



## **Microsoft**

### **Exam Questions mb-240**

Microsoft Dynamics 365 for Field Service

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### 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 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

**Answer: B**

### NEW 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.

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 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	<input type="text"/>
Billed	<input type="text"/>
Estimate	<input type="text"/>
Expired	<input type="text"/>
Traveling	<input type="text"/>
In progress	<input type="text"/>

- 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

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 5**

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

**Answer:** BD

#### **NEW QUESTION 6**

##### **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.

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.		

- A. Mastered
- B. Not Mastered

**Answer:** A

**Explanation:**

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

**NEW QUESTION 7**

**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:

Actions	Answer Area	
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.		

- A. Mastered
- B. Not Mastered

**Answer:** A

**Explanation:**

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

**NEW QUESTION 8**

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.

**Answer:** D

**NEW QUESTION 9**

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.	

- A. Mastered
- B. Not Mastered

**Answer:** A

**Explanation:**

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

**NEW QUESTION 10**

**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**
- Requirement Group**
- Schedule Board**
- Booking Rule**
- Incident type**
- Booking Resource Booking**

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.

Dispatchers must be able to locate the resources needed for the heavy machinery repair within a single search to allow for efficient scheduling.

Dispatchers and scheduling administrators must have a way to easily review all resource availability and be able to schedule the work order.

When customers on credit hold request service, no technician can be sent and dispatchers must be alerted of the credit hold status.

- A. Mastered
- B. Not Mastered

**Answer:** A

**Explanation:**

**Answer Area**

- Resource Crew**
- Requirement Group**
- Schedule Board**
- Booking Rule**
- Incident type**
- Booking Resource Booking**

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.

Dispatchers must be able to locate the resources needed for the heavy machinery repair within a single search to allow for efficient scheduling.

Dispatchers and scheduling administrators must have a way to easily review all resource availability and be able to schedule the work order.

When customers on credit hold request service, no technician can be sent and dispatchers must be alerted of the credit hold status.

**Resource Crew**

**Schedule Board**

**Schedule Board**

**Booking Rule**

**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**

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

- A. Mastered
- B. Not Mastered

**Answer:** A

**Explanation:**

**Answer Area**

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

**NEW QUESTION 15**

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.

**Answer:** BDE

**NEW QUESTION 19**

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.		

- 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 24**

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:



### Answer Area

<b>track the return</b>
<b>other return to vendor options</b>

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.

- A. Mastered
- B. Not Mastered

**Answer:** A

**Explanation:**

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

**NEW QUESTION 30**

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.

**Answer:** BC

**Explanation:**

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

**NEW QUESTION 31**

**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.

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.

**NEW QUESTION 32**

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 34**

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 37**

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