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MB-240

Microsoft Dynamics 365 for Field Service (beta)

Version 1.0

Sections

1. Configure field service applications
2. Manage work orders
3. Schedule and dispatch work orders
4. Manage field service mobility
5. Manage inventory and purchasing
6. Manage assets and agreements

Exam A

QUESTION 1

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 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 Field Service system administrator.

You are configuring a new instance of Dynamics 365 for Field Service. The organization needs to accurately capture the cost of work order bookings.

Solution: You implement the following configuration changes:

- 1) Create Resource Pay Types for regular, holiday, overtime, travel, and breaks.
- 2) Assign an Hourly Markup percentage to each Resource Pay Type.
- 3) Assign Resource Pay Types to the applicable Pay Type.4) Create the Holiday Schedule.

Does this meet the goal?

- A. Yes
- B. No

Correct Answer: B

Section: Configure field service applications

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 stated goals. Some question sets might have more than one correct solution, while others might not have a correct solution.

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Solution: You implement the following configuration changes:

- 1) Create Resource Pay Types for regular, holiday, overtime, travel, and breaks.
- 2) Assign an Hourly Markup percentage to each Resource Pay Type.
- 3) Assign Resource Pay Types to the applicable Pay Type.
- 4) Create Business Closures.
- 5) Create Bookable Resources with Hourly Rates.

Does this meet the goal?

- A. Yes
- B. No

Correct Answer: B

Section: Configure field service applications

Explanation

Explanation/Reference:

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 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 configuring a new instance of Dynamics 365 for Field Service. The organization needs to accurately capture the cost of work order bookings.

Solution: You implement the following configuration changes:

- 1) Create Resource Pay Types for regular, holiday, overtime, travel, and breaks.
- 2) Assign an Hourly Markup percentage to each Resource Pay Type.
- 3) Assign Resource Pay Types to the applicable Pay Type.
- 4) Create Business Closures.
- 5) Create Bookable Resources with Hourly Rates and Work Hours.

Does this meet the goal?

- A. Yes
- B. No

Correct Answer: A

Section: Configure field service applications

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 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 Field Service system administrator.

You are configuring a new instance of Dynamics 365 for Field Service. The organization needs to automatically generate work orders based on agreements, and send invoices on a recurring basis by customer.

Solution: You implement the following configuration changes.

- 1) Create Agreement
- 2) Define Agreement Products
- 3) Set Booking Recurrence
- 4) Create Invoice Setup
- 5) Define Invoice Recurrence

Does this meet the goal?

- A. Yes
- B. No

Correct Answer: B

Section: Configure field service applications

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 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 Field Service system administrator.

You are configuring a new instance of Dynamics 365 for Field Service. The organization needs to automatically generate work orders based on agreements, and send invoices on a recurring basis by customer.

Solution: You implement the following configuration changes.

- 1) Create Agreement
- 2) Define Booking Setup
- 3) Create Invoice Setup
- 4) Set Auto Generate Invoice = Yes
- 5) Populate Generate Agreement Invoices X Days in Advance

Does this meet the goal?

- A. Yes
- B. No

Correct Answer: B

Section: Configure field service applications

Explanation

Explanation/Reference:

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 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 Field Service system administrator.

You are configuring a new instance of Dynamics 365 for Field Service. The organization needs to automatically generate work orders based on agreements, and send invoices on a recurring basis by customer.

Solution: You implement the following configuration changes.

- 1) Create Agreement
- 2) Define Booking Setup
- 3) Set Booking Recurrence
- 4) Create Invoice Setup
- 5) Define Invoice Recurrence

Does this meet the goal?

- A. Yes
- B. No

Correct Answer: A

Section: Configure field service applications

Explanation

Explanation/Reference:

QUESTION 7

You are a Dynamics 365 for Field Service Administrator. Your organization wants to use Connected Field Service for existing Customer Assets.

You install Connected Field Service and set up Azure IoT Central, but it seems no alerts are being received in Dynamics 365 for the devices.

You need to find the issue and resolve it.

Which action should you choose?

- A. Configure the Create CFS alerts from IoT Central Workflow within Dynamics 365.
- B. Create the IoT Connected Device connection role to link devices to customer assets.
- C. Register the device in Dynamics 365 Connected Field Service.
- D. Configure the Create CFS alerts from IoT Central within Microsoft Flow.

Correct Answer: D

Section: Configure field service applications

Explanation

Explanation/Reference:

References: <https://docs.microsoft.com/en-us/dynamics365/customer-engagement/field-service/cfs-iot-central-alerts>

QUESTION 8 You are a Dynamics 365 for Field Service Administrator.

You install and configure Connected Field Service with Azure IoT Central. Several of your connected devices sent alerts back to Dynamics 365 and work orders were created. However, the work orders were not sent back to Azure IoT Central.

You need to resolve the issue.

Which Action should you take to resolve the issue?

- A. Configure the Microsoft Flow When a work order is created in Connected Field Service, update IoT Central.
- B. Create an IoT Command in Dynamics 365 to trigger an update in IoT Central.
- C. Configure the Dynamics 365 workflow When a work order is created in Connected Field Service, update IoT Central.
- D. Create an IoT action in Dynamics 365 to trigger an update in IoT Central.

Correct Answer: A

Section: Configure field service applications

Explanation

Explanation/Reference:

References: <https://docs.microsoft.com/en-us/dynamics365/customer-engagement/field-service/cfs-iot-central-work-orders>

QUESTION 9 You are a Dynamics 365 for Field Service consultant.

One of your Dynamics 365 customers wants to decrease the number of repair appointments by sending fewer technicians onsite.

You need to provide a recommendation of which solution your customer should use to achieve their request.

What should you recommend?

- A. Azure IoT Hub
- B. Connected Field Service
- C. Dynamics 365 for Field Service
- D. Crew Scheduling

Correct Answer: B

Section: Configure field service applications

Explanation

Explanation/Reference:

QUESTION 10

DRAG DROP

You are a field service administrator for your company.

You review the Field Service administrator guide to understand how the status fields can support your company's business processes.

Which unique entity system status value matches with its Entity Type? To answer, drag the appropriate unique entity system status values to the appropriate Entity Type. Each unique entity system status value may be used once, more than once, or not at all. You may need to drag the split bar between panes or scroll to view the content.

NOTE: Each correct selection is worth one point.

Select and Place:



Answer Area

Purchase Order

Agreement

Booking Status

Draft

Billed

Estimate

Expired

Traveling

In progress

Correct Answer:

Answer Area	
Purchase Order	Draft Purchase Order
Agreement	Billed Purchase Order
Booking Status	Estimate Agreement
	Expired Agreement
	Traveling Booking Status
	In progress Booking Status



Section: Configure field service applications

Explanation

Explanation/Reference:

QUESTION 11

Contoso, Ltd has just acquired a new company in order to increase the services it offers to its customers. Contoso, Ltd. wants to ensure that it is able to track all of the stages in its service management workflow, including the services offered by the new service company.

You need to configure Dynamics 365 CE for Field Services to ensure that all of the necessary status values are configured correctly to track your company's unique business process.

Which action must you perform?

- A. Edit the existing system status field values.
- B. Create the necessary sub-status values.
- C. Create the necessary system status values.
- D. Create the necessary service task values.

Correct Answer: B

Section: Configure field service applications

Explanation

Explanation/Reference:

QUESTION 12

As a new start-up field services company, you are looking to streamline your customer service process to provide the best customer service experience.

Your company has decided to implement Dynamics Field Services as the foundation for its customer service management processes.

You need to ensure that the cases that the customer service team creates can be quickly and efficiently converted to work orders (that will minimize the need to add additional information to the work orders) using the out-of-the-box capabilities.

Which key item do you need to configure before the customer service agents will be able to convert a case to a work order?

- A. Resources
- B. Work Order Types
- C. Booking Rules
- D. Incident Type

Correct Answer: D

Section: Configure field service applications

Explanation



Explanation/Reference:

References: <https://docs.microsoft.com/en-us/dynamics365/customer-engagement/field-service/configure-incident-types>

QUESTION 13

DRAG DROP

You are a Dynamics 365 for Field Service administrator. Your company only uses contractors as Bookable Resources. The contractors are not licensed Dynamics 365 users.

The scheduling team books work orders to resources based on location. The team provides you with scenarios because many resources are not showing up in the scheduling assistant.

You need to update bookable resource records based on the provided scenarios.

Which address type should you use with each scenario? To answer, drag the appropriate address type to the appropriate scenario. Each address type may be used one, more than once, or not at all. You may need to drag the split bar between panes or scroll to view the content.

NOTE: Each correct selection is worth one point.

Select and Place:

Entity		Requirement	
Location Agnostic	Contact Addresses	Contractors in TerritoryA start the day at their home location.	
Business Unit Address	Organizational Unit Address	Contractors in Territory8 do not have a starting location.	
Resource Address		Contractors in TerritoryA end the day at TerritoryA office.	

Correct Answer:

Entity		Requirement	
Location Agnostic	Contact Addresses	Contractors in TerritoryA start the day at their home location.	Contact Addresses
Business Unit Address	Organizational Unit Address	Contractors in Territory8 do not have a starting location.	Location Agnostic
Resource Address		Contractors in TerritoryA end the day at TerritoryA office.	Organizational Unit Address

Section: Configure field service applications
Explanation

Explanation/Reference:

References: <https://docs.microsoft.com/en-us/learn/modules/configure-bookable-resources-urs-dynamics-field-service/3-define-bookable-resources>

QUESTION 14

Your company is expanding nationally.

You need to configure tax codes for a new territory, so the company can start to operate in the new territory.

You realize that you can identify which field service record types the tax code will be applied to.

Which three Field Service record types are taxable within the new tax code? Each correct answer presents a complete solution.

- A. Agreements
- B. Services
- C. Purchase Orders
- D. Products
- E. Work Orders

Correct Answer: ABD

Section: Configure field service applications

Explanation

Explanation/Reference:

QUESTION 15 You are entering products and services into Dynamics 365 CE Field Services.

You need to ensure that your field technicians can use the products when completing work orders.

Which two field service product types should you configure to allow your technicians to add work order products? Each correct answer presents a complete solution.

- A. Product
- B. Non Inventory
- C. Inventory
- D. Service



Correct Answer: CD

Section: Configure field service applications

Explanation

Explanation/Reference:

References: <https://docs.microsoft.com/en-us/dynamics365/customer-engagement/field-service/create-product-or-service>

QUESTION 16

The field service team manager needs you to give a new technician user access to the system. The technician will use the mobile application to fill out work orders when they are onsite doing field work to repair factory motors at customer sites. When the dispatcher takes vacation, the new technician user will manage dispatcher functions.

Which two field service security roles will the new technician user need? Each correct answer presents part of the solution.

- A. Field Service-Dispatcher
- B. Field Service-App Access and Field Service -Resource
- C. Field Service-Mobile User
- D. Field Service-User

Correct Answer: AB

Section: Configure field service applications

Explanation

Explanation/Reference:

References: <https://docs.microsoft.com/en-us/dynamics365/customer-engagement/field-service/view-user-accounts-security-roles#field-service-roles>

QUESTION 17

DRAG DROP

To improve communications with customers, your company has decided to implement Twilio, a third-party communication platform that has call and messaging capabilities.

The Twilio solution includes a number of core components to deliver the capability, all of which need to be set up.

Which five steps should you take in sequence to prepare data for optimization? To answer, move the appropriate actions from the list of actions to the answer area and arrange them in the correct order.

Select and Place:

STEPS		ORDER
Configure Microsoft Flow Account.		
Set up a Twilio account.		
Generate account SID and authentication token.	➤	⬆
Configure SMS and IVR workflows.	⬅	⬇
Install a Twilio-managed solution.		
Obtain phone numbers.		

Correct Answer:

STEPS		ORDER
Configure Microsoft Flow Account.		Set up a Twilio account.
Set up a Twilio account.		Generate account SID and authentication token.
Generate account SID and authentication token.	➤	Install a Twilio-managed solution.
Configure SMS and IVR workflows.	⬅	Obtain phone numbers.
Install a Twilio-managed solution.		Configure SMS and IVR workflows.
Obtain phone numbers.		

Section: Configure field service applications

Explanation

Explanation/Reference:

QUESTION 18

DRAG DROP

Your company has a requirement to use the out-of-the-box Resource types to categorize Active Bookable Resource types. The company wants to ensure easy Dynamics 365 upgrades as needed.

You need to ensure that you only use the appropriate Resource types.

Which types are available for your use? To answer, drag each description on the left to the appropriate column on the right. Each description may be used once, more than once, or not at all. You may need to drag the split bar between panes or scroll to view the content.

NOTE: Each correct selection is worth one point.

Select and Place:

Descriptions	Answer Area	
	Resource Type	Not a Resource Type
Account		
User		
Service Center		
Equipment		
Team		

Correct Answer:

Descriptions	Answer Area	
	Resource Type	Not a Resource Type
Account	Account	
User	User	
Service Center		Service Center
Equipment	Equipment	
Team		Team

Section: Configure field service applications
Explanation

Explanation/Reference:

References: <https://docs.microsoft.com/en-us/dynamics365/customer-engagement/field-service/set-up-bookable-resources>

QUESTION 19

You are a Dynamics 365 for Field Service Dispatcher reviewing automatically generated bookings for optimization of the schedule.

You notice that, for certain customers, Work Orders are being generated without service tasks, products, or services, when they should have them documented from the Agreement.

Which two of the following should you troubleshoot? Each correct answer presents part of the solution.

- A. Incident Type contains appropriate Service Tasks, Products, and Services.
- B. Incident Type field "**Copy Incident Items to Agreement**" is marked "**Yes**".
- C. Agreement Booking Setup field "**Auto Generate Work Order**" is marked "**Yes**".
- D. Agreement Booking Setup contains appropriate Service Tasks, Products, and Services

Correct Answer: BD

Section: Manage work orders
Explanation

Explanation/Reference:

QUESTION 20
DRAG DROP

You are a Dynamics 365 Field Service Administrator Your organization wants to use Incident Types with Work Orders.

You need to create and configure Incident Types based on the provided scenarios.

Which Incident Type feature should you use with each scenario? To answer, drag the appropriate Incident Type feature to the appropriate scenario. Each feature may be used once, more than once, or not at all. You may need to drag the split bar between panes or scroll to view the content.

NOTE: Each correct selection is worth one point.

Select and Place:

Entity

Products

Service Tasks

Services

Characteristics

Answer Area

Requirement

Incident Types must have a Labor Hours record.

Incident Types must have 1 product brochure.

Incident types must have a checklist for technicians to follow.

Correct Answer:

Entity		Requirement	
Products	Services	Incident Types must have a Labor Hours record.	Services
Service Tasks	Characteristics	Incident Types must have 1 product brochure.	Products
		Incident types must have a checklist for technicians to follow.	Service Tasks

Section: Manage work orders

Explanation

Explanation/Reference:



QUESTION 21

DRAG DROP

You are a Dynamics 365 for Field Service Administrator.

You are setting up a new Incident Type. There are no service tasks or products created that are related to this incident.



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

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

Select and Place:

OPTION		TARGET
Create and save all necessary service tasks.		
Create, save, and publish all necessary products.		
Create and save the incident.	➤	⬆
Add all service tasks for this incident.	⬅	⬇
Add all products for this incident.		
Add all services for this incident.		
Add any appropriate notes for this incident.		
Create and save all necessary products.		
Publish the incident.		

Correct Answer:

OPTION	TARGET
Create and save all necessary service tasks.	Create and save all necessary products.
Create, save, and publish all necessary products.	Create and save all necessary service tasks.
Create and save the incident.	 Create and save the incident.
Add all service tasks for this incident.	 Add all service tasks for this incident.
Add all products for this incident.	Add all products for this incident.
Add all services for this incident.	Add all services for this incident.
Add any appropriate notes for this incident.	Add any appropriate notes for this incident.
Create and save all necessary products.	
Publish the incident.	

Section: Manage work orders
 Explanation Explanation/Reference:

References: <https://docs.microsoft.com/en-us/dynamics365/customer-engagement/field-service/configure-incident-types>

QUESTION 22

You are setting up a maintenance agreement for a new customer that will require preventative maintenance visits as well as emergency visits to repair unforeseen equipment failures.

You want to be certain that the price the customer is charged for all maintenance and repairs visits accurately reflects the agreed upon price list. The price of the spare parts used in equipment repairs varies significantly by the territory where the client is located.

As the work order administrator, you need to ensure that the prices used when generating the invoices for work completed are correct, based on the agreement with the customer and the territory of the customer.

What are three ways that you can accomplish this goal? Each correct answer presents a complete solution.

- A. Add a regional price list to the agreement that includes the price for products and services used.
- B. Add a regional price list to the work order product that includes the price for products and services used.
- C. Add a territory relationship to the work order that includes the price for products and services used.
- D. Add a regional price list to the work order type that includes the price for products and services used.
- E. Add a territory relationship to the agreement that includes the price for products and services used.

Correct Answer: ABC

Section: Manage work orders

Explanation

Explanation/Reference:

QUESTION 23

DRAG DROP

You are a Dynamics 365 for Field Service Dispatcher.

You need to use the schedule board to find resources for a work order. The work order can be completed by any resource who has the correct piece of equipment and who is available at 9:00 A.M during a selected week.

Which four steps must you take, in sequence, to successfully implement this capability within the schedule board? To answer, move the appropriate actions from the list of actions to the answer area and arrange them in the correct order.

Select and Place:

Answer Area

Actions

Book the work order.

Create a new requirement group.

Create a requirement group template.

Add the incident type to a work order.

Associate an incident type to the requirement group template.

Book the requirement with the scheduling assistant.



Correct Answer:

Actions	Answer Area
Book the work order.	Create a requirement group template.
Create a new requirement group.	Associate an incident type to the requirement group template.
Create a requirement group template.	Add the incident type to a work order.
Add the incident type to a work order.	Book the work order.
Associate an incident type to the requirement group template.	
Book the requirement with the scheduling assistant.	

Section: Schedule and dispatch work orders
Explanation

Explanation/Reference:

References: <https://docs.microsoft.com/en-us/dynamics365/customer-engagement/field-service/multi-resource-scheduling-requirement-groups>

QUESTION 24 You are a Dynamics 365 for Field Service administrator for a construction company.

You need to schedule a work order for a group of resources that will work together for a set number of days, week, or months.

How should you achieve the goal without scheduling the same requirements multiple times manually by using the schedule board (or with the schedule assistant)?

A. Use Facility Scheduling

- B. Use Multi-Resource Scheduling
- C. Use Resource Crew Scheduling
- D. Use Universal Resource Scheduling

Correct Answer: B

Section: Schedule and dispatch work orders

Explanation

Explanation/Reference:

References: <https://docs.microsoft.com/en-us/dynamics365/customer-engagement/field-service/multi-resource-scheduling-requirement-groups>

QUESTION 25

DRAG DROP

You work for a digital billboard manufacturing company. When manufacturing is completed, the new digital billboards are shipped to a client site for installation. As the dispatcher for your company, you need to identify and schedule the different resources that are required to complete the installation of the digital billboard.

The installation of a billboard is a complicated process and requires a large team of resources all with different skills. These installations occur frequently, so you want to dispatch the resources for installations as efficiently as possible.

You need to configure multi-resource scheduling.

Which three steps should you perform, in sequence, to enable the multi-resource scheduling? To answer, move the appropriate actions from the list of actions to the answer area and arrange them in the correct order.

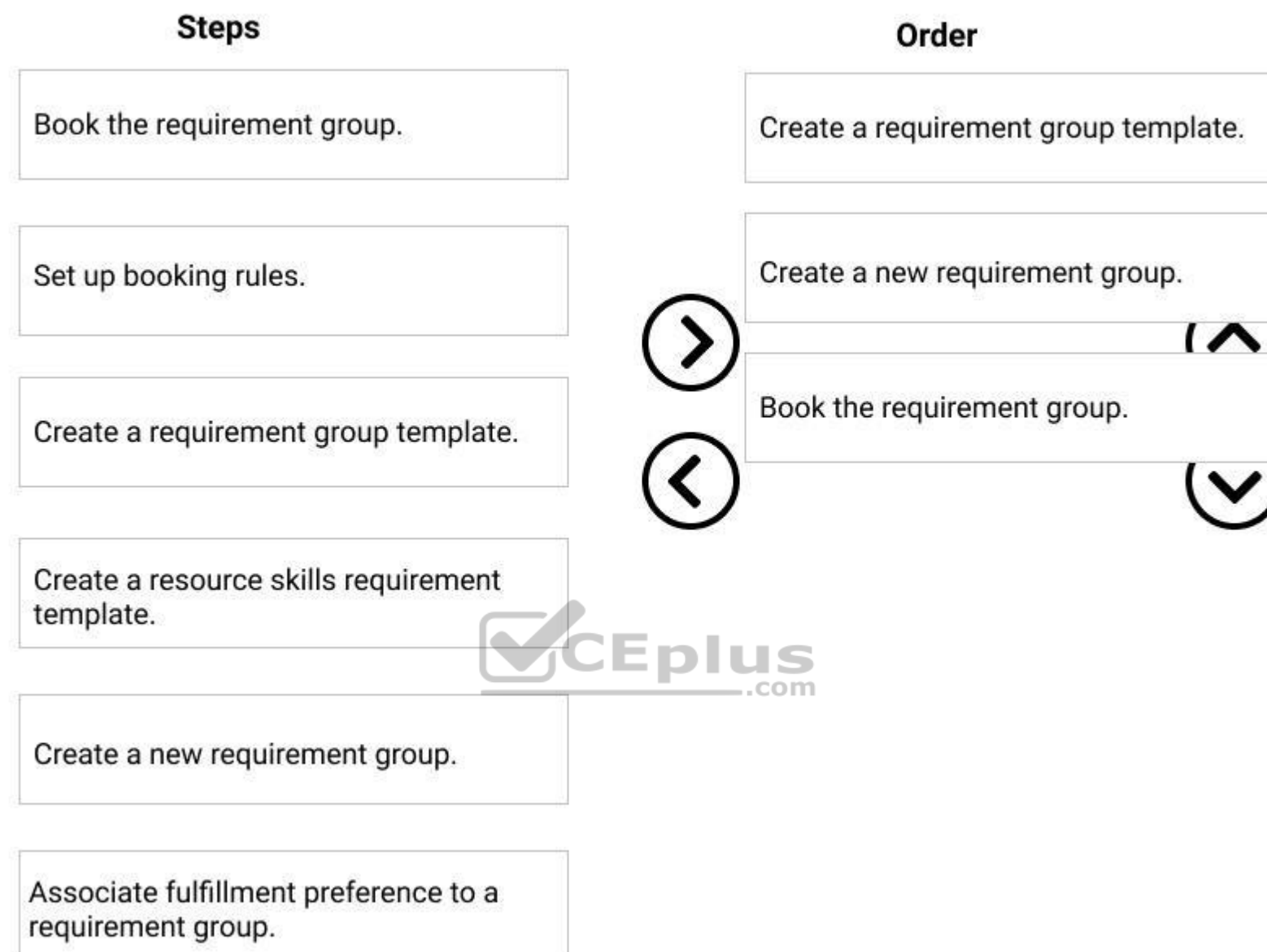
Select and Place:



Steps		Order
Book the requirement group.		
Set up booking rules.	➤	⬆
Create a requirement group template.	⬅	⬇
Create a resource skills requirement template.		
Create a new requirement group.		
Associate fulfillment preference to a requirement group.		



Correct Answer:



Section: Schedule and dispatch work orders

Explanation

Explanation/Reference:

References: <https://docs.microsoft.com/en-us/dynamics365/customer-engagement/field-service/multi-resource-scheduling-requirement-groups>

QUESTION 26 You are implementing Dynamics 365 for Field Service.

Your customer needs to understand how they can schedule the closest possible resource to a work order. The requirement further specifies it could be start of day from the company's site or during the middle of the day from an existing work order.

You need to provide them with the settings they need to properly configure so the closest resource is found when using the schedule assistant.

What should you suggest?

- A. Update the Resources Synchronization Timeout (in sec) setting within the Schedule Board Settings.
- B. Update the Load Default Filters on the Schedule Assistant.
- C. Update the Starting Location to Organization Unit within Schedule Board Settings.
- D. Update the filter on the Scheduler core tool tips view.

Correct Answer: C

Section: Schedule and dispatch work orders

Explanation

Explanation/Reference:

QUESTION 27

DRAG DROP

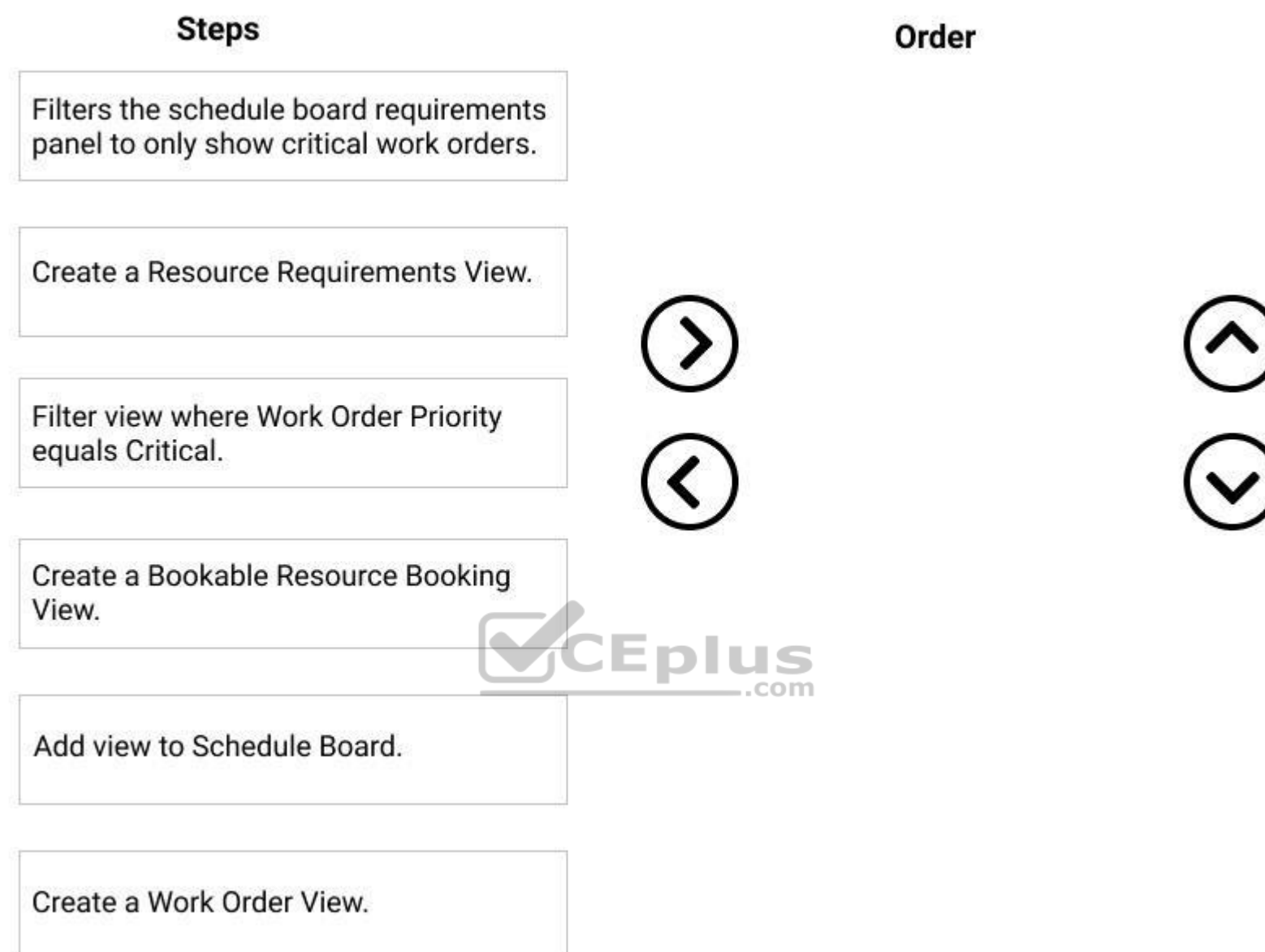
You are a Dynamics 365 for Field Service Administrator. You are working with your company's scheduling team on requirements for a new schedule board view.

The team needs a schedule board view where they only see work orders with a priority of Critical.

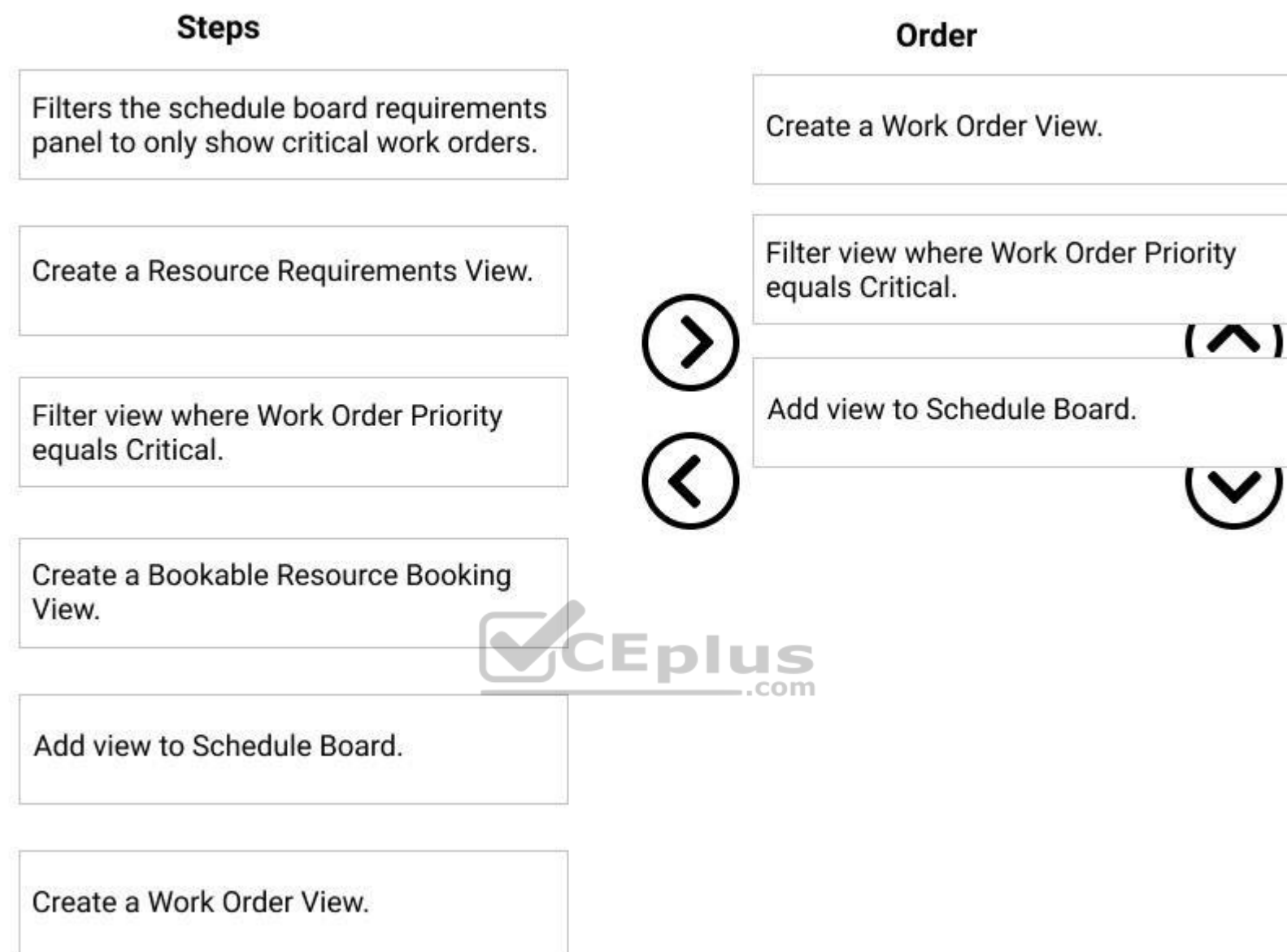
Which three steps should you perform, in sequence, to meet their need? To answer, move the appropriate actions from the list of actions to the answer area and arrange them in the correct order.

Select and Place:





Correct Answer:



Section: Schedule and dispatch work orders

Explanation

Explanation/Reference:

QUESTION 28 You are a Dynamics 365 for Field Service scheduler using the Schedule Assistant.

You notice the Schedule Assistant always sets the Default Radius to 25 KM.

You need to have the schedule assistant Default Radius set to 50 Miles.

Which two options should you choose? Each correct answer presents a complete solution.

- A. Set the **Default Radius Unit** to **Miles** under **Field Service Settings, Work Order/Booking** section.
- B. Set the **Default Radius Value** to **50** under **Scheduling Parameters**.
- C. Set the **Default Radius Value** to **50** under **Field Service Settings, Work Order/ Booking** section.
- D. Set the **Default Radius Unit** to **Miles** under **Scheduling Parameters**.

Correct Answer: BD

Section: Schedule and dispatch work orders

Explanation

Explanation/Reference:

QUESTION 29

You are a Dynamics 365 for Field Service Administrator. You configure Route Scheduling Optimization (RSO) and publish the schedule.

One of your schedulers indicates two of their resources are not getting work orders assigned.

You need to determine reasons why the two resources are not assigned work orders through RSO.

Which three options should you choose? Each correct answer presents a complete solution.

- A. Work Hours is not properly configured for days being optimized.
- B. **Optimize Schedule** field is not set to **Yes**.
- C. The **Work Location** field is not set to **Onsite**.
- D. Scheduling Method is not set to **Optimize**.
- E. **Start Location** and **End Location** fields are not the same.

Correct Answer: BDE

Section: Schedule and dispatch work orders

Explanation



Explanation/Reference:

References: <https://docs.microsoft.com/en-us/dynamics365/customer-engagement/field-service/rso-configuration>

QUESTION 30

DRAG DROP

You have the Universal Resource Scheduling (URS) security role.

Your organization creates a custom entity. The records for the entity need to be scheduled to resources.

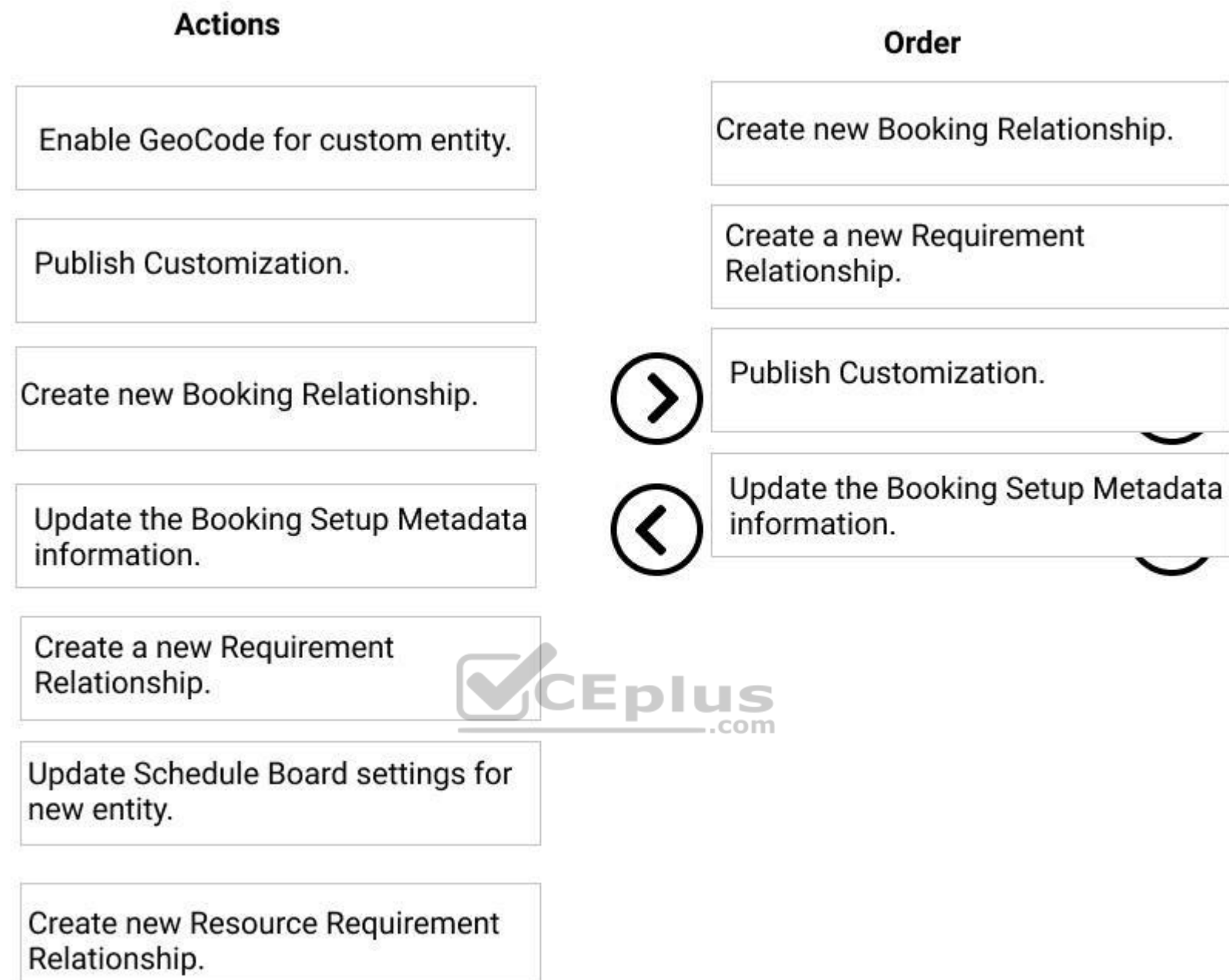
You need to enable the new entity to be scheduled. You select the entity that needs to be enabled and need to continue the set up process.

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

Select and Place:

Actions		Order
Enable GeoCode for custom entity.		
Publish Customization.		
Create new Booking Relationship.	➤	⬆
Update the Booking Setup Metadata information.	⬅	⬇
Create a new Requirement Relationship.		
Update Schedule Board settings for new entity.		
Create new Resource Requirement Relationship.		

Correct Answer:



Section: Schedule and dispatch work orders
Explanation

Explanation/Reference:

References: <https://docs.microsoft.com/en-us/dynamics365/customer-engagement/common-scheduler/schedule-anything-with-universal-resource-scheduling>

QUESTION 31
DRAG DROP

You are a new Dynamics 365 for Field Service Administrator for a manufacturing firm.

Your manager has asked you to configure the system to enable scheduling for maintenance of equipment at customer sites. It is against company policy to dispatch resources to sites with known issues such as credit or safety holds. Many site visits may require more than one technician to be sent for the repair.

Which resource scheduling component should be used for each task? To answer, drag the appropriate resource scheduling component to the appropriate task. Each resource scheduling component may be used once, more than once, or not at all. You may need to drag the split bar between panes or scroll to view the content.

NOTE: Each correct selection is worth one point.

Select and Place:

Answer Area

Resource Crew	Heavy machinery repair requires three technicians as well as a safety inspector to be sent to the site. Additionally, power testing equipment must be sent to complete the inspection.	
Requirement Group	Dispatchers must be able to locate the resources needed for the heavy machinery repair within a single search to allow for efficient scheduling.	
Schedule Board	Dispatchers and scheduling administrators must have a way to easily review all resource availability and be able to schedule the work order.	
Booking Rule	When customers on credit hold request service, no technician can be sent and dispatchers must be alerted of the credit hold status.	
Incident type		
Booking Resource Booking		

Correct Answer:

Answer Area

Resource Crew	Heavy machinery repair requires three technicians as well as a safety inspector to be sent to the site. Additionally, power testing equipment must be sent to complete the inspection.	Resource Crew
Requirement Group		
Schedule Board	Dispatchers must be able to locate the resources needed for the heavy machinery repair within a single search to allow for efficient scheduling.	Schedule Board
Booking Rule	Dispatchers and scheduling administrators must have a way to easily review all resource availability and be able to schedule the work order.	Schedule Board
Incident type	When customers on credit hold request service, no technician can be sent and dispatchers must be alerted of the credit hold status.	Booking Rule
Booking Resource Booking		

Section: Schedule and dispatch work orders

Explanation

Explanation/Reference:

Explanation:

QUESTION 32 You are a Dynamics 365 Field Service dispatcher using the Scheduling Assistant function.

One of your customers, Adventure Works, does not want one of your resources to be scheduled to work orders going forward. The resource must be able to be scheduled for other accounts.

How can you achieve this goal?

- A. Create a **Requirement Resource Preference** record for the resource.
Set the **Preference Type** to **Restricted** and **Cascade** to **No**.
- B. Create a **Requirement Resource Preference** record for the resource.
Set the **Preference Type** to **Restricted** and **Account** to **Adventure Works**.
- C. Select **Load the Default Filters on the Schedule Board**.
- D. Create a **Requirement Resource Preference** record for the resource.

Correct Answer: B

Section: Schedule and dispatch work orders

Explanation

Explanation/Reference:

QUESTION 33

DRAG DROP

A new member of your company's scheduling department is learning which scheduling function to use in Dynamics 365 for Field Service, based on different scenarios.

You need to provide a scheduling matrix to the new team member.

Which scheduling function should be used with each scenario? To answer, drag the appropriate function to the appropriate scenario. Each function may be used once, more than once, or not at all. You may need to drag the split bar between panes or scroll to view the content.

NOTE: Each correct selection is worth one point.

Select and Place:



Answer Area

Schedule Board	View map of resource, organizational units, bookings, or requirements.	
Schedule Assistant	Filter resources to see select resources' actively scheduled work orders.	
Booking Rules	Filter resources based on requirements of the work order.	
Resource Scheduling Optimization	Schedule requirements that are part of a group.	
Facility Scheduling		

Correct Answer:

Answer Area

Schedule Board	View map of resource, organizational units, bookings, or requirements.	Schedule Board
Schedule Assistant	Filter resources to see select resources' actively scheduled work orders.	Schedule Board
Booking Rules	Filter resources based on requirements of the work order.	Schedule Assistant
Resource Scheduling Optimization	Schedule requirements that are part of a group.	Schedule Assistant
Facility Scheduling		

Section: Schedule and dispatch work orders
Explanation

Explanation/Reference:

QUESTION 34

You are Dynamics 365 for Field Service Administrator and work for a manufacturing company. The company provides customers with large power systems for sophisticated data centers. The power systems are serviced by a field engineering team.

The field engineering team documents work done on repairs and maintenance by completing Work Orders within Dynamics 365.

You need to easily schedule work orders for the field engineering team via the schedule and enable geocoding.

Which two steps must you take to schedule resources via the schedule board and enable geocoding? Each correct answer presents part of the solution.

- A. Connect to Maps in **Resource Scheduling**.
- B. Configure the map on the **Schedule Board**.
- C. Set **Auto Geo Code Addresses** to **Yes** in **Resource Scheduling**.
- D. Set **Auto Geo Code Addresses** to **Yes** in Field **Service Settings**.

Correct Answer: AC

Section: Schedule and dispatch work orders
Explanation

Explanation/Reference:

QUESTION 35





DRAG DROP

You are setting your environment to use Resource Scheduling Optimization (RSO). You have enabled Optimize Schedule for all Bookable Resources.

You need to complete the remaining steps to prepare your work order data for optimization.

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

Select and Place:

Actions		Order
Set Optimize Schedule field to Yes for all Work Order Requirement records.		
Configure Scheduling Method for booking statuses.		
Set Default Scheduling Method to Optimize for work order booking setup metadata.		
Set Optimize Schedule field to Yes for all Unscheduled Work Order Requirement records.		
Update From Data and To Date for all unscheduled work order requirement record.		

Correct Answer:

Actions	Order
<div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 10px;">Set Optimize Schedule field to Yes for all Work Order Requirement records.</div> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 10px;">Configure Scheduling Method for booking statuses.</div> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 10px;">Set Default Scheduling Method to Optimize for work order booking setup metadata.</div> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 10px;">Set Optimize Schedule field to Yes for all Unscheduled Work Order Requirement records.</div> <div style="border: 1px solid #ccc; padding: 5px;">Update From Data and To Date for all unscheduled work order requirement record.</div>	<div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 10px;">Set Optimize Schedule field to Yes for all Unscheduled Work Order Requirement records.</div> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 10px;">Update From Data and To Date for all unscheduled work order requirement record.</div> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 10px;"> <div style="display: flex; align-items: center; justify-content: space-between;"> ⏪ <div style="flex-grow: 1;">Configure Scheduling Method for booking statuses.</div> ⏩ </div> </div> <div style="display: flex; justify-content: space-around; margin-top: 20px;"> <div style="font-size: 3em;">⏮</div> <div style="font-size: 3em;">⏭</div> </div>

Section: Schedule and dispatch work orders
Explanation

Explanation/Reference:

References: <https://docs.microsoft.com/en-us/dynamics365/customer-engagement/field-service/rso-configuration>

QUESTION 36

DRAG DROP

You are a dispatcher for a cable installation company that provides installation services in multiple territories. The company is using Dynamics 365 for Field Service to manage their work orders. Every time a work order is created, the dispatch team is manually assigning the work order to a territory in order to book the correct resources.

You are tasked with ensuring that Dynamics 365 will automatically assign work orders to territories so that the dispatcher can search for the correct resources.



Which four steps, in sequence, must be configured to ensure that when work orders are created they will automatically be mapped to the correct territory? To answer, move the appropriate actions from the list of actions to the answer area and arrange them in the correct order.

Select and Place:

Steps		Order
Add new resource territories.		
Add new service territories.		
Assign members to territories.	➤	⬆
Map postal codes to service territories.	⬅	⬇
From the view of Active Resources, click the assign territories button in the menu ribbon.		
Use the territory lookup on each user record to assign territory.		



Correct Answer:

Steps	Order
Add new resource territories.	Add new service territories.
Add new service territories.	Add new resource territories.
Assign members to territories.	Map postal codes to service territories. 
Map postal codes to service territories.	Assign members to territories. 
From the view of Active Resources, click the assign territories button in the menu ribbon.	
Use the territory lookup on each user record to assign territory.	

Section: Schedule and dispatch work orders

Explanation

Explanation/Reference:

QUESTION 37

DRAG DROP

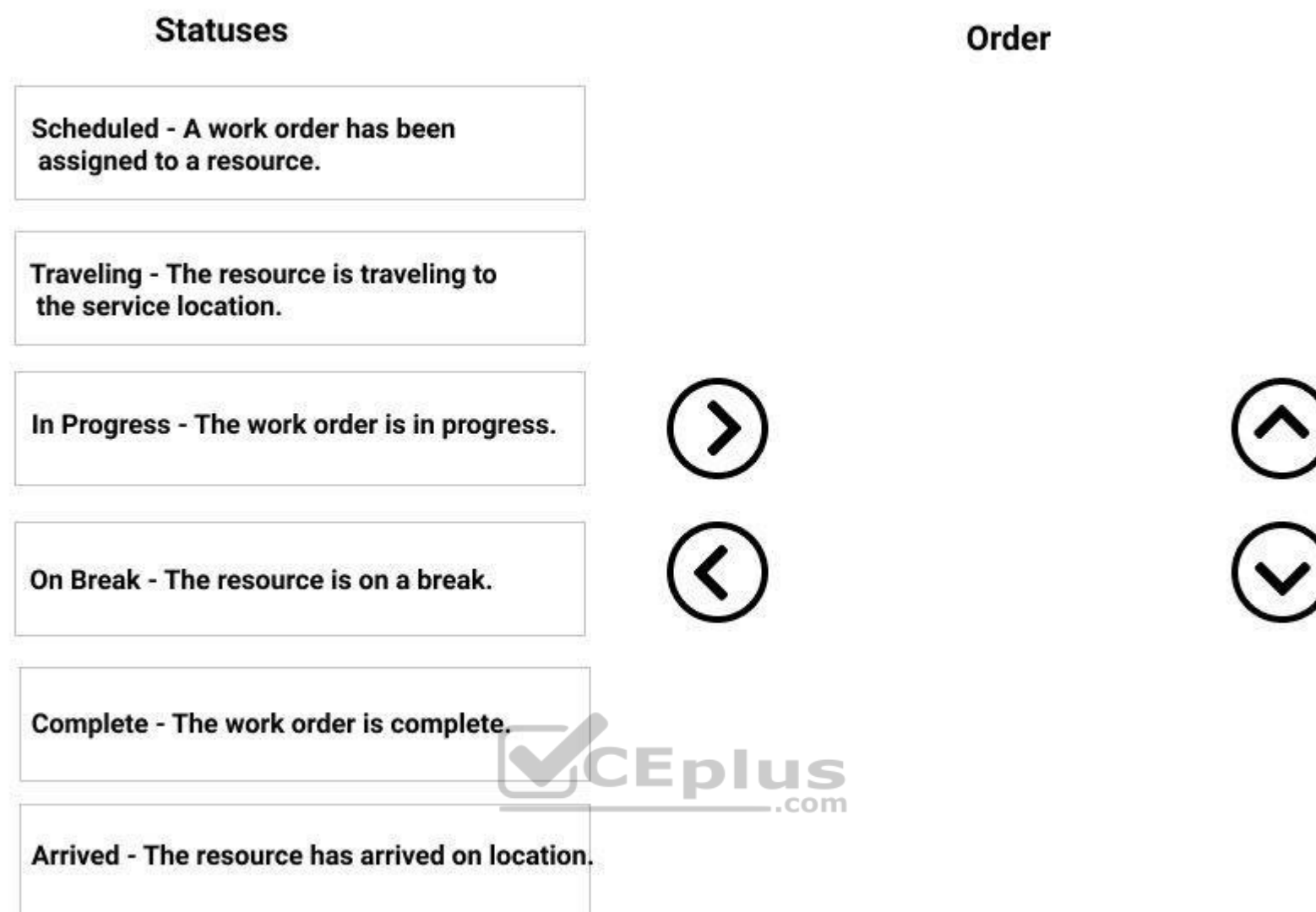
Your company is preparing to deploy the Dynamics Field Service with Mobile Application.

Your manager asks you to ensure that the Booking Statuses will match with the current business process the field technicians are following.

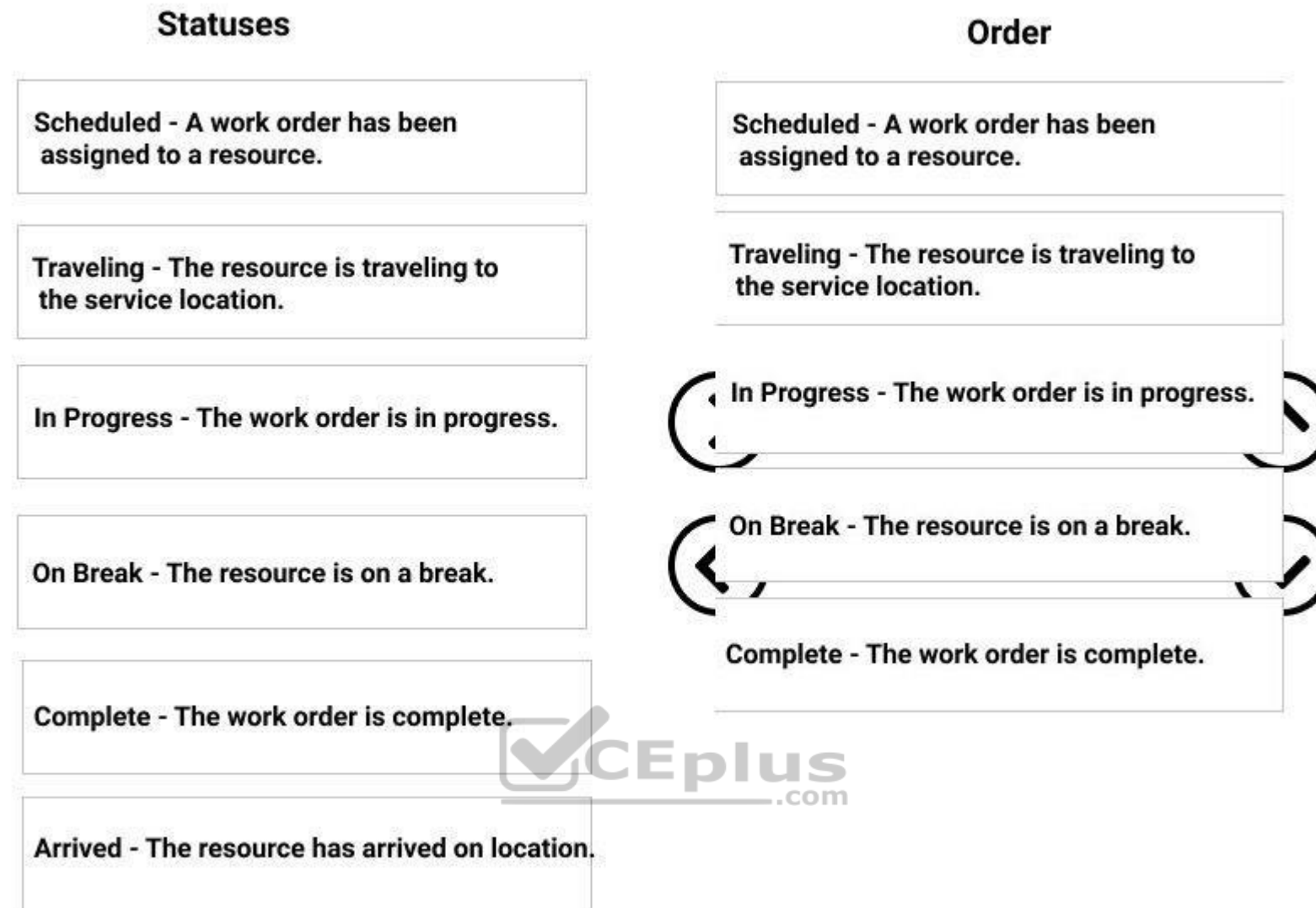
As the Field Service Administrator, you review the documentation and discover that the out-of-the-box Booking Statuses will meet your company's needs.

What is the order of the Booking Statuses for the five out-of-the box booking status fields? To answer, move the five out-of-the-box booking status fields to the answer area and arrange them in the correct order.

Select and Place:



Correct Answer:



Section: Schedule and dispatch work orders
Explanation

Explanation/Reference:

QUESTION 38

Your company processes a large number of work orders each day. The company wants to ensure the high priority work orders are dealt with immediately.

You need to configure the schedule board so that bookings are easily visible to the dispatchers.

How can you configure Dynamics Field Services to increase booking visibility?

- A. Configure a work order type for high priority issues, to help categorize high priority work order records.
- B. Configure an Incident type for high priority incidents on work order records.
- C. Configure the status color for a booking status record, to identify high priority work order records.
- D. Configure a priority record to allow you to identify high priority work order records.

Correct Answer: C

Section: Schedule and dispatch work orders
Explanation

Explanation/Reference:

QUESTION 39

The company has hired a new manager to set up and configure Field Service to automatically schedule work orders to the most appropriate resource scheduling.

The manager is unable to optimize requirements and bookings related to work orders.

Which three settings are required? Each correct answer presents part of the solution.

- A. Assign the Field Service-Administrator security role to the RSO user.
- B. Add the RSO dispatcher role to a dispatcher.
- C. Enable **Resource Scheduling Optimization**.
- D. Set **Connect to Maps** as **Yes**.
- E. Add RSO to the profile Field Service-Administrator.

Correct Answer: CDE

Section: Schedule and dispatch work orders

Explanation

Explanation/Reference:

References: <https://docs.microsoft.com/en-us/dynamics365/customer-engagement/field-service/rso-configuration>

QUESTION 40

You are a Field Service resource manager for Contoso, Ltd. and are setting up characteristics for field technicians who are responsible for repairs on rental equipment.

Work performed on certain types of backhones, trenchers, and excavating equipment requires different attributes to be identified for proper work order assignment and scheduling.

Which two characteristics are valid? Each correct answer presents a complete solution.

- A. Certification
- B. Approval Status
- C. Skill
- D. Rating Value



Correct Answer: AC

Section: Schedule and dispatch work orders

Explanation

Explanation/Reference:

References: <https://docs.microsoft.com/en-us/dynamics365/customer-engagement/field-service/set-up-bookable-resources#set-up-field-technician-resources>

QUESTION 41 You are a Dynamics 365 for Field Service scheduling coordinator.

When you select the Book button on a work order, TechnicianA never shows up as available.

You need to update the system to see TechnicianA's availability.

What should you do?

- A. Set **Enable for Availability Search** to **Yes** on the TechnicianA bookable resource record.
- B. Set **Ignore Proposed Bookings** to **Yes** on the Schedule Assistant view.
- C. Set **Real Time Mode** to **Yes** on the Schedule Assistant view.
- D. Set **Display on Schedule Board** to **Yes** on the TechnicianA bookable resource record.

Correct Answer: A

Section: Schedule and dispatch work orders
Explanation

Explanation/Reference:
References: <https://docs.microsoft.com/en-us/dynamics365/customer-engagement/field-service/set-up-bookable-resources>

QUESTION 42
DRAG DROP

Your organization wants to use the Field Service Mobile App for technicians in the field.

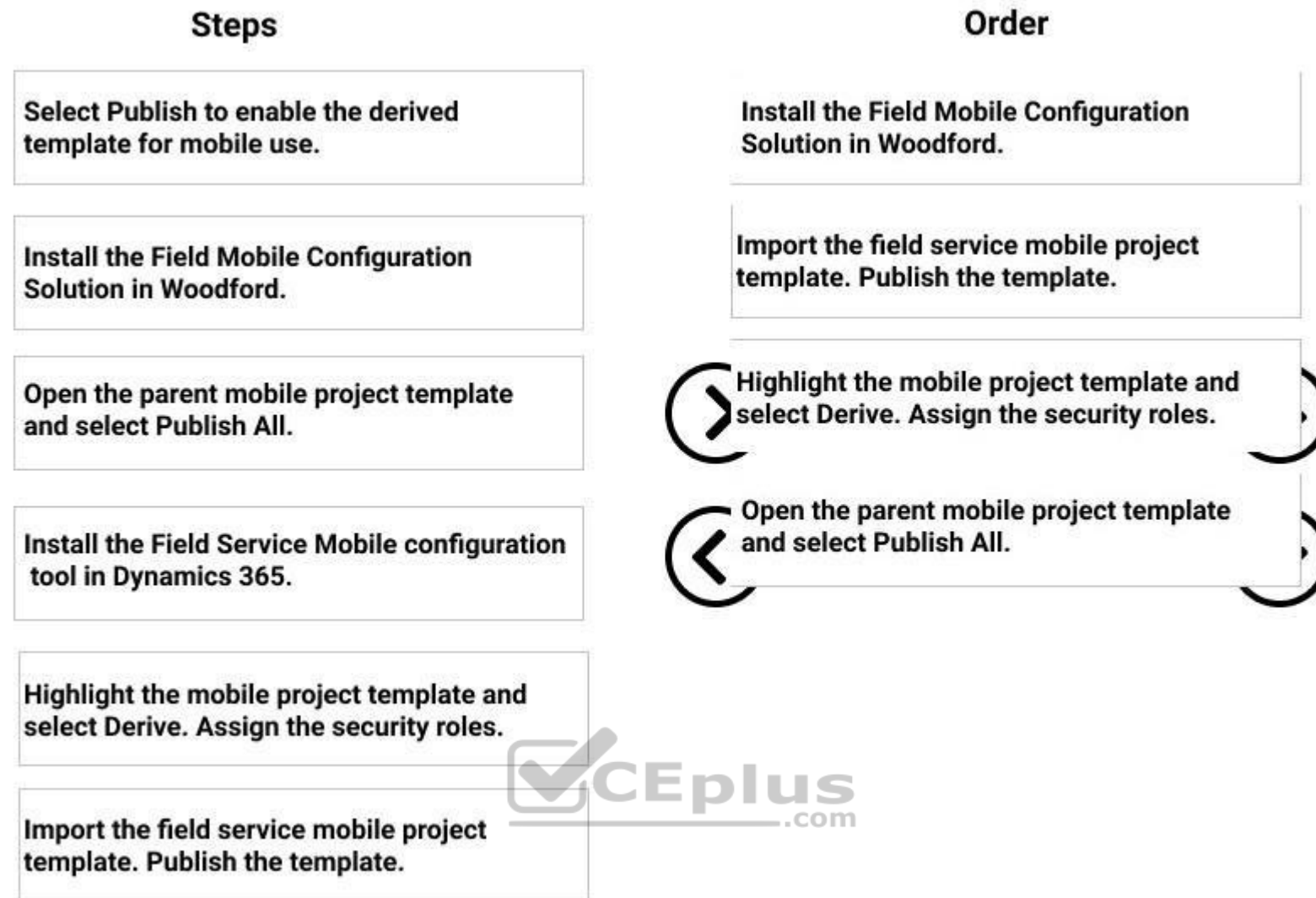
You need to install the solution, so it can be configured for mobile technicians.

What are the four steps you need to perform, in sequence, to ensure the mobile solution is ready for configuration and deployment? To answer, move the appropriate actions from the list of actions to the answer area and arrange them in the correct order.

Select and Place:

Steps		Order
Select Publish to enable the derived template for mobile use.		
Install the Field Mobile Configuration Solution in Woodford.		
Open the parent mobile project template and select Publish All.	➤	⬆
Install the Field Service Mobile configuration tool in Dynamics 365.	⬅	⬇
Highlight the mobile project template and select Derive. Assign the security roles.		
Import the field service mobile project template. Publish the template.		

Correct Answer:



Section: Manage field service mobility Explanation

Explanation/Reference:

References: <https://docs.microsoft.com/en-us/dynamics365/customer-engagement/field-service/install-field-service#download-the-field-service-mobile-app-on-a-phone-or-tablet>

QUESTION 43

You are a Dynamics 365 for Field Service Administrator and work for a manufacturing firm. You are receiving support requests that field engineers are unable to see a custom area entitled "Parts Requests" within the Dynamics 365 Field Service Mobile App.

You need to troubleshoot the Dynamics 365 for Field Service mobile app to ensure that the field engineers are able to view the customizations created.

What are the three steps you can take to troubleshoot the issue reported? Each correct answer presents a complete solution.

- A. Ensure that the Dynamics Mobile solution with the appropriate customizations has been published.
- B. Synchronize the Dynamics 365 for Field Service Mobile App.
- C. Ensure that a security role has been assigned to the project.
- D. Verify that the impacted field engineers are enabled to use this project.
- E. Ensure that the Woodford project with the appropriate customizations has been published.

Correct Answer: BCE

Section: Manage field service mobility Explanation

Explanation/Reference:

QUESTION 44 You are Dynamics 365 for Field Service Development Manager.

You need to enable customization development for multiple developers, via the Woodford solution, where customizations can be combined together to complete the development requirements.

What should you create in order to enable this capability?

- A. Create a project for each developer, which publishes changes to a master project.
- B. Create a project for each developer, using security roles to identify what customizations are available for modification.
- C. Create a Dynamics 365 solution for each developer, which publishes changes to the Woodford solution.
- D. Create a project for each developer, each within its own Woodford solution.

Correct Answer: A

Section: Manage field service mobility Explanation

Explanation/Reference:

QUESTION 45 You are a Dynamics 365 for Field Service Mobile customizer.

Your mobile technicians indicate that when in offline mode, they do not have access to the same data set that is available online. Offline mode contains less account and work order data, and users cannot see warehouses.

You need to determine which updates to make within the mobile project so that technicians can see the appropriate information.

Which three actions should you choose? Each correct answer presents a complete solution.

- A. Update Synchronization setting to **Always Full Sync**.
- B. Update entity Sync Filter.
- C. Update View filters.
- D. Update the Max Sync Records setting.
- E. Update the entity Mode to Online and Offline.



Correct Answer: BDE

Section: Manage field service mobility Explanation

Explanation/Reference:

QUESTION 46 You are a Dynamics 365 for Field Service Administrator.

You have a requirement to make a custom attribute "Contract Status" required and to not allow invalid data to be entered in the attribute.

What are three ways that you can make an attribute required on a form within the Dynamics 365 for Field Service Mobile App and ensure invalid data cannot be entered? Each correct answer presents a complete solution.

- A. Create an **OnSave** rule, and display a message to the user if the specific field does not meet the required conditions.
- B. Create an **OnChange** rule, and set a simple validation for a field to check whether the field contains data.
- C. Create an **Option Set** with all possible options for the attribute.
- D. Create an **OnChange** rule to highlight a field when it does not contain correct field data.
- E. Create an **OnSave** rule to check any field's data, but without highlighting the field when the condition is not met.

Correct Answer: ACE

Section: Manage field service mobility Explanation

Explanation/Reference:

QUESTION 47 You are a Dynamics 365 for Field Service Mobile (FSM) customizer.

Technicians report that they are not seeing their Bookings in the FSM app.

You need to investigate why they cannot see their bookings.

What are three actions you must take to perform your investigation? Each correct answer presents a complete solution.

- A. Check Drip Scheduling setting on the Bookable Resource.
- B. Check sync filter on Bookable Resource Booking View.
- C. Check if sync filter on Bookable Resource entity is too restrictive for offline mode.
- D. Check that FSM app is syncing to server.
- E. Check if sync filter on Bookable Resource Booking entity is too restrictive for offline mode.

Correct Answer: ACE

Section: Manage field service mobility Explanation

Explanation/Reference:

References: <https://docs.microsoft.com/en-us/dynamics365/customer-engagement/field-service/mobile-faq-bookings-not-showing>

QUESTION 48 You are a Dynamics 365 for Field Service Mobile Administrator (FSM).

When technicians log into FSM, they receive the following message:

“Your organization has not configured Field Service Mobile.” You log into FSM and cannot reproduce the issue with your login.

What must you do to fix the issue?

- A. Update the Security Roles for the FSM project within Woodford.
- B. Update the Priority for the FSM project within Woodford.
- C. Update the Security Roles for all Bookable Resources within Dynamics 365.
- D. Set **Enabled for Field Service Mobile** to **Yes** for all Bookable Resources.

Correct Answer: D

Section: Manage field service mobility Explanation

Explanation/Reference:

References: <https://docs.microsoft.com/en-us/dynamics365/customer-engagement/field-service/field-service-mobile-app-user-guide>

QUESTION 49 You are in charge of setting up the new Dynamics 365 CE Field Services environment for your company.

As the field Service Administrator, you need to configure the field service settings for work orders for your environment.

Which three work order settings can be configured by the Field Service Administrator? Each correct answer presents a complete solution.

- A. Default work order type
- B. Auto generate resource requirement for work order
- C. Work order invoice creation
- D. Default work order completed status
- E. Auto generate work order for agreement booking

Correct Answer: ABD



Section: Manage field service mobility Explanation

Explanation/Reference:

QUESTION 50

DRAG DROP

You need to create a purchase order for a thermal overload cooling fan for a refrigeration unit on the shop floor.

After creating a purchase order, what are the five steps, in sequence, for completing the order and receiving the products? To answer, move the appropriate actions from the list of actions to the answer area and arrange them in the correct order.

Select and Place:

Steps		Order
Add Purchase Order receipt products.		
Send completed bill to Enterprise Resource Planning (ERP).		
Create a Purchase Order Receipt.	➤	⬆
Add Products.	⬅	⬇
Obtain Approval.		
Create Purchase Order Bill.		

Correct Answer:



Section: Manage inventory and purchasing
Explanation

Explanation/Reference:

References: <https://docs.microsoft.com/en-us/dynamics365/customer-engagement/field-service/create-purchase-order>

QUESTION 51

You are onsite, working on a customer's factory floor. You need to return tomorrow and replace a belt on the conveyor. You look at the inventory in Warehouse 1, and there are 10 in stock. You pull the belt from stock and create an inventory transfer record.

What are the two correct steps to complete the transfer? Each correct answer presents part of the solution.

- A. Select the source warehouse, then select the destination warehouse.
- B. Enter the quantity to transfer, then click transfer.
- C. Enter the part number from the drop down, then click to transfer.
- D. Select the From warehouse location, then select the To warehouse location.

Correct Answer: AB

Section: Manage inventory and purchasing

Explanation

Explanation/Reference:

References: <https://docs.microsoft.com/en-us/dynamics365/customer-engagement/field-service/create-inventory-transfer>

QUESTION 52

DRAG DROP

Your company's inventory clerk has received a truck shipment of parts for repair of equipment on such a rush order. The order needs to be completed as soon as possible.

Which three steps, in sequence, are needed to receive the products to the existing rush order in Field Service? To answer, move the appropriate actions from the list of actions to the answer area and arrange them in the correct order.

Select and Place:

STEPS		ORDER
Click Receipt Products		
Create an Inventory Adjustment record.		
Click Show Purchase order Products not fully received yet.	➤	⬆
Click the drop-down arrow next to the P.O. name.	⬅	⬇
Post the Receipt record.		

Correct Answer:

STEPS	ORDER
Click Receipt Products	Click the drop-down arrow next to the P.O. name.
Create an Inventory Adjustment record.	Click Receipt Products
Click Show Purchase order Products not fully received yet.	Click Show Purchase order Products not fully received yet.
Click the drop-down arrow next to the P.O. name.	
Post the Receipt record.	

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Section: Manage inventory and purchasing
Explanation

Explanation/Reference:

References: <https://docs.microsoft.com/en-us/dynamics365/customer-engagement/field-service/create-purchase-order>

QUESTION 53

DRAG DROP

Your company uses Dynamics 365 for Field Service.

The company's inventory clerk goes to the bin location for electrical switches and discovers there are none in stock. However, the Field Service Inventory shows a quantity of one.

In which order should the required fields be entered to adjust the inventory to the correct amount? To answer, move the three appropriate actions from the list of actions to the answer area and arrange them in the correct order.

Select and Place:

Fields		ORDER
Warehouse		
Bin location		
Unit	➤	⬆
Product	⬅	⬇
Quantity		

Correct Answer:

Fields	ORDER
Warehouse	Product
Bin location	Unit
Unit	Quantity
Product	
Quantity	

➤
⬅
⬇



Section: Manage inventory and purchasing
Explanation

Explanation/Reference:

QUESTION 54
 DRAG DROP

Your company's inventory clerk is using the Returning to Vendor feature in Dynamics 365 for Field Service to process a customer's request to return a wheel that is the wrong size.

The clerk needs to understand the different tracking options for returning to the vendor.

Which actions correspond with track the return and which actions correspond with another return to vendor option? To answer, drag the type of return to the action. Each type or return may be used once, more than once, or not at all. You may need to drag the split bar between panes or scroll to view the content.

NOTE: Each correct selection is worth one point.

Select and Place:

Answer Area

track the return

other return to vendor
options

Mark when the return was approved.

Mark when the return was shipped.

Mark when the return was received.

Issue credit to the customer.

Issue a credit memo.



Correct Answer:

Answer Area

track the return	Mark when the return was approved.	track the return
other return to vendor options	Mark when the return was shipped.	track the return
	Mark when the return was received.	track the return
	Issue credit to the customer.	other return to vendor options
	Issue a credit memo.	other return to vendor options

Section: Manage inventory and purchasing

Explanation

Explanation/Reference:

References: <https://docs.microsoft.com/en-us/dynamics365/customer-engagement/field-service/process-return>

QUESTION 55

DRAG DROP

There are certain steps a Field Service Manager must take for RMA approval, and then for creating an RMA receipt.

Which steps pertain to RMA Approval and which steps pertain to RMA Receipts? To answer, drag RMA Approval or RMA Receipts to the appropriate steps. RMA Approval and RMA Receipts may be used once, more than once, or not at an. You may need to drag the split bar between panes or scroll to view the content.

NOTE: Each correct selection is worth one point.

Select and Place:

Answer Area

RMA Approval

RMA Receipt

Verify RMA products are linked to customer equipment records.

Arrange shipping and transportation for the products to be returned.

Determine if RMA products can be returned to the manufacturer and if a credit must be issued.

Give the step a name.

Correct Answer:



Answer Area

RMA Approval

RMA Receipt

Verify RMA products are linked to customer equipment records.

Arrange shipping and transportation for the products to be returned.

Determine if RMA products can be returned to the manufacturer and if a credit must be issued.

Give the step a name.

RMA Approval

RMA Approval

RMA Approval

RMA Receipt

Section: Manage inventory and purchasing
Explanation
Explanation/Reference:

References: <https://docs.microsoft.com/en-us/dynamics365/customer-engagement/field-service/process-return>

QUESTION 56

You are a Dynamics 365 for Field Service Billing Administrator. Your customer wants to purchase a series of quarterly preventative maintenance visits as well as bi-weekly site visits.

The customer wants to be billed for the preventative maintenance quarterly but billed for the site visits monthly.

What are two ways that this can be completed against a single Agreement? Each correct answer presents a complete solution.

- A. Create Invoice Setup for preventative maintenance, with Invoice Products tied to Quarterly Price List.
- B. Create Invoice Setup for preventative maintenance with Invoice Recurrence of every three months.
- C. Create Invoice Setup for site visits, with Invoice Recurrence of each month.
- D. Create Invoice Setup for site visits, with Invoice Products tied to Monthly Price List.

Correct Answer: BC

Section: Manage assets and agreements

Explanation

Explanation/Reference:

References: <https://docs.microsoft.com/en-us/dynamics365/customer-engagement/field-service/set-up-customer-agreements#add-invoice-setup>

QUESTION 57

DRAG DROP

You are a Dynamics 365 for Field Service Administrator. All Products have the **Convert to Customer Asset** field set to **Yes**.

Some users indicate products on a customer asset are not always becoming a customer asset. Users provide you with three scenarios.

You need to review the scenarios and provide the answers.

What happens to the product for each user scenario? To answer, drag the appropriate solution to satisfy each listed requirements. Each solution may be used once, more than once, or not at all. You may need to drag the split bar between panes or scroll to view the content.

NOTE: Each correct selection is worth one point.

Select and Place:

Answer Area

Product is Converted to Customer Asset.	Work Order Product is Estimated. Booking is Closed and Work Order is Closed-Posted.	
Product is not Converted to Customer Asset.	Work Order Product is Used. Booking is Closed and Work Order is Open – Completed.	
Product is Converted as an Inactive Customer Asset.	Work Order Product is Used. Booking is Canceled and Work Order is Closed-Posted.	

Correct Answer:

Answer Area

Product is Converted to Customer Asset.

Product is not Converted to Customer Asset.

Product is Converted as an Inactive Customer Asset.

Work Order Product is Estimated. Booking is Closed and Work Order is Closed-Posted.

Work Order Product is Used. Booking is Closed and Work Order is Open – Completed.

Work Order Product is Used. Booking is Canceled and Work Order is Closed-Posted.

Product is not Converted to Customer Asset.

Product is not Converted to Customer Asset.

Product is Converted to Customer Asset.

Section: Manage assets and agreements
Explanation

Explanation/Reference:



QUESTION 58

You are a Dynamics 365 for Field Service Administrator.

You need to add two compressor sub-components to one of the refrigerator customer assets, in the environment and set up the sub-components for the customer asset.

What must you do to properly set up the assets?

- A. Add the compressor sub-components as sub-assets on the refrigerator customer asset record.
- B. Click **View Hierarchy** on the refrigerator customer asset record.
- C. Set the **Master Asset** on the sub-components to the refrigerator Customer Asset record.
- D. Add the compressor sub-components as customer asset records.

Correct Answer: A

Section: Manage assets and agreements
Explanation

Explanation/Reference:

QUESTION 59

You work for a recycling company that provides customers with large compactor units to collect their recyclable materials. The compactor units are comprised of two separate components: a container to collect the recyclable materials and a separate component that compacts the recyclable materials to make them easier to transport.

These containers are expensive, and the components tend to break down frequently, requiring ongoing maintenance and repairs.

You need to easily track the containers that your company has at each client location and maintain a service history for each of the sub-components.

- A. Configure the customer asset records hierarchically, and maintain service history at the sub-component level.
- B. Configure the customer inventory records individually, in order to maintain the service history at the parent component level.
- C. Configure the customer inventory records in a hierarchy, and maintain service history at the sub-component level.
- D. Configure the customer asset records hierarchically, and maintain service history at the service account level.

Correct Answer: A

Section: Manage assets and agreements

Explanation

Explanation/Reference:

References: <https://docs.microsoft.com/en-us/dynamics365/customer-engagement/field-service/configure-set-up-customer-assets>

