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Microsoft Dynamics 365 Fundamentals Finance and Operations Apps (ERP)

Microsoft MB-920

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Topic Break Down

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QUESTION NO: 1

A company implements Dynamics 365 Finance.

Which two components can you use to create a financial dimension set?

Each correct answer presents part of the solution.

NOTE: Each correct selection is worth one point.

A. Derived dimension

B. Financial dimension

C. Main account

D. Account structure

ANSWER: B C

Explanation:

A financial dimension set is a named collection of dimensions that Finance uses to organize and report ledger information consistently. The set can include one or more **Financial dimension** values, such as Department, Cost center, Business unit, or a custom dimension backed by a legal-entity-specific or shared list. Including these dimensions allows reports and inquiries to group, filter, and display balances according to the organization's reporting requirements.

A **Main account** can also be included in a financial dimension set. The main account represents the natural account portion of the ledger account, such as cash, revenue, expense, asset, or liability classifications. Including it enables reporting and analysis that combines account balances with the selected organizational dimensions. This is particularly useful for financial reporting layouts that need to show values by both account and organizational segments.

Dimension sets support reusable reporting definitions: after a set is created, it can be selected where a consistent combination of ledger dimensions is needed. Microsoft describes financial dimensions and their relationship to the main account in the ledger account structure in Financial dimensions. For configuration context, see Configure account structures.

QUESTION NO: 2

An organization has several legal entities that use separate general ledgers.

The organization needs to combine the financial results of the legal entities for corporate reporting.

You need to recommend a Dynamics 365 Finance feature.

What should you recommend?

A. Financial consolidation

B. Vendor collaboration

C. Transportation management

D. Retail assortment management

ANSWER: A

Explanation:

Financial consolidation is the appropriate recommendation because it enables an organization to combine account balances from multiple legal entities into a consolidated legal entity for financial reporting. The source legal entities can maintain their own ledgers, currencies, and fiscal periods while their financial information is brought together for corporate analysis.

Consolidation processes can include mapping source accounts and dimensions to the consolidated organization, translating currencies when required, and posting consolidation transactions. This provides a structured method for producing financial statements that represent the results of the organization as a whole.

For more information, see Financial consolidation overview.

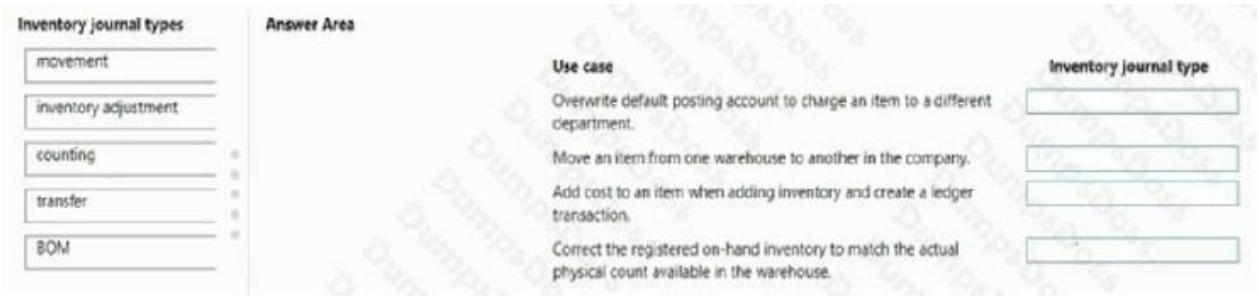
QUESTION NO: 3 - (DRAG DROP)

A company implements Dynamics 365 Supply Chain Management.

The company needs to use inventory journals to post different types of physical inventory transactions.

Match each type of inventory journal to its use case. To answer, drag the appropriate type of inventory journal from the column on the left to its use case on the right. Each type of inventory journal may be used once, more than once, or not at all.

NOTE: Each correct match is worth one point.



ANSWER:

Explanation:

Inventory journals provide a controlled way to record physical inventory activity while applying the appropriate inventory and financial posting behavior. The correct mapping uses the journal designed for each operational purpose. A movement journal is used when inventory must be issued or received with a financial offset that can be selected for the transaction, such as charging the value of an item to a different department rather than using the item's usual posting setup. A transfer journal records an internal move of inventory from one warehouse to another warehouse in the same legal entity.

An inventory adjustment journal is appropriate when inventory is added and a cost must be entered for that receipt. Posting the adjustment updates the item's on-hand quantity and value and creates the related ledger transaction. A counting journal supports a physical stock count: users enter the counted quantity and, after posting, the system adjusts the registered on-hand quantity to agree with the actual quantity found in the warehouse. These journal types therefore align the operational event, inventory update, and financial impact correctly. Microsoft's inventory-journal documentation describes journals as the mechanism for creating and posting inventory transactions, including movement, transfer, adjustment, and counting activities. See Inventory journals in Dynamics 365 Supply Chain Management and Create and post a counting journal.

QUESTION NO: 4

A company plans to implement Dynamics 365 Supply Chain Management.

Which three actions can vendors perform? Each correct answer presents a complete solution.

NOTE: Each correct selection is worth one point.

A. Change the inventory cost of items.

B. Submit invoices electronically.

C. Create transfer orders.

D. Confirm purchase orders.

E. Respond to a request for quote (RFQ).

ANSWER: B D E

Explanation:

Dynamics 365 Supply Chain Management provides vendor collaboration capabilities that let external vendors participate directly in selected procurement processes through the Vendor collaboration module. Vendors can submit invoices electronically by creating and submitting vendor invoices in the collaboration interface, where the invoices are then available for the customer organization to review and process. This reduces manual document exchange and supports a more streamlined procure-to-pay process.

Vendors can also confirm purchase orders. They can review purchase-order information that has been shared with them, update relevant delivery details when permitted, and submit confirmations to communicate whether and how they will fulfill the order. Purchase-order confirmation gives the buying organization current information for planning and follow-up.

Responding to a request for quote (RFQ) is another vendor collaboration function. A vendor can review an RFQ received from a customer, enter quotation details such as prices and delivery terms, and submit the response for the customer's evaluation. These capabilities are documented in the Vendor collaboration with customers article and the Vendor collaboration overview.

QUESTION NO: 5 - (HOTSPOT)

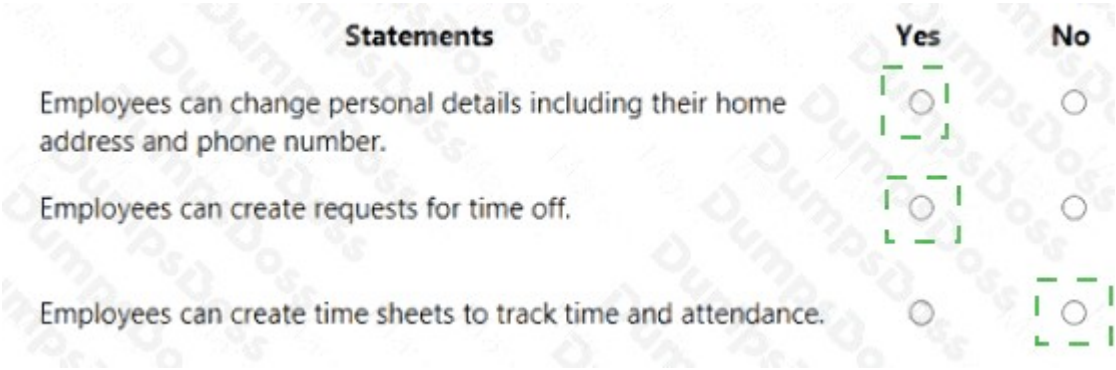
A company wants to understand the self-service capabilities of Dynamics 365 Human Resources. Instructions: For each of the following statements, select Yes if the statement is true. Otherwise, select No.

NOTE: Each correct selection is worth one point.

Statements	Yes	No
Employees can change personal details including their home address and phone number.	○	○
Employees can create requests for time off.	○	○
Employees can create time sheets to track time and attendance.	○	○

ANSWER:

Answer:



Answer:

Explanation:

Dynamics 365 Human Resources includes employee self-service features that allow employees to view and maintain information that belongs to their own worker record. This includes personal and contact details, subject to the organization's security and configuration. An employee can therefore update information such as a home address and phone number without needing an HR representative to make every routine change. Microsoft documents this capability in its employee self-service guidance: Employee self service.

Employee self-service also supports leave and absence processes. Employees can create and submit requests for time off, allowing the request to follow the organization's configured approval workflow. This gives employees visibility into their leave information and enables managers or approvers to review requests through the appropriate process. The related Microsoft documentation describes using leave and absence features for requesting time off: Leave and absence overview.

Accordingly, the correct hotspot selections are Yes for the statement about changing personal details, Yes for the statement about creating time-off requests, and No for the statement about creating timesheets to track time and attendance. The answer image places the markers in exactly these locations, so no correction is needed.

QUESTION NO: 6

A company uses Dynamics 365 Commerce.

The company needs to schedule several base Dynamics 365 Commerce reports.

The reports must print statistics about inventory sales from the previous week every Sunday night to a physical printer.

You need to identify the right tool.

Which tool should you use?

A. Management Reporter

B. Chart controls

C. Power Bi

D. Microsoft Excel

E. Microsoft SQL Server Reporting Services (SSRS)

ANSWER: E

Explanation:

Microsoft SQL Server Reporting Services (SSRS) is the appropriate tool because base Dynamics 365 Commerce reports are SSRS reports. SSRS is designed for operational, formatted reports that can retrieve transactional data, apply date-based parameters such as the prior week, and produce printer-ready output. In this scenario, the report execution can be configured as a recurring batch job that runs every Sunday night. Its destination settings can then send the generated report to a network or physical printer, rather than requiring a user to open and manually print it.

This capability is especially suitable for regularly distributed inventory-sales statistics because SSRS provides a consistent layout for tabular operational reporting and supports report parameters, batch processing, and print destinations within

Dynamics 365 finance and operations apps. Commerce reporting uses the platform's SSRS reporting infrastructure, so it aligns with the requirement to schedule standard Commerce reports rather than build a separate analytics solution. Microsoft's documentation describes the use of SSRS reports in finance and operations apps and the platform batch framework used to automate recurring processes: SSRS reporting in Dynamics 365 and Batch processing overview.

QUESTION NO: 7

A company uses Dynamics 365 Supply Chain Management and Warehouse Management.

The company wants the system to create warehouse work for outbound orders and direct workers to the appropriate locations for picking and putting inventory.

Which two Warehouse Management components should you configure? Each correct answer presents part of the solution.

NOTE: Each correct selection is worth one point.

A. Work templates

B. Location directives

C. Financial dimension sets

D. Vendor invoice workflows

E. Collection letter sequences

ANSWER: A B

Explanation:

Work templates define the warehouse work that the system creates for a process. For example, a work template can define the sequence of pick and put activities required to fulfill a sales order. Work templates help ensure that workers receive the appropriate work instructions on the Warehouse Management mobile app.

Location directives determine the locations that the system uses for warehouse work. They can direct the system to select an appropriate picking location for inventory and an appropriate put location for the work process. Location directives can use inventory, location, and order criteria to apply the correct warehouse rules.

Work templates and location directives operate together to generate work and determine where workers should perform each activity. For more information, see Work templates and Location directives.

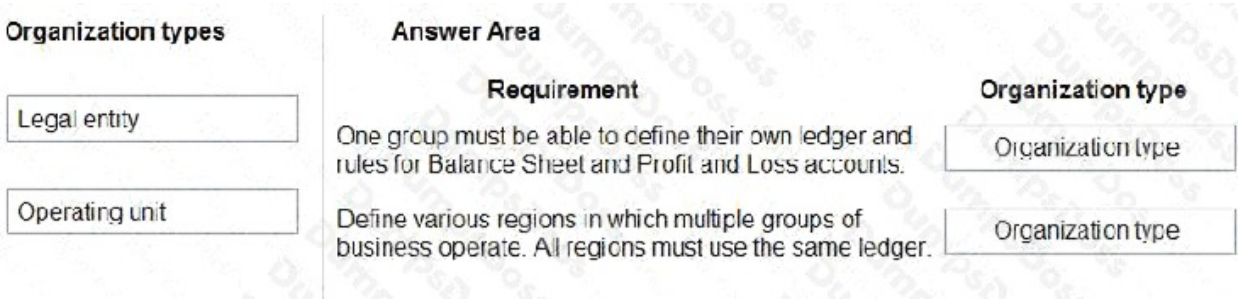
QUESTION NO: 8 - (SIMULATION)

An organization consisting of several companies is implementing Dynamics 365 Finance. The organization views company and department data by geographical regions and business functions.

You need to recommend organization types for the company based on the requirements.

What should you recommend? To answer, drag the appropriate organization types to the correct scenarios. Each organization type 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.



ANSWER: See the explanation for the answer

Explanation:

Assign the organization types as follows:

One group must be able to define their own ledger and rules for Balance Sheet and Profit and Loss accounts:
`Legal entity`

Define various regions in which multiple groups of business operate. All regions must use the same ledger:
`Operating unit`

A legal entity has its own accounting ledger and financial reporting requirements. Operating units, such as regional or functional structures, can be used to represent internal parts of the organization while sharing the legal entity's ledger.

QUESTION NO: 9

A company is implementing Dynamics 36S Commerce for retail operations and Dynamics 36S Supply Chain Management for warehousing and financial operations. You need to import small groups of new customers and edit existing customers. Which two tools should you use? Each correct answer presents a complete solution.

NOTE: Each correct selection is worth one point.

A. Data upgrade tool

B. Data management workspace

C. Microsoft Dynamics Office add-in for Microsoft Excel

D. Microsoft Dynamics Office add-in for Microsoft Word

ANSWER: B C

Explanation:

Data management workspace is appropriate for importing customer data because it provides the framework for importing and exporting business data through data entities. A user can select a customer-related entity, prepare a data project, map source fields when needed, validate the data, and run the import. This makes it suitable for loading small groups of new customer records, as well as for repeatable imports that require monitoring and error handling. Microsoft describes data management as the capability used to manage data entities and import/export data projects in finance and operations apps. See Data management overview.

Microsoft Dynamics Office add-in for Microsoft Excel is appropriate for editing existing customers because Excel integration lets authorized users open entity data in an Excel workbook, make changes using familiar spreadsheet features, and publish those changes back to Dynamics 365. The add-in works with Open in Excel-enabled data entities, allowing users to update multiple existing records efficiently while Dynamics 365 applies its business data validation on publish. This is particularly useful when the update is a small, user-driven maintenance task rather than a large-scale integration. Microsoft documents this workflow in Office integration with Excel.

QUESTION NO: 10

A company is evaluating Dynamics 365 Supply Chain Management.

You need to identify the available modules in Supply Chain Management.

Which two modules can you identify? Each correct answer presents a complete solution. Choose two.

NOTE: Each correct selection is worth one point.

A. Time and attendance

B. Inventory management

C. Fixed assets

D. Procurement and sourcing

E. Cash and bank management

ANSWER: B D

Explanation:

Inventory management is a core Dynamics 365 Supply Chain Management functional area. It provides the processes and controls used to manage on-hand inventory across sites and warehouses, including inventory transactions, reservations, inventory status, counting, transfers, and inventory valuation-related operational information. Effective inventory management gives organizations visibility into available stock and supports fulfillment, replenishment, warehouse operations, and planning activities.

Procurement and sourcing is also a core Supply Chain Management module. It supports the end-to-end purchasing process for goods and services, including vendor management, procurement policies, purchase requisitions, requests for quotation, purchase orders, product receipts, and vendor collaboration. These capabilities help an organization source materials and services required for its supply chain while applying purchasing controls and maintaining supplier-related information.

Microsoft groups both functional areas within its Supply Chain Management documentation and describes their business processes as part of the product's supply chain capabilities. For more information, see Inventory management overview and Procurement and sourcing overview.

QUESTION NO: 11

An organization has two legal entities. Items may be sold by one company only or by both companies.

You need to recommend a solution to standardize the items across the legal entities.

What should you recommend?

A. Lifecycle Services

B. Item templates

C. Products and product masters

D. Product Insights

ANSWER: C

Explanation:

Products and product masters is the appropriate recommendation because Dynamics 365 Supply Chain Management separates shared product definitions from company-specific released-product setup. A product or product master is created in the shared product-information area, allowing the organization to maintain a consistent product identity, name, description, units, dimensions, and other common attributes. The product can then be released only to the legal entities that need to sell

or otherwise use it. This directly supports the requirement that some items are available in one company while others are available in both, without creating separate, inconsistent item definitions for each legal entity.

After release, each legal entity can maintain its own operational settings for the released product, such as site-specific coverage, costing, purchasing, sales, inventory, and warehouse-related setup. Product masters are particularly useful when products vary by dimensions such as size, color, style, or configuration, while a standard product is suitable where no such variants are required. This shared-product and legal-entity release model provides central standardization together with the needed company-level control. See Release products to legal entities and Product information management overview.

QUESTION NO: 12

A manufacturer uses Dynamics 365 Supply Chain Management.

The manufacturer wants to predict future customer demand by using historical sales data and then use the forecast as input to supply planning.

You need to recommend a feature.

What should you recommend?

A. Demand forecasting

B. Vendor collaboration

C. Cycle counting

D. Invoice matching

ANSWER: A

Explanation:

Demand forecasting is the appropriate feature because it enables an organization to generate statistical forecasts from historical transaction data. Forecast results can be reviewed and adjusted to reflect expected market conditions, promotions, or business knowledge.

The approved demand forecast can be used by master planning to help calculate future material and capacity requirements. This enables the manufacturer to plan purchase, production, and transfer supply based on expected demand rather than relying only on existing orders. For more information, see Demand forecasting.

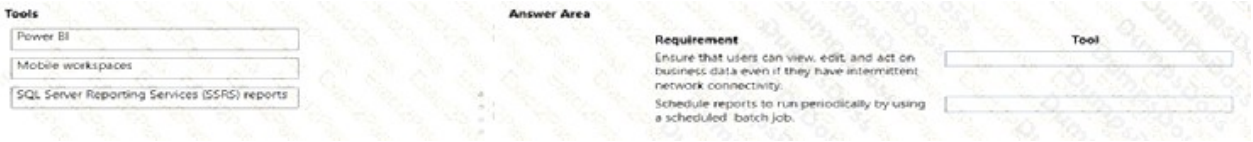
QUESTION NO: 13 - (SIMULATION)

A company plans to implement Dynamics 365 Finance and Dynamics 365 Supply Chain Management.

You need to recommend tools to meet the company ' s reporting requirements.

What should you recommend? To answer, drag the appropriate tools to the correct requirements. Each tool 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.



ANSWER: See the explanation for the answer

Explanation:

Assign the tools as follows:

Mobile workspaces provide mobile access to Finance and Supply Chain Management data and can support offline/intermittent-connectivity scenarios. SSRS reports can be configured to run through the batch framework on a recurring schedule.

QUESTION NO: 14

A company that manufactures bottled and canned beverages implements Dynamics 365 Supply Chain Management.

Most products are packed in quantities of 12 or 24.

You need to recommend a process to ensure that customers always purchase the products in these predefined package quantities.

What should you recommend?

A. Set up purchase order multiples for the items.

B. Configure a standard order quantity for the items.

C. Create a purchase order and manually adjust the order quantities.

D. Set up a safety stock quantity for the items.

E. Set up sales order multiples for the items.

ANSWER: E

Explanation:

Set up sales order multiples for the items. In Dynamics 365 Supply Chain Management, default order settings can be defined per released product and site, with separate controls for inventory, purchase, and sales orders. The sales-order multiple specifies the increment in which an item can be ordered by a customer. For example, a sales-order multiple of 12 allows quantities such as 12, 24, 36, and 48, which aligns ordering with the manufacturer's defined package sizes. This provides an order-entry control that supports the commercial requirement that customers purchase full package quantities rather than arbitrary individual-unit quantities.

Where products are available in different pack sizes, the business can define the appropriate sales multiple for each released product or product variant. The sales setting is specifically relevant because the requirement concerns quantities entered on customer sales orders, not quantities the company purchases from vendors or quantities used for replenishment planning. Default order settings can also include minimum and maximum quantities when the organization needs additional sales-quantity restrictions, but the order multiple is the setting that enforces package-based ordering increments. See Default order settings for products and Item coverage and planning parameters.

QUESTION NO: 15 - (HOTSPOT)

HOTSPOT

A company plans to implement Dynamics 365 Finance as their financial system. The company needs to know which features the system supports.

For each of the following statements, select Yes if the statement is true. Otherwise, select No.

NOTE: Each correct selection is worth one point.

Hot Area:

Answer Area

Statements	Yes	No
Configure separation of duties for tasks that must be performed by different users.	○	○
Automatic notification for approval when an invoice created is higher than $10,000.	○	○
Scheduled generation of financial statements.	○	○

ANSWER:

Answer Area

Statements	Yes	No
Configure separation of duties for tasks that must be performed by different users.	○	○
Automatic notification for approval when an invoice created is higher than $10,000.	○	○
Scheduled generation of financial statements.	○	○

Explanation:

Dynamics 365 Finance supports each capability represented in the answer area. Segregation of duties is available through the security framework and is used to identify or prevent conflicting responsibilities from being assigned to the same user. Organizations can define duties, privileges, and conflict rules so that sensitive financial activities are appropriately separated among users. This provides an important internal-control mechanism for finance operations. Microsoft describes the setup and management of these controls in its segregation of duties documentation.

The application also supports workflow-based approval processes for vendor invoices. A workflow can use conditions, including invoice monetary amounts, to route an invoice for approval when it exceeds a defined threshold such as $10,000. Workflow participants can receive notifications and work items so that they are alerted to approvals requiring their action. This lets a company apply its approval policy consistently while retaining an auditable workflow history. Details of invoice workflow configuration are available in the vendor invoice workflow documentation.

Finally, Dynamics 365 Finance includes Financial reporting for producing formal financial statements and management reports. Financial reports can be generated and distributed according to a schedule, enabling recurring production of reports such as balance sheets, income statements, and cash-flow statements without requiring a user to manually run each report every time. Scheduled reporting helps ensure stakeholders receive current financial information at regular intervals. Microsoft documents this functionality in its Financial reporting overview.

QUESTION NO: 16

A company uses Dynamics 365 Commerce to manage omnichannel operations.

An account manager needs to send reports to customers that contain information such as recent sales orders, customer information, and open quotations from the system.

Each account manager has a requirement to build and use their own report layouts that contain images, static text, and information unique to the customers.

The account managers do not have developer privileges.

The reports must be generated in their final format from Dynamics 365 Commerce.

You need to determine which technology the account managers can use to build their reports.

Which technology should you select?

A. SQL Server Reporting Services reports

B. Power BI reports

C. Microsoft Word

D. PDF

ANSWER: C

Explanation:

Microsoft Word is the appropriate technology because Dynamics 365 Finance and Operations apps supports document templates that business users can create and maintain in Word without requiring developer privileges. A template can include static content such as a company logo, images, headings, standard terms, and customer-specific text. It can also contain data fields that Dynamics 365 populates at generation time, enabling the document to include customer details and transactional information associated with the selected record.

This approach is designed for customer-facing, formatted business documents rather than analytical dashboards. Account managers can use a Word layout as the controlled presentation format, customize it for their business needs, and generate documents directly from Dynamics 365. The resulting document is ready to distribute and can be printed or saved in an appropriate final format as needed. This fits the requirement that nondevelopers own the report layout while the application supplies current operational data from Commerce-related Finance and Operations records.

Microsoft documents the setup and use of Word templates in Finance and Operations apps at Configure Word document templates. For the broader document-generation workflow, see Word template options.

QUESTION NO: 17

A company uses Dynamics 365 Finance.

The company needs to create country-specific electronic business documents without requiring developers to change application code for each document format.

Which two capabilities are provided by Electronic Reporting? Each correct answer presents part of the solution.

NOTE: Each correct selection is worth one point.

A. Create configurable document formats.

B. Define data models and model mappings.

C. Modify the application source code for each format.

D. Manage warehouse locations.

E. Create production routes.

ANSWER: A B

Explanation:

Electronic Reporting configurations enable organizations to define the format and content of electronic documents, including invoices, regulatory reports, and other business documents. Configurations can be designed to meet country-specific or organization-specific requirements without customization of the application source code.

Data models and model mappings are also Electronic Reporting capabilities. A data model represents the business information that a report requires, while a model mapping identifies how that information is obtained from Dynamics 365 Finance data sources. This separation allows a format to be maintained independently from the underlying application implementation.

Electronic Reporting supports configurable document generation and helps organizations adapt formats as reporting requirements change. For more information, see Electronic Reporting overview.

QUESTION NO: 18

A company uses Dynamics 365 Finance.

The company requires a workflow that includes two independent approvals for purchase requisitions above $10,000.

You need to recommend the workflow element the company should use.

Which workflow element should you recommend?

A. manual decision

B. sub-workflow

C. conditional decision

D. parallel activity

ANSWER: D

Explanation:

parallel activity is the appropriate workflow element because the requirement calls for two approvals that are independent of one another. In the Dynamics 365 Finance and Operations workflow editor, a parallel activity splits the workflow into separate branches. Each branch can contain its own approval step, routing, participants, and escalation configuration. The approval processes can therefore be initiated at the same time rather than requiring one approver to act before the other approval begins.

For purchase requisitions above $10,000, the workflow can use a condition to determine whether the amount meets the threshold and then route qualifying requisitions into a parallel activity. The two branches can each be configured with an approval element for the appropriate approver or approval group. After the parallel branches are completed according to the configured completion policy, the workflow can continue to subsequent steps or complete the requisition workflow. This design supports independent review while preserving a single requisition workflow process and a clear audit trail of both approval outcomes.

Microsoft documents workflow configuration and the available workflow elements, including parallel activities, in its Finance and Operations guidance: Configure a workflow process and Configure purchase requisition workflows.

QUESTION NO: 19

A retailer uses Dynamics 365 Commerce.

The retailer wants to reward customers for repeat purchases and allow customers to earn and redeem points across retail stores and the e-commerce site.

You need to recommend a feature for the retailer.

What should you recommend?

A. Loyalty programs

B. Trade agreements

C. Product receipts

D. Vendor rebates

ANSWER: A

Explanation:

Loyalty programs are the appropriate feature because Dynamics 365 Commerce supports loyalty schemes that reward customers for transactions across commerce channels. The retailer can define loyalty programs, loyalty tiers, reward points, and redemption rules. Loyalty cards can then be associated with customers and used during channel transactions.

When the configured channels participate in the loyalty program, customers can earn points from qualifying purchases and redeem eligible points for rewards. This provides a consistent loyalty experience across physical and online channels. For more information, see Define loyalty programs.

QUESTION NO: 20 - (DRAG DROP)

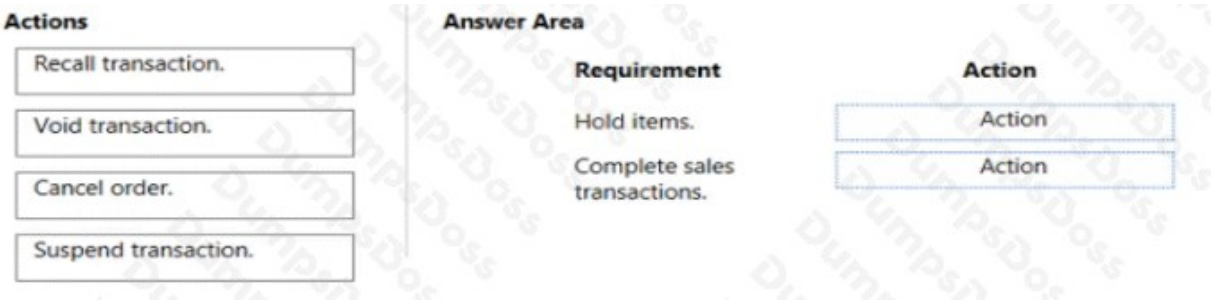
A retail store uses a point of sale (POS) system to process customer sales. A customer selects several items for purchase.

The customer wants to come back to pay for the items later the same day.

You need to recommend a process to support the customer request.

What should you recommend? To answer, drag the appropriate actions to the correct requirements. Each action 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.



ANSWER:

Explanation:

When a customer has selected merchandise but intends to return later the same day to pay, the POS user should suspend the transaction. Suspending preserves the active basket, including the items, quantities, prices, discounts, customer information, and other transaction details already entered. This allows the cashier to stop the current checkout without losing

the sale and makes the register available to serve the next customer. In practical terms, suspension is the POS process that holds the customer's items in an unfinished sale while payment is deferred.

When the customer returns, the cashier should recall the transaction. Recall retrieves the previously suspended transaction into the POS so the cashier can review the basket, make any necessary updates, accept payment, and finalize the sale. Together, these two functions support the intended workflow: first retain the customer's pending purchase, then reopen it later for checkout. Microsoft's Commerce POS documentation describes suspended transactions as transactions that can be retrieved and completed later, and it documents recalling suspended transactions from the POS transaction functions. See POS operations and POS transaction operations for the POS transaction-management model.

Therefore, use Suspend transaction for holding the items, and use Recall transaction when the customer returns to complete the sale. This preserves the original customer basket and provides a smooth, accurate continuation of the sale at a later time.

QUESTION NO: 21

A company uses Dynamics 365 Finance.

The company wants to control the approval of vendor invoices and general ledger journals.

Which two capabilities are provided by workflow? Each correct answer presents a complete solution.

NOTE: Each correct selection is worth one point.

A. Route documents to users for approval.

B. Assign tasks to users.

C. Create product variants automatically.

D. Calculate inventory cost automatically.

ANSWER: A B

Explanation:

Workflow can route documents to users for approval. An organization can configure approval steps for supported business documents, such as vendor invoices and journals, so that designated users review them before the process continues.

Workflow can assign tasks to users. Tasks can be included in a workflow to require a user to complete an action before the document moves to the next workflow step. Workflow configuration can also include conditions, approvals, automated tasks, and escalation settings to support controlled business processes. For more information, see Workflow system overview.