

Microsoft

Exam Questions mb-240

Microsoft Dynamics 365 for Field Service



NEW 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 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

Answer: B

NEW QUESTION 2

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 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

Answer: A

NEW QUESTION 3

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.

Answer Area

| |
|----------------|
| Purchase Order |
| Agreement |
| Booking Status |

Draft

Billed

Estimate

Expired

Traveling

In progress

- A. Mastered
- B. Not Mastered

Answer: A

Explanation:

Answer Area

| |
|----------------|
| Purchase Order |
| Agreement |
| Booking Status |

Draft

Purchase Order

Billed

Purchase Order

Estimate

Agreement

Expired

Agreement

Traveling

Booking Status

In progress

Booking Status

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.

Answer: B

NEW QUESTION 5

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:

Answer Area

| 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. | |

- A. Mastered
- B. Not Mastered

Answer: A

Explanation:

Answer Area

| 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 |

NEW QUESTION 6

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

Answer: ABD

NEW QUESTION 7

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

Answer: AB

Explanation:

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

NEW QUESTION 8

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.

Answer Area

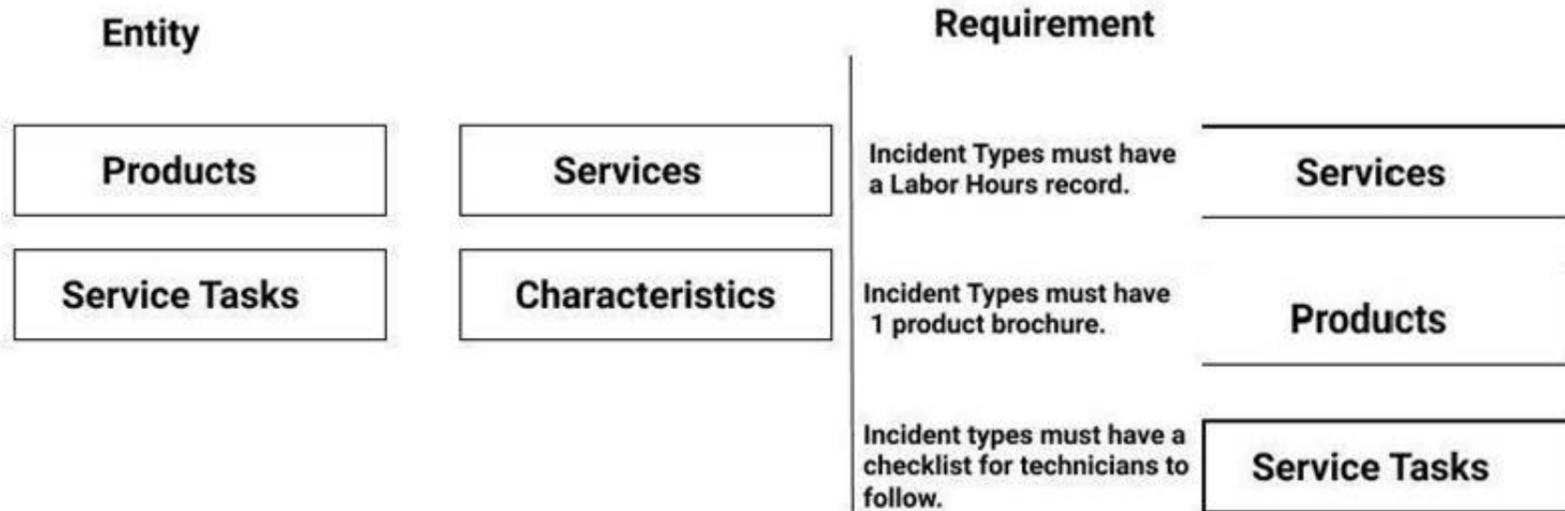
| Entity | | Requirement | |
|---------------|-----------------|---|--|
| Products | Services | Incident Types must have a Labor Hours record. | |
| Service Tasks | Characteristics | Incident Types must have 1 product brochure. | |
| | | Incident types must have a checklist for technicians to follow.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

- A. Mastered
- B. Not Mastered

Answer: A

Explanation:

Answer Area



NEW QUESTION 9

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 Work
- C. Select Load the Default Filters on the Schedule Board.
- D. Create a Requirement Resource Preference record for the resource.

Answer: B

NEW QUESTION 10

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.

Answer: AC

NEW QUESTION 10

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. | | |

- A. Mastered
- B. Not Mastered

Answer: A

Explanation:

| 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. | | |

NEW QUESTION 15

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.

Answer: CDE

Explanation:

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

NEW QUESTION 16

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.

Answer: A

Explanation:

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

NEW QUESTION 21

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.

Answer: ACE

NEW QUESTION 25

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.

Answer: D

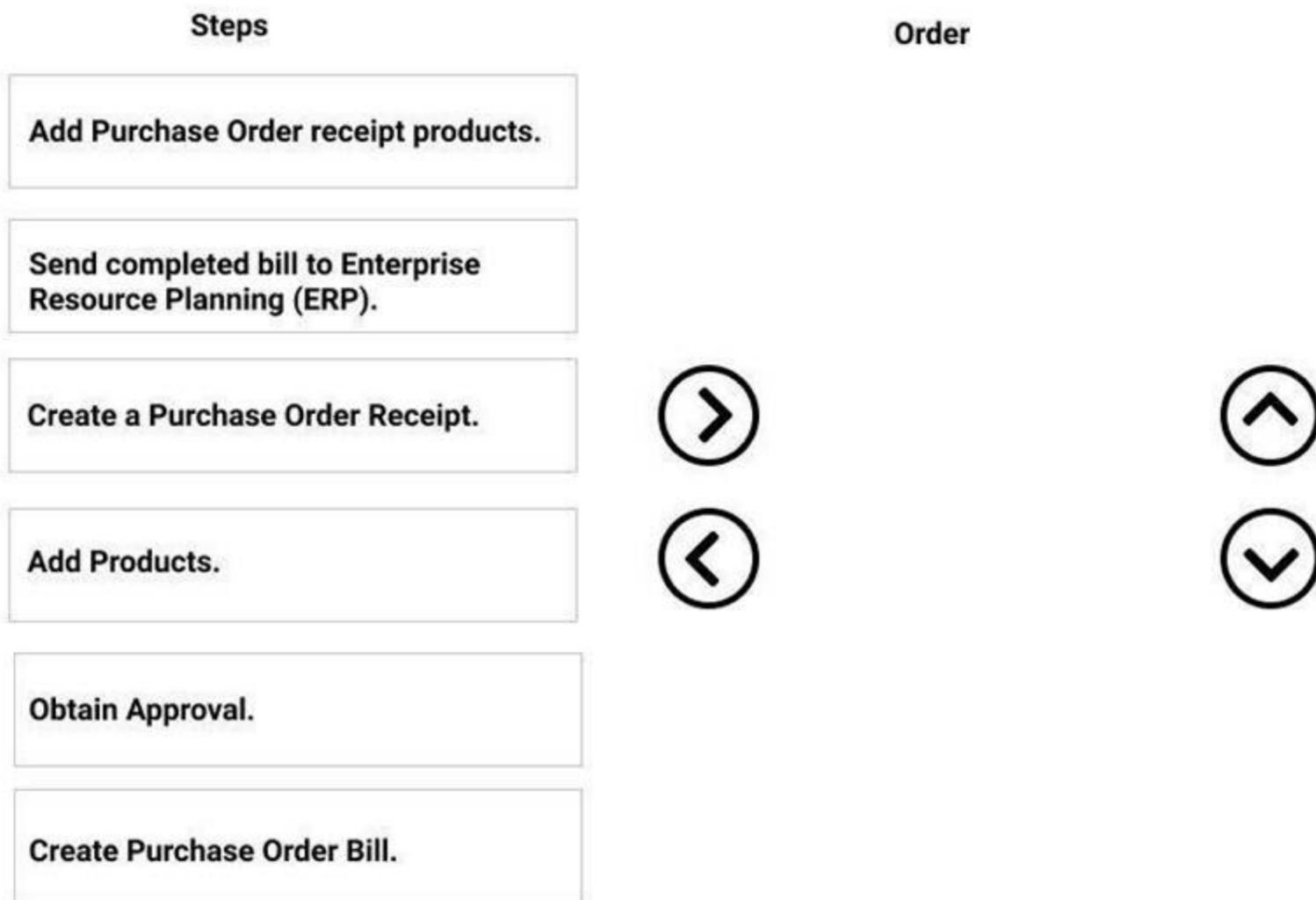
Explanation:

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

NEW QUESTION 27

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:



- A. Mastered
- B. Not Mastered

Answer: A

Explanation:

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

NEW QUESTION 30

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.

Answer: AB

Explanation:

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

NEW QUESTION 35

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 | | |

- A. Mastered
- B. Not Mastered

Answer: A

Explanation:

| Fields | | ORDER |
|--------------|--|---|
| Warehouse | | |
| Bin location | | |
| Unit | | |
| Product |  |  |
| Quantity | | |

| Fields | | ORDER |
|--------------|--|---|
| Warehouse | | |
| Bin location | | |
| Unit | | |
| Product |  |  |
| Quantity | | |

NEW QUESTION 36

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.
- 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.

- A. Mastered
- B. Not Mastered

Answer: A

Explanation:

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.

 Product is not Converted to Customer Asset.

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

 Product is not Converted to Customer Asset.

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

 Product is Converted to Customer Asset.

NEW QUESTION 41

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.

Answer: A

NEW QUESTION 42

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.

Answer: A

Explanation:

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

NEW QUESTION 43

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