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**Exam** : **MB-240**

**Title** : Microsoft Dynamics 365 Field  
Service Functional Consultant

**Vendor** : Microsoft

**Version** : DEMO

**NO.1** During requirement and design discussions, Litware, Inc. Subject Matter Experts (SMEs) discuss a specific scenario.

A customer purchases an HVAC system along with a 1-year service contract and a 3-year extended warranty.

After 9 months, the system shuts down and the customer cannot get it started back up. The customer calls into Litware, Inc. to inform them the system is down and he needs a service technician to come out to fix the unit.

The SMEs want to know which functionality within Dynamics 365 Field Service can handle the scenario.

Which configuration steps should you take in each of the categories listed? To answer, drag the appropriate configuration to the correct category in the answer area. Each element 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 match is worth one point.

**Answer:**

Explanation:

Topic 1, Litware, Inc Case Study

Company structure and resources

Litware, Inc. is a home improvement retail company with stores around the world. Litware, Inc. also offers various installation and repair services using both employees and subcontractors.

Litware, Inc. has stores located throughout the United States and Canada.

The company has three main types of stores, each offering a different combination of service personnel.

1. DIY Stores are retail and contractor stores with supply items for electrical, lighting, and other home improvement DIY projects.

- \* Delivery personnel pick up at the local warehouse for each store.

- \* Installers install major appliances.

2. Pro Stores offer design ideas for major home renovations.

- \* Designers are assigned to a department based on skills and expertise.

- \* Installers are assigned to a geographic region.

- \* Repair Technicians are all subcontractors.

3. Home Improvement Stores offer the convenience of purchasing items available in the DIY stores, but also include the expert design, installation and repair services offered in the Pro Stores.

- \* Designers are assigned to a department based on skills and expertise.

- \* Delivery personnel pick up at the local warehouse for each store

- \* Installers are assigned to multiple stores in a geographic region.

- \* Repair technicians are all subcontractors.

- \* Dispatchers are assigned to all territories in a region. Dispatchers assign repair and installation work to technicians based on skill.

All internal delivery, repair and installation employees will utilize the Field Service mobile app.

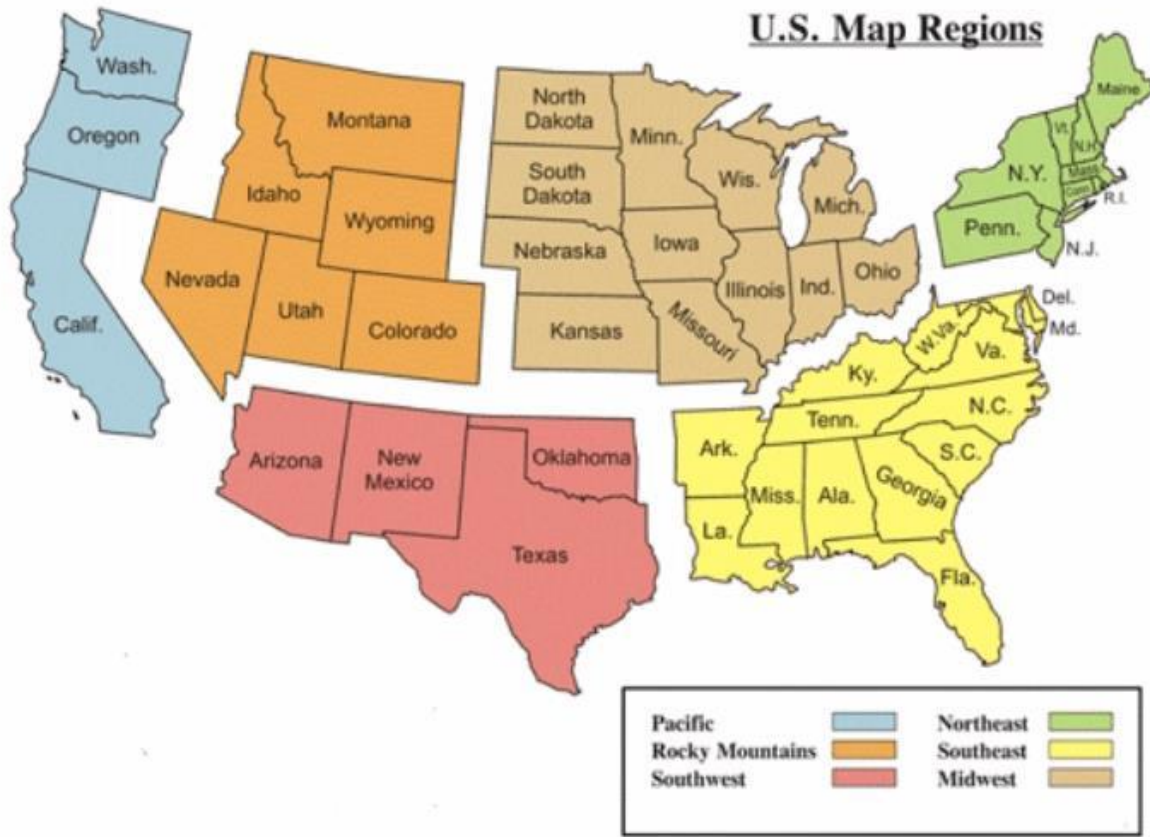
Litware, Inc.

employees have full-service licenses, while subcontractors do not

Regions

Dispatchers can see all work request data for their region, including resources.

The U.S. regions are:

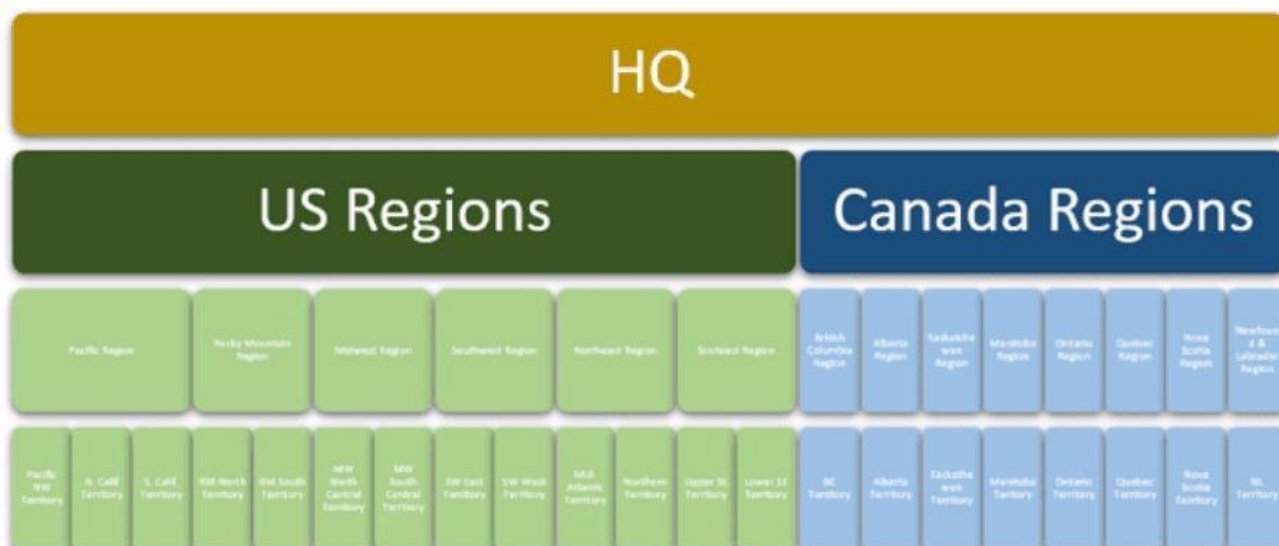


The Canadian regions are:



Data management structure

Litware, Inc. store employees can see data within their region. This is to provide better support of customers and stores within the regions. The current data access structure appears as follows:



**Field Service difficulties**

Typical job assignment is as follows:

- \* Appliance Delivery & Hookup: 2 resources - subcontracted out
- \* Landscaping: minimum 2 resources. 1 expert
- \* Carpeting: 2-3 resources
- \* Tile Flooring: 2 resources
- \* Kitchen Cabinets: 3 resources
- \* Hardwood Flooring: 2 resources
- \* Repairs: 1-2 resources

A spreadsheet tracks the skills and certifications earned by each internal employee. They are:

SKILLS	CERTIFICATIONS
Bath Design	Certified Electrician
Bath Remodel	Certified Carpenter
Cabinet Installation	Certified Flooring Installer
Cabinet Refacing	Certified HVAC Technician
Carpeting	Certified Interior Designer
Electrical	Certified Landscaper
General Landscaping	
Hardwood Flooring	
Kitchen Design	
Kitchen Remodeling	
Landscaper Designer	

The Skill Proficiency Model used at Litware, Inc. is as follows;

- 1 - Novice
- 2 - Inexperienced
- 3 - Moderate Experience
- 4 - Experienced
- 5 - Expert/Certified

For each type of job, there must be at least one certified or highly experienced resource on the job. Their current system does not have a way to share technical documents and instructions with the technicians and have them review it while onsite.

All work is printed out and the provided to the resources. Contractors are currently emailed the job details to which they need to confirm availability. Contractors sometimes decline work. In some of these cases, the Litware, Inc. dispatch team does not react quickly to this information and the customer ' s work or delivery is delayed.

## Customer base

Currently, all customer data are held in Dynamics 365 Finance and Operations (D365 F & O).

\* Most store employees do not have access to this data as it is currently being implemented for backend features, such as inventory and invoicing.

\* Designers and those scheduling can pull up a customer and their pending orders and installations, but they cannot see the payment details and terms.

85% of Litware 's customers are households.

15% are construction-based companies that either purchase or hire Litware, Inc. for specific jobs.

\* Most of these companies receive a 5-10% discount on supplies and 10% discount on labor.

## Planned changes

Litware, Inc. plans to implement Dynamics 365 Field Service. The requirements gathered during analysis are:

### Work Orders and Scheduling

\* Scheduling based on resource skill, and number of required resources based on job type and duration.

\* Preventative Maintenance emergency calls take priority over other types of jobs.

\* Schedule resources based on location, maximizing total work hours and then minimizing drive time.

\* All HVAC down jobs require a resource to be onsite at the customer location within 2 hours, per contract terms.

\* Some high-end HVAC systems can tell the company when the system is experiencing issues. Alert dispatchers when this occurs if this feature is enabled and purchased.

\* Set contractually obligated times for HVAC down jobs.

\* Set reminders or see critical details to act on for a job.

\* Ability to quickly book a job.

\* Easily see when a resource is on Paid Time Off on the schedule board.

### Service Contracts

\* Set up and create a Preventative Maintenance (PM) type of contracts.

\* PM contracts are only for HVAC systems. Semi-annual maintenance jobs should be created 30-days before they are to be scheduled.

### # Preventative Maintenance

\* Semi-annual inspections Discount on any required parts and additional labor.

\* Include 24-hour emergency service calls at no-charge.

### Extended Warranties

\* Ability to setup and create an Extended Warranty type of contracts.

\* Start when Manufacturer warranty ends.

\* Can be purchased for 1, 2 or 3 years and include all parts and labor.

### Products and Services

\* Integration between D365 F & O and D365 Field Service.

\* Implement a parts return process for any unused or defective part during an installation job.

\* Multiple price lists will be used, based on region and customer type (retail, construction).

### Resources

\* Implement company holidays for US and Canada

\* Implement various pay types based on OT, Weekends/Holidays, Travel and Regular Time.

\* Implement Paid Time Off.

\* Optimize resource schedules.

\* Access to jobs assigned for the day.

- \* Specialty equipment scheduled on work orders as needed.

#### Technical requirements

#### Invoicing

- \* Send Work Order details to D365 F & O when a job is completed, and after internal reviews are performed.
- \* The system must track the price of resources based on holidays and after-hours scenarios at a rate of one and a half times the normal billing rate.
- \* Travel time is non-billable. Travel time should be captured as normal billing rate.
- \* A Delivery Fee of \$75 is charged for each order.
- \* Subcontractor travel time is non-billable but is paid to the subcontractor company by Litware, Inc.

#### Resources

- \* Contractor technicians require access to work order and customer details once assigned to a booking. They do not have a license.
- \* Dispatchers need a schedule board for their region(s).
- \* Resources have access to view their skills, skill level and certification data.
  - o Certifications set to expire over the next 120 days should show highlighted in Yellow, o Certifications already expired will show in Red.
- \* Resources will be notified when they enter or leave a job, or are assigned a job for the day.
- \* Resource booking automatically updated when they enter job site.
- \* High priority jobs will send an alert to the resources ' phone and send them a text message.
- \* Resources assigned to a job where their skill level = 1 will be assigned to an experienced resource for 3 months.
- \* Resources on the job can use their smartphone to call and obtain assistance.
- \* Resources can access documents either online or offline.

#### Products and Services

- \* All parts removed from a customer ' s equipment must be returned to the Main warehouse.
- \* All parts not used or deemed defective during an installation must be returned to the originating warehouse.
- \* All appliances and parts will become part of the customer record.
- \* All products are received into the Main warehouse and then distributed to van stock for delivery or installation.
- \* All assets that have an expired manufacturer warranty should show a notification.

#### Work Orders

- \* The ability to have templates for work orders. Templates will provide guidance for technicians, and recommend products and default services.
- \* Work Orders created from a PM contract need to have a status = Service Contract.
- \* Work Orders created from an Extended Warranty contract need to have a status = Extended Warranty
- \* All HVAC down work orders must be set to high priority.
- \* All emergency, and contractual Work Orders must be created, reviewed and dispatched within 1 hour. A technician must be onsite within 2 hours.
- \* All Work Orders created from a PM are non-billable.
- \* All Extended Warranty jobs must include a flat service fee of \$75.

#### Scheduling

- \* High Priority work orders for HVAC down cannot be moved once scheduled.
- \* Work Orders scheduled to technician(s) who do not have the desired skill set and level should show

a warning.

o If scheduled, it will send an approval record to the manager to approve the assignment. Approved are booked. Rejected are canceled and the dispatcher notified.

\* Dispatchers will assign multi-day work orders, such as kitchen cabinets, bathrooms, landscaping, to the same group of resources for the duration of the work.

\* All work orders for an existing asset, where the asset does not have an active manufacturer ' s warranty, or a valid extended warranty should show an alert upon scheduling.

\* Resources should be optimized for high priority items, maximize their work hours and then minimize travel time.

Security and access

\* Safeguards must be in place for the data on the Field Service mobile app if a technician loses his mobile device.

\* Technicians in the field should only see work orders scheduled for today.

\* Field Service administrators need the ability to update the defaults for the schedule assistant.

**NO.2** Litware, Inc. needs your company to suggest a best practice for implementing multi-resource work order scheduling for kitchen cabinet installation jobs, that includes a new, inexperienced technician.

In addition, they need a resource skilled in cabinet installation and cabinet resurfacing.

Using the requirements provided, which five actions should you perform in sequence? To answer, move the appropriate actions from the list of actions to the answer area and arrange them in the correct order.

Actions	Order
For each requirement for the requirement group template, ensure the duration is filled in. Each requirement duration can vary.	1
Add the Installation incident type to the Kitchen Cabinet Installation requirement group.	2
Add requirements to the requirement group template for each of the required skills. Set the <b>All</b> or <b>Any</b> option to <b>Any</b> .	3
For each requirement for the requirement group template, ensure the duration is filled in. Each requirement duration must be the same.	4
Create a requirement group template called Kitchen Cabinet Installation. Set <b>Is Template</b> to <b>Yes</b> .	5
Add requirements to the requirement group template for each of the required skills. Set the <b>All</b> or <b>Any</b> option to <b>All</b> .	
Add the requirement group to the Kitchen Cabinet Installation incident type.	
Add the Installation incident type to a work order, and book the work order.	

**Answer:**

**Actions**

- For each requirement for the requirement group template, ensure the duration is filled in. Each requirement duration can vary.
- Add the Installation incident type to the Kitchen Cabinet Installation requirement group.
- Add requirements to the requirement group template for each of the required skills. Set the **All** or **Any** option to **Any**.
- For each requirement for the requirement group template, ensure the duration is filled in. Each requirement duration must be the same.
- Create a requirement group template called Kitchen Cabinet Installation. Set **Is Template** to **Yes**.
- Add requirements to the requirement group template for each of the required skills. Set the **All** or **Any** option to **All**.
- Add the requirement group to the Kitchen Cabinet Installation incident type.
- Add the Installation incident type to a work order, and book the work order.



**Order**

- 1 For each requirement for the requirement group template, ensure the duration is filled in. Each requirement duration must be the same.
- 2 Create a requirement group template called Kitchen Cabinet Installation. Set **Is Template** to **Yes**.
- 3 Add requirements to the requirement group template for each of the required skills. Set the **All** or **Any** option to **All**.
- 4 Add the requirement group to the Kitchen Cabinet Installation incident type.
- 5 Add the Installation incident type to a work order, and book the work order.

**Explanation:**

**Actions**

- For each requirement for the requirement group template, ensure the duration is filled in. Each requirement duration can vary.
- Add the Installation incident type to the Kitchen Cabinet Installation requirement group.
- Add requirements to the requirement group template for each of the required skills. Set the **All** or **Any** option to **Any**.



**Order**

- 1 For each requirement for the requirement group template, ensure the duration is filled in. Each requirement duration must be the same.
- 2 Create a requirement group template called Kitchen Cabinet Installation. Set **Is Template** to **Yes**.
- 3 Add requirements to the requirement group template for each of the required skills. Set the **All** or **Any** option to **All**.
- 4 Add the requirement group to the Kitchen Cabinet Installation incident type.
- 5 Add the Installation incident type to a work order, and book the work order.



**NO.3** All delivery charges must be automatically added to any Delivery work order, and the price must be set and locked. The delivery charge must be set up in a way so that it is invoiced upon delivery completion.

Which three steps should you take to set up the invoice? Each correct answer presents part of the solution.

NOTE: Each correct selection is worth one point.

- A.** Create a Delivery Charge Product Record. Set Field Service Product Type to Service.
- B.** Create a business rule to set the Delivery Charge work order product record line status to Used, and ensure Unit Amount is 75.00 Make Quantity and Amount fields read only
- C.** Add the Delivery Charge product to the delivery incident type. Set Quantity to 1
- D.** Create a Delivery Charge Product Record. Set Field Service Product Type to Non-Inventory.
- E.** Create a business rule to set the Delivery Charge work order service line status to Used, set Duration to 1 hour and Amount to \$75.00. Make Duration and Sale Amount details read only with the business rule.

**Answer:** A B C

**NO.4** Litware, Inc. designers sometimes have to schedule an experienced technician and trainee to go out to a customer ' s home to take measurements.

One of their customers, wants a kitchen and bathroom remodel completed during the same timeframe. The customer has asked for Litware, Inc. to have both measurements completed at the same time.

Currently, Litware, Inc. does not any technicians with both kitchen remodeling and bath remodel skills.

Litware, Inc. wants to use the new Quick Book functionality to schedule multiple resources to this work order.

Which five actions should you perform in sequence? To answer, move the appropriate actions from the list of actions to the answer area and arrange them in the correct order.

Actions	Order
Add the requirement group to the resource requirement.	1
Set <b>Enable Quick Book</b> to <b>Yes</b> under the work order <b>Booking Setup Metadata</b> .	2
Create a new requirement group template and requirement group, indicating the need for two resources each with different skills.	3
Add the requirement group to the Multiple Room Remodel incident type.	4
Create a work order with the Multiple Room Remodel incident type.	5
Select a time slot, and then select <b>Book</b> to book the resource.	
Filter the Quick Book pop-up window to the desired date window.	

**Answer:**

Actions	Order
Add the requirement group to the resource requirement.	1
Set <b>Enable Quick Book</b> to <b>Yes</b> under the work order <b>Booking Setup Metadata</b> .	2
Create a new requirement group template and requirement group, indicating the need for two resources each with different skills.	3
Add the requirement group to the Multiple Room Remodel incident type.	4
Create a work order with the Multiple Room Remodel incident type.	5
Select a time slot, and then select <b>Book</b> to book the resource.	
Filter the Quick Book pop-up window to the desired date window.	

Explanation:

**Actions**

Add the requirement group to the resource requirement.

Set **Enable Quick Book** to **Yes** under the work order **Booking Setup Metadata**.

**Order**

1 Create a new requirement group template and requirement group, indicating the need for two resources each with different skills.

2 Add the requirement group to the Multiple Room Remodel incident type.

3 Create a work order with the Multiple Room Remodel incident type.

4 Select a time slot, and then select **Book** to book the resource.

5 Filter the Quick Book pop-up window to the desired date window.



**NO.5** A new service technician was recently hired on at Litware, Inc. and is assigned to the HVAC team. The service technician is still learning about the job and the units the company sells and services.

The service technician has been assigned to a repair work order for a unit. Upon arrival and inspection, the service technician turns off the one circuit breaker to the unit, but is not sure what should be done next. The service technician makes a phone call to the internal help team, but they aren't sure how to provide guidance as they cannot see what exactly the service technician is looking at and the service technician cannot describe it.

What should the company implement to handle this sort of issue?

- A. Microsoft Dynamics 365 Guides
- B. Microsoft Dynamics 365 Remote Assist
- C. Microsoft Teams
- D. Resource Scheduling Optimization

**Answer:** B

Topic 2, Contoso Case study General Overview

Contoso is a large international manufacturing company that has offices around the world with service and scheduling departments in each office. In addition, Contoso has sales reps throughout the world.

Contoso has main offices in North America, Europe, and Asia, with global headquarters based in Redmond, Washington, USA. Each of the regional offices has their own sales and service teams. The regional HQ locations also include sales and services leaders and executive management. Global HQ houses company executives for various departments, including sales and service.

Office hours are from 8:00 am to 6:00 pm, every day of the week except holidays, which have no work hours.

This applies to all offices, using their local time zone. Third-party contractors handle work outside of normal work hours at a higher rate. Field Service staff Contoso's service technicians around the world will be a combination of internal employees and third-party contractors.

\* Pay type is Straight for regular work hours, and Overtime for work on holidays and after hours.

\* All technicians have the capacity of handling just one job at a time, while supervisors can handle 2 jobs at a time.

Contoso's internal field service employees:

- \* Begin and end their workday at their home of record.
- \* Have a default office location / regional office.
- \* Are assigned to multiple territories.

All third-party contractors:

- \* Begin and end their workdays at their office location.
- \* Have a default office location / regional office.
- \* Are assigned to only one territory.

Dispatchers:

- \* Work at the Main office for their region
- \* Assigned to all territories in the region.
- \* Have privileges to customize their Schedule Boards.

All field service technicians will utilize the Field Service mobile app.

- \* Contoso employees will have full field service licenses, while third-party contractors will not.
- \* Field Service technicians will not have access to Leads, Opportunities or other sales-specific data.
- \* Dispatchers can see all data for their region, though they will mostly be scheduling for only one territory.

Contoso has several classes to distinguish the capability and training level of its field technicians. All work order bookings need to respect these classes and book resources accordingly.

Org structure setup

Contoso currently uses Dynamics 365 Customer Engagement for leads, opportunities, quotes and orders.

There are currently 200 sales users in North America. 500 in Europe and 400 in the Asia-Pacific region.

The Contoso physical environment is structured in the following manner, with the roles noted.

Location	Location Details	Roles
Redmond, WA	<ul style="list-style-type: none"> <li>• Global HQ</li> <li>• North America HQ</li> </ul>	<ul style="list-style-type: none"> <li>• Executive Management</li> <li>• Sales Executives</li> </ul>
Chicago, IL	North America Midwest Regional Office	<ul style="list-style-type: none"> <li>• Sales Reps</li> <li>• Sales Managers</li> <li>• Regional Sales Manager</li> </ul>
Los Angeles, CA	North America West Coast Regional Office	<ul style="list-style-type: none"> <li>• Sales Reps</li> <li>• Sales Managers</li> <li>• Regional Sales Manager</li> </ul>
New York, NY	North America East Coast Regional Office	<ul style="list-style-type: none"> <li>• Sales Reps</li> <li>• Sales Managers</li> <li>• Regional Sales Manager</li> </ul>
Montreal, QC	North America Canada Regional Office	<ul style="list-style-type: none"> <li>• Sales Reps</li> <li>• Sales Managers</li> <li>• Regional Sales Manager</li> </ul>
City of Manila, Philippines	<ul style="list-style-type: none"> <li>• APAC HQ</li> <li>• Philippines Regional Office</li> </ul>	<ul style="list-style-type: none"> <li>• Sales Reps</li> <li>• Sales Managers</li> <li>• Sales Director</li> <li>• Regional Sales Manager</li> <li>• Executive Management</li> </ul>
Kolkata, India	<ul style="list-style-type: none"> <li>• APAC India Regional Office</li> </ul>	<ul style="list-style-type: none"> <li>• Sales Reps</li> <li>• Sales Managers</li> <li>• Regional Sales Manager</li> </ul>



### Field Service structure

Contosos field service technicians respond to all installation work orders with two human resources:

- \* One licensed technician (Level 3). and...
- \* One apprentice technician. Apprentices can be either Level 1 (new trainee) or Level 2 (halfway through training).

In many cases installation work also requires the use of specialty tools, depending on what is being installed The current system does not have any way to track the level of skill for each resource, nor the uses for the specialty tools. This is handled as " tribal knowledge. " Preventative maintenance work orders can be handled by one resource if they are a Level 2. If the resource is a Level 1. they must be accompanied by a Level 3 resource, and vice versa.

All field service technicians are required to complete OSHA training annually. In their first year of apprenticeship they must complete the full 40-hour course. In the next 2 years they must complete the 8-hour refresher course. This cycle repeats every 3 years for the duration of their employment. In the current system, when a technician has finished with a work order, they turn in the paper copy with their notes to the dispatcher. The dispatcher then gives that information to a back-office employee, who will check the work order to ensure accuracy before creating an invoice. Contoso wishes to automate this exact process in the new system.

### Customer base

About half of Contoso ' s customer base includes Not For Profit service organizations. The implications for billing are complex, so it ' s important that Tax Exempt Status be noted for all Accounts and flow through to all Work Orders. NFP Customers who are associated with government entities will pay for travel time; other customers will not. This information should flow from the Billing Account to all associated Service Accounts.

Most Contoso customers sign agreements for Preventative Maintenance. Contoso uses templates and incidents to ensure services standards are the same across all regions. Preventative Maintenance agreements include monthly inspection and quarterly cleaning and inspection, with billing occurring quarterly.

### Remaining consistent

Contoso plans to keep the current data structure and extend it to the new Field Service functionality. Field Service users will fall under the same organizational structure currently implemented for the sales staff.

- \* Field service technicians will only be able to see their assigned work orders and bookings.
- \* Dispatchers will be able to see all work orders and bookings for the region- Planned changes

Contoso plans to implement Dynamics 365 Field Service with mobile access. They will be using incidents, work orders, bookings and invoicing. The following requirements were gathered during analysis:

1. Work Orders and Scheduling.

- o Automated and suggestion-based scheduling.
- o Scheduling based on required technician skills and number of technicians needed.
- o Schedule resources based on location, minimizing travel time when possible.
- o Technicians must be onsite within 3 hours of an emergency Work Order being assigned to them.
- o The travel time should automatically update upon changing a booking.

2. Agreements

- o Setup and create work orders, bookings and invoices for preventative maintenance with work orders automatically created 14 days before PM is due.
- o Escalation of Work Orders based upon agreed customer commitment.
- o Ability to designate clients as Preferred, with special pricing.

3. Products and Services

- o Warehousing and inventory management processes will be implemented, including tracking products moved onto trucks for installation at customer sites.
- o Implement a parts return process that includes having a technician uninstall the part to be returned.
- o Multiple price lists will be used, divided into Gold, Silver and Bronze levels, based on the spending level of each customer.
- o Internal teams need the capability to associate a 3D image to a Customer Asset record.
- o Products added to a work order should be set to Allocated.

4. Resources

- o Implement Company Holidays for North American regions, o Implement Paid Time Off for all regions.
- o Specialty equipment will be scheduled on work orders as needed.
- o Training and skill levels will be noted as appropriate for resources.

5. System

- o Geocoding will be activated throughout the system.
- o Territories will be used for Accounts, Resources and Work Orders.

Technical requirements

Contoso identified the following technical requirements:

1. Invoicing

- o Auto creation of invoices upon work completion.
- o The system must track the price of resources based on holidays and after-hours scenarios at a rate of one and a half times the normal billing rate.
- o Travel time is billable for all field service technicians, pay type Travel, which should be noted on all Service Accounts.

2. Resources

- o Contractor technicians require access to work order and customer details once assigned to a booking.
- o Dispatchers need a schedule board for their region(s).

3. Products and Services

- o All parts that are removed from a customer 's equipment must be returned to the Main warehouse.
- o Products to be marked as Assets will be configured accordingly.

o All products that will become Assets require installation by a technician.

o All products are received into the Main warehouse.

4. Work Orders

o The ability to have templates for work orders; The templates will provide guidance for technicians along with recommended products and default services.

o Once a work order is posted it should no longer show on views.

o Contoso will use the " out of the box " work order statuses to begin, though they may be changed in later phases of the project.

5. Scheduling

o Once a work order is scheduled, do not change the time.

o Work Orders scheduled to technician(s) who do not have the desired skill set and level should show a warning.

6. Security and access

o Safeguards must be in place for the data on the Field Service Mobile App if a technician loses his mobile phone or tablet device, o The Field Service Administrator needs the ability to update the defaults for the schedule assistant.

7. Accounts

o Any Service Accounts that do not have a Billing Account noted should show a warning, o Any Billing Accounts that do not have a Price List noted should show a warning.

**NO.6** You need to create a Preventative Maintenance Agreement that meets Contoso standards and requirements.

Which five actions should you perform in sequence? To answer, move the appropriate actions from the list of actions to the answer area and arrange them in the correct order.

Actions	Order
Create an agreement with no incident.	
Add one agreement schedule for both monthly and quarterly visits.	
Create an agreement with the PM incident selected.	
Add two agreement schedules, one monthly and one quarterly.	
Set agreement to <b>Active</b> .	
Set <b>Auto Generate Work Order</b> to <b>Yes</b> .	
Set <b>Invoice Recurrence</b> to <b>Monthly</b> , recur every 3 months.	

**Answer:**

Actions	Order
Create an agreement with no incident.	
Add one agreement schedule for both monthly and quarterly visits.	
Create an agreement with the PM incident selected.	Create an agreement with the PM incident selected.
Add two agreement schedules, one monthly and one quarterly.	Add two agreement schedules, one monthly and one quarterly.
Set agreement to <b>Active</b> .	Set agreement to <b>Active</b> .
Set <b>Auto Generate Work Order</b> to <b>Yes</b> .	Set <b>Auto Generate Work Order</b> to <b>Yes</b> .
Set <b>Invoice Recurrence</b> to <b>Monthly</b> , recur every 3 months.	Set <b>Invoice Recurrence</b> to <b>Monthly</b> , recur every 3 months.

**Explanation:**

A screenshot of a computer Description automatically generated

The screenshot shows two panels: 'Actions' on the left and 'Order' on the right. The 'Actions' panel contains two items: 'Create an agreement with no incident.' and 'Add one agreement schedule for both monthly and quarterly visits.' The 'Order' panel contains five numbered items: '1 Create an agreement with the PM incident selected.', '2 Add two agreement schedules, one monthly and one quarterly.', '3 Set agreement to **Active**.', '4 Set **Auto Generate Work Order** to **Yes**.', and '5 Set **Invoice Recurrence** to **Monthly**, recur every 3 months.' Navigation arrows are visible between the panels.

**NO.7** You are assigned to a Microsoft Dynamics 365 Field Service implementation for a Gym & Fitness company.

You need to distribute a survey to any customers who sign up for a monthly subscription. The Customer Experience Manager wants to send the survey with a custom email address instead of using the default Dynamics 365 Customer Voice survey email address.

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

- A. Add a custom email address in the Microsoft 365 Admin Center.
- B. Add a custom email address in the Microsoft Power Platform Admin Center.
- C. Add and verify a domain in the Microsoft Power Platform Admin Center.
- D. Add and verify a domain in the Microsoft 365 Admin Center.

**Answer:** A,D

**NO.8** A dispatcher in Indianapolis, Indiana receives an emergency service call on July 4 and assigns the booking to a third-party contractor, attaching the emergency SLA. The contractor receives notification of the work order and travels from his home to the job site, arriving 3.5 hours after the work was assigned.

The contractor works for 2 hours, installing 2 new identical chillers, which need to be added to the customer 's annual maintenance agreement. The contractor fills in product usage and notes, gets the client 's signature, and then changes the booking status to Completed A back office employee needs to look at the work order to ensure accuracy, then change the status to Posted.

When performing a quality check, what will the back office employee expect to see as a result of this service call? To answer, drag the appropriate record type to the correct statement. Each record 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 match is worth one point.

The screenshot shows a matching exercise interface. On the left, under 'Record types', there are three items: 'Work Order / Booking', 'Invoice', and 'Customer Asset'. On the right, under 'Statements', there are five items: 'Travel time charged from the third-party Organizational Unit Address to the jobsite', 'Two new records created, one for each chiller', 'One Product with a status of **Used**', 'Labor time charged for 2 hours @ 1.5 time', and 'Warning message saying the SLA was exceeded'. Below the statements is a column labeled 'Record types' with five empty boxes for matching.

**Answer:**

**Record types**

- Work Order / Booking
- Invoice
- Customer Asset

**Answer Area**

**Statements**

Travel time charged from the third-party Organizational Unit Address to the jobsite

Two new records created, one for each chiller

One Product with a status of **Used**

Labor time charged for 2 hours @ 1.5 time

Warning message saying the SLA was exceeded

**Record types**

- Invoice
- Customer Asset
- Work Order / Booking
- Invoice
- Work Order / Booking

**Explanation:**

A white paper with black text Description automatically generated

**Record types**

- Work Order / Booking
- Invoice
- Customer Asset

**Answer Area**

**Statements**

Travel time charged from the third-party Organizational Unit Address to the jobsite

Two new records created, one for each chiller

One Product with a status of **Used**

Labor time charged for 2 hours @ 1.5 time

Warning message saying the SLA was exceeded

**Record types**

- Invoice
- Customer Asset
- Work Order / Booking
- Invoice
- Work Order / Booking

**NO.9** Contoso has asked that you create several work order types to meet their Requirements and Planned Changes.

Of the many work order types requested, which three should you create? Each correct answer presents a complete solution.

NOTE: Each correct selection is worth one point.

- A. Installation
- B. Agreement
- C. Returns
- D. Inspection
- E. Preventative Maintenance

**Answer:** A D E

**NO.10** You need to use the Agreement function in Microsoft Dynamics 365 Field Service to automatically generate work orders and invoices. This configuration will be used for preventative and maintenance work.

You need to determine the configurations that are available for you to use in the Agreements setup. Which three configurations are available? Each correct answer presents a complete solution.

NOTE: Each correct selection is worth one point.

- A. Auto Generate Work Order
- B. Auto Generate Booking Dates in 24 hours
- C. Resource Priority

- D. Generate Work Order Days in Advance
- E. Booking Recurrence specification

**Answer:** A,D,E

**NO.11** Dispatchers at Contoso have access to a wide range of information because they often cover for each other within the region. However, for their normal dairy operations, they only need to be able to see resources in their territory.

The dispatcher needs to customize their schedule board to filter resources to their territory. What should the dispatcher do?

- A. On the Filter & Map View window, select a Service Territory, then select Save Current Filters as Default.
- B. On the Filter & Map View window, select a Resource Type, then select Save Current Filters as Default.
- C. In the Scheduler Settings, select one Territory.
- D. Add a Booking Requirements tab.

**Answer:** A

**NO.12** When Contoso installs chillers for customers, they are expected to follow the same procedure for each install.

You need to configure the functionality necessary to automatically add all the tasks and resources needed to a work order when the work order type is Chiller Installation. You must follow the established Contoso guidelines for installation requirements, as outlined in the Case Study, and create the most efficient process possible.

Which four actions should you perform in sequence? To answer, move the appropriate actions from the list of actions to the answer area and arrange them in the correct order.

Actions	Order
Create a priority record.	
Create a work order sub-status called Chiller Installation.	
Configure an incident type.	
Associate the incident type to the requirement group template.	
Configure a requirement group template.	⤴
Add the incident type to all Chiller Installation work orders.	⤵

**Answer:**

Actions	Order
Create a priority record.	
Create a work order sub-status called Chiller Installation.	
Configure an incident type.	
Associate the incident type to the requirement group template.	
Configure a requirement group template.	⤴
Add the incident type to all Chiller Installation work orders.	⤵

Order
Configure an incident type.
Associate the incident type to the requirement group template.
Configure a requirement group template.
Add the incident type to all Chiller Installation work orders.

**Explanation:**

A screenshot of a computer Description automatically generated

**Actions**

- Create a priority record.
- Create a work order sub-status called Chiller Installation.

**Order**

- 1 Configure an incident type.
- 2 Associate the incident type to the requirement group template.
- 3 Configure a requirement group template.
- 4 Add the incident type to all Chiller Installation work orders.



**NO.13** A work order has been created with Bharti Airtel as the Billing Account and Airtel Kolkata as the Service Account.

You need to determine the account where various work order information originates. The sheeted work order type and entitlement do not have any of this information.

Which account belongs to each piece of work order information? To answer, drag the appropriate account to the correct piece of work order information. Each account 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 match is worth one point.

**Accounts**

- Bharti Airtel
- Airtel Kolkata

**Answer Area**

**Work order information**

- Geocoded Address
- Service Territory
- Invoice Account
- Price List
- Travel Charge Type

**Accounts**


**Answer:**

**Accounts**

- Bharti Airtel
- Airtel Kolkata

**Answer Area**

**Work order information**

- Geocoded Address
- Service Territory
- Invoice Account
- Price List
- Travel Charge Type

**Accounts**

Airtel Kolkata
Airtel Kolkata
Bharti Airtel
Airtel Kolkata
Bharti Airtel

Explanation:

A close-up of a computer screen Description automatically generated

Accounts	Answer Area	Work order information	Accounts
Bharti Airtel		Geocoded Address	Airtel Kolkata
Airtel Kolkata		Service Territory	Airtel Kolkata
		Invoice Account	Bharti Airtel
		Price List	Airtel Kolkata
		Travel Charge Type	Bharti Airtel

**NO.14** Dispatchers and technicians in Dynamics 365 Field Service want to be able to automatically update work order statuses. You need to configure the feature to allow the update of a work order based on resource location. Which feature should you configure?

- A. Auto-geocoding for addresses
- B. Geofencing
- C. Booking maps
- D. Connection to Microsoft Bing Maps

**Answer:** D

Topic 3, Plumbing and heating company Case study

Company overview

LitWare Inc. is a plumbing and heating company which provides installation, maintenance, and repair services in United States (U.S.) and Canada.

LitWare also offers various installation and repair services such heating, venting, and air conditioning (HVAC). plumbing, and roofing for commercial customers using their employees and subcontractors.

Company structure and resources

The company has three main types of services, each offering a different combination of service personnel.

1. Training services provide training to LitWare employees and subcontractors to perform the work in the regions serviced

2. Unplanned maintenance services address emergency repair requests for their customers.

\* Dispatchers are assigned to all territories in a region Dispatchers assign repair and installation work to repair technicians based on their skills.

\* Repair technicians are employees and subcontractors

3. Planned maintenance services perform regular and planned checks for their customers.

\* Inspectors are assigned to all regions based on skills and expertise.

\* Installers are assigned to multiple territories in a geographic region 1 Repair technicians are employees and subcontractors

\* Dispatchers are assigned to all territories in a region. Dispatchers assign repair and installation work to technicians based on skills.

All the inspection, repair, and installation employees utilize the field Service mobile app Dispatchers can see all work request data for their region and see all the bookable resources.

Job structures

typical job assignments are as follows:

- \* Inspections: 1 -2 resources
- \* Installations: minimum 2 resources. 1 expert
- \* Repairs: 1-3 resources

Skills and certifications

The following spreadsheet tracks the skills and certifications earned by each internal employee:

Skills	Certifications
Plumbing	Certified Plumber
Heating	Certified HVAC Technician
Ventilation	Certified Flooring Installer
Air Conditioning	Certified HVAC Technician
Electrical	Certified Electrician
Solar Panel	Certified Solar Panel Installer

The Service areas are:

Accounts	Trade	Location	Type
-	Plumbing	U.S. & Canada	Coverage
-	Heating	U.S. & Canada	Coverage
-	Ventilation	U.S. & Canada	Coverage
-	Electrical	Canada	Coverage
-	Air Conditioning	U.S.	Coverage
In Land traders	Solar Panel	U.S.	Exclusion

For each type of job, there must be at least one certified or highly experienced resource on the job. Their current system does not have a way to maintain the availability of a service, maintain the subcontractor 's insurance details, certifications, and more options for inspectors. All work is printed out and provided as a hard copy to the resources. It is not easy to distribute the new updated materials for the service c\* share the new troubleshooting guides.

Planned changes

LitWare plans to implement Dynamics 365 Field Service. The requirements gathered during analysis are:

Work orders and scheduling

- \* Scheduling based on resource skill and number of required resources based on job type and duration.
- \* Planned Maintenance emergency calls take priority over other types of fobs.
- \* Schedule resources based on location, maximizing total work hours and then minimizing drive time.
- \* Ability to track technician time.
- \* Ability to configure rates and pay types.
- \* Ability to easily see when a resource is on Time Off on the schedule board
- \* All resource time-off requests should be approved by both their manager and their line manager

Service contracts

- \* Set up and create a Planned Maintenance type of contract.
- \* Define the coverage of the regions by the work.

Inspection management

- \* Ability to configure inspections.
- \* Ability fen inspections to be linked with work orders and customer assets.

Resources

- \* Implement company holidays for U.S. and Canada.
- \* Implement various pay types based on overtime, weekends and holidays, travel and regular time.
- \* Implement paid time off.
- \* Ability for resource calendars to reflect resource time off and work hours.
- \* Access to jobs assigned for the day.
- \* Ability to capture the validity of the insurance and send a 90-day reminder notification before the expiry.
- \* Activate geocoding throughout the system.

- \* Use territories for accounts, resources, and work orders.

- \* Enable Microsoft SharePoint Integration.

Field Service mobile app

- \* Ability for technician to access work orders and asset details.

- \* Ability to perform inspections on the mobile app

- \* Ability to work through offline mode.

- \* Ability to enter time for The work.

Technical Requirements

Resources require the ability to:

- \* Configure work hours templates based on their time zone.

- \* Access and view their skill, skill level, and certification data

- \* Certifications set to expire over the next 90 days should show highlighted in Yellow. o Certifications already expired will show in Red.

- \* Access documents either online or offline.

- \* Have the " time-off requests enabled for approval by default for resource who has skill of electrical, and have the requests approved by both their manager and line manager.

Work orders

- \* The ability to have templates for work orders.

- o Templates will provide guidance for technicians, and help recommend products and default services.

- \* Work orders created from a PM contract need to have a status a Service Contract Inspections:

- \* Ability to configure advance inspections with conditional logics based on the questions,

- \* Ability to use the latest inspections for analytics on a weekly basis.

- \* Ability to perform ad-hoc inspections with assets.

- \* Ability for users to export responses.

Security and access

- \* Technicians in the field should only see work orders scheduled for today.

- \* Technicians should have the option to enter manual time.

- \* Technicians should have the option to complete the inspections.

- \* Technicians should have the ability to access relevant apps to complete the job.

- \* Technicians should have the ability to access the guides.

- \* Administrators should have access to the technician usage of the guides.

**NO.15** LitWare has requirements for configuring the Field Service mobile app. and you are responsible for setting up the system to meet those requirements.

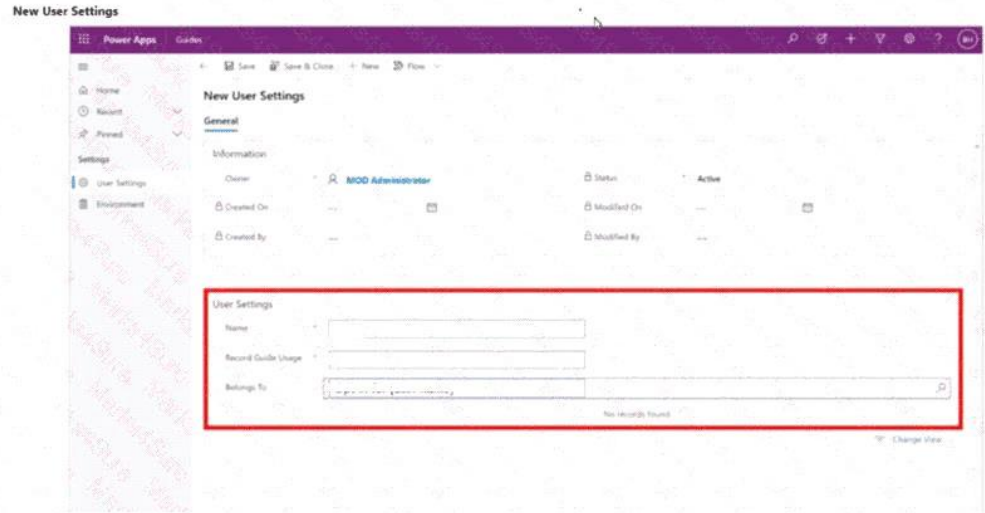
You need to set up help documents related to the requirements as per the case study.

How should you configure the user settings? To answer, move the appropriate configurations to the correct location. You may use each configuration once or not at all. You may need to drag the split bar between panes or scroll to view content.

NOTE: Each correct match is worth one point.

User setting inputs

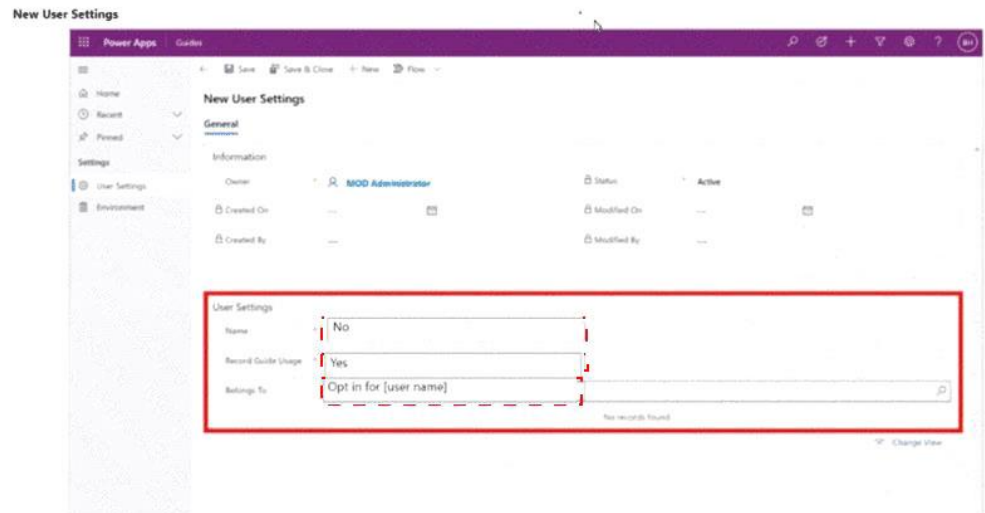
No
Yes
Opt in for [user name]
Opt out for [user name]
Field Service technicians
Field Service mobile app users



**Answer:**

User setting inputs

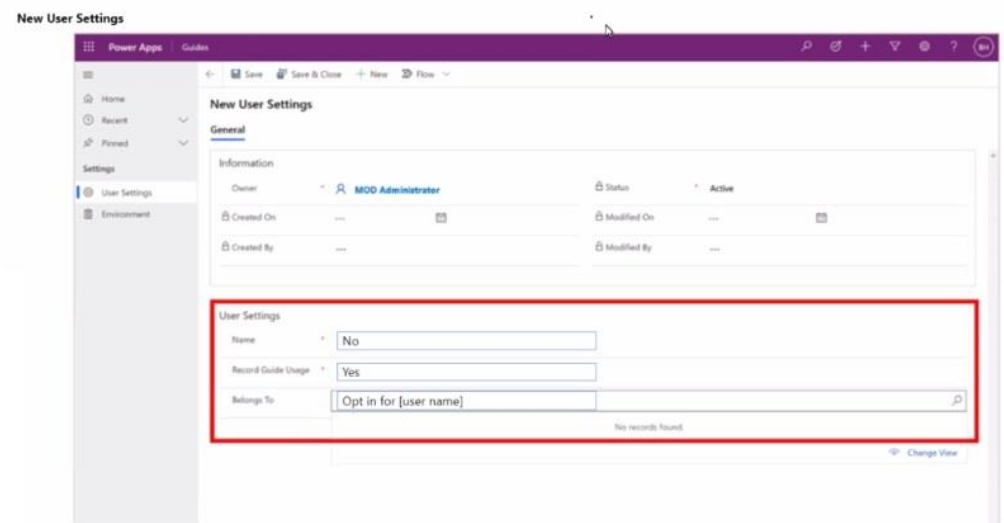
No
Yes
Opt in for [user name]
Opt out for [user name]
Field Service technicians
Field Service mobile app users



**Explanation:**

User setting inputs

No
Yes
Opt in for [user name]
Opt out for [user name]
Field Service technicians
Field Service mobile app users



**NO.16** LitWare has requirements for configuring the Insurance. You are responsible for setting up the system to manage the insurance Which three actions should you perform in sequence? To answer, move the three appropriate actions

from the list of actions to the answer area. Arrange the three actions in the correct order.

**Actions**

Create a one-to-many relationship between insurance and subcontractor.
Check the insurance flag on the account record.
Enable Trades Coverage in the settings.
Create a cloud flow to validate the insurance and send reminder.

**Order**

1	
2	
3	

**Answer:**

**Actions**

Create a one-to-many relationship between insurance and subcontractor.
Check the insurance flag on the account record.
Enable Trades Coverage in the settings.
Create a cloud flow to validate the insurance and send reminder.

**Order**

1	Enable Trades Coverage in the settings.
2	Create a one-to-many relationship between insurance and subcontractor.
3	Create a cloud flow to validate the insurance and send reminder.

**Explanation:**

To manage the insurance for LitWare, you should perform the following actions in sequence:

- \* Enable Trades Coverage in the settings.
- \* Create a one-to-many relationship between insurance and subcontractor.
- \* Create a cloud flow to validate the insurance and send a reminder.

These steps will help ensure that insurance details are properly managed and that reminders are sent out in a timely manner. This is crucial for maintaining compliance and ensuring that all subcontractors have valid insurance coverage.

**NO.17** You need to set up the system to meet LitWare's inspection requirements.

Which three actions should you perform in sequence in the Field Service app? To answer, move the three appropriate actions from the list of actions to the answer area. Arrange the three actions in the order.

**Actions**

Update record generation start time.
Set Analytics Frequency = "Immediately".
Set Analytics Frequency = "Custom".
Access the <b>Inspection</b> tab within Field Service app settings.
Enable Analytics.
Set Analytics Frequency = "Daily".

**Order**

**Answer:**

**Actions**

Update record generation start time.
Set Analytics Frequency = "Immediately".
Set Analytics Frequency = "Custom".
Access the <b>Inspection</b> tab within Field Service app settings.
Enable Analytics.
Set Analytics Frequency = "Daily".

**Order**

Access the <b>Inspection</b> tab within Field Service app settings.
Enable Analytics.
Set Analytics Frequency = "Daily".

**Explanation:**

**Actions**

Update record generation start time.
Set Analytics Frequency = "Immediately".
Set Analytics Frequency = "Custom".

**Order**

1	Access the <b>Inspection</b> tab within Field Service app settings.
2	Enable Analytics.
3	Set Analytics Frequency = "Daily".

To set up the system to meet LitWare's inspection requirements in the Field Service app, you should perform these three actions in sequence:

- \* Access the Inspection tab within Field Service app settings.
- \* Enable Analytics.
- \* Set Analytics Frequency to "Daily".

These steps will allow you to configure the inspection settings, enable analytics for inspections, and set the frequency of analytics to daily for regular updates. This will help LitWare Inc. to meet their inspection requirements effectively.

Topic 4, LitWare Inc. New Case study  
LitWare Inc. is a plumbing and heating company which provides installation, maintenance, and repair services in United States (U.S.) and Canada.

LitWare also offers various installation and repair services such heating, venting, and air conditioning (HVAQ, plumbing, and roofing for commercial customers using their employees and subcontractors.

Company structure and resources

The company has three main types of services, each offering a different combination of service personnel.

1. Training services provide training to LitWare employees and subcontractors to perform the work in the regions serviced.
2. Unplanned maintenance services address emergency repair requests for their customers.
  - o Dispatchers are assigned to all territories in a region. Dispatchers assign repair and installation work to repair technicians based on their skills.
  - o Repair technicians are employees and subcontractors.
3. Planned maintenance services perform regular and planned checks for their customers.
  - o inspectors are assigned to all regions based on skills and expertise.
  - o Installers are assigned to multiple territories in a geographic region.
  - o Repair technicians are employees and subcontractors.
  - o Dispatchers are assigned to all territories in a region. Dispatchers assign repair and installation work to technicians based on skills.

All the inspection, repair, and installation employees utilize the Field Service mobile app.

Dispatchers can see all work request data for their region and see all the bookable resources.

Job structure

Typical job assignments are as follows:

- \* Inspections: 1 -2 resources
- \* Installations: minimum 2 resources. 1 expert
- \* Repairs: 1 -3 resources

Skills and certifications

The following spreadsheet tracks the skills and certifications earned by each internal employee:

Skills	Certifications
Plumbing	Certified Plumber
Heating	Certified HVAC Technician
Ventilation	Certified Flooring Installer
Air Conditioning	Certified HVAC Technician
Electrical	Certified Electrician
Solar Panel	Certified Solar Panel Installer

Service areas

The service areas are:

Accounts	Trade	Location	Type
-	Plumbing	U.S. & Canada	Coverage
-	Heating	U.S. & Canada	Coverage
-	Ventilation	U.S. & Canada	Coverage
-	Electrical	Canada	Coverage
-	Air Conditioning	U.S.	Coverage
In Land traders	Solar Panel	U.S.	Exclusion

For each type of job, there must be at least one certified or highly experienced resource on the job. Their current system does not have a way to maintain the availability of a service, maintain the subcontractor ' s insurance details, certifications, and more options for inspectors. All work is printed out and provided as a hard copy to the resources. It is not easy to distribute the new updated materials for the service or share the new troubleshooting guides.

#### Planned changes

LitWare plans to implement Dynamics 365 Field Service. The requirements gathered during analysis are:

#### Work orders and scheduling

- \* Scheduling based on resource skill, and number of required resources based on job type and duration.
- \* Planned Maintenance emergency calls take priority over other types of jobs.
- \* Schedule resources based on location, maximizing total work hours and then minimizing drive time.
- \* Ability to track technician time.
- \* Ability to configure rates and pay types.
- \* Ability to easily see when a resource is on Time Off on the schedule board.
- \* All resource time-off requests should be approved by both their manager and their line manager.

#### Service contracts

- \* Set up and create a Planned Maintenance type of contract.
- \* Define the coverage of the regions by the work.

#### Inspection management

- \* Ability to configure inspections.
- \* Ability for inspections to be linked with work orders and customer assets.

#### Resources

- \* Implement company holidays for U.S. and Canada.
- \* Implement various pay types based on overtime, weekends and holidays, travel and regular time.
- \* Implement paid time off.
- \* Ability for resource calendars to reflect resource time off and work hours.
- \* Access to jobs assigned for the day.
- \* Ability to capture the validity of the insurance and send a 90-day reminder notification before the expiry.
- \* Activate geocoding throughout the system.
- \* Use territories for accounts, resources, and work orders.
- \* Enable Microsoft SharePoint Integration.

#### Field Service mobile app

- \* Ability for technician to access work orders and asset details.
- \* Ability to perform inspections on the mobile app.
- \* Ability to work through offline mode.
- \* Ability to enter time for the work.

#### Technical requirements

Resources require the ability to:

- \* Configure work hours templates based on their time zone.
- \* Access and view their skills, skill level, and certification data.
- o Certifications set to expire over the next 90 days should show highlighted in Yellow, o Certifications already expired will show in Red.
- \* Access documents either online or offline.
- \* Have their time-off requests enabled for approval by default for resource who has skill of electrical, and have the requests approved by both their manager and line manager.

#### Work orders

- \* The ability to have templates for work orders.
- o Templates will provide guidance for technicians, and help recommend products and default services.
- \* Work orders created from a PM contract need to have a status = Service Contract.

#### Inspections:

- \* Ability to configure advance inspections with conditional logics based on the questions.
- \* Ability to use the latest inspections for analytics on a weekly basis.
- \* Ability to perform ad-hoc inspections with assets.
- \* Ability for users to export responses.

#### Security and access

- \* Technicians in the field should only see work orders scheduled for today.
- \* Technicians should have the option to enter manual time.
- \* Technicians should have the option to complete the inspections.
- \* Technicians should have the ability to access relevant apps to complete the job.
- \* Technicians should have the ability to access the guides.
- \* Administrators should have access to the technician usage of the guides.

**NO.18** You need to advise LitWare administrators on configuring advanced options for inspection requirements.

Which option should you recommend?

- A.** Download as Report
- B.** Download as Word template
- C.** Export to PDF
- D.** Export to Excel

**Answer:** C

**NO.19** You need to set up the system to manage the work hours template for all the resources.

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

- A.** Go to the resource and select the Working hours tab.
- B.** Set the resources in the correct time zone.
- C.** Create a work hours template based on the region.
- D.** Create new working hours, then select Repeat as " custom " , with " Monday to Friday ' and the hours set as " 8:00 am to 5:00 pm ' "
- E.** Select the resource, set the calendar, and apply the working hours template.

**Answer:** C E

**NO.20** 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.

Actions

- ☰ Access the work order, go to **Related Entities** and create time entry.
- ☰ Select work order, choose the duration, and select the status.
- ☰ Access the Field Service mobile app and select **Time Entry**.
- ☰ Create time entry.
- ☰ Select work order, choose the start time and end time, and select the status.

Order



**Answer:**

Actions

- ☰ Access the work order, go to **Related Entities** and create time entry.
- ☰ Select work order, choose the duration, and select the status.
- ☰ Access the Field Service mobile app and select **Time Entry**.
- ☰ Create time entry.
- ☰ Select work order, choose the start time and end time, and select the status.

Order

- ☰ Access the Field Service mobile app and select **Time Entry**.
- ☰ Create time entry.
- ☰ Select work order, choose the start time and end time, and select the status.

Explanation:

A screenshot of a computer Description automatically generated

**Actions**

- ☰ Access the work order, go to **Related Entities** and create time entry.
- ☰ Select work order, choose the duration, and select the status.

**Order**

- 1 ☰ Access the Field Service mobile app and select **Time Entry**.
- 2 ☰ Create time entry.
- 3 ☰ Select work order, choose the start time and end time, and select the status.

**NO.21** LitWare has requirements for configuring the services around the region.

You need to set up the system to meet those requirements.

Which four actions should you perform in sequence? To answer, move the four appropriate actions from the list of actions to the answer area. Arrange the four actions in the correct order.

**Action**

- ☰ Install the solution for trades and trade coverages.
- ☰ Create an incident after the validation by cloud flow.
- ☰ Enable the trades and trades coverage in the settings.
- ☰ Create the trade record.
- ☰ Create incident types and update the Trade field.
- ☰ Create trade coverage for the account and/or the location.

**Order**

**Answer:**

**Action**

- ☰ Install the solution for trades and trade coverages.
- ☰ Create an incident after the validation by cloud flow.
- ☰ Enable the trades and trades coverage in the settings.
- ☰ Create the trade record.
- ☰ Create incident types and update the Trade field.
- ☰ Create trade coverage for the account and/or the location.

**Order**

- ☰ Enable the trades and trades coverage in the settings.
- ☰ Create the trade record.
- ☰ Create incident types and update the Trade field.
- ☰ Create trade coverage for the account and/or the location.

Explanation:

#### Action

- ⋮ Install the solution for trades and trade coverages.
- ⋮ Create an incident after the validation by cloud flow.

#### Order

- 1 ⋮ Enable the trades and trades coverage in the settings.
- 2 ⋮ Create the trade record.
- 3 ⋮ Create incident types and update the Trade field.
- 4 ⋮ Create trade coverage for the account and/or the location.

### Topic 5, Wingtip Toys

#### Company Overview

Wingtip Toys is a specialist prop fabrication company specializing in animatronic dinosaur sculptures. The sculptures are assets that belong to the company. The assets are painstakingly constructed over several years using proprietary techniques and require significant capital investment.

#### Staff members

Wingtip Toys has five staff members:

1. The Chief Executive Officer (CEO)
2. The prop master
3. The robotics engineer
4. The robotics intern
5. You, the Power Platform administrator

Employees 2, 3, and 4 are field technicians. Customers pay a surcharge for technician travel time, so the CEO requires they are diligent in marketing themselves as " Travelling " on their Field Service mobile apps as soon as they begin driving to a site.

#### Assets overview

Customers - such as film studios, museums, and theme parks - usually lease assets on a long-term basis. Lease agreements are sold with regular maintenance, both cosmetic and technical. Short-term rentals are also available for specific projects at theatres, events, or for filming on location. The CEO has recently produced a barcode for each dinosaur currently in use. The new barcode should be applied to the inside of the sculpture ' s mouths at the next visit.

#### Dinosaur sculptures

All dinosaur sculptures have been added as assets. A custom choice type column named " Species " has been added to the main form and is manually selected when a new asset is created The prop master asked you to create a custom page that will allow them to browse through all current and previous dinosaur sculptures; each displaying the sculpture name, completion data, species, and a small image.

The catalog should allow the user to drill down into further information about the asset and (if applicable) the account of the customer currently renting or leasing it.

#### Overview

Cosmetic work is always performed by the prop master, created automatically via agreements and scheduled by the CEO.

The " Cosmetic maintenance " incident type currently has four related products. Two of those are field service type products and two are service task types.

#### Technical work orders

Within the last few months, some customers have contacted Wingtip Toys to note that a tooth or two had fallen out of the dinosaurs ' mouths. This is due to wear and tear on the roaring and chewing motions that customers can trigger.

The CEO wants to add dental check-up to the " Cosmetic maintenance " incident type to allow the prop master to prevent these incidences from occurring in the future where needed. This incident type has no associated cost to the customer.

**Inspections**

As the dental check-up of dinosaurs can have technical implications, the robotics engineer works with you to create an inspection, which must be completed every time the process is completed.

The engineer wants the inspection to appear to the prop master in their mobile app as per the above image.

However, they also need to add the scanning of the new barcode sticker.

Further, the CEO requires completed inspections to be related to the correct dinosaur as part of their service history.

**New programming: dance firmware update**

The intern has just begun completing work orders on their own. Once they have completed all items and performed their inspection, they need to wait for the engineer to review their work before they can mark the job as " Completed. " This give the engineer an opportunity to assess whether something additional might be required.

**NO.22** You are implementing Dynamic 365 Field Service for a customer.

You need to implement push notifications to the Field Service Mobile app to send proactive communications to the assigned technicians in real-time.

Which three actions should you perform in the Power Automate Cloud Flow in sequence? To answer, move the three appropriate actions from the list of actions to the answer area. Arrange the three actions in the correct order.

Actions

- Identify the user who owns the booking.
- Use the **Send Push Notification** action to configure the notification.
- Retrieve the mobile phone number of the user assigned to the booking.
- Ensure the resource on the booking is a user.
- Identify the user who is using the Field Service Mobile app.
- Use the **Send Push Notification V2** action to configure the notification.

Order

**Answer:**

Actions

- Identify the user who owns the booking.
- Use the **Send Push Notification** action to configure the notification.
- Retrieve the mobile phone number of the user assigned to the booking.
- Ensure the resource on the booking is a user.
- Identify the user who is using the Field Service Mobile app.
- Use the **Send Push Notification V2** action to configure the notification.

Order

- Ensure the resource on the booking is a user.
- Identify the user who is using the Field Service Mobile app.
- Use the **Send Push Notification V2** action to configure the notification.

**Explanation:**

Actions

- ☰ Identify the user who owns the booking.
- ☰ Use the **Send Push Notification** action to configure the notification.
- ☰ Retrieve the mobile phone number of the user assigned to the booking.

Order

- 1 ☰ Ensure the resource on the booking is a user.
- 2 ☰ Identify the user who is using the Field Service Mobile app.
- 3 ☰ Use the **Send Push Notification V2** action to configure the notification.

**NO.23** Your organization uses Dynamics 365 Field Service.

The organization wants you to set up process steps checklists for technicians to follow when completing work orders in the field. What should you do?

- A.** Create an inspection form and assign it to the work order type.
- B.** Create service activities for work orders, based on work order type.
- C.** Create service tasks, and add to incident types.
- D.** Create a business process flow, based on work order type.

**Answer:** C