are assigned to teams.
- Users are assigned to teams.
- The Contact entity is set to have basic read privileges only.
- During testing, a user reports a spelling mistake on the Number of Children label. An administrator corrects the spelling in the Sandbox environment and imports the unmanaged solution into the QA environment.

Requirements. Business requirements

- The events coordinator needs a dashboard containing the weather forecast and flight arrivals along with events that they are managing and their work schedule.
 - Guests must be entered as contact records in the system. Returning guests must be added directly from an existing contact record. ▪
- The contact record must include a preferences section that has information such as newspaper preferences and slipper size.
- The contact record must show a chart of all previous stay types.
 - Preferences must be stored only on the contact record so that the information is always current.
 - All the colors in the system must be consistent with the Contoso branding.
 - Duplicate contact records must be eliminated, and all guest records combined under one contact.

Requirements. Technical requirements

- The hotel wants to avoid custom development and Inline frames (Iframes) where possible.
- A duplicate detection rule must be created for contacts to show an alert when an email already exists in the system.
- The Number of Guests field must be mandatory only when the Check-in stage is active for the front desk agent.
- Customizations must be made in the Sandbox environment, exported as a managed solution, and imported into the QA environment.
- Information from an external travel agent database is used to see potential reservations. The database consists of Name, Arrival Date, Departure Date, and Cost per Night. The information must be read only.

Issues

- During testing, a user discovered that on the guest record, there are two stay type fields: Stay Type, which is an option set, and Stay, which is a lookup. Stay does not appear in any other area.
- The front desk staff does not receive any alerts when creating contacts even if the contacts have the same email address.
- When a manager assigns a contact to a front desk agent, the front desk agent cannot see the record.
- The front desk staff currently must enter all the guest information, even if the guest has stayed at the hotel previously.

QUESTION 1

You need to simplify the registration process for repeat guests.

Which entity component should you use?

- A. fields
- B. workflows
- C. relationships
- D. business rules

Correct Answer: C

Section: (none)

Explanation

Explanation/Reference:



Manage user experience design

Question Set 1

QUESTION 1

You are a Dynamics 365 for Customer Service system administrator. You create an app for the sales team.

Members of the sales team cannot access the app.

You need to ensure that sales team members can access the app.

Where should you configure app permissions?

- A. Dynamics administration center
- B. Manage Roles
- C. Dynamics 365 home
- D. Security Roles

Correct Answer: B

Section: (none)

Explanation



Explanation/Reference:

References: <https://docs.microsoft.com/en-us/dynamics365/customer-engagement/customize/manage-access-apps-security-roles>

QUESTION 2

You are a Dynamics 365 for Customer Service system administrator. You create a business rule for the Case form. The business rule marks some fields as required when the Created On date field does not equal the Modified On date field.

You activate the business rule. The form does not mark the specified fields as required when the condition is met.

You need to determine the cause of the issue.

What is the cause?

- A. the Created On and Modified On date fields are not included on the form.
- B. the Created On and Modified On date fields are in a hidden tab on the form.
- C. Created On and Modified On are system fields and cannot be used in business rules.

D. the fields to be required are set to Optional at the field property level.

Correct Answer: A

Section: (none)

Explanation

Explanation/Reference:

References: <https://docs.microsoft.com/en-us/dynamics365/customer-engagement/customize/create-business-rules-recommendations-apply-logic-form>

QUESTION 3

You are a Dynamics 365 Customer Service system administrator. You create a custom entity named Buildings and add it to the Sales app.

When a user views the Buildings form, a field for Location is missing. You create the field and add the field to the form, but the user cannot see the field.

You need to make the Location field visible to the user.

What should you do?

- A. Add the Location field to the Buildings form.
- B. Publish customizations.
- C. Change privileges to the user's security role.
- D. Create a new Buildings form.



Correct Answer: B

Section: (none)

Explanation

Explanation/Reference:

QUESTION 4

You are a Dynamics 365 for Customer Service system administrator.

Your organization does not permit the use of custom code for solutions.

You need to create a view that can be viewed by all users in an organization.

Where should you create the view?

- A. List view of the entity
- B. System Settings
- C. App Designer
- D. Advanced Find

Correct Answer: C

Section: (none)

Explanation

Explanation/Reference:

Reference: <https://docs.microsoft.com/en-us/dynamics365/customer-engagement/customize/create-edit-views-app-designer>

QUESTION 5

You are a Dynamics 365 Customer Service system administrator. You export a solution containing customization from the development environment and import the solution into a quality assurance environment.

You need to allow removal of the customization and solution from the quality assurance environment.

What should you do?

- A. Export the solution as managed.
- B. Update the publisher prefix to new.
- C. Publish all customizations.
- D. Export the solution as unmanaged.

Correct Answer: D

Section: (none)

Explanation

Explanation/Reference:

QUESTION 6

You are a Dynamics 365 administrator for a veterinarian clinic.

On the client appointment form, there is a dropdown field for clients to select their type of pet. If a client selects the option Other, the veterinarian wants a text field to appear so that additional details can be added.

You need to create a dynamically visible field.

What should you configure?

- A. business rule
- B. workflow
- C. business process flow
- D. field visibility on the form

Correct Answer: D

Section: (none)

Explanation

Explanation/Reference:

References: <https://www.sherweb.com/blog/dynamics-365/configuring-business-rules-within-microsoft-dynamics-365-crm/>

QUESTION 7

You manage Dynamics 365 for a company.

You must prevent users from launching and using Power Automate.

You need to hide the Flows button on the user interface.

Which configuration setting should you change?

- A. the Customizations section of System Settings
- B. the SiteMap
- C. the Buttons tab of Flow
- D. the Entity component of the default solution

Correct Answer: A

Section: (none)

Explanation

Explanation/Reference:

Reference: <https://www.inogic.com/blog/2018/10/show-or-hide-microsoft-flow-button-in-dynamics-365/>

QUESTION 8

You are a Dynamics for Sales administrator for a car dealership. The dealership uses only out-of-the-box functionality. When a new car is sold, the salesperson uses a Word template to generate a letter from the quote to thank the customer.

You need to determine if you can revise the template.

Which Word template change can you make?

- A. Format the table to have alternating color rows.
- B. Format the Created On field to a long date format.
- C. Add the Discount field conditionally.
- D. Add the address of the customer.

Correct Answer: D

Section: (none)

Explanation

Explanation/Reference:

**QUESTION 9**

You are a Dynamics 365 for Customer Service system administrator. You are configuring an app by using the unified interface.

You need to ensure that users follow a set procedure at the conclusion of meetings to capture required information.

Which method should you use?

- A. task flows
- B. Microsoft Outlook Reminder
- C. goal
- D. Microsoft Flow

Correct Answer: A

Section: (none)

Explanation

Explanation/Reference:

QUESTION 10

You are a Dynamics 365 Customer Service administrator.

Clients report that documentation they receive from the organization often uses different logos and fonts.

You need to standardize branding for all internal Microsoft Word documents.

Which two templates can you use? Each correct answer presents a complete solution.

NOTE: Each correct selection is worth one point.

- A. email
- B. article
- C. global
- D. page
- E. mail merge

Correct Answer: AD

Section: (none)

Explanation

Explanation/Reference:

**QUESTION 11**

You are a Dynamics 365 for Customer Service system administrator.

Your organization does not permit the use of custom code for solutions.

You need to create a view that can be viewed by all users in an organization.

Where should you create the view?

- A. Entities component of a solution
- B. System Settings
- C. Microsoft Visual Studio
- D. Advanced Find

Correct Answer: A

Section: (none)

Explanation

Explanation/Reference:

QUESTION 12

You are a Dynamics 365 for Customer Service system administrator.

Your organization does not permit the use of custom code for solutions.

You need to create a view that can be viewed by all users in an organization.

Where should you create the view?

- A. Entities component of a solution
- B. Microsoft Excel template
- C. Microsoft Visual Studio
- D. Advanced Find

Correct Answer: A

Section: (none)

Explanation



Explanation/Reference:

Manage user experience design

Testlet 2

Case Study

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Background

Lamna Healthcare Company owns and operates childcare centers nationwide. The company serves children ranging in age from four to ten. Childcare centers are open 7:00 am to 6:00 pm Monday through Friday.

The company has a Dynamics 365 system administrator who works from 9:00 am to 5:00 pm Monday through Friday. The administrator creates user records for potential hires during final interview processes.

Lamna separates children into groups based on age. Group A is for ages 4-6, Group B is for ages 7-8, and Group C is for ages 9-10. Each group is monitored by a team of 2-3 childcare workers.

Most correspondence between workers and parents is done by using email.

The company runs employee meetings each month to present updates and discuss issues. The administrator creates appointments in Dynamics 365 for each employee meeting.

Current processes**Dynamics 365**

Lamna has been using Dynamics 365 and Microsoft Office 365 for three years. Access to Dynamics 365 is limited to childcare workers. Support staff only have access to Office 365 applications.

There is a high turnover rate among childcare workers, so there is often a rush to hire replacements. Childcare workers are often hired on weekends and start work the following Monday.

The administrator maintains a list of apps that are approved for use and makes the list available to all Dynamics 365 users.

Child registration

When a parent registers a child, workers collect information such as known allergies, emergency contact information, list of medications, and scans of signed consent forms for the child. Additional information is collected through the year including field trip consent forms and an annual feedback survey that parents complete.

Intake

Every day an employee records each child's arrival time, departure time, and the name of the person who picked up the child in an attendance log. Each record includes a field to enter emergency contact information for the child. This field often remains blank since the childcare worker is too busy to populate this information.

Attendance records are created from a child record. The supervisor reviews an attendance log at the end of day for each team of workers.

Reports

Reports are created from Microsoft Word templates for the healthcare workers and documents are stored in Microsoft SharePoint.

You create a Child Attendance report and complete testing of the report in a sandbox environment. The report is ready for deployment to the production environment.

Requirements

Attendance

The child attendance log must be accessible by all staff members. A Child Attendance report is also required, as this information is often accessed at the parent's request. All fields for collecting additional information must be hidden by default.

In order to make the process of recording attendance information more efficient, workers must create an attendance record for each child and add the child to the record.

If a child is not picked up by 6:00pm, a text message must be sent to the parents notifying them of additional charges for late pickup. Microsoft Flow is used to deliver text messages to parents about additional charges for late pickup.

Medication

Complex information such as medications must be contained in a sub-grid on the child's record.

When children change age groups, all of their records must be available to the new team of childcare workers. A child's medication record must no longer be viewable by the previous group of childcare workers.

System customizations

All customization and testing are performed in the sandbox environment and then moved to production. To simplify management of Dynamics 365, Lamna Healthcare keeps all components in the default solution but maintains a unique prefix. Dynamics is a no-code environment.

Option sets must be used wherever possible. For example, the allergies field displays a list of common allergies. You must include an option named **Other** in each option set to allow users to enter a value that is not available in the option set. When Other is selected, the form must display a text field that requires entry.

Problem statements

Parents of a child named Elizabeth recently changed her surname. The parent hands in a field trip consent form that includes the new surname. The support worker cannot find the child in the system.

Users report having to sign back into the system very frequently, often multiple times during the course of a period of usage.

When children move to new age groups, medication records for the child are not visible to the new group's childcare workers.

QUESTION 1

You need to set up annual surveys.

What should you do?

- A. Enable Voice of the Customer.
- B. Use dialogs.
- C. Enable Customer Insights.
- D. Install a custom workflow solution.

Correct Answer: A

Section: (none)

Explanation

Explanation/Reference:

References:

<https://docs.microsoft.com/en-us/dynamics365/customer-engagement/voice-of-customer/design-basic-survey>

QUESTION 2

You need to ensure that attendance records contain the proper default values.

What should you do?

- A. a workflow
- B. a field mapping
- C. a business process flow
- D. a business rule

Correct Answer: B



Section: (none)

Explanation

Explanation/Reference:



Manage user experience design

Testlet 3

Case Study

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Background

Lamna Healthcare is a local medical clinic comprised of doctors, nurses, and office staff. The company is implementing Dynamics 365 for Sales.

Current environment

Environments

- The company has the following environments: Sandbox, QA, and Production.
 - All environments use one custom app in the Unified Interface.
 - There is one solution in the Sandbox environment containing modifications to the Patient and Invoice forms. ▪
- A security group has been created for each environment.

You configure the system as follows:

- Duplicate detection is not set for the Patient entity.
- The currency field for Service Fee is set to two decimal places.

- Mailboxes are set to synchronize with Microsoft Exchange in the Production instance.

Testing and customization

- All changes are first created in the Sandbox environment and then imported into the QA environment for testing.
- Testers only have access to the QA environment where testing occurs.
- Doctors and nurses enter patient, billing, diagnostic, and other information directly.

Security roles

There are two custom security roles; one for doctors and nurses, and another for the support staff.

Data import

- You import records for all current patients and past patients for the last five years.
- A static worksheet of the patient records was exported after data import for validation. All records have been updated since that time.

Requirements

Functional

- Ensure changes can be quickly made to customizations in the Production environment.
- Provide all staff members access to a list of patients with the flue.
- Provide doctors the ability to add medications related to a patient without navigating away from the patient's record. Medications must be stored against a custom entity named Medication.
- Provide doctors, nurses, and office staff default navigation schemes based on their roles.

User interface

- Populate the custom field Follow-up Date with a date seven days from the visit date if a custom Follow-up checkbox is selected. Display the Visit Date field on the Visit form. Do not display the Follow-up Date field.
- Display values in the Service Fee field as whole dollars.

The Status field on the Patient form contains historical data that must be retained.

Issues

You observe the following issues:

- For some imported patient records, the doctor's name in the Current Doctor field is not spelled correctly.
- A nurse uses the search on the All Patients view and cannot find a patient who left the clinic last year.

- During testing, a nurse discovers a redundant field on the patient record.
 - An office staff member tests emails, but the email is not sent.
 - The modification to the Patient form needs to be tested immediately, but the Invoice form modification needs to be tested the following week.
 - A new user account for a doctor has been created in Office 365. The user account for the doctor must be available only in the QA environment.
-
- A change in process has caused a Status field to be unnecessary to display on the Patient form.

QUESTION 1

You need to ensure that the nurse is able to retrieve patient records within the All Patients View screen.

Which view should you modify?

- A. Advanced Find
- B. All Patients
- C. Quick Find
- D. Lookup

Correct Answer: C

Section: (none)

Explanation



Explanation/Reference:

Explanation:

- A nurse uses the search on the All Patients view and cannot find a patient who left the clinic last year.
- A view has a Quick Find box which will find all active records in the entity.

Manage user experience design

Testlet 4

Case study

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- Guest stay types consist of business, personal, and conference.
- Each guest stay follows the same stages: Reservation, Check-in, Stay, and Check-out.
- The majority of the system configuration is completed, and testing is in progress.
- There are three Dynamics 365 environments: Sandbox, QA, and Production. System settings are the same for the three environments.
- All emails are configured for Production.
- The company partners with a third-party service that provides weather forecasts and flight arrivals information for the places where they have hotels.

Current environment. Security

- Security roles are assigned to teams.
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- The Contact entity is set to have basic read privileges only.
- During testing, a user reports a spelling mistake on the Number of Children label. An administrator corrects the spelling in the Sandbox environment and imports the unmanaged solution into the QA environment.

Requirements. Business requirements

- The events coordinator needs a dashboard containing the weather forecast and flight arrivals along with events that they are managing and their work schedule.
 - Guests must be entered as contact records in the system. Returning guests must be added directly from an existing contact record. ▪
- The contact record must include a preferences section that has information such as newspaper preferences and slipper size.
- The contact record must show a chart of all previous stay types.
 - Preferences must be stored only on the contact record so that the information is always current.
 - All the colors in the system must be consistent with the Contoso branding.
 - Duplicate contact records must be eliminated, and all guest records combined under one contact.

Requirements. Technical requirements

- The hotel wants to avoid custom development and Inline frames (Iframes) where possible.
- A duplicate detection rule must be created for contacts to show an alert when an email already exists in the system.
- The Number of Guests field must be mandatory only when the Check-in stage is active for the front desk agent.
- Customizations must be made in the Sandbox environment, exported as a managed solution, and imported into the QA environment.
- Information from an external travel agent database is used to see potential reservations. The database consists of Name, Arrival Date, Departure Date, and Cost per Night. The information must be read only.

Issues

- During testing, a user discovered that on the guest record, there are two stay type fields: Stay Type, which is an option set, and Stay, which is a lookup. Stay does not appear in any other area.
- The front desk staff does not receive any alerts when creating contacts even if the contacts have the same email address.
- When a manager assigns a contact to a front desk agent, the front desk agent cannot see the record.
- The front desk staff currently must enter all the guest information, even if the guest has stayed at the hotel previously.

QUESTION 1

You need to update a guest's preferences in the guest form.

What should you use?

- A. Power BI
- B. Timeline
- C. Quick view form
- D. Canvas app

Correct Answer: C

Section: (none)

Explanation

Explanation/Reference:



Manage Entities and Data

Question Set 1

QUESTION 1

You are a Dynamics 365 Customer Service system administrator.

You must create a new entity to support a new feature. Entity data will be transactional and will be associated with business units.

You need to configure entity ownership.

Which entity ownership type should you use?

- A. organization-owned
- B. user or team owned
- C. business-owned
- D. none

Correct Answer: B

Section: (none)

Explanation



Explanation/Reference:

QUESTION 2

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.

You are developing a Dynamics 365 app for a bank. The app must display information about loan accounts and the customers assigned to those items.

You need to model the relationships between objects used by the app.

Solution: Create a diagram that shows the following information: application ribbon, entity fields, entity form, message, option set, site map, and web resources.

Does the solution meet the goal?

- A. Yes

B. No

Correct Answer: B

Section: (none)

Explanation

Explanation/Reference:

QUESTION 3

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You are developing a Dynamics 365 app for a bank. The app must display information about loan accounts and the customers assigned to those items.

You need to model the relationships between objects used by the app.

Solution: Create an entity relationship diagram. Model ownership, one-to-one, one-to-many, and many-to-many relationships as well as fields per entity that are required.

Does the solution meet the goal?

A. Yes

B. No

Correct Answer: A

Section: (none)

Explanation

Explanation/Reference:

QUESTION 4

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You are developing a Dynamics 365 app for a bank. The app must display information about loan accounts and the customers assigned to those items.

You need to model the relationships between objects used by the app.

Solution: Generate entity diagrams by using the metadata diagram tool.

Does the solution meet the goal?

A. Yes

B. No

Correct Answer: A

Section: (none)

Explanation

Explanation/Reference:

QUESTION 5

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.

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You are developing a Dynamics 365 app for a bank. The app must display information about loan accounts and the customers assigned to those items.

You need to model the relationships between objects used by the app.

Solution: Access Solution Explorer and take a screenshot of the entities, forms, views, charts, fields, 1:N relationships, N:1 relationships, and N:N relationships.

Does the solution meet the goal?

A. Yes

B. No

Correct Answer: B

Section: (none)

Explanation

Explanation/Reference:

QUESTION 6

You are a Dynamics 365 for Customer Service administrator. Sales team members record leads in a Microsoft Excel workbook after conferences.

The system must prevent the addition of duplicate leads from the workbooks.

Sales team members must be able to manually create a duplicate lead record.

You need to configure duplicate detection settings.

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

NOTE: Each correct selection is worth one point.

- A. Create a duplicate detection job for all active accounts.
- B. Set the value of **When a record is created or updated** to **on**.
- C. Set the value of **When a record is created or updated** to **off**.
- D. Set the value of **Enable duplicate detection** to **off**.
- E. Set the value of **During import** to **on**.

Correct Answer: AE

Section: (none)

Explanation

Explanation/Reference:

QUESTION 7

You export a Microsoft Excel workbook from Dynamics 365. The workbook contains 10,000 rows of data. You email the workbook and a description of the data to another user.

The user reports that they can only see 500 rows of data.

You need to determine why the user cannot view all the data.

Why is the user unable view all available data?

- A. You exported a static worksheet. The user does not have the appropriate security role in Dynamics 365 to see all records.
- B. You exported a PivotTable worksheet. The user does not have the appropriate security role in Dynamics 365 to see all records.
- C. You created a chart in Dynamics 365 Customer Engagement and exported the chart.

D. You ran a report in Dynamics 365 Customer Engagement and then saved the report as an Excel file.

Correct Answer: D

Section: (none)

Explanation

Explanation/Reference:

QUESTION 8

You are a Dynamics 365 Customer Service system administrator. You create a parent entity and a child entity. The parent entity has a 1:N relationship with the child entity.

You need to ensure that when the owner changes on the parent record that all child records are assigned to the new owner.

You need to configure the relationship behavior type.

What should you use?

- A. Parental
- B. Restrict
- C. Referential
- D. Referential, Restrict Delete



Correct Answer: A

Section: (none)

Explanation

Explanation/Reference:

References: <https://docs.microsoft.com/en-us/dynamics365/customer-engagement/customize/create-and-edit-1n-relationships#relationship-behavior> **Manage Entities and Data**

Testlet 2

Case Study

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Background

Lamna Healthcare Company owns and operates childcare centers nationwide. The company serves children ranging in age from four to ten. Childcare centers are open 7:00 am to 6:00 pm Monday through Friday.

The company has a Dynamics 365 system administrator who works from 9:00 am to 5:00 pm Monday through Friday. The administrator creates user records for potential hires during final interview processes.

Lamna separates children into groups based on age. Group A is for ages 4-6, Group B is for ages 7-8, and Group C is for ages 9-10. Each group is monitored by a team of 2-3 childcare workers.

Most correspondence between workers and parents is done by using email.

The company runs employee meetings each month to present updates and discuss issues. The administrator creates appointments in Dynamics 365 for each employee meeting.

Current processes

Dynamics 365

Lamna has been using Dynamics 365 and Microsoft Office 365 for three years. Access to Dynamics 365 is limited to childcare workers. Support staff only have access to Office 365 applications.

There is a high turnover rate among childcare workers, so there is often a rush to hire replacements. Childcare workers are often hired on weekends and start work the following Monday.

The administrator maintains a list of apps that are approved for use and makes the list available to all Dynamics 365 users.

Child registration

When a parent registers a child, workers collect information such as known allergies, emergency contact information, list of medications, and scans of signed consent forms for the child. Additional information is collected through the year including field trip consent forms and an annual feedback survey that parents complete.

Intake

Every day an employee records each child's arrival time, departure time, and the name of the person who picked up the child in an attendance log. Each record includes a field to enter emergency contact information for the child. This field often remains blank since the childcare worker is too busy to populate this information.

Attendance records are created from a child record. The supervisor reviews an attendance log at the end of day for each team of workers.

Reports

Reports are created from Microsoft Word templates for the healthcare workers and documents are stored in Microsoft SharePoint.

You create a Child Attendance report and complete testing of the report in a sandbox environment. The report is ready for deployment to the production environment.

Requirements

Attendance



The child attendance log must be accessible by all staff members. A Child Attendance report is also required, as this information is often accessed at the parent's request. All fields for collecting additional information must be hidden by default.

In order to make the process of recording attendance information more efficient, workers must create an attendance record for each child and add the child to the record.

If a child is not picked up by 6:00pm, a text message must be sent to the parents notifying them of additional charges for late pickup. Microsoft Flow is used to deliver text messages to parents about additional charges for late pickup.

Medication

Complex information such as medications must be contained in a sub-grid on the child's record.

When children change age groups, all of their records must be available to the new team of childcare workers. A child's medication record must no longer be viewable by the previous group of childcare workers.

System customizations

All customization and testing are performed in the sandbox environment and then moved to production. To simplify management of Dynamics 365, Lamna Healthcare keeps all components in the default solution but maintains a unique prefix. Dynamics is a no-code environment.

Option sets must be used wherever possible. For example, the allergies field displays a list of common allergies. You must include an option named **Other** in each option set to allow users to enter a value that is not available in the option set. When Other is selected, the form must display a text field that requires entry.

Problem statements

Parents of a child named Elizabeth recently changed her surname. The parent hands in a field trip consent form that includes the new surname. The support worker cannot find the child in the system.

Users report having to sign back into the system very frequently, often multiple times during the course of a period of usage.

When children move to new age groups, medication records for the child are not visible to the new group's childcare workers.

QUESTION 1

You need to ensure that attendance records contain the proper default values.

What should you do?

- A. a business rule
- B. a field mapping
- C. a workflow
- D. a business process flow



Correct Answer: B

Section: (none)

Explanation

Explanation/Reference:

Manage Entities and Data

Testlet 3

Case Study

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Background

Lamna Healthcare is a local medical clinic comprised of doctors, nurses, and office staff. The company is implementing Dynamics 365 for Sales.

Current environment

Environments

- The company has the following environments: Sandbox, QA, and Production.
 - All environments use one custom app in the Unified Interface.
 - There is one solution in the Sandbox environment containing modifications to the Patient and Invoice forms. ▪
- A security group has been created for each environment.

You configure the system as follows:

- Duplicate detection is not set for the Patient entity.
- The currency field for Service Fee is set to two decimal places.
- Mailboxes are set to synchronize with Microsoft Exchange in the Production instance.

Testing and customization

- All changes are first created in the Sandbox environment and then imported into the QA environment for testing.
- Testers only have access to the QA environment where testing occurs.
- Doctors and nurses enter patient, billing, diagnostic, and other information directly.

Security roles

There are two custom security roles; one for doctors and nurses, and another for the support staff.

Data import

- You import records for all current patients and past patients for the last five years.
- A static worksheet of the patient records was exported after data import for validation. All records have been updated since that time.

Requirements

Functional

- Ensure changes can be quickly made to customizations in the Production environment.
- Provide all staff members access to a list of patients with the flue.
- Provide doctors the ability to add medications related to a patient without navigating away from the patient's record. Medications must be stored against a custom entity named Medication.
- Provide doctors, nurses, and office staff default navigation schemes based on their roles.

User interface

- Populate the custom field Follow-up Date with a date seven days from the visit date if a custom Follow-up checkbox is selected. Display the Visit Date field on the Visit form. Do not display the Follow-up Date field.
- Display values in the Service Fee field as whole dollars.
- The Status field on the Patient form contains historical data that must be retained.

Issues

You observe the following issues:

- For some imported patient records, the doctor's name in the Current Doctor field is not spelled correctly.
- A nurse uses the search on the All Patients view and cannot find a patient who left the clinic last year.
- During testing, a nurse discovers a redundant field on the patient record.
- An office staff member tests emails, but the email is not sent.
- The modification to the Patient form needs to be tested immediately, but the Invoice form modification needs to be tested the following week.
- A new user account for a doctor has been created in Office 365. The user account for the doctor must be available only in the QA environment.
- A change in process has caused a Status field to be unnecessary to display on the Patient form.

QUESTION 1

You need to update the Service Fee field to meet requirements.

What should you modify?

- A. data type
- B. field type
- C. precision
- D. minimum and maximum values

Correct Answer: C

Section: (none)

Explanation

Explanation/Reference:

QUESTION 2

You need to resolve the redundant field issue.

What should you do?

- A. Delete the field from the solution in the Sandbox environment.
- B. Remove the field from the solution in the Sandbox environment.
- C. Remove the field from the solution in the QA environment.
- D. Delete the field from the solution in the QA environment.



Correct Answer: D

Section: (none)

Explanation

Explanation/Reference:

Manage Entities and Data

Testlet 4

Case study

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Background

- Contoso Suites is a hotel chain that is in the process of implementing Dynamics 365 Customer Service to manage their events and front desk registrations. ▪
- Guest stay types consist of business, personal, and conference.
- Each guest stay follows the same stages: Reservation, Check-in, Stay, and Check-out.
- The majority of the system configuration is completed, and testing is in progress.
- There are three Dynamics 365 environments: Sandbox, QA, and Production. System settings are the same for the three environments.
- All emails are configured for Production.
- The company partners with a third-party service that provides weather forecasts and flight arrivals information for the places where they have hotels.

Current environment. Security

- Security roles are assigned to teams.
- Users are assigned to teams.
- The Contact entity is set to have basic read privileges only.
- During testing, a user reports a spelling mistake on the Number of Children label. An administrator corrects the spelling in the Sandbox environment and imports the unmanaged solution into the QA environment.

Requirements. Business requirements

- The events coordinator needs a dashboard containing the weather forecast and flight arrivals along with events that they are managing and their work schedule.
 - Guests must be entered as contact records in the system. Returning guests must be added directly from an existing contact record. ▪
- The contact record must include a preferences section that has information such as newspaper preferences and slipper size.
- The contact record must show a chart of all previous stay types.
 - Preferences must be stored only on the contact record so that the information is always current.
 - All the colors in the system must be consistent with the Contoso branding.
 - Duplicate contact records must be eliminated, and all guest records combined under one contact.

Requirements. Technical requirements

- The hotel wants to avoid custom development and Inline frames (Iframes) where possible.
- A duplicate detection rule must be created for contacts to show an alert when an email already exists in the system.
- The Number of Guests field must be mandatory only when the Check-in stage is active for the front desk agent.
- Customizations must be made in the Sandbox environment, exported as a managed solution, and imported into the QA environment.
- Information from an external travel agent database is used to see potential reservations. The database consists of Name, Arrival Date, Departure Date, and Cost per Night. The information must be read only.

Issues

- During testing, a user discovered that on the guest record, there are two stay type fields: Stay Type, which is an option set, and Stay, which is a lookup. Stay does not appear in any other area.
- The front desk staff does not receive any alerts when creating contacts even if the contacts have the same email address.
- When a manager assigns a contact to a front desk agent, the front desk agent cannot see the record.
- The front desk staff currently must enter all the guest information, even if the guest has stayed at the hotel previously.

QUESTION 1

You need to view the potential reservation data in Dynamics 365.

What should you do?

- A. Import records into a custom activity.
- B. Add records to the guest entity.
- C. Import records into a custom entity.
- D. Create a virtual entity.

Correct Answer: C

Section: (none)

Explanation

Explanation/Reference:



Implement Security

Question Set 1

QUESTION 1

You are a Dynamics 365 Customer Service system administrator for a company.

The vice president of sales must be able to read account data for her business unit and other business units that report to her.

You need to configure the minimum level of access for the read privilege on the Account entity.

Which access level should you assign?

- A. Business Unit
- B. Organization
- C. User
- D. Parent: Child Business Unit



<https://vceplus.com/>

Correct Answer: D

Section: (none)

Explanation

Explanation/Reference:

QUESTION 2

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.

You are a Dynamics 365 for Customer Service administrator for Contoso, Ltd. A user named Elizabeth Rice signs in to Dynamics 365 by using the following sign in name: Elisabeth.Rice@contoso.com.

After marriage, Elisabeth changes her legal name to Elisabeth Mueller.

You need to update the sign in name for the user without losing any application history.

Solution: Change Elisabeth's username in the user record from Dynamics 365.

Does the solution meet the goal?

- A. Yes
- B. No

Correct Answer: A

Section: (none)

Explanation

Explanation/Reference:

Reference: <https://support.microsoft.com/en-us/help/930853/how-to-change-the-user-name-and-the-logon-name-for-a-user-record-in-mi>

QUESTION 3

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.

You are a Dynamics 365 for Customer Service administrator for Contoso, Ltd. A user named Elizabeth Rice signs in to Dynamics 365 by using the following sign in name: Elisabeth.Rice@contoso.com.

After marriage, Elisabeth changes her legal name to Elisabeth Mueller.

You need to update the sign in name for the user without losing any application history.

Solution: Ask the Microsoft 365 administrator to sign in to the admin portal and change the user name.

Does the solution meet the goal?

- A. Yes
- B. No

Correct Answer: B

Section: (none)

Explanation

Explanation/Reference:

QUESTION 4

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.

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You are a Microsoft Dynamics 365 administrator for Contoso, Ltd. A user named Elizabeth Rice signs in to Dynamics 365 by using the following sign in name: Elisabeth.Rice@contoso.com.

After marriage, Elisabeth changes her legal name to Elisabeth Mueller.

You need to update the sign in name for the user without losing any application history.

Solution: From Dynamics 365, select **Email Configuration**. In the active mailbox for the user, update the name.

Does the solution meet the goal?

- A. Yes
- B. No

Correct Answer: B

Section: (none)

Explanation

Explanation/Reference:

QUESTION 5

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.

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You are a Dynamics 365 for Customer Service administrator for Contoso, Ltd. A user named Elizabeth Rice signs in to Dynamics 365 by using the following sign in name: Elisabeth.Rice@contoso.com.

After marriage, Elisabeth changes her legal name to Elisabeth Mueller.

You need to update the sign in name for the user without losing any application history.

Solution: Delete the user account in Dynamics 365 and recreate it with the new name.

Does the solution meet the goal?

- A. Yes
- B. No

Correct Answer: B

Section: (none)

Explanation

Explanation/Reference:



Implement Security

Testlet 2

Case Study

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Background

Lamna Healthcare is a local medical clinic comprised of doctors, nurses, and office staff. The company is implementing Dynamics 365 for Sales.

Current environment

Environments

- The company has the following environments: Sandbox, QA, and Production.
 - All environments use one custom app in the Unified Interface.
 - There is one solution in the Sandbox environment containing modifications to the Patient and Invoice forms. ▪
- A security group has been created for each environment.

You configure the system as follows:

- Duplicate detection is not set for the Patient entity.
- The currency field for Service Fee is set to two decimal places.

- Mailboxes are set to synchronize with Microsoft Exchange in the Production instance.

Testing and customization

- All changes are first created in the Sandbox environment and then imported into the QA environment for testing.
- Testers only have access to the QA environment where testing occurs.
- Doctors and nurses enter patient, billing, diagnostic, and other information directly.

Security roles

There are two custom security roles; one for doctors and nurses, and another for the support staff.

Data import

- You import records for all current patients and past patients for the last five years.
- A static worksheet of the patient records was exported after data import for validation. All records have been updated since that time.

Requirements

Functional

- Ensure changes can be quickly made to customizations in the Production environment.
- Provide all staff members access to a list of patients with the flue.
- Provide doctors the ability to add medications related to a patient without navigating away from the patient's record. Medications must be stored against a custom entity named Medication.
- Provide doctors, nurses, and office staff default navigation schemes based on their roles.

User interface

- Populate the custom field Follow-up Date with a date seven days from the visit date if a custom Follow-up checkbox is selected. Display the Visit Date field on the Visit form. Do not display the Follow-up Date field.
- Display values in the Service Fee field as whole dollars.
- The Status field on the Patient form contains historical data that must be retained.

Issues

You observe the following issues:

- For some imported patient records, the doctor's name in the Current Doctor field is not spelled correctly.
- A nurse uses the search on the All Patients view and cannot find a patient who left the clinic last year.

- During testing, a nurse discovers a redundant field on the patient record.
 - An office staff member tests emails, but the email is not sent.
 - The modification to the Patient form needs to be tested immediately, but the Invoice form modification needs to be tested the following week.
 - A new user account for a doctor has been created in Office 365. The user account for the doctor must be available only in the QA environment.
- A change in process has caused a Status field to be unnecessary to display on the Patient form.

QUESTION 1

You need to grant a new doctor access to the test environment.

What should you do?

- A. Add the doctor to the QA environment security group and assign the role in the QA environment.
- B. Assign security in the QA environment.
- C. Assign security in the Sandbox environment and promote to the QA environment.
- D. Add the doctor to the Sandbox environment security group, assign security in the Sandbox environment, and promote to the QA environment.

Correct Answer: A

Section: (none)

Explanation



Explanation/Reference:

Explanation:

- A new user account for a doctor has been created in Office 365. The user account for the doctor must be available only in the QA environment. ▪
- There are two custom security roles; one for doctors and nurses, and another for the support staff.

You should assign the security group to the security role and add the doctor to the security group.

Implement Security

Testlet 3

Case study

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- Contoso Suites is a hotel chain that is in the process of implementing Dynamics 365 Customer Service to manage their events and front desk registrations. ▪
- Guest stay types consist of business, personal, and conference.
- Each guest stay follows the same stages: Reservation, Check-in, Stay, and Check-out.
- The majority of the system configuration is completed, and testing is in progress.
- There are three Dynamics 365 environments: Sandbox, QA, and Production. System settings are the same for the three environments.
- All emails are configured for Production.
- The company partners with a third-party service that provides weather forecasts and flight arrivals information for the places where they have hotels.

Current environment. Security

- Security roles are assigned to teams.
- Users are assigned to teams.
- The Contact entity is set to have basic read privileges only.
- During testing, a user reports a spelling mistake on the Number of Children label. An administrator corrects the spelling in the Sandbox environment and imports the unmanaged solution into the QA environment.

Requirements. Business requirements

- The events coordinator needs a dashboard containing the weather forecast and flight arrivals along with events that they are managing and their work schedule.
 - Guests must be entered as contact records in the system. Returning guests must be added directly from an existing contact record. ▪
- The contact record must include a preferences section that has information such as newspaper preferences and slipper size.
- The contact record must show a chart of all previous stay types.
 - Preferences must be stored only on the contact record so that the information is always current.
 - All the colors in the system must be consistent with the Contoso branding.
 - Duplicate contact records must be eliminated, and all guest records combined under one contact.

Requirements. Technical requirements

- The hotel wants to avoid custom development and Inline frames (Iframes) where possible.
- A duplicate detection rule must be created for contacts to show an alert when an email already exists in the system.
- The Number of Guests field must be mandatory only when the Check-in stage is active for the front desk agent.
- Customizations must be made in the Sandbox environment, exported as a managed solution, and imported into the QA environment.
- Information from an external travel agent database is used to see potential reservations. The database consists of Name, Arrival Date, Departure Date, and Cost per Night. The information must be read only.

Issues

- During testing, a user discovered that on the guest record, there are two stay type fields: Stay Type, which is an option set, and Stay, which is a lookup. Stay does not appear in any other area.
- The front desk staff does not receive any alerts when creating contacts even if the contacts have the same email address.
- When a manager assigns a contact to a front desk agent, the front desk agent cannot see the record.
- The front desk staff currently must enter all the guest information, even if the guest has stayed at the hotel previously.

QUESTION 1

You need to modify security for the front desk agent.

Which feature should you modify?

- A. Access team
- B. Team
- C. Role
- D. User

Correct Answer: B

Section: (none)

Explanation

Explanation/Reference:



Implement Integration

Question Set 1

QUESTION 1

You are a Dynamics 365 Customer Service system administrator. You integrate Microsoft OneDrive for Business with Dynamics 365.

Some users report that they cannot access OneDrive for Business from within Dynamics 365.

You need to troubleshoot the access issue.

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

NOTE: Each correct selection is worth one point.

- A. Review Microsoft Office 365 Groups configuration.
- B. Instruct users to confirm that they can access OneDrive for Business by using a web browser.
- C. Review Microsoft account access configuration.
- D. Confirm OneDrive for Business privilege settings.

Correct Answer: BC

Section: (none)

Explanation

Explanation/Reference:

Explanation:

Make sure their Microsoft accounts are licensed and enabled for OneDrive for Business.

Confirm they can access OneDrive for Business by using a web browser.

QUESTION 2

You are a Dynamics 365 administrator for a bookstore.

The sales team wants to add information about previous purchases to emails, when they correspond with customers.

You need to provide the sales team the ability to search relevant information from Dynamics when they email a customer from Outlook.

What needs to be installed in Outlook?

- A. Dynamics 365 App for Outlook



- B. Dynamics 365 AI for Market Insights
- C. iframe for Dynamics 365
- D. Dynamics 365 AI for Sales

Correct Answer: A

Section: (none)

Explanation

Explanation/Reference:

References: <https://docs.microsoft.com/en-us/dynamics365/outlook-app/dynamics-365-app-outlook-user-s-guide>

QUESTION 3

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.

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You are a Dynamics 365 for Sales administrator for a software company. The sales team need to attach a large number of supporting documents to customer records, but management does not want to incur the cost of additional storage.

The company does not have any Office 365 application integrations enabled.

You need to recommend a storage solution that keeps storage costs low.

Solution: Enable OneNote integration.

Does the solution meet the goal?

- A. Yes
- B. No

Correct Answer: B

Section: (none)

Explanation

Explanation/Reference:

QUESTION 4

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.

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The company does not have any Office 365 application integrations enabled.

You need to recommend a storage solution that keeps storage costs low.

Solution: Enable server-based SharePoint integration.

Does the solution meet the goal?

- A. Yes
- B. No

Correct Answer: A

Section: (none)

Explanation



Explanation/Reference:

References: <https://docs.microsoft.com/en-us/power-platform/admin/set-up-dynamics-365-online-to-use-sharepoint-online>

QUESTION 5

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.

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The company does not have any Office 365 application integrations enabled.

You need to recommend a storage solution that keeps storage costs low.

Solution: Enable OneDrive for Business.

Does the solution meet the goal?

- A. Yes
- B. No

Correct Answer: B

Section: (none)

Explanation

Explanation/Reference:

QUESTION 6

You are a Dynamics 365 for Customer Service system administrator.

The sales team must be able to take photos and record audio notes for use in Dynamics 365.

You need to integrate Dynamics 365 with Microsoft OneNote.

What should you do first?

- A. Enable Microsoft Office 365 Groups.
- B. Configure security privileges.
- C. Enable Microsoft OneDrive for Business.
- D. Enable server-based Microsoft SharePoint integration.

Correct Answer: D

Section: (none)

Explanation

Explanation/Reference:

References: <https://docs.microsoft.com/en-us/dynamics365/customer-engagement/admin/set-up-onenote-integration-in-dynamics-365>

QUESTION 7

You export a Microsoft Excel workbook from Dynamics 365. The workbook contains 10,000 rows of data. You email the workbook and a description of the data to another user.

The user reports that they can only see 500 rows of data.

You need to determine why the user cannot view all the data.

Why is the user unable to view all available data?

- A. You exported a static worksheet and the columns are automatically hidden from other users.
- B. You exported a dynamic worksheet. The user does not have the appropriate security role in Dynamics 365 to see all records.
- C. You exported a dynamic worksheet. The user does not have the appropriate permissions in Excel to see all records.
- D. You ran a report in Dynamics 365 Customer Engagement and then saved the report as an Excel file.

Correct Answer: B

Section: (none)

Explanation

Explanation/Reference:

QUESTION 8

You are a Dynamics 365 for Customer Service system administrator.

You must use Power Automate to create an opportunity from a Microsoft Excel workbook.

You need to ensure flow will trigger on the Opportunity entity.

What should you do?

- A. Configure connections.
- B. Add the timeline control.
- C. Enable business process flow.
- D. Enable change tracking.

Correct Answer: A

Section: (none)

Explanation

Explanation/Reference:

QUESTION 9

You are a Dynamics 365 Customer Service system administrator. You implement Dynamics 365 for a customer.

The customer wants to use Microsoft OneNote in Dynamics for a custom entity. The OneNote tab does not appear in the Timeline.

You need to make the tab visible.

What should you do first?

- A. Enable the entity for Microsoft SharePoint document management.
- B. Grant access in the user's security role.
- C. Check document management for the entity in the default solution.
- D. Grant access under the user's product licenses.

Correct Answer: A

Section: (none)

Explanation

Explanation/Reference:

References: <https://docs.microsoft.com/en-us/dynamics365/customer-engagement/admin/set-up-onenote-integration-in-dynamics-365>

QUESTION 10

You are a Dynamics 365 for Customer Service system administrator. Your organization deploys Dynamics 365 for Outlook.

The sales team reports the following synchronization issues between Dynamics 365 and Outlook:

- Microsoft PowerPoint presentations are missing from meeting invitations that are sent from Dynamics 365. ▪
- Outlook task lists are not visible in Dynamics 365.

You need to enable system settings to help address these issues.

Which two settings should you enable? Each correct answer presents part of the solution.

NOTE: Each correct selection is worth one point.

- A. Exchange folder-level tracking.
- B. Synchronize appointment attachments with Outlook or Exchange.
- C. Synchronize tasks that assigned in Outlook.

D. Go Offline

Correct Answer: BC

Section: (none)

Explanation

Explanation/Reference:

References: <https://docs.microsoft.com/en-us/dynamics365/customer-engagement/outlook-addin/admin-guide/configure-synchronization-appointments-contacts-tasks>

QUESTION 11

You create and share a Power Automate button for the Account entity. The button sends a Microsoft Teams meeting invitation from Dynamics 365.

Which users can view the flow button run history?

- A. Each user can only view their run history.
- B. System administrators may only view the run history.
- C. Only the user who creates the button can view the run history for all users.
- D. Every user can view all run history.
- E. People with the appropriate role can see all run history.



Correct Answer: C

Section: (none)

Explanation

Explanation/Reference:

References: <https://docs.microsoft.com/en-us/flow/share-buttons>

QUESTION 12

You manage the Dynamics 365 for Customer Service environment for an organization.

Microsoft SharePoint will not be deployed in the environment for a year.

You need to integrate Microsoft Office 365 solutions with the Dynamics 365 instance to help the sales team with internal collaboration efforts.

Which three solutions can you currently implement? Each correct answer presents part of the solution.

NOTE: Each correct selection is worth one point.

- A. Microsoft OneDrive for Business
- B. Microsoft Yammer
- C. Microsoft OneNote
- D. Microsoft Exchange Online
- E. Microsoft Skype for Business

Correct Answer: BDE

Section: (none)

Explanation

Explanation/Reference:

References: <https://docs.microsoft.com/en-us/dynamics365/customer-engagement/admin/add-office-365-online-services>

QUESTION 13

You manage a Dynamics 365 Customer Service environment.

Some users report the installation for Dynamics 365 for Outlook fails.

You need to determine which devices comply with the software requirements to install and use Dynamics 365 for Outlook.

Which two configurations represent the required client software requirements to run Dynamics 365 for Outlook? Each correct answer presents a complete solution.

NOTE: Each correct solution is worth one point.

- A. Windows 8 and Internet Explorer 10
- B. Windows 8.1 with Internet Explorer 10
- C. Windows 8 and Internet Explorer 9
- D. Windows 7 and Internet Explorer 11

Correct Answer: AB

Section: (none)

Explanation

Explanation/Reference:

Explanation:

IE 10 or 11 are supported.

Windows 7 would require Service Pack 1.

References: <https://docs.microsoft.com/en-us/dynamics365/outlook-addin/admin-guide/software-requirements>

QUESTION 14

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.

You are a Dynamics 365 for Sales administrator for a software company. The sales team need to attach a large number of supporting documents to customer records, but management does not want to incur the cost of additional storage.

The company does not have any Office 365 application integrations enabled.

You need to recommend a storage solution that keeps storage costs low.

Solution: Enable Outlook integration.

Does the solution meet the goal?

- A. Yes
- B. No



Correct Answer: B

Section: (none)

Explanation

Explanation/Reference:

QUESTION 15

You are a Dynamics 365 for Customer Service developer. You use Power Automate to create a flow for custom entity.

The flow does not run when events occur in Dynamics 365 for the custom entity. Flows do run for other entities.

You need to ensure that the flow is triggered for the custom entity.

What should you enable?

- A. Run flows in the security role.

- B. Plug-in and custom workflow activity tracing in system settings.
- C. Change tracking on the entity.
- D. Power Automate in system settings.

Correct Answer: C

Section: (none)

Explanation

Explanation/Reference:

QUESTION 16

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.

You use Forms Pro to create a customer satisfaction survey.

You need to distribute the survey.

Solution: Provide a QR code that links to the survey.

Does the solution meet the goal?

- A. Yes
- B. No

Correct Answer: A

Section: (none)

Explanation

Explanation/Reference:

QUESTION 17

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.



You use Forms Pro to create a customer satisfaction survey.

You need to distribute the survey.

Solution: Use social media.

Does the solution meet the goal?

A. Yes

B. No

Correct Answer: A

Section: (none)

Explanation

Explanation/Reference:

QUESTION 18

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.

You use Forms Pro to create a customer satisfaction survey.

You need to distribute the survey.

Solution: Send a text message that includes the survey link.

Does the solution meet the goal?

A. Yes

B. No

Correct Answer: A

Section: (none)

Explanation

Explanation/Reference:

Implement Integration

Testlet 2

Case Study

This is a case study. **Case studies are not timed separately. You can use as 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 time to ensure that you are able to complete all questions included on this exam in the time provided.

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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 are ready to answer a question, click the **Question** button to return to the question.

Background

Lamna Healthcare Company owns and operates childcare centers nationwide. The company serves children ranging in age from four to ten. Childcare centers are open 7:00 am to 6:00 pm Monday through Friday.

The company has a Dynamics 365 system administrator who works from 9:00 am to 5:00 pm Monday through Friday. The administrator creates user records for potential hires during final interview processes.

Lamna separates children into groups based on age. Group A is for ages 4-6, Group B is for ages 7-8, and Group C is for ages 9-10. Each group is monitored by a team of 2-3 childcare workers.

Most correspondence between workers and parents is done by using email.

The company runs employee meetings each month to present updates and discuss issues. The administrator creates appointments in Dynamics 365 for each employee meeting.

Current processes

Dynamics 365

Lamna has been using Dynamics 365 and Microsoft Office 365 for three years. Access to Dynamics 365 is limited to childcare workers. Support staff only have access to Office 365 applications.

There is a high turnover rate among childcare workers, so there is often a rush to hire replacements. Childcare workers are often hired on weekends and start work the following Monday.

The administrator maintains a list of apps that are approved for use and makes the list available to all Dynamics 365 users.

Child registration

When a parent registers a child, workers collect information such as known allergies, emergency contact information, list of medications, and scans of signed consent forms for the child. Additional information is collected through the year including field trip consent forms and an annual feedback survey that parents complete.

Intake

Every day an employee records each child's arrival time, departure time, and the name of the person who picked up the child in an attendance log. Each record includes a field to enter emergency contact information for the child. This field often remains blank since the childcare worker is too busy to populate this information.

Attendance records are created from a child record. The supervisor reviews an attendance log at the end of day for each team of workers.

Reports

Reports are created from Microsoft Word templates for the healthcare workers and documents are stored in Microsoft SharePoint.

You create a Child Attendance report and complete testing of the report in a sandbox environment. The report is ready for deployment to the production environment.

Requirements

Attendance

The child attendance log must be accessible by all staff members. A Child Attendance report is also required, as this information is often accessed at the parent's request. All fields for collecting additional information must be hidden by default.

In order to make the process of recording attendance information more efficient, workers must create an attendance record for each child and add the child to the record.

If a child is not picked up by 6:00 pm, a text message must be sent to the parents notifying them of additional charges for late pickup. Microsoft Flow is used to deliver text message to parents about additional charges for late pickup.

Medication

Complex information such as medications must be contained in a sub-grid on the child's record.

When children change age groups, all of their records must be available to the new team of childcare workers. A child's medication record must no longer be viewable by the previous group of childcare workers.

System customizations

All customization and testing are performed in the sandbox environment and then moved to production. To simplify management of Dynamics 365, Lamna Healthcare keeps all components in the default solution but maintains a unique prefix. Dynamics is a no-code environment.

Option sets must be used wherever possible. For example, the allergies field displays a list of common allergies. You must include an option named **Other** in each option set to allow users to enter a value that is not available in the option set. When Other is selected, the form must display a text field that requires entry.

Problem statements

Parents of a child named Elizabeth recently changed her surname. The parent hands in a field trip consent form that includes the new surname. The support worker cannot find the child in the system.

Users report having to sign back into the system very frequently, often multiple times during the course of a period of usage.

When children move to new age groups, medication records for the child are not visible to the new group's childcare workers.

QUESTION 1

You need to ensure that new childcare workers can use Dynamics 365 within Microsoft Outlook.

What should you do?

- A. Have the childcare worker install the Dynamics add-in from Outlook.
- B. Push the Dynamics 365 for Outlook to childcare workers.
- C. Have the childcare worker deploy Dynamics 365 App for Outlook.
- D. Push the Dynamics 365 App for Outlook to childcare workers.

Correct Answer: D

Section: (none)

Explanation

Explanation/Reference:

QUESTION 2

You need to assist the support worker's effort to attach a field trip form to Elizabeth's record.

What should you do?

- A. Upload the document to a manually created SharePoint location under the new name in Dynamics.
- B. Update the SharePoint record name.
- C. Upload the document under the child's new name in Dynamics 365.
- D. Update the SharePoint GUID.

Correct Answer: D

Section: (none)

Explanation

Explanation/Reference:



Implement Integration

Testlet 3

Case Study

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Background

Lamna Healthcare is a local medical clinic comprised of doctors, nurses, and office staff. The company is implementing Dynamics 365 for Sales.

Current environment

Environments

- The company has the following environments: Sandbox, QA, and Production.
 - All environments use one custom app in the Unified Interface.
 - There is one solution in the Sandbox environment containing modifications to the Patient and Invoice forms. ▪
- A security group has been created for each environment.

You configure the system as follows:

- Duplicate detection is not set for the Patient entity.
- The currency field for Service Fee is set to two decimal places.

- Mailboxes are set to synchronize with Microsoft Exchange in the Production instance.

Testing and customization

- All changes are first created in the Sandbox environment and then imported into the QA environment for testing.
- Testers only have access to the QA environment where testing occurs.
- Doctors and nurses enter patient, billing, diagnostic, and other information directly.

Security roles

There are two custom security roles; one for doctors and nurses, and another for the support staff.

Data import

- You import records for all current patients and past patients for the last five years.
- A static worksheet of the patient records was exported after data import for validation. All records have been updated since that time.

Requirements

Functional

- Ensure changes can be quickly made to customizations in the Production environment.
- Provide all staff members access to a list of patients with the flue.
- Provide doctors the ability to add medications related to a patient without navigating away from the patient's record. Medications must be stored against a custom entity named Medication.
- Provide doctors, nurses, and office staff default navigation schemes based on their roles.

User interface

- Populate the custom field Follow-up Date with a date seven days from the visit date if a custom Follow-up checkbox is selected. Display the Visit Date field on the Visit form. Do not display the Follow-up Date field.
- Display values in the Service Fee field as whole dollars.
- The Status field on the Patient form contains historical data that must be retained.

Issues

You observe the following issues:

- For some imported patient records, the doctor's name in the Current Doctor field is not spelled correctly.
- A nurse uses the search on the All Patients view and cannot find a patient who left the clinic last year.

- During testing, a nurse discovers a redundant field on the patient record.
 - An office staff member tests emails, but the email is not sent.
 - The modification to the Patient form needs to be tested immediately, but the Invoice form modification needs to be tested the following week.
 - A new user account for a doctor has been created in Office 365. The user account for the doctor must be available only in the QA environment.
- A change in process has caused a Status field to be unnecessary to display on the Patient form.

QUESTION 1

You need to ensure that the office staff can successfully test emails.

What should you do?

- A. Add the QA environment as a synchronizing instance.
- B. Change the synchronization method in the QA environment.
- C. Add the QA environment as an OrgID in Exchange.
- D. Change the synchronizing instance of the QA environment.

Correct Answer: D

Section: (none)

Explanation



Explanation/Reference:

Explanation:

- An office staff member tests emails, but the email is not sent.
- Mailboxes are set to synchronize with Microsoft Exchange in the Production instance.

We need to configure the QA environment as the synchronizing instance.

Implement Integration

Testlet 4

Case study

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Background

- Contoso Suites is a hotel chain that is in the process of implementing Dynamics 365 Customer Service to manage their events and front desk registrations. ▪
- Guest stay types consist of business, personal, and conference.
- Each guest stay follows the same stages: Reservation, Check-in, Stay, and Check-out.
- The majority of the system configuration is completed, and testing is in progress.
- There are three Dynamics 365 environments: Sandbox, QA, and Production. System settings are the same for the three environments.
- All emails are configured for Production.
- The company partners with a third-party service that provides weather forecasts and flight arrivals information for the places where they have hotels.

Current environment. Security

- Security roles are assigned to teams.
- Users are assigned to teams.
- The Contact entity is set to have basic read privileges only.
- During testing, a user reports a spelling mistake on the Number of Children label. An administrator corrects the spelling in the Sandbox environment and imports the unmanaged solution into the QA environment.

Requirements. Business requirements

- The events coordinator needs a dashboard containing the weather forecast and flight arrivals along with events that they are managing and their work schedule.
 - Guests must be entered as contact records in the system. Returning guests must be added directly from an existing contact record. ▪
- The contact record must include a preferences section that has information such as newspaper preferences and slipper size.
- The contact record must show a chart of all previous stay types.
 - Preferences must be stored only on the contact record so that the information is always current.
 - All the colors in the system must be consistent with the Contoso branding.
 - Duplicate contact records must be eliminated, and all guest records combined under one contact.

Requirements. Technical requirements

- The hotel wants to avoid custom development and Inline frames (Iframes) where possible.
- A duplicate detection rule must be created for contacts to show an alert when an email already exists in the system.
- The Number of Guests field must be mandatory only when the Check-in stage is active for the front desk agent.
- Customizations must be made in the Sandbox environment, exported as a managed solution, and imported into the QA environment.
- Information from an external travel agent database is used to see potential reservations. The database consists of Name, Arrival Date, Departure Date, and Cost per Night. The information must be read only.

Issues

- During testing, a user discovered that on the guest record, there are two stay type fields: Stay Type, which is an option set, and Stay, which is a lookup. Stay does not appear in any other area.
- The front desk staff does not receive any alerts when creating contacts even if the contacts have the same email address.
- When a manager assigns a contact to a front desk agent, the front desk agent cannot see the record.
- The front desk staff currently must enter all the guest information, even if the guest has stayed at the hotel previously.

QUESTION 1

You need to test the welcome email workflow.

What should you do?

- A. Add the sender's email to synchronize to QA and Production.
- B. Switch the tester's email to synchronize only to QA.
- C. Add the tester's email to synchronize to QA and Production.
- D. Switch the sender's email to synchronize only to QA.

Correct Answer: B

Section: (none)

Explanation

Explanation/Reference:



Perform Solutions Deployment and Testing

Question Set 1

QUESTION 1

You are a Dynamics 365 Customer Service developer.

You need to configure a new solution.

What should you configure for the new solution?

- A. Installed date
- B. Version
- C. Security
- D. Option value prefix

Correct Answer: B

Section: (none)

Explanation

Explanation/Reference:

Explanation:

The required fields for a new solution are:

- Display Name: - The name shown in the list of solutions. You can change this later.
- Name: - The unique name of the solution. This is generated using the value you enter in the Display Name field. You can edit this before you save the solution, but after you save the solution, you can't change it.
- Publisher: - You can select the default publisher or create a new publisher. We recommend that you create a publisher for your organization to use consistently across your environments where you will use the solution. See Solution publisher later in this article.
- Version: - Enter a number for the version of your solution. This is only important if you export your solution. The version number will be included in the file name when you export the solution.

Note:

There are several versions of this question in the exam. The question currently has two possible correct answers:

1. Version
2. Publisher

Other incorrect answer options you may see on the exam include the following:

1. Team Ownership
2. Prefix "new_"



Reference:

<https://docs.microsoft.com/en-us/powerapps/maker/common-data-service/create-solution>

QUESTION 2

You are a Dynamics 365 Customer Service developer.

You need to configure a new solution.

What should you configure in the new solution?

- A. Prefix “new_”
- B. Security
- C. Publisher
- D. Team Ownership

Correct Answer: C

Section: (none)

Explanation

Explanation/Reference:

Explanation:

The required fields for a new solution are:

- Display Name: - The name shown in the list of solutions. You can change this later.
- Name: - The unique name of the solution. This is generated using the value you enter in the Display Name field. You can edit this before you save the solution, but after you save the solution, you can't change it.
- Publisher: - You can select the default publisher or create a new publisher. We recommend that you create a publisher for your organization to use consistently across your environments where you will use the solution. See Solution publisher later in this article.
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2. Publisher

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1. Installed date
2. Option value prefix



Reference: <https://docs.microsoft.com/en-us/powerapps/maker/common-data-service/create-solution> **QUESTION 3**

You are a Dynamics 365 for Customer Service system administrator. You make changes to the Onsite Goals index structure.

Since the index structure changes, users report that a subgrid from the Onsite Goals custom entity takes a very long time to load on the Account records page.

You need to improve the query load time and optimize the Onsite Goals entity.

Which action should you perform?

- A. In an Internet browser, in the browser options, set the option to retain browser history.
- B. In the Data Performance view, use the Optimize functions.
- C. In System Jobs, resume paused system jobs.
- D. In the Dynamics 365 Diagnostic tool, run the diagnostic test.

Correct Answer: B

Section: (none)

Explanation

Explanation/Reference:



QUESTION 4

You are a Dynamics 365 Customer Service system administrator. You set up server-side synchronization. You plan to deploy the Dynamics 365 App for Outlook after users have received training.

Users do not have administrator rights.

You need to identify which method you would use to deploy Dynamics 365 App for the trained users.

Which method will accomplish this goal?

- A. Push the App for Outlook to all eligible users from the Dynamics 365 administration center.
- B. Have users install themselves directly from the Dynamics 365 Settings area.
- C. Have users install themselves from the personal Settings area.
- D. Push the App for Outlook to only select users from Dynamics 365 Settings area.
- E. Push the App for Outlook manually or automatically to all eligible users from Dynamics 365 Settings area.

Correct Answer: D

Section: (none)

Explanation

Explanation/Reference:

QUESTION 5

The sales team plans to create printed materials to be handed out each month during on-site visits with clients.

The materials must include client-specific information and statistics from Dynamics 365.

You need to ensure that sales team members can create the materials.

Which technology should you implement?

- A. Word template
- B. marketing list
- C. sales literature
- D. Excel template

Correct Answer: B

Section: (none)

Explanation



Explanation/Reference:

References: <https://crmbook.powerobjects.com/basics/marketing/marketing-lists/>

QUESTION 6

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.

You are a Dynamics 365 for Customer Service system administrator. You use the Data Performance tool. There are 14 items in the All Data Performance Logs view. Some log items detail positive operational impact percentages while others detail negative operational percentages.

Users report that the system is less responsive than in the past.

You need to improve system performance.

Solution: Select **optimize** for log items that have optimizations available and that have a positive operational impact percentage.

Does the solution meet the goal?

- A. Yes
- B. No

Correct Answer: B

Section: (none)

Explanation

Explanation/Reference:

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.

On a Contact record, a user creates a Note record that contains the word running.

One week later, the user reports that they cannot find the Contact record associated with the Note record.

You need to find the Note record.

Solution: Use Categorized Search to search for the word **run**.

Does the solution meet the goal?

- A. Yes
- B. No

Correct Answer: B

Section: (none)

Explanation

Explanation/Reference:

Explanation:

Only a relevance search can search the text in notes.

QUESTION 8

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.

On a Contact record, a user creates a Note record that contains the word running.

One week later, the user reports that they cannot find the Contact record associated with the Note record.

You need to find the Note record.

Solution: Use Quick Find search on the Notes list to search for the word **run**.

Does the solution meet the goal?

- A. Yes
- B. No

Correct Answer: B

Section: (none)

Explanation



Explanation/Reference:

QUESTION 9

You are a Dynamics 365 Customer Service developer. You have a solution that uses release version 2.4.2.6. You clone the solution and apply an update.

You must assign the cloned solution a new version number using the Microsoft recommended versioning system.

You need to set the version number for the new solution.

Which version number should you set?

- A. 2.4.3.7
- B. 2.5.0.1
- C. 2.5.3.6
- D. 3.1.2.7

Correct Answer: B

Section: (none)

Explanation

Explanation/Reference:

References: <https://docs.microsoft.com/en-us/dynamics365/customer-engagement/customize/use-segmented-solutions-patches-simplify-updates>

QUESTION 10

You manage Dynamics 365 for Customer Service Development, Test, and Production instances. You use an unmanaged solution to develop customizations and deploy the customizations to a Production instance.

Several deployed customizations do not meet legal standards. You delete the unmanaged solution and the customizations remain.

You need to remove the customizations.

What should you do?

- A. Change the publisher settings.
- B. Install the previous solution.
- C. Manually remove each customization.
- D. Change the version number on the unmanaged solution to the previous version.

Correct Answer: C

Section: (none)

Explanation

Explanation/Reference:

QUESTION 11

You manage a Dynamics 365 for Customer Service instance.

You need to add Voice of the Customer to the instance.

What should you do?

- A. Sign in to the Sandbox instance. Create the solution with Voice of the Customer entities, test Voice of the Customer, and then import the solution into the production instance.

- B. Select the Application tab in the Dynamics 365 admin center. Configure Voice of the Customer.
- C. Download Voice of the Customer from the Microsoft website. Import the solution into the Dynamics 365 instance.
- D. Search AppSource for Voice of the Customer. Import the solution.
- E. Add the correct role to each user to allow them to use the Voice of the Customer solution.

Correct Answer: B

Section: (none)

Explanation

Explanation/Reference:

References:

<https://docs.microsoft.com/en-us/dynamics365/customer-engagement/voice-of-customer/install-solution>



<https://vceplus.com/>