



MB-240^{Q&As}

Microsoft Dynamics 365 Field Service

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QUESTION 1

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

Blank area for screenshot

Create an Inventory Adjustment record.

Blank area for screenshot

Blank area for screenshot

Post the Receipt record.

ORDER

Click the drop-down arrow next to the P.O. name.

Click Receipt Products

Click Show Purchase order Products not fully received yet.

Navigation icons: Right arrow, Left arrow, Down arrow

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

QUESTION 2

A customer service agent fails to solve a customer's issue over the phone.

The agent needs to converted the case to a work order in order to schedule a technician visit.

What is required to successfully convert a case to a work order?

- A. SLA
- B. Incident Type
- C. Work Order Type
- D. Customer Asset

Correct Answer: B

QUESTION 3

You are viewing the Microsoft Dynamics 365 Field Service historical insights report.

You need to determine the options available for filtering on the reports.

Which three options are available for filtering? Each correct answer presents a complete solution.



NOTE: Each correct selection is worth one point.

- A. Service task
- B. Service territory
- C. Asset
- D. Technician
- E. Date range

Correct Answer: BDE

QUESTION 4

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

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

QUESTION 5

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

QUESTION 6

You have created a new entity to tie to the Asset to capture key data. You launch the Microsoft Dynamics 365 Field Service mobile app in offline mode.

You need to ensure that you can see the entity.

What should you do?

A. Sign in to Power Apps, and ensure the entity is enabled for mobile offline.

B. Sign in to Power Apps, and ensure the entity is enabled for Microsoft Outlook mobile offline.

C. Sign in to the System Business Settings to ensure the entity is enabled for mobile offline.

D. Enable the entity for mobile.

Correct Answer: A

QUESTION 7

You are scheduling a customer for preventative maintenance performed on a predictable schedule.

The customer wants the work performed within two (2) days of the 15th of each month, and an Agreement has already been created.

Which three elements of the booking setup are valid? Each correct answer presents part of the solution.

NOTE: Each correct selection is worth one point.

A. Auto Generate Work Order = Yes

B. Preferred Resource contains data

C. Auto Generate Work Order = No

D. Preferred Resource either contains data or is blank

E. Pre-Booking Flexibility = 2 and Post Booking Flexibility = 2

Correct Answer: ADE

QUESTION 8



Your customer asks you to create a dashboard.

The application must meet the following requirements:

Capture work orders, asset information, and customer information.

Allow actions to be taken directly from the dashboard.

Allow data filtration.

You need to determine the type of dashboard you should create in the app designer.

Which type of dashboard should you create?

- A. Power BI
- B. Classic
- C. Single-stream interactive
- D. Multi-stream interactive

Correct Answer: D

QUESTION 9

You have configured Microsoft Dynamics 365 Customer Voice, along with Dynamics 365 Field Service.

Your manager wants to add the customer's First Name, Last Name, and Work Order Number to the survey.

In which two survey elements can you add these variables? Each correct answer presents a complete solution.

NOTE: Each correct selection is worth one point.

- A. Section description
- B. Footer text
- C. Post-survey message heading
- D. Survey header

Correct Answer: AC

QUESTION 10

You are a Microsoft Dynamics 365 Field Service dispatcher. A customer's work order has a particular characteristic and time requirement that is different from most other work orders.

You need to be shown the most suitable resources, and manually book the one that matches the customer's requirements.



What should you do?

- A. Schedule by using drag and drop on the Schedule Board.
- B. Schedule by building a rule to automatically assign the customer-preferred resource.
- C. Schedule the using Resource Scheduling Optimization.
- D. Schedule by using the Schedule Assistant.

Correct Answer: D

QUESTION 11

You are implementing a Microsoft Dynamics 365 Field Service solution for a client.

The client needs to be able to view the Parent Asset and Master Asset when the Primary Incident Customer Asset is associated to a work order. The asset data should not be stored directly on the work order. It should only be visible when the

Customer Asset is selected.

Solution:

1.
Create a quick view form on the Customer Asset.
2.
Add the Parent Asset and Master Asset to the new quick view form.
3.
Add the Customer Asset quick view form to the work order.
4.
Publish the customizations. Does this meet the goal?

A. Yes

B. No

Correct Answer: B

QUESTION 12

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**

Set Optimize Schedule field to Yes for all Work Order Requirement records.

Set Default Scheduling Method to Optimize for work order booking setup metadata.

Order

Set Optimize Schedule field to Yes for all Unscheduled Work Order Requirement records.

Update From Data and To Date for all uncheduled work order requirement record.



Configure Scheduling Method for booking statuses.



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

QUESTION 13

You have configured Microsoft Dynamics 365 Field Service, along with the Dynamics 365 Field Service mobile app.

A field service technician logs into the mobile app and reports issues performing standard functions. You confirmed that the technician has a valid Field Service license and the correct security role.

You need to find and resolve this issue.

What should you do?

- A. Check the user's permissions to the mobile app.
- B. Check the permissions for specific entities in the Security role.
- C. Check whether the user has access to the Field Service model-driven app.
- D. Check whether the appropriate field security profile is assigned.

Correct Answer: B

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