



MB-240^{Q&As}

Microsoft Dynamics 365 Field Service

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**QUESTION 1****DRAG DROP**

There are certain steps a Field Service Manager must take for RMA approval, and then for creating an RMA receipt.

Which steps pertain to RMA Approval and which steps pertain to RMA Receipts? To answer, drag RMA Approval or RMA Receipts to the appropriate steps. RMA Approval and RMA Receipts 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**RMA Approval****RMA Receipt**

Verify RMA products are linked to customer equipment records.

Arrange shipping and transportation for the products to be returned.

Determine if RMA products can be returned to the manufacturer and if a credit must be issued.

Give the step a name.

Correct Answer:

**Answer Area****RMA Approval****RMA Receipt****Verify RMA products are linked to customer equipment records.****Arrange shipping and transportation for the products to be returned.****Determine if RMA products can be returned to the manufacturer and if a credit must be issued.****Give the step a name.****RMA Approval****RMA Approval****RMA Approval****RMA Receipt**References: <https://docs.microsoft.com/en-us/dynamics365/customer-engagement/field-service/process-return>**QUESTION 2**

Your organization is planning to implement Microsoft Dynamics 365 Field Service mobile app based on the Microsoft Power Platform.

You need to install this app on a mobile device and test it.

What are the two prerequisites for installing the mobile app? Each correct answer presents part of the solution.

NOTE: Each correct selection is worth one point.

- A. Ensure the minimum supported version of the Field Service solution is installed.
- B. Ensure the user is has the Field Service-Resource security role.
- C. Ensure the user is correctly set up in the Woodford solution.
- D. Ensure the user is assigned the appropriate Microsoft Power Apps license.

Correct Answer: AB

QUESTION 3

You are setting up assets for a customer.

The VP of Field Service wants to have greater visibility to all the serialized components of an asset in a hierarchical view.

Solution: You define the Top-Level Asset with as many parent-child sub-assets as necessary, rolling up for viewing in a



hierarchy.

Does this meet the goal?

A. Yes

B. No

Correct Answer: B

QUESTION 4

You are a Dynamics 365 Field Service functional consultant who is setting up a new incident type that will contain three service tasks and two products. None of your existing service tasks, services or products will work for this incident type. Which three steps are required to create this new incident type?

- A. Add any necessary notes for this incident type.
- B. Add all necessary service tasks and products to the incident type.
- C. Create and save the incident type.
- D. Create/save/publish the all necessary service tasks and products.
- E. Add all necessary services to the incident type.

Correct Answer: BCD

QUESTION 5

Your company processes a large number of work orders each day. The company wants to ensure the high priority work orders are dealt with immediately.

You need to configure the schedule board so that bookings are easily visible to the dispatchers.

How can you configure Dynamics Field Services to increase booking visibility?

- A. Configure a work order type for high priority issues, to help categorize high priority work order records.
- B. Configure an Incident type for high priority incidents on work order records.
- C. Configure the status color for a booking status record, to identify high priority work order records.
- D. Configure a priority record to allow you to identify high priority work order records.

Correct Answer: D

Correct answer is D. You can create priority records in Dynamics 365 for Field service app and assign color along with level of importance. <https://docs.microsoft.com/en-us/dynamics365/field-service/set-priorities>

**QUESTION 6**

Work Orders, once completed and reviewed, need to go to Dynamics 365 Finance and Operations for invoicing. All Closed-Posted work orders should be sent to Dynamics 365 Finance and Operations, but the Common Data Service project template keeps failing.

What must you do to have the integration complete successfully?

- A. Set Default Work Order Completed Status to Closed - Posted
- B. Set Work Order Invoice Creation setting to On Work Order Posted
- C. Set Work Order Invoice Creation setting to Never
- D. Create Work Order Sub-Status of Dynamics 365 Finance and Operations Invoice. Set work order sub-status to Dynamics 365 Finance and Operations Invoice

Correct Answer: C

QUESTION 7

You recently created a new schedule board tab.

You need to ensure that only a subset of users can view this new tab.

Which two actions should you perform? Each correct answer presents part of the solution. NOTE: Each correct selection is worth one point.

- A. Ensure the schedule board tab is configured to be shared with specific people.
- B. From the schedule board setting, ensure the record is shared with the appropriate users or teams.
- C. From the schedule board setting, email the record link to the appropriate users or teams.
- D. Ensure the users have the proper security role.

Correct Answer: AB

QUESTION 8**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	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.	
Requirement Group	Dispatchers must be able to locate the resources needed for the heavy machinery repair within a single search to allow for efficient scheduling.	
Schedule Board	Dispatchers and scheduling administrators must have a way to easily review all resource availability and be able to schedule the work order.	
Booking Rule	When customers on credit hold request service, no technician can be sent and dispatchers must be alerted of the credit hold status.	
Incident type		
Booking Resource Booking		

Correct Answer:

**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****QUESTION 9****DRAG DROP**

Your organization wants to use the Field Service Mobile App for technicians in the field.





You need to install the solution, so it can be configured for mobile technicians.

What are the four steps you need to perform, in sequence, to ensure the mobile solution is ready for configuration and deployment? To answer, move the appropriate actions from the list of actions to the answer area and arrange them in the

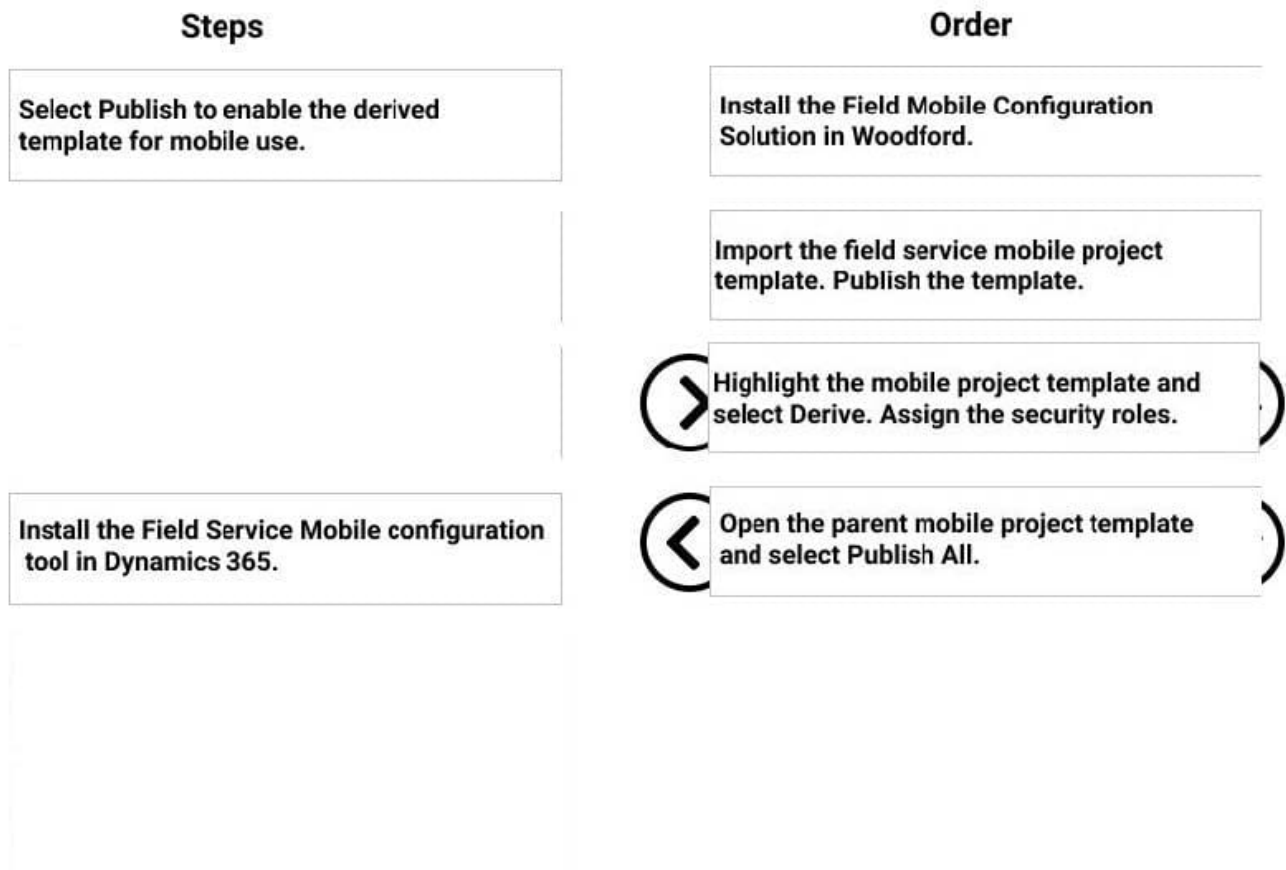
correct order.

Select and Place:



Steps	Order	
Select Publish to enable the derived template for mobile use.		
Install the Field Mobile Configuration Solution in Woodford.		
Open the parent mobile project template and select Publish All.		
Install the Field Service Mobile configuration tool in Dynamics 365.		
Highlight the mobile project template and select Derive. Assign the security roles.		
Import the field service mobile project template. Publish the template.		

Correct Answer:



References: <https://docs.microsoft.com/en-us/dynamics365/customer-engagement/field-service/install-field-service#download-the-field-service-mobile-app-on-a-phone-or-tablet>

QUESTION 10

You are installing and setting up the Remote Assist model-driven app for your customer.

You need to advise the customer on the actions available in the model-driven app.

Which three actions can be taken in the model-driven app? Each correct answer presents a complete solution.

NOTE: Each correct selection is worth one point.

- A. Invite an external user to join a one-time call.
- B. Create asset records.
- C. Assign Remote Assist licenses.
- D. Enable the Remote Assist Calls Dashboard.
- E. Enable Remote Assist offline storage capacity.
- F. Assign Remote Assist security roles.



Correct Answer: ABD

QUESTION 11

As part of the Microsoft Dynamics 365 Field Service implementation, your company wants to track the time that technicians spend on work orders and other scenarios. The company wants to be able to report on utilization and billing.

You need to advise on the ways time entries can be created in Field Service.

What are three possible ways? Each correct answer presents a complete solution.

NOTE: Each correct selection is worth one point.

- A. Automatically for bookings related to Custom Entities
- B. Manually for Custom Business Processes
- C. Automatically for Work Order bookings
- D. Automatically for bookings related to Cases
- E. Automatically for Time-off requests

Correct Answer: BCE

QUESTION 12

You are a Microsoft Dynamics 365 Field Service dispatcher using the Scheduling Assistant function.

One of your customers, Adventure Works, does not want one of your resources to be scheduled to work orders going forward. However, this resource must be available to be scheduled for other accounts.

Solution: You select the resource in the Restricted Resources field within the Schedule Assistant filter every time you book a work order for Adventure Works.

Does this meet the goal?

- A. Yes
- B. No

Correct Answer: B

QUESTION 13

DRAG DROP

You are a dispatcher for a cable installation company that provides installation services in multiple territories. The



company is using Dynamics 365 for Field Service to manage their work orders. Every time a work order is created, the dispatcher

team is manually assigning the work order to a territory in order to book the correct resources.

You are tasked with ensuring that Dynamics 365 will automatically assign work orders to territories so that the dispatcher can search for the correct resources.

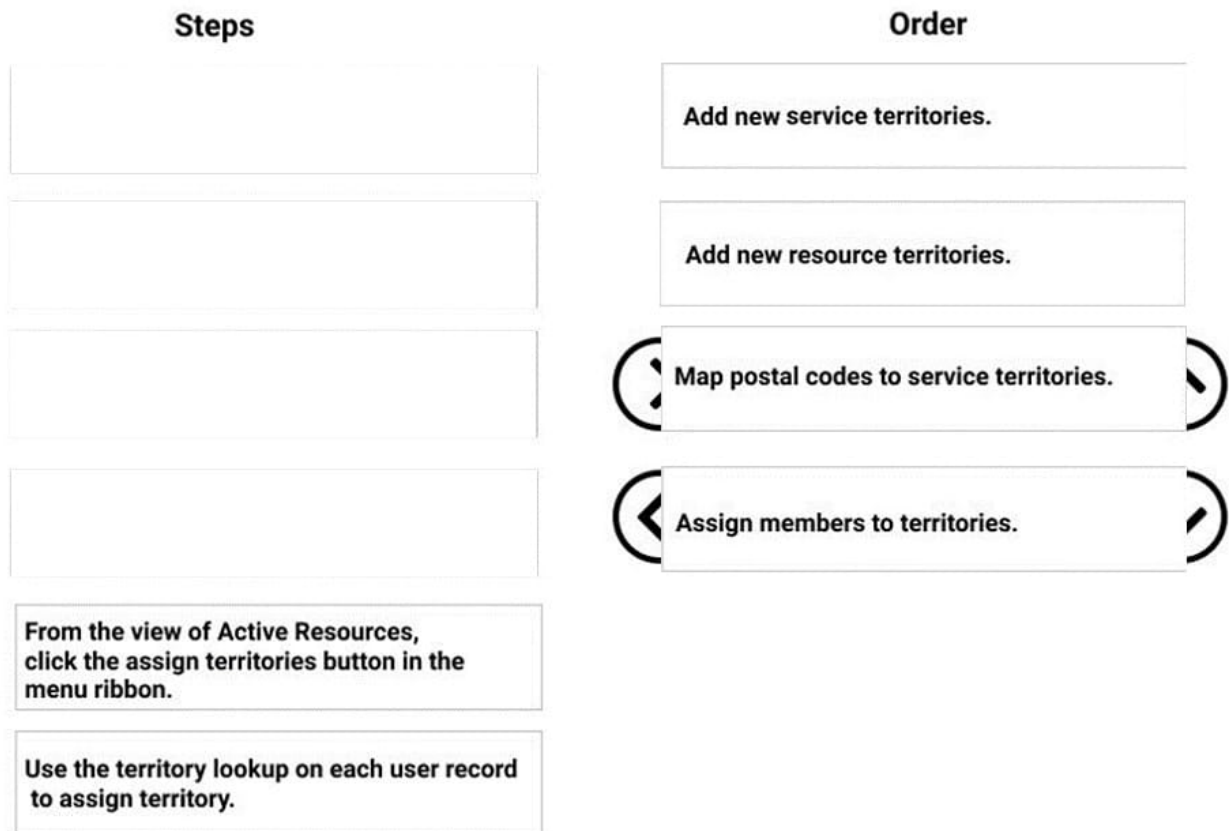
Which four steps, in sequence, must be configured to ensure that when work orders are created they will automatically be mapped to the correct territory? To answer, move the appropriate actions from the list of actions to the answer area

and arrange them in the correct order.

Select and Place:

Steps		Order
Add new resource territories.		
Add new service territories.		
Assign members to territories.	➤	⬆
Map postal codes to service territories.	⬅	⬇
From the view of Active Resources, click the assign territories button in the menu ribbon.		
Use the territory lookup on each user record to assign territory.		

Correct Answer:



QUESTION 14

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



QUESTION 15

You are onsite, working on a customer's factory floor. You need to return tomorrow and replace a belt on the conveyor. You look at the inventory in Warehouse 1, and there are 10 in stock. You pull the belt from stock and create an inventory transfer record.

What are the two correct steps to complete the transfer? Each correct answer presents part of the solution.

- A. Select the source warehouse, then select the destination warehouse.
- B. Enter the quantity to transfer, then click transfer.
- C. Enter the part number from the drop down, then click to transfer.
- D. Select the From warehouse location, then select the To warehouse location.

Correct Answer: AB

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

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