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Topic Break Down

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QUESTION NO: 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 Agreement Products

3) Set Booking Recurrence

4) Create Invoice Setup

5) Define Invoice Recurrence

Does this meet the goal?

A. Yes

B. No

ANSWER: B

Explanation:

No is correct because the configuration does not include creating an Agreement Booking Setup. An agreement alone is only the parent record for the recurring service arrangement. To generate work orders automatically, Field Service requires an Agreement Booking Setup associated with the agreement. This setup defines the work-order generation behavior and is where the booking recurrence is configured. Agreement products and services are then associated with the booking setup so that they are added to the generated work orders.

Recurring invoicing similarly requires an Agreement Invoice Setup, which provides the invoicing configuration for the agreement and supports an invoice recurrence. Although the proposed steps include an invoice setup and recurrence, they omit the essential booking-setup record needed to establish the recurring work-order process. Therefore, the listed configuration cannot fully meet the requirement to automatically generate work orders from agreements while also invoicing customers on a recurring schedule. Microsoft's agreement configuration guidance describes setting up agreement booking details before configuring recurrence and work-order content. See Set up agreements to automatically generate work orders and Set up agreements to generate invoices.

QUESTION NO: 2

You are working on the Dynamics 365 Field Service self-scheduling portal. You are explaining the states of a booking or appointment that are visible in the portal to your customer.

The customer asks which portal states will yield a message that includes a link to an online web experience hosted on Microsoft Power Portals.

Which three messages will include this link? Each correct answer presents a complete solution.

NOTE: Each correct selection is worth one point.

A. Booking Reminder

B. Booking Canceled

C. Booking Committed

D. Booking Complete

E. Technician Traveling

ANSWER: A B D

Explanation:

Booking Reminder, **Booking Canceled**, and **Booking Complete** are the message types that include a link to the customer-facing online scheduling experience. The link gives the customer a direct route from a service communication to the portal experience associated with the appointment, rather than requiring the customer to locate the portal independently. This supports a consistent self-service workflow throughout the appointment lifecycle: a customer can access appointment-related information from a reminder, receive the portal route when an appointment is canceled, and return to the online experience after work has been completed.

In the terminology used when this capability was introduced, the hosted customer experience was implemented with Power Apps portals (also called Power Portals). The portal technology has since evolved into Microsoft Power Pages, but the purpose of these appointment communications remains to connect the customer to the relevant online experience. Field Service supports customer-focused scheduling and communication processes as part of its broader service-management capabilities. See the Dynamics 365 Field Service overview and the Microsoft Power Pages introduction for product context.

QUESTION NO: 3

You are implementing Connected Field Service.

You need to provide a list of IoT components that can be used within Connected Field Service. Which three IoT components are applicable? Each correct answer presents a complete solution. NOTE: Each correct selection is worth one point.

A. Azure Blob Storage

B. Azure SQL Database

C. App Services

D. Cognitive Services

E. Azure Cosmos Database

F. Stream Analytics

ANSWER: A C F

Explanation:

Azure Blob Storage, **App Services**, and **Stream Analytics** are applicable components in the Azure-based Connected Field Service architecture. Connected Field Service extends Dynamics 365 Field Service with device telemetry and alert processing, using Azure services to ingest, process, retain, and act on IoT data. Azure Blob Storage can be used for scalable storage of device messages and related unstructured data, supporting retention and later analysis. App Services provide the hosted application capability used by integration and management components that connect the Field Service environment with Azure IoT workloads. Stream Analytics provides real-time stream processing: it can evaluate incoming telemetry, apply query logic, and route meaningful events for downstream action, such as creating or updating IoT alerts that can lead to Field Service work orders. Together, these services support a practical flow from connected-device data through real-time processing and application integration into service operations. Microsoft describes Connected Field Service as using Azure IoT capabilities to monitor devices and trigger proactive service activities. See Connected Field Service overview and Azure Stream Analytics documentation.

QUESTION NO: 4

You are implementing Dynamics 365 for Field Service for a company with service teams in multiple regional offices.

Each technician must be associated with the office that manages the technician and from which the technician starts the workday.

You need to configure the Field Service record that represents each regional office.

What should you create?

A. An organizational unit

B. A territory

C. A warehouse

D. A customer asset

ANSWER: A

Explanation:

Create an **organizational unit** for each regional office. Organizational units represent locations or divisions within the service organization, such as regional branches, offices, or depots. Bookable resources can be associated with an organizational unit, allowing Field Service to represent the resource's operational home location.

Organizational units can also be used in scheduling scenarios, including travel calculations when a resource starts or ends the day at the organization's location. A territory represents an area where service is delivered, while a warehouse represents a location where inventory is stored. See Set up organizational units and Set up bookable resources.

QUESTION NO: 5

Your customer wants to update compressor temperature information in an external system called Maximo.

The update in the external system should happen if the compressor temperature reading is above 107 degrees, while the technician is performing onsite repairs.

What is the most efficient way to perform this task systematically?

A. Create a Business Process Flow on the work order to update Maximo when the temperature reading entered is greater than 107 degrees.

B. Create Dual Write integration logic to update Maximo when the temperature reading entered is greater than 107 degrees.

C. Create a Power Automate flow to update Maximo when the temperature reading entered is greater than 107 degrees.

D. Create a Business Process Flow on the booking to update Maximo when the temperature reading entered is greater than 107 degrees.

ANSWER: C

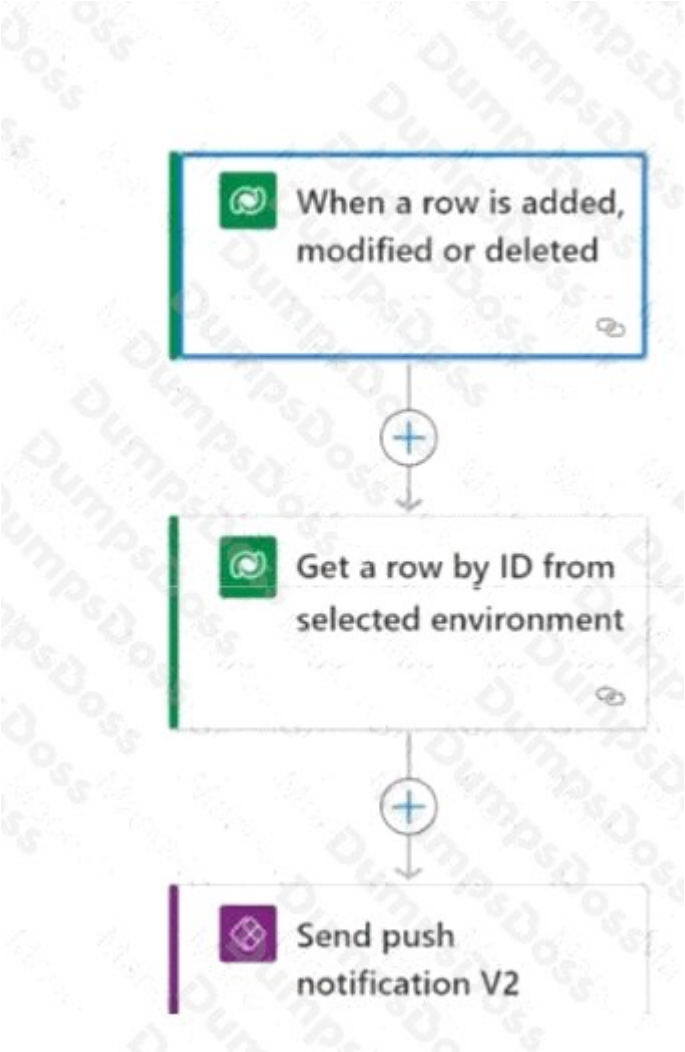
Explanation:

Create a Power Automate flow to update Maximo when the temperature reading entered is greater than 107 degrees. A cloud flow can systematically respond when the relevant Dataverse record is created or updated as a technician records the compressor temperature during onsite work. The flow can evaluate the temperature value with a condition and, only when it exceeds 107 degrees, call Maximo by using an available connector, a custom connector, or an HTTP action against Maximo's API. This provides an event-driven integration that is repeatable for every qualifying reading and does not require the technician to perform additional manual integration steps. Power Automate also supports connection management, monitoring through flow run history, and error-handling patterns such as retries or notifications, which are important for reliable updates to an external line-of-business system. Microsoft documents that Dataverse triggers can run flows when rows are added, modified, or deleted, and that conditions can control which actions run based on data values. See Microsoft Learn: Dataverse triggers and Microsoft Learn: Use conditions in cloud flows.

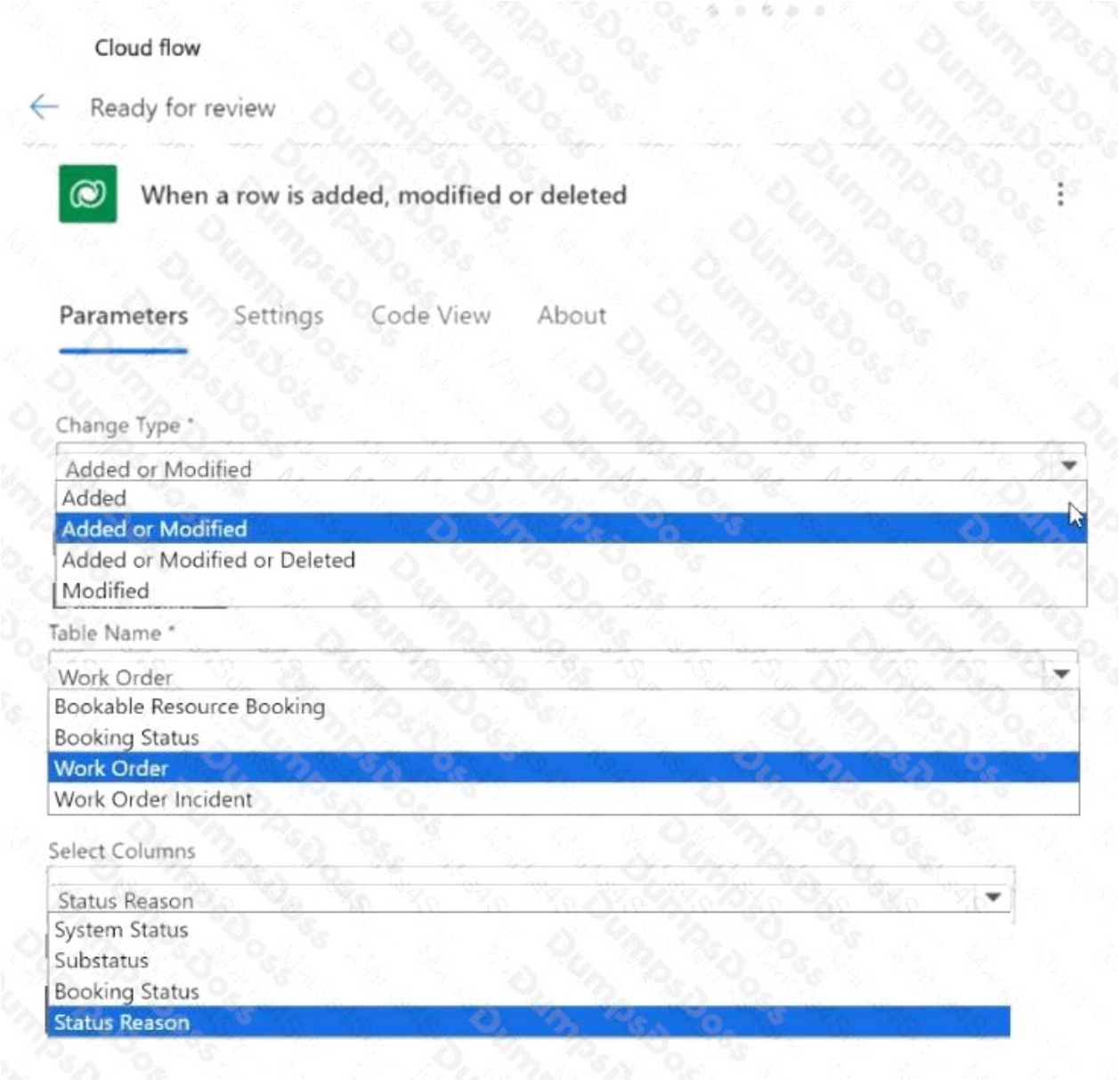
QUESTION NO: 6 - (SIMULATION)

You need to complete the cloud flow to send the push notification to the robotics engineer.

How should you configure the cloud flow ' s trigger? To answer, select the appropriate settings in the fields of the cloud flow.



NOTE: Each correct selection is worth one point.



ANSWER: See the explanation for the answer

Explanation:

Configure the Dataverse trigger **When a row is added, modified or deleted** as follows:

Change Type: `Added or Modified`
Table Name: `Work Order`
Select Columns: `Status Reason`

This starts the flow for newly created work orders and when the work order's status reason changes, allowing the subsequent actions to retrieve the work order and send the push notification.

QUESTION NO: 7 - (SIMULATION)

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.

ANSWER: See the explanation for the answer

Explanation:

Use the following Resource Scheduling components:

Known site issues, including credit holds or safety holds: Booking alerts. Configure an account/site booking alert (and set the account to not allow booking where the policy requires a hard block) so dispatchers are alerted and do not schedule work at that customer site.
A maintenance visit that requires multiple technicians: Requirement group. A requirement group contains the individual resource requirements and enables the Schedule Board or Resource Scheduling Optimization to find and book the required technicians together.

Therefore, drag **Booking alerts** to each task concerning credit or safety holds, and drag **Requirement group** to the task concerning sending more than one technician.

QUESTION NO: 8

You are a Dynamics 365 Field Service system administrator.

You need to enable your technicians to work offline using the Field Service Mobile app.

Which three items define what data will be taken offline? Each correct answer presents part of the solution. Choose three.

NOTE: Each correct selection is worth one point.

A. Tables

B. Views

C. Filters

D. Relationships

E. Sitemap

F. Forms

ANSWER: A C D

Explanation:

Offline data availability in Dynamics 365 Field Service Mobile is configured through the mobile offline profile. **Tables** define the Dataverse record types that are eligible for download to the technician’s device, such as work orders, bookings, accounts, and other Field Service records. **Filters** restrict the records downloaded from those tables so that each technician receives only the data relevant to their work, such as bookings assigned to that user or records within a required date range. **Relationships** determine how related records are included when the primary table’s records are synchronized. For example, when a booking is downloaded, related work-order information and other required related data can be made available offline through the configured table relationships. Together, these settings control both the scope of the offline dataset and the connected records required for technicians to complete work without connectivity. Microsoft’s offline profile guidance describes configuring tables and associated filters, while the Field Service Mobile documentation explains that offline profiles provide the data needed by users in offline scenarios. See Configure Mobile Offline and Field Service Mobile overview.

QUESTION NO: 9

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. Multi-stream interactive

C. Single-stream interactive

D. Classic

ANSWER: B

Explanation:

Multi-stream interactive is the appropriate dashboard type because it provides an interactive workspace for monitoring and acting on records from multiple tables. In this scenario, the dashboard must present work orders, asset information, and customer information, which are distinct but related types of Field Service data. A multi-stream interactive dashboard can include separate data streams for each relevant table, giving dispatchers or service managers a consolidated operational view without limiting the dashboard to a single record type.

Interactive dashboards also support filtering, including global filters that update the dashboard's streams and charts based on selected values. This enables users to focus on the records relevant to a particular customer, date range, status, territory, or other business criterion. In addition, the streams display actionable records, allowing users to open a record and perform work directly from the dashboard experience. Microsoft describes interactive dashboards as providing real-time, actionable views of business data, with multi-stream dashboards supporting multiple entity streams. See Interactive dashboards in model-driven apps and Create and edit dashboards for model-driven apps.

QUESTION NO: 10

A customer wants to book a servicing appointment from the Field Service self-scheduling portal.

The customer needs to be able to schedule an appointment with an available technician with the right skillset for the job.

Which two options can be used? Each correct answer presents a complete solution,

NOTE: Each correct selection is worth one point

A. Communication Type

B. Work Order type

C. Service Product

D. Service Type

ANSWER: B D

Explanation:

Work Order type and **Service Type** can be exposed as service-selection approaches in the Field Service self-scheduling experience. Each approach gives the customer a meaningful way to identify the service they need before submitting a booking request. The selected service information is used to create the underlying service request or work order context, including the scheduling requirements that the system evaluates.

Field Service scheduling evaluates resource availability together with requirement details such as required characteristics, territory, duration, and other constraints. Consequently, configuring services through a work order type or a service type allows the booking process to be tied to the appropriate work definition and its technician-skill requirements. The schedule assistant can then identify a technician who is both available in the requested time period and qualified for the work.

Work order types also provide a consistent way to classify work orders and apply operational defaults, while service types provide a customer-facing service choice for appointment booking. This supports a self-service booking flow without requiring the customer to know which technician should perform the work. See Configure work order types and Schedule work orders in Microsoft Learn.

QUESTION NO: 11

You are a Dynamics 365 for Field Service administrator.

Your organization uses different labor rates and product prices for installation work and emergency repair work.

You need new work orders to automatically use the appropriate price list according to the selected work order type.

What should you configure?

A. Configure the applicable Price List on each work order type.

B. Configure the applicable Price List on each booking status.

C. Configure the applicable Price List on each resource territory.

D. Configure the applicable Price List on each service task.

ANSWER: A

Explanation:

Configure the applicable **Price List** on each work order type. A work order type categorizes work orders and can be configured with defaults that are applied when users create work orders of that type. Associating the correct price list with an installation or emergency repair work order type helps ensure that Field Service uses the intended prices for work order products and services.

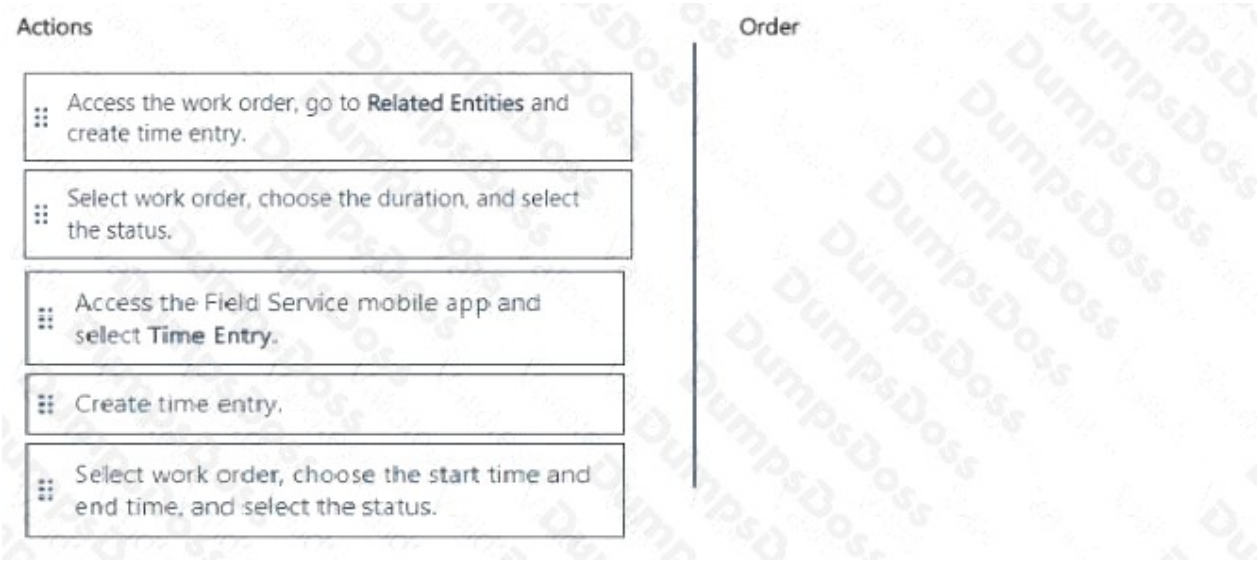
An incident type standardizes the work that must be performed, including tasks, products, services, and requirements. It does not replace the work order type configuration used to establish work-order defaults such as pricing behavior. For more information, see Work order types in Dynamics 365 Field Service and Add products and services to work orders.

QUESTION NO: 12 - (DRAG DROP)

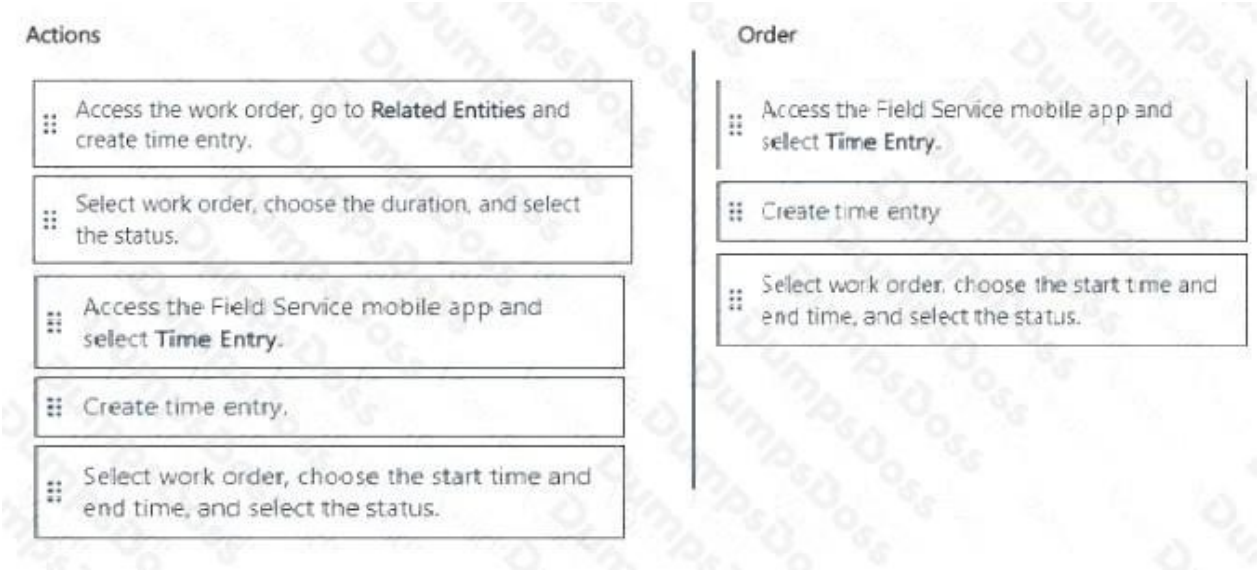
LitWare has requirements for the ability to track technician time.

You need to set up a manual option to track the time against the work orders.

Which three actions should you perform in sequence? To answer, move the three a Arrange the three actions in the correct order.



ANSWER:



Explanation:

Manual technician time tracking is performed from the Time Entry area in the Field Service mobile experience. The technician starts by opening the Field Service mobile app and selecting **Time Entry**, which opens the place where individual time records are managed. From there, the technician creates a new time entry. Creating the record first is necessary because the work performed, time boundaries, and workflow state are fields on that time-entry record.

After the new record is open, the technician associates it with the appropriate work order and records the actual **start time** and **end time**. The technician then selects the required status to complete the entry according to the organization's time-entry process. This captures manually entered elapsed work time in a way that can be connected to the work order and used for operational tracking, review, and downstream reporting.

This follows the standard Field Service approach in which time entries are separate records associated with work orders, rather than a duration being entered directly as the initial action on the work order. Microsoft's Field Service documentation describes using time entries to record technician work time and link that time to the relevant work order. See Track time in Dynamics 365 Field Service and Dynamics 365 Field Service mobile for the mobile workflow context.

QUESTION NO: 13

You are identifying Inconsistencies in recent work order billings.

You find a work order that does not have art Invoke and Actuals posted

What are two reasons why this may have happened? tach correct answer presents a complete solution.

NOTE: Each correct selection is worth one point.

A. Actuals are only generated when the invoke is marked M Paid

B. Actuals are only generated when the invoke is Confirmed

C. The Work Order Invoice Creation setting is set to Never

D. The setting for generating invoices for work orders created by an agreement was incorrectly set.

ANSWER: C D

Explanation:

The Work Order Invoice Creation setting is set to Never is a valid reason because this Field Service setting controls whether the application automatically creates invoices from work orders. When it is configured as *Never*, completing and posting a work order does not produce an invoice, even if the work order contains billable products or services. Administrators should review this setting when expected billing records are absent.

The setting for generating invoices for work orders created by an agreement was incorrectly set is also valid. Agreement-generated work orders follow the agreement's billing and invoice configuration. The agreement invoice setup determines how and when invoices are generated for work performed under that agreement. If the agreement configuration is missing, disabled, or uses an inappropriate invoice schedule, the related work order can be completed without the expected billing outcome. Reviewing both the global invoice-creation behavior and the agreement's invoice setup is therefore necessary when investigating billing inconsistencies for recurring work.

For configuration details, see Configure Field Service settings and Set up agreements in Dynamics 365 Field Service.

QUESTION NO: 14 - (DRAG DROP)

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:



ANSWER:



Explanation:

After a purchase order exists in Dynamics 365 Field Service, the operational process starts by adding the required product to the order. In this case, the thermal overload cooling fan is the item that must be purchased, so it needs to be represented as a purchase-order product before the order can proceed. The purchase order is then approved, establishing that the organization has authorized the purchase and that the order can move forward.

When the vendor delivers the fan, the receiving process is recorded by creating a purchase order receipt. The receipt is the transaction that documents that goods have arrived. Products are then added to the purchase order receipt to identify the actual items and quantities received. This supports inventory and cost tracking by tying the delivered product to the original purchase order.

After the receipt and its product lines are recorded, creating a purchase order bill completes the purchasing workflow in Field Service. The bill records the supplier-facing financial information associated with the received purchase-order products. This order keeps authorization, physical receipt of goods, and billing properly aligned. Sending a completed bill to an ERP system is an optional integration-related activity rather than a required core step in the five-step Field Service purchase-order and receiving sequence shown here. Microsoft's purchase-order guidance is available in the Dynamics 365 Field Service purchase orders documentation.

QUESTION NO: 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: B C D

Explanation:

Resource Scheduling Optimization must first be activated before it can evaluate resource requirements, available capacity, constraints, and bookings to generate optimized schedules. Therefore, **Enable Resource Scheduling Optimization.** is required at the environment level. Users who perform scheduling and run or manage optimization jobs need the appropriate Resource Scheduling Optimization permissions in addition to their Field Service scheduling permissions. Assigning the RSO dispatcher role to a dispatcher enables that dispatcher to work with optimization capabilities for booking and requirement scheduling.

Travel time and route calculations are an important input to optimization because the service selects resources based not only on availability and skills, but also on factors such as location and travel. Setting **Connect to Maps as Yes.** enables Field Service to use mapping services for this location-aware scheduling information. With RSO enabled, a properly authorized dispatcher, and map connectivity configured, the organization can create optimization schedules that automatically assign work to suitable resources. For configuration guidance, see Configure Resource Scheduling Optimization and Resource Scheduling Optimization security roles.

QUESTION NO: 16

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

B. Enable the entity for mobile.

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

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

ANSWER: C

Explanation:

Sign in to Power Apps, and ensure the entity is enabled for mobile offline. Field Service mobile uses Power Apps mobile offline capabilities, so a custom Dataverse table must be included and configured in the app's mobile offline profile before its data can be downloaded and used without connectivity. In the Power Apps maker portal, an administrator or maker opens the relevant mobile offline profile, adds the custom table, and configures the required data filters and relationships. The profile is then published so that the Field Service mobile app can synchronize the table's permitted records to the technician's device. Adding the table is particularly important when it is related to an asset, because any related tables and the columns required by forms, views, or business processes must also be available in the offline configuration. After the revised profile is published and the device synchronizes, users can view and work with the entity's records while offline. Microsoft describes configuring mobile offline profiles and selecting Dataverse tables in the Power Apps mobile offline documentation. Field Service-specific offline behavior and setup are covered in the Field Service Mobile offline documentation.

QUESTION NO: 17

You are a Dynamics 365 Field Service technician at a customer site. Three additional existing customer assets need to be added to the work order. You need to add these customer assets to the work order. What should you do?

A. Add the customer assets to the primary work order incident.

B. Add the customer assets at the work order product level.

C. Add additional incidents with the associated existing asset.

D. Add the customer assets directly to the work order.

ANSWER: C

Explanation:

Add additional incidents with the associated existing asset. In Dynamics 365 Field Service, a work order incident represents a specific service issue or job to be completed as part of a work order. Each work order incident includes an associated Customer Asset field, allowing the work order to cover service for more than one existing customer asset. Create an additional work order incident for each of the three assets and select the appropriate existing asset on that incident. This preserves the relationship between the work performed and the individual asset being serviced, which supports accurate service history, asset tracking, and downstream reporting. Work order incidents can also contain the incident-specific service tasks, products, and services required for that asset. This model is especially appropriate when a technician discovers additional assets requiring work after the original work order has already been created. Microsoft documents that work order incidents organize the work to be performed and can be associated with customer assets; incident types can populate the relevant service details when applicable. See Work order incident types in Field Service and Customer assets in Field Service.