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QUESTION & ANSWER

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Exam : **MB-300**

Title : Microsoft Dynamics 365:
Core Finance and
Operations

Version : DEMO

1. Topic 1, Relecloud Case

Background

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

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

Current environment: System and IT

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

Current environment: Customer Service

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

Current environment: Technical Support/IT

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

Current environment: Account Representatives

- ⇒ Each customer is assigned a single account representative.
- ⇒ Account representatives use multiple devices.
- ⇒ Only account representatives have the ability to approve credits.
- ⇒ All email to customers come through their own Outlook instance.

Current environment: Finance

- ⇒ Customers do not have invoice accounts.
- ⇒ Only finance resources have the ability to enter credits.
- ⇒ Credits can be entered by any of the four finance resources assigned the Credits and Refunds security role.
- ⇒ If the request has not been updated in four days, the request is escalated to the Controller. The account representative must be alerted when this occurs.

Requirements: Technical support/IT

- ⇒ Support technicians must use Microsoft's existing knowledge base to resolve open issues.
- ⇒ If an issue exists, support technicians must report the status of the issue on a weekly basis.
- ⇒ If there is no existing support request, support technicians must create one for Microsoft evaluation.
- ⇒ All software must be installed centrally when possible.
- ⇒ The Dynamics 365 Finance and Operations production environment must have an update cadence of every second Saturday from 4-7 A.M. EST.
- ⇒ Updates must be tested in separate environment.

Requirements: Account representatives

- ⇒ Account representatives must be able to see only the relevant customer fields and records automatically from their dashboard.
- ⇒ Account representatives must be able to export the list of customers to Microsoft Excel.
- ⇒ Account representatives must be able to navigate to the customer master record for any editing or record entry tasks.
- ⇒ The forms must be relevant based on each account representative's needs.
- ⇒ Account representatives need a centralized location to see multiple data components.
- ⇒ Account representatives require an offline list of their current customers in Excel with only the fields they need.
- ⇒ The IT Director must reassign all instances of an account representative's customer contacts if the representative leaves the company.
- ⇒ An alert must be sent automatically to an account representative when a credit is issued or any data is changed on a customer's record.

Requirements: Financials

- ⇒ Any refund must be printed as a physical check.
- ⇒ All printers must be exclusive to the financial legal entity.

Issues

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

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

You need to determine when and where the user regression testing should take place for new Dynamics 365 Finance releases.

When and where should the testing take place?

- A. the Monday before the second Saturday in the month in the base Test/User Acceptance Testing environment
- B. the Monday before the second Saturday in the month in the base sandbox environment
- C. the Monday after the second Saturday in the month in the base Test/User Acceptance Testing environment
- D. the Monday after the second Saturday in the month in the base sandbox environment

Answer: A

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

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

- A. Recreate the job alert as a change-based alert.
- B. Enable change-based alerts.
- C. Increase the batch job running frequency.
- D. Specify the batch server for the alert notifications job.

Answer: A,C

3.You need to trigger a Flow when a technical service order request is created.

Which three objects can you use? Each correct answer presents a complete solution. NOTE: Each correct selection is worth one point.

- A. Work items
- B. Change-based alerts
- C. Business Events
- D. External feeds
- E. Workflow

Answer: B,C,D

4.DRAG DROP

You need to enable interactive email providers for the different groups in the organization.

Which email providers should you enable? To answer, drag the appropriate email provider IDs to the correct groups. Each email provider ID 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 content. NOTE: Each correct selection is worth one point.

Email Provider ID

Answer Area

- EML
- Exchange
- SMTP
- IMAP

- Group**
- Customer Service
 - Account Representative

- Email Provider ID**
- -

Answer:

Email Provider ID

Answer Area

- EML
- Exchange
- SMTP
- IMAP

- Group**
- Customer Service
 - Account Representative

- Email Provider ID**
- SMTP
 - EML

5.DRAG DROP

You need to design a business process for the account manager’s customer list requirements. Which three actions you perform in sequence? To answer, move the appropriate actions to the answer area and arrange them in the correct order. NOTE: Each correct selection is worth one point.

Actions

On the workspace list, hide/remove fields by using **Personalize this form**.

Use the **Export to Excel** functionality on the data in the grid.

Use the **Open in Excel** functionality on the data in the grid.

Add the form to a workspace as a list.

Add the form to a workspace as a **Tile**.

On the workspace list, apply filters for **Advanced filter or sort**.

On the All Customers grid, hide/remove fields via **Personalize this form**.

On the All Customers grid, apply filters for **Advanced filter or sort**.

Answer:

Actions

On the workspace list, hide/remove fields by using **Personalize this form**.

On the All Customers grid, hide/remove fields via **Personalize this form**.

Use the **Export to Excel** functionality on the data in the grid.

On the All Customers grid, apply filters for **Advanced filter or sort**.

Use the **Open in Excel** functionality on the data in the grid.

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