EXAM HEIST



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Microsoft

(MB-240)

Microsoft Dynamics 365 for Field Service (beta)

Total: **343 Questions**

Link: https://examheist.com/papers/microsoft/mb-240

Question: 1 **Exam Heist**

Note: This question is part of a series of questions that present the same scenario. Each question in the series contains a unique solution that might meet stated goals. Some question sets might have more than one correct solution, while others might not have a correct solution.
After you answer a question in this section, you will NOT be able to return to it. As a result, these questions will not appear in the review screen.
You are a Dynamics 365 for Field Service system administrator.
You are configuring a new instance of Dynamics 365 for Field Service. The organization needs to accurately capture the cost of work order bookings.
Solution: You implement the following configuration changes:
1) Create Resource Pay Types for regular, holiday, overtime, travel, and breaks.
2) Assign an Hourly Markup percentage to each Resource Pay Type.
3) Assign Resource Pay Types to the applicable Pay Type.
4) Create the Holiday Schedule.
Does this meet the goal?

A. Yes

B. No

Answer: B

Explanation:

Answer = B.

Set resource hourly rate is missing.

Set resource work hours is missing.

And holiday schedule should be business closures.

Question: 2 **Exam Heist**

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2) Assign an Hourly Markup percentage to each Resource Pay Type.
3) Assign Resource Pay Types to the applicable Pay Type.
4) Create Business Closures.
5) Create Bookable Resources with Hourly Rates.
Does this meet the goal?

A. Yes

B. No

Answer: B

Explanation:

Answer = B.

Set resource work hours is missing.

Question: 3 **Exam Heist**

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Solution: You implement the following configuration changes:
1) Create Resource Pay Types for regular, holiday, overtime, travel, and breaks.
2) Assign an Hourly Markup percentage to each Resource Pay Type.
3) Assign Resource Pay Types to the applicable Pay Type.
4) Create Business Closures.
5) Create Bookable Resources with Hourly Rates and Work Hours.
Does this meet the goal?

A. Yes
B. No

Answer: A

Explanation:

Answer = A.

Allthough I have no idea where you can assign Resource Pay Types to the applicable Pay Type.

Question: 4 **Exam Heist**

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You are a Dynamics 365 for Field Service system administrator.
You are configuring a new instance of Dynamics 365 for Field Service. The organization needs to automatically generate work orders based on agreements, and send invoices on a recurring basis by customer.
Solution: You implement the following configuration changes.
1) Create Agreement
2) Define Agreement Products
3) Set Booking Recurrence
4) Create Invoice Setup
5) Define Invoice Recurrence
Does this meet the goal?

A. Yes
B. No

Answer: B

Explanation:

Answer = B.

There is no such thing as agreement products.

Only invoice products exists and should be defined in the invoice setup.

Question: 5 **Exam Heist**

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You are configuring a new instance of Dynamics 365 for Field Service. The organization needs to automatically generate work orders based on agreements, and send invoices on a recurring basis by customer.
Solution: You implement the following configuration changes.
1) Create Agreement
2) Define Booking Setup
3) Create Invoice Setup
4) Set Auto Generate Invoice = Yes
5) Populate Generate Agreement Invoices X Days in Advance
Does this meet the goal?

A. Yes

B. No

Answer: B

Explanation:

Answer = B.

Set booking recurrence is missing.

There is no such option as set auto generate invoice. Only auto generate work order exists.

Same for generate agreement invoices X days in agvance.

Question: 6 **Exam Heist**

Note: This question is part of a series of questions that present the same scenario. Each question in the series contains a unique solution that might meet stated goals. Some question sets might have more than one correct solution, while others might not have a correct solution.
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Solution: You implement the following configuration changes.
1) Create Agreement
2) Define Booking Setup
3) Set Booking Recurrence
4) Create Invoice Setup
5) Define Invoice Recurrence
Does this meet the goal?

A. Yes

B. No

Answer: A

Explanation:

Answer = A.

Let's hope the auto generate work order is set to Yes.

Question: 7 **Exam Heist**

You are a Dynamics 365 for Field Service Administrator. Your organization wants to use Connected Field Service for existing Customer Assets.
You install Connected Field Service and set up Azure IoT Central, but it seems no alerts are being received in Dynamics 365 for the devices.
You need to find the issue and resolve it.
Which action should you choose?

A. Configure the Create CFS alerts from IoT Central Workflow within Dynamics 365.
B. Create the IoT Connected Device connection role to link devices to customer assets.
C. Register the device in Dynamics 365 Connected Field Service.
D. Configure the Create CFS alerts from IoT Central within Microsoft Flow.

Answer: D

Explanation:

Reference:
https://docs.microsoft.com/en-us/dynamics365/customer-engagement/field-service/cfs-iot-central-alerts

Question: 8 **Exam Heist**

You are a Dynamics 365 for Field Service Administrator.
You install and configure Connected Field Service with Azure IoT Central. Several of your connected devices sent alerts back to Dynamics 365 and work orders were created. However, the work orders were not sent back to Azure IoT Central.
You need to resolve the issue.
Which Action should you take to resolve the issue?

A. Configure the Microsoft Flow When a work order is created in Connected Field Service, update IoT Central.
B. Create an IoT Command in Dynamics 365 to trigger an update in IoT Central.
C. Configure the Dynamics 365 workflow When a work order is created in Connected Field Service, update IoT Central.
D. Create an IoT action in Dynamics 365 to trigger an update in IoT Central.

Answer: A

Explanation:

Reference:
https://docs.microsoft.com/en-us/dynamics365/customer-engagement/field-service/cfs-iot-central-work-orders

Question: 9 Exam Heist

You are a Dynamics 365 for Field Service consultant.
One of your Dynamics 365 customers wants to decrease the number of repair appointments by sending fewer technicians onsite.
You need to provide a recommendation of which solution your customer should use to achieve their request.
What should you recommend?

A. Azure IoT Hub
B. Connected Field Service
C. Dynamics 365 for Field Service
D. Crew Scheduling

Answer: B

Explanation:

Answer as B is because by setting connected field service work can be done from hub / shop itself and hence less technicians will be needed to be sent onsite.

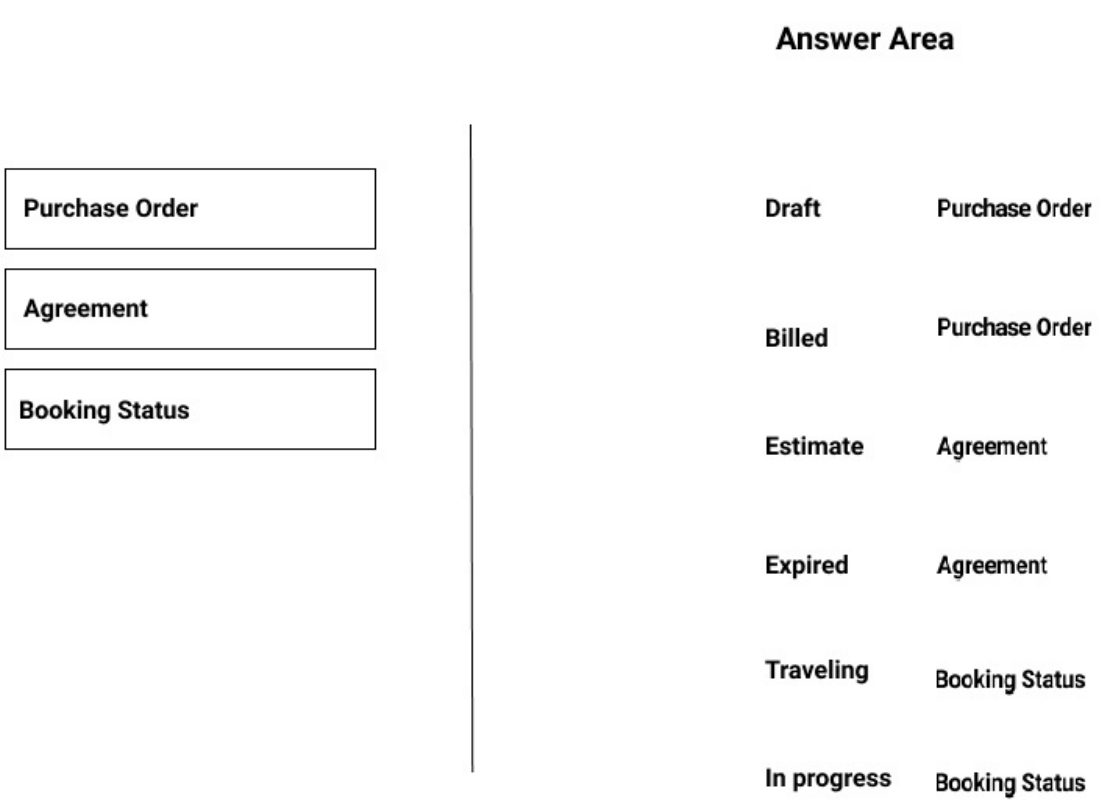
Question: 10 Exam Heist

DRAG DROP -
You are a field service administrator for your company.
You review the Field Service administrator guide to understand how the status fields can support your company's business processes.
Which unique entity system status value matches with its Entity Type? To answer, drag the appropriate unique entity system status values to the appropriate
Entity Type. Each unique entity system status value may be used once, more than once, or not at all. You may need to drag the split bar between panes or scroll to view the content.
NOTE: Each correct selection is worth one point.
Select and Place:

Answer Area

Purchase Order	Draft
Agreement	Billed
Booking Status	Estimate
	Expired
	Traveling
	In progress

Answer:



Question: 11 **Exam Heist**

Contoso, Ltd has just acquired a new company in order to increase the services it offers to its customers. Contoso, Ltd. wants to ensure that it is able to track all of the stages in its service management workflow, including the services offered by the new service company.
You need to configure Dynamics 365 CE for Field Services to ensure that all of the necessary status values are configured correctly to track your company's unique business process.
Which action must you perform?

A. Edit the existing system status field values.
B. Create the necessary sub-status values.
C. Create the necessary system status values.
D. Create the necessary service task values.

Answer: B

Explanation:

Ans = B(Sub-Statuses)

https://docs.microsoft.com/en-us/dynamics365/field-service/set-up-booking-statuses

Booking statuses allow you to create multiple sub-statuses mapped to each of your booking statuses in order to more precisely define your company's unique business processes.

Question: 12 **Exam Heist**

As a new start-up field services company, you are looking to streamline your customer service process to provide the best customer service experience.
Your company has decided to implement Dynamics Field Services as the foundation for its customer service management processes.
You need to ensure that the cases that the customer service team creates can be quickly and efficiently converted to work orders (that will minimize the need to add additional information to the work orders) using the out-of-the-box capabilities.
Which key item do you need to configure before the customer service agents will be able to convert a case to a work order?

A. Resources
B. Work Order Types
C. Booking Rules
D. Incident Type

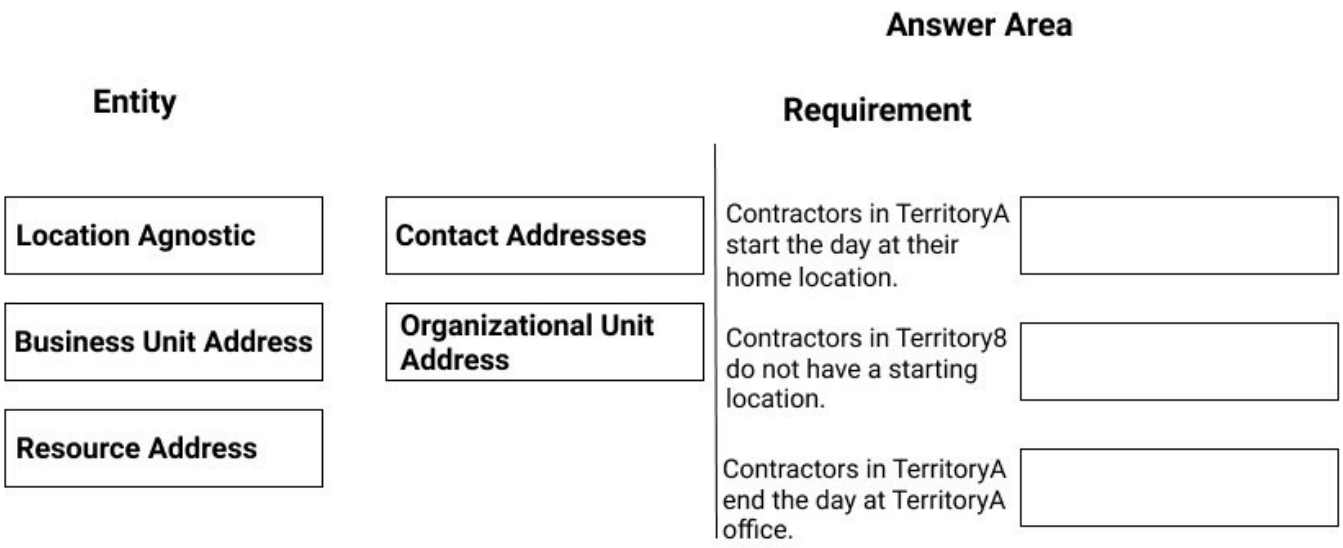
Answer: D

Explanation:

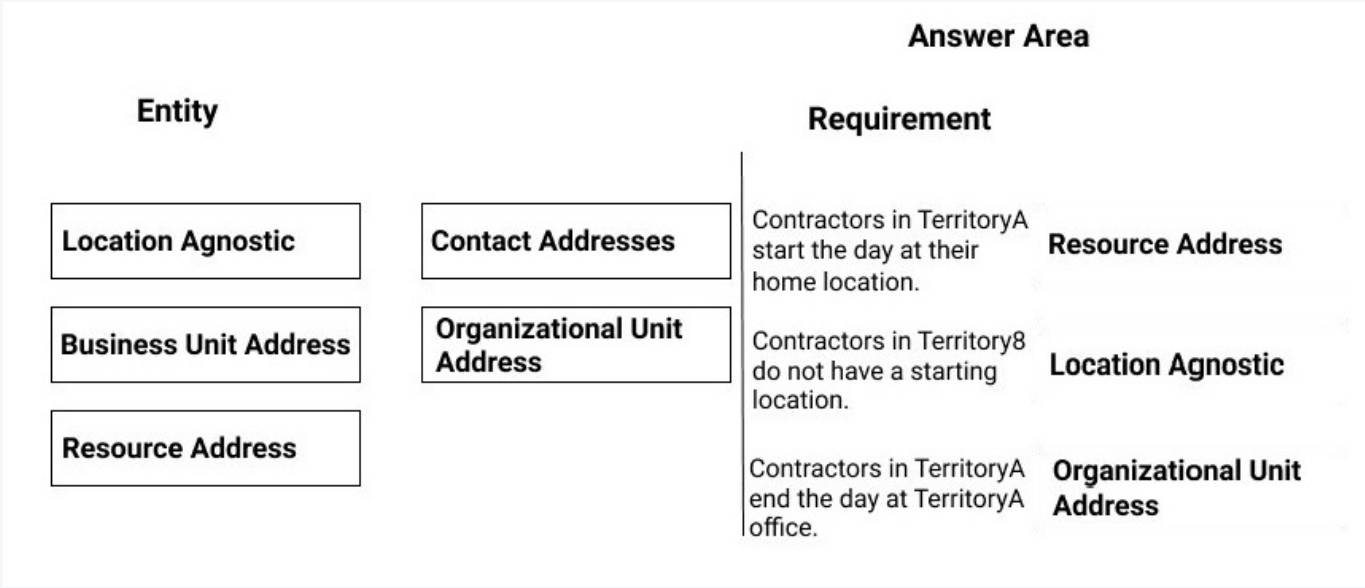
Reference:
https://docs.microsoft.com/en-us/dynamics365/customer-engagement/field-service/configure-incident-types

Question: 13 **Exam Heist**

DRAG DROP -
You are a Dynamics 365 for Field Service administrator. Your company only uses contractors as Bookable Resources. The contractors are not licensed Dynamics
365 users.
The scheduling team books work orders to resources based on location. The team provides you with scenarios because many resources are not showing up in the scheduling assistant.
You need to update bookable resource records based on the provided scenarios.
Which address type should you use with each scenario? To answer, drag the appropriate address type to the appropriate scenario. Each address type may be used one, 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:



Explanation:

1. Resource Address

2. Location Agnostics

3. Organizational Unit Address

Question: 14 **Exam Heist**

Your company is expanding nationally.
You need to configure tax codes for a new territory, so the company can start to operate in the new territory.
You realize that you can identify which field service record types the tax code will be applied to.
Which three Field Service record types are taxable within the new tax code? Each correct answer presents a complete solution.

A. Agreements
B. Services
C. Purchase Orders
D. Products
E. Work Orders

Answer: ABD

Explanation:

A. Agreements

B. Services

D. Products

Question: 15 **Exam Heist**

You are entering products and services into Dynamics 365 CE Field Services.

You need to ensure that your field technicians can use the products when completing work orders.
Which two field service product types should you configure to allow your technicians to add work order products?
Each correct answer presents a complete solution.

A. Product
B. Non Inventory
C. Inventory
D. Service

Answer: BC

Explanation:

The product can only be a product with the Field Service product type of Inventory or Non Inventory.

It must be B&C for the Work Order Product. D - Service is for the Work Order Service

Question: 16 **Exam Heist**

The field service team manager needs you to give a new technician user access to the system. The technician will use the mobile application to fill out work orders when they are onsite doing filed work to repair factory motors at customer sites. When the dispatcher takes vacation, the new technician user will manage dispatcher functions.
Which two field service security roles will the new technician user need? Each correct answer presents part of the solution.

A. Field Service-Dispatcher
B. Field Service-App Access and Field Service -Resource
C. Field Service-Mobile User
D. Field Service-User

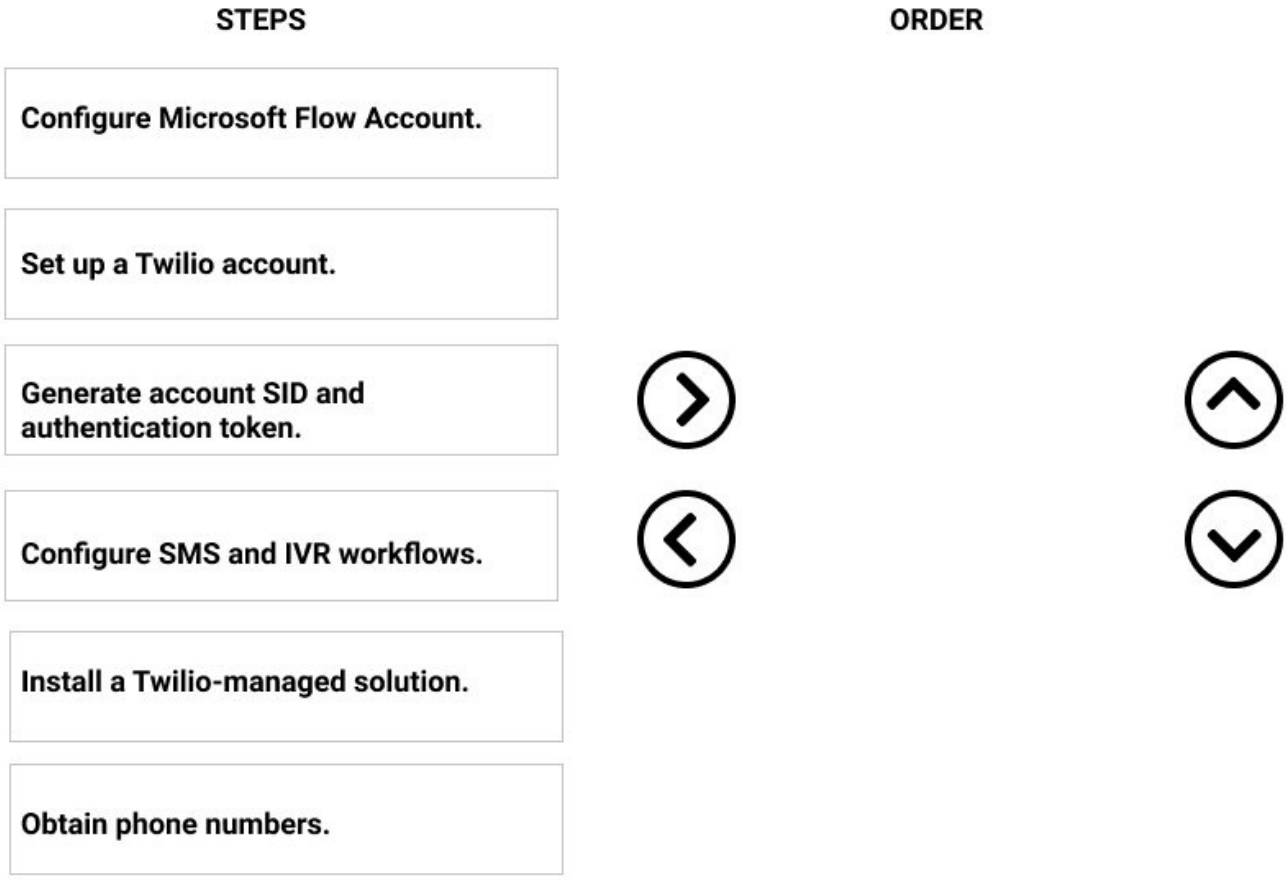
Answer: AB

Explanation:

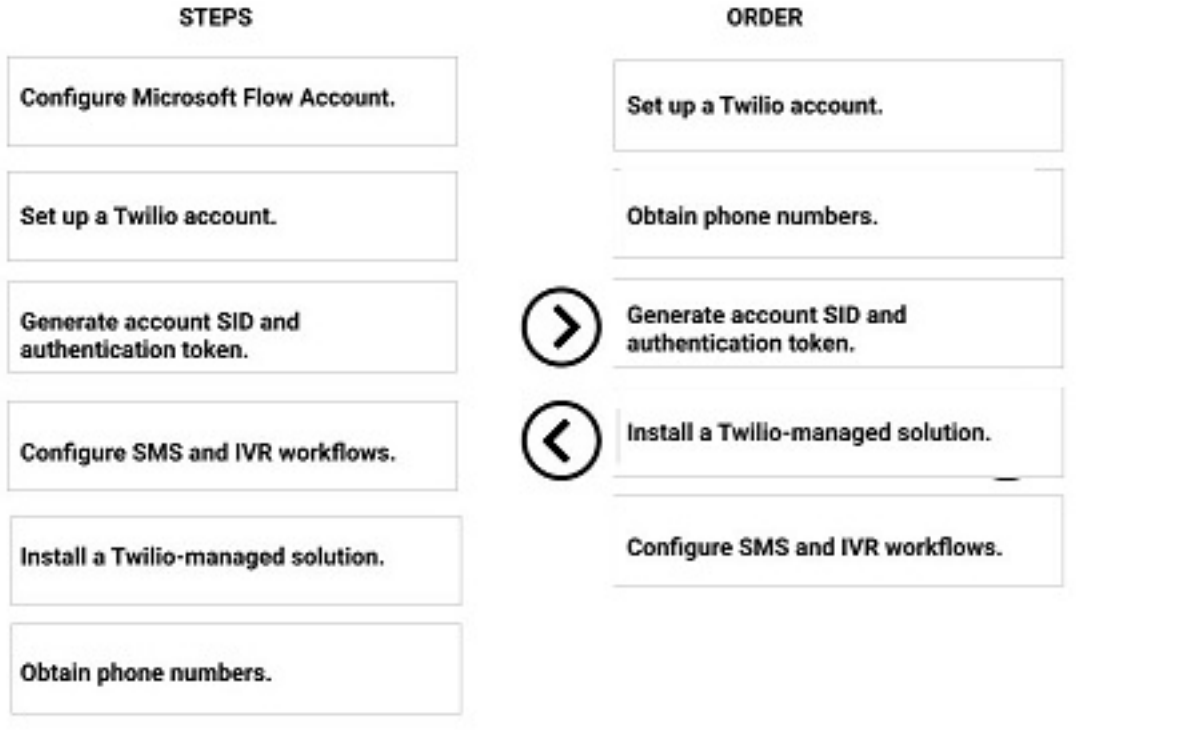
Reference:
https://docs.microsoft.com/en-us/dynamics365/customer-engagement/field-service/view-user-accounts-security-roles#field-service-roles

Question: 17 **Exam Heist**

DRAG DROP -
To improve communications with customers, your company has decided to implement Twilio, a third-party communication platform that has call and messaging capabilities.
The Twilio solution includes a number of core components to deliver the capability, all of which need to be set up.
Which five steps should you take in sequence to prepare data for optimization? To answer, move the appropriate actions from the list of actions to the answer area and arrange them in the correct order.
Select and Place:



Answer:



Explanation:

1. Setup a twilio Account

2. Obtain Phone Numbers

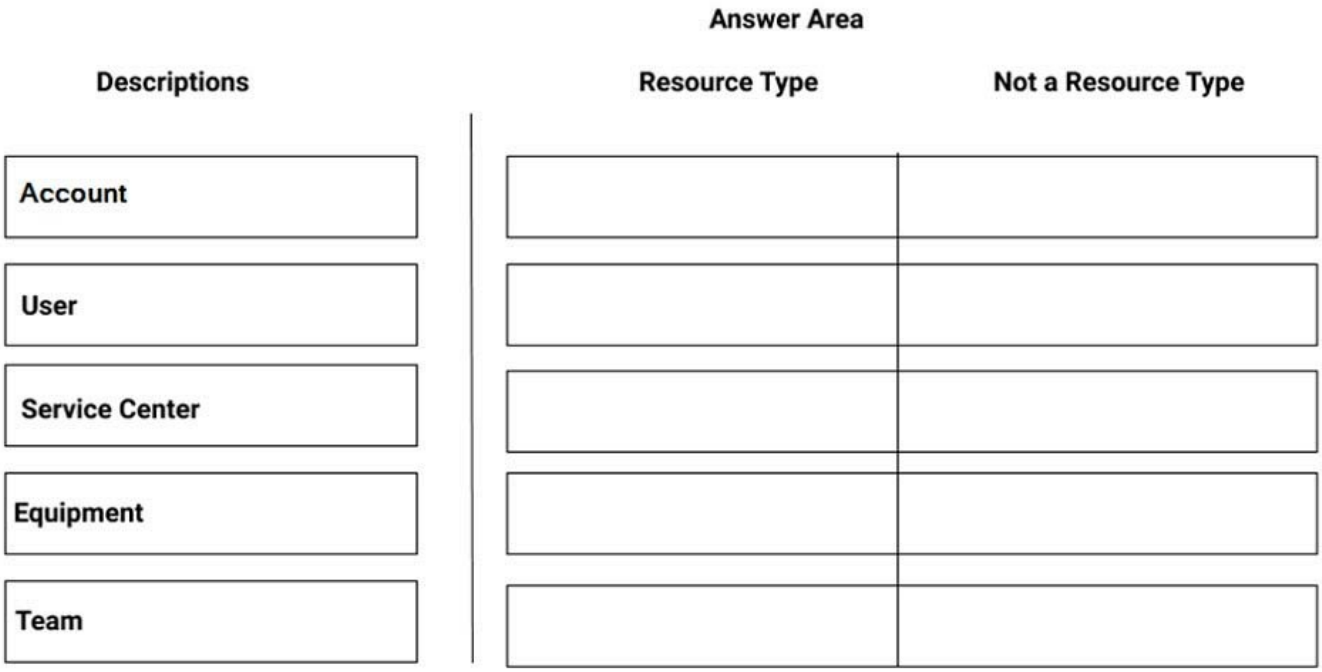
3. Generate account SID and authentication token

4. Install a Twilio-managed solution

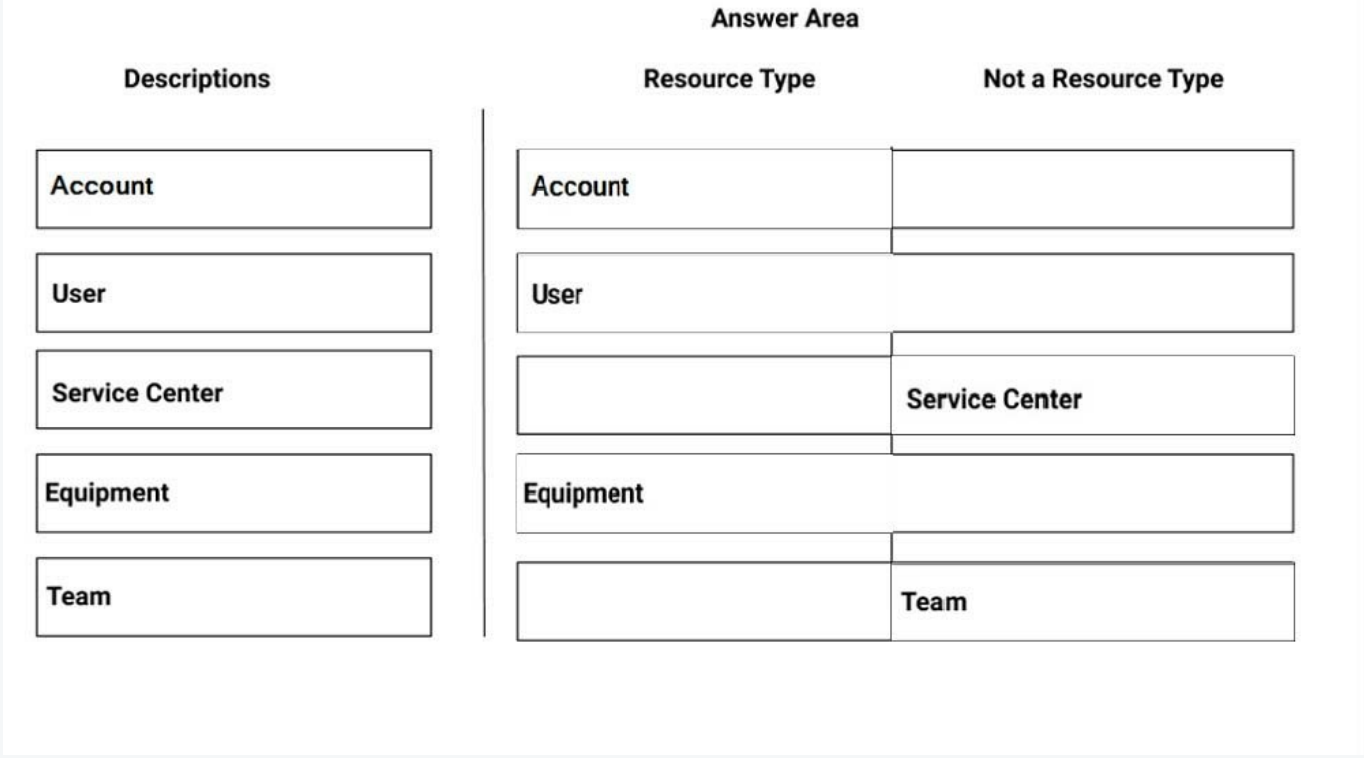
5. Configure SMS and IVR solution

Question: 18 **Exam Heist**

DRAG DROP -
Your company has a requirement to use the out-of-the-box Resource types to categorize Active Bookable Resource types. The company wants to ensure easy
Dynamics 365 upgrades as needed.
You need to ensure that you only use the appropriate Resource types.
Which types are available for your use? To answer, drag each description on the left to the appropriate column on the right. Each description 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:



Explanation:

Reference:
https://docs.microsoft.com/en-us/dynamics365/customer-engagement/field-service/set-up-bookable-resources

Question: 19 **Exam Heist**

You are a Dynamics 365 for Field Service Dispatcher reviewing automatically generated bookings for optimization of the schedule.
You notice that, for certain customers, Work Orders are being generated without service tasks, products, or services, when they should have them documented from the Agreement.
Which two of the following should you troubleshoot? Each correct answer presents part of the solution.

A. Incident Type contains appropriate Service Tasks, Products, and Services.
B. Incident Type field "Copy Incident Items to Agreement" is marked "Yes".
C. Agreement Booking Setup field "Auto Generate Work Order" is marked "Yes".
D. Agreement Booking Setup contains appropriate Service Tasks, Products, and Services

Answer: BD

Explanation:

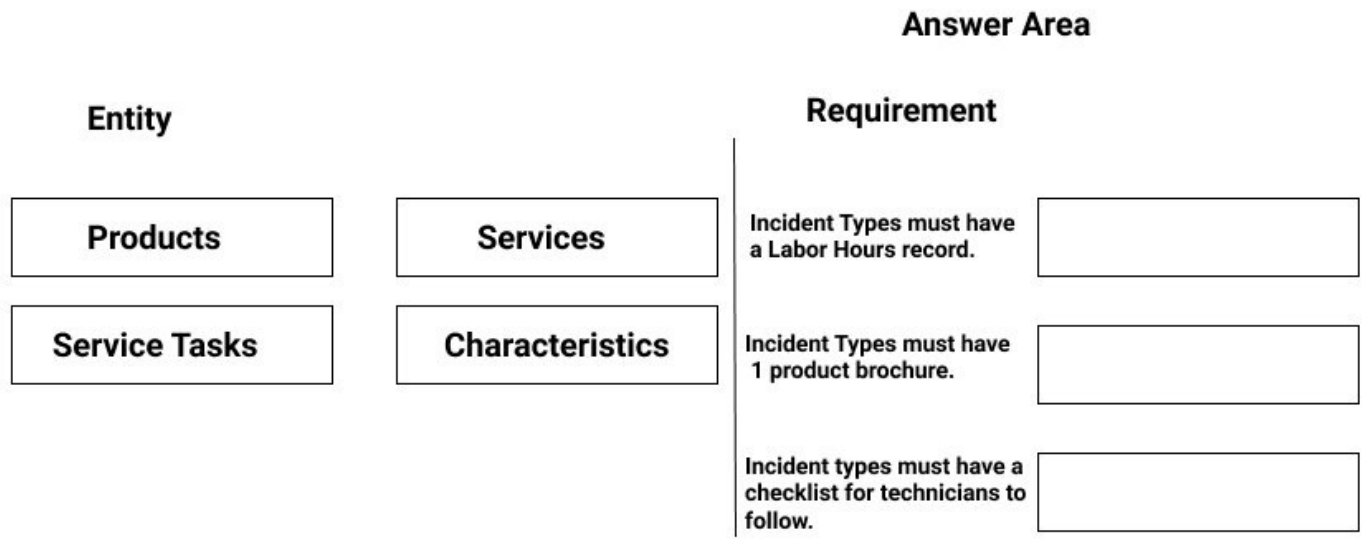
BD is correct. A does not solve the issue! Even if an incident type contains appropriate service tasks, products, and services, it is still possible that created work orders based on agreements ("they should have them documented from the Agreement") are being generated without service tasks, products, or services! So with A it is possible that an incident type has tasks, services, products, but a related work order generated from agreement has not. C is about not creating work orders at all.

In contrast: B ensures that incident type and related work order from agreement are the same in terms of tasks, services, products. D is evidently an option which

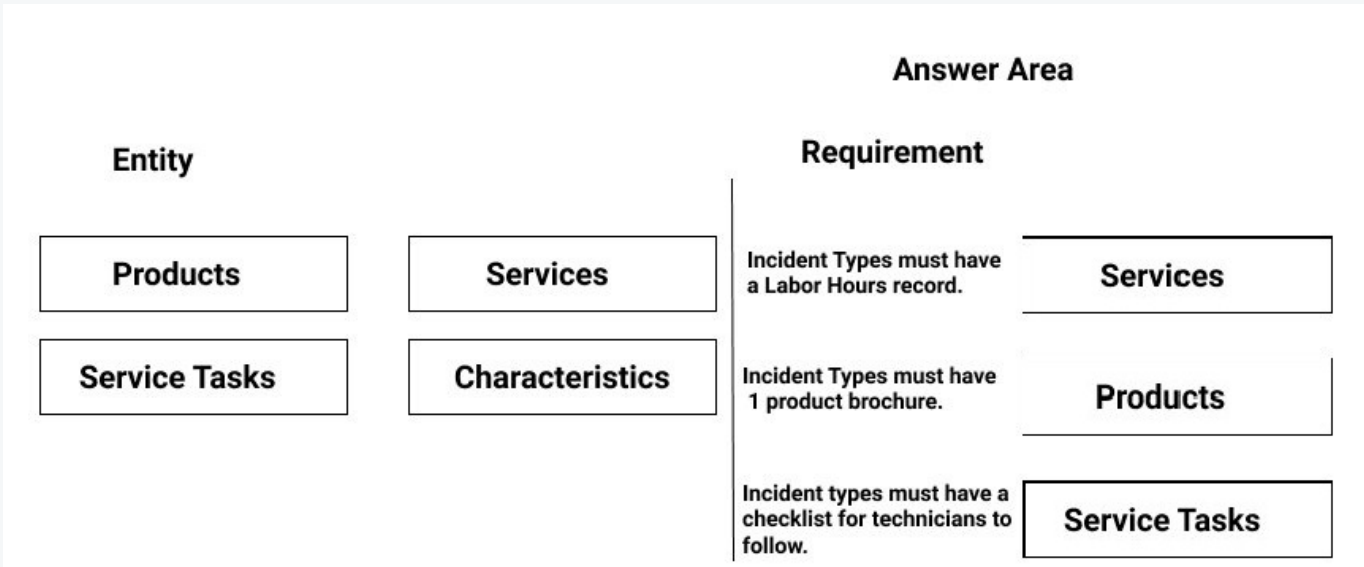
guarantees work orders with tasks, services, products.

Question: 20 Exam Heist

DRAG DROP -
You are a Dynamics 365 Field Service Administrator Your organization wants to use Incident Types with Work Orders.
You need to create and configure Incident Types based on the provided scenarios.
Which Incident Type feature should you use with each scenario? To answer, drag the appropriate Incident Type feature to the appropriate scenario. Each feature 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:



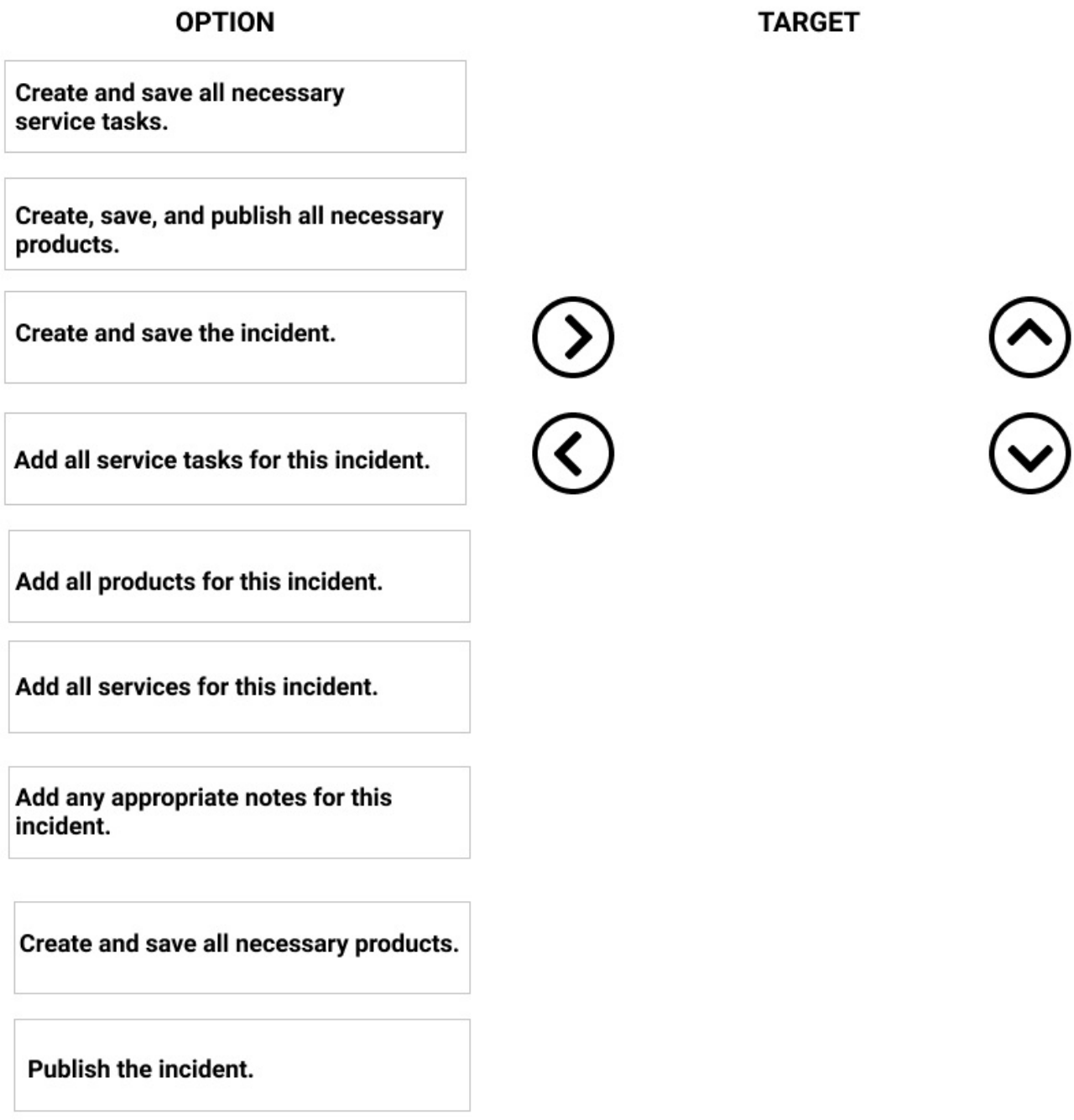
Answer:



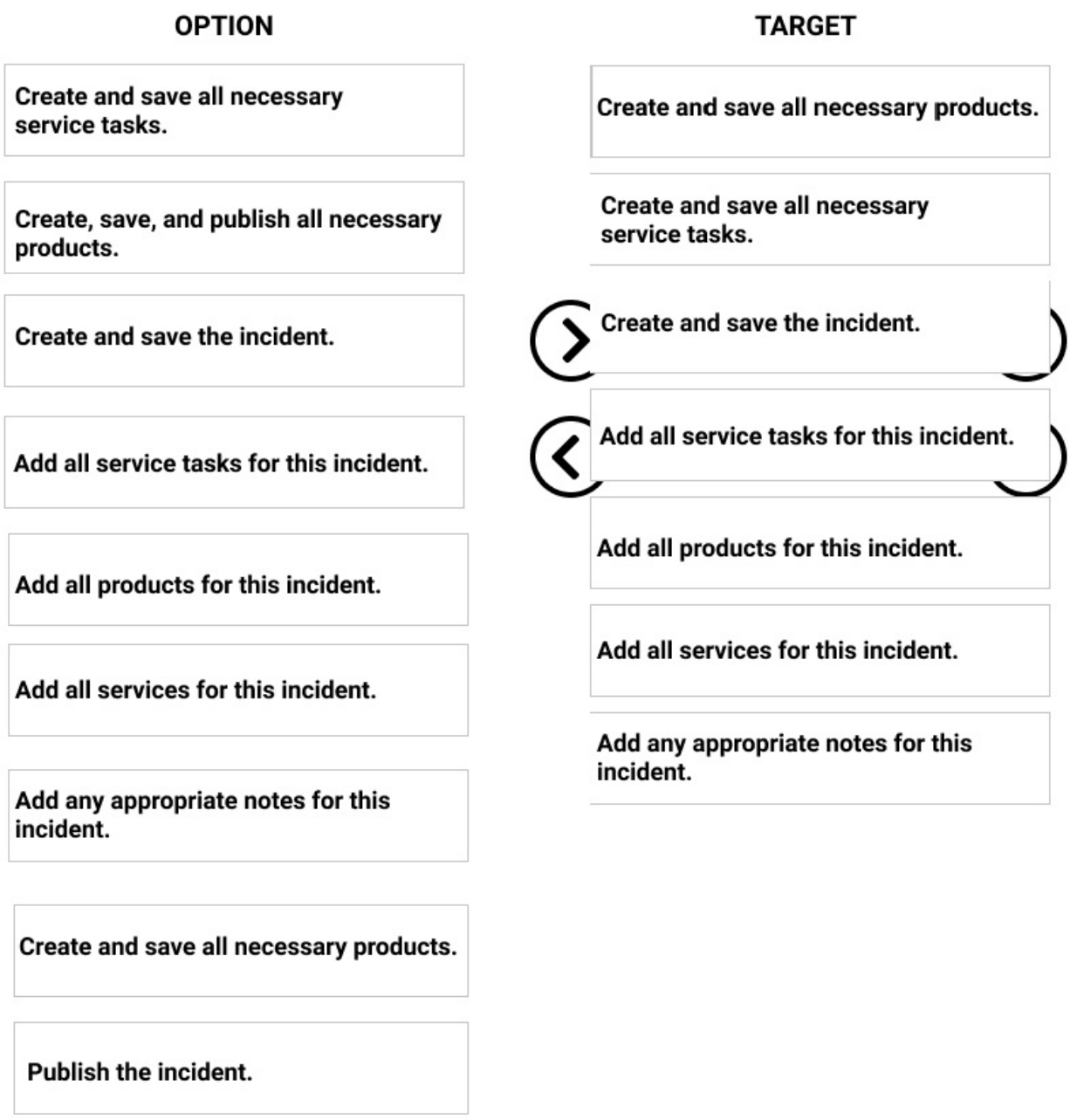
Question: 21 Exam Heist

DRAG DROP -

You are a Dynamics 365 for Field Service Administrator.
You are setting up a new Incident Type. There are no service tasks or products created that are related to this incident.
Which seven actions should you perform in sequence to add these services? To answer, move the appropriate actions from the list of actions to the answer area and arrange them in the correct order.
NOTE: More than one order of answer choices is correct. You will receive credit for any of the correct orders you select.
Select and Place:



Answer:



Explanation:

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

Question: 22 **Exam Heist**

You are setting up a maintenance agreement for a new customer that will require preventative maintenance visits as well as emergency visits to repair unforeseen equipment failures.
You want to be certain that the price the customer is charged for all maintenance and repairs visits accurately reflects the agreed upon price list. The price of the spare parts used in equipment repairs varies significantly by the territory where the client is located.
As the work order administrator, you need to ensure that the prices used when generating the invoices for work completed are correct, based on the agreement with the customer and the territory of the customer.
What are three ways that you can accomplish this goal? Each correct answer presents a complete solution.

A. Add a regional price list to the agreement that includes the price for products and services used.

B. Add a regional price list to the work order product that includes the price for products and services used.
C. Add a territory relationship to the work order that includes the price for products and services used.
D. Add a regional price list to the work order type that includes the price for products and services used.
E. Add a territory relationship to the agreement that includes the price for products and services used.

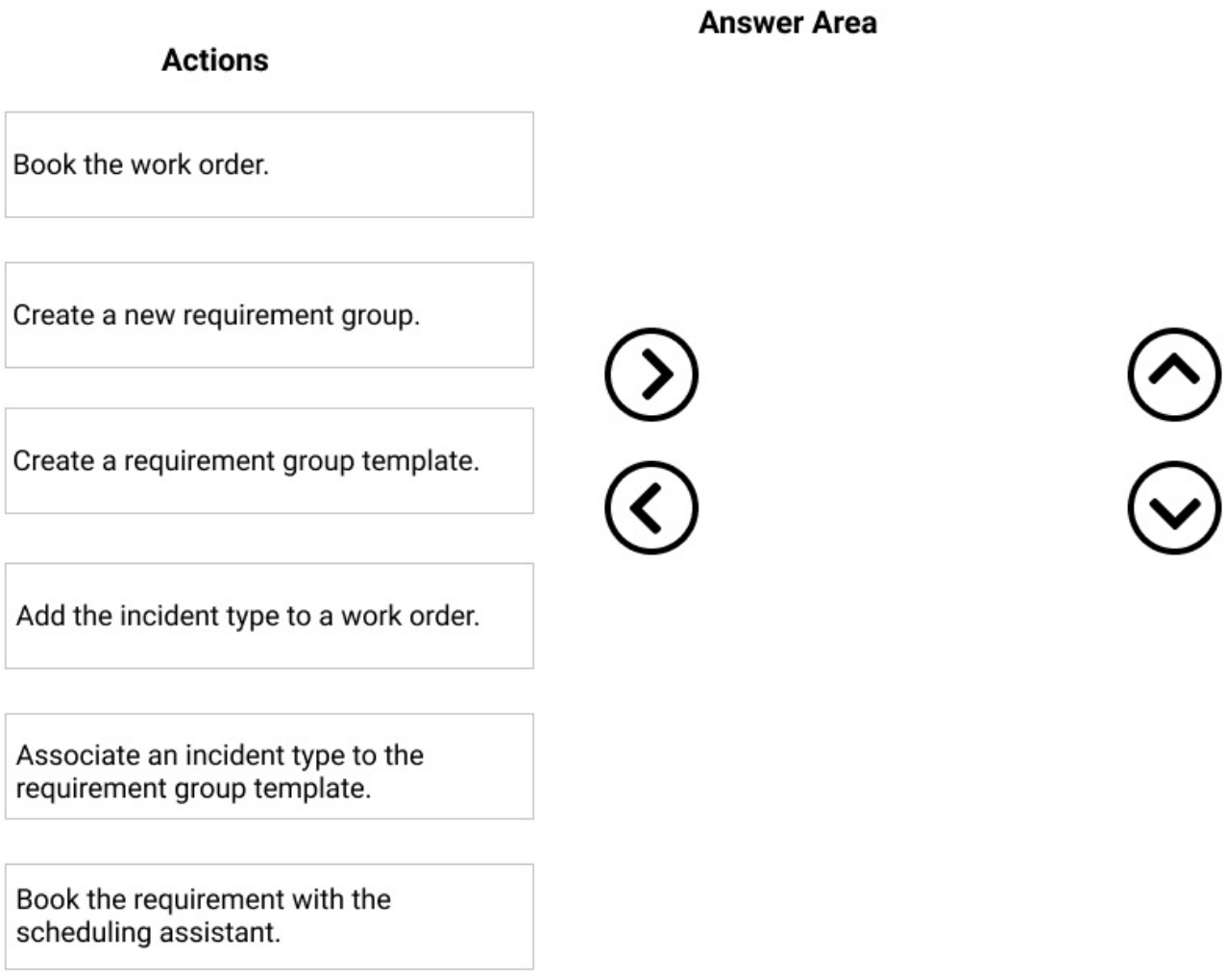
Answer: ABD

Explanation:

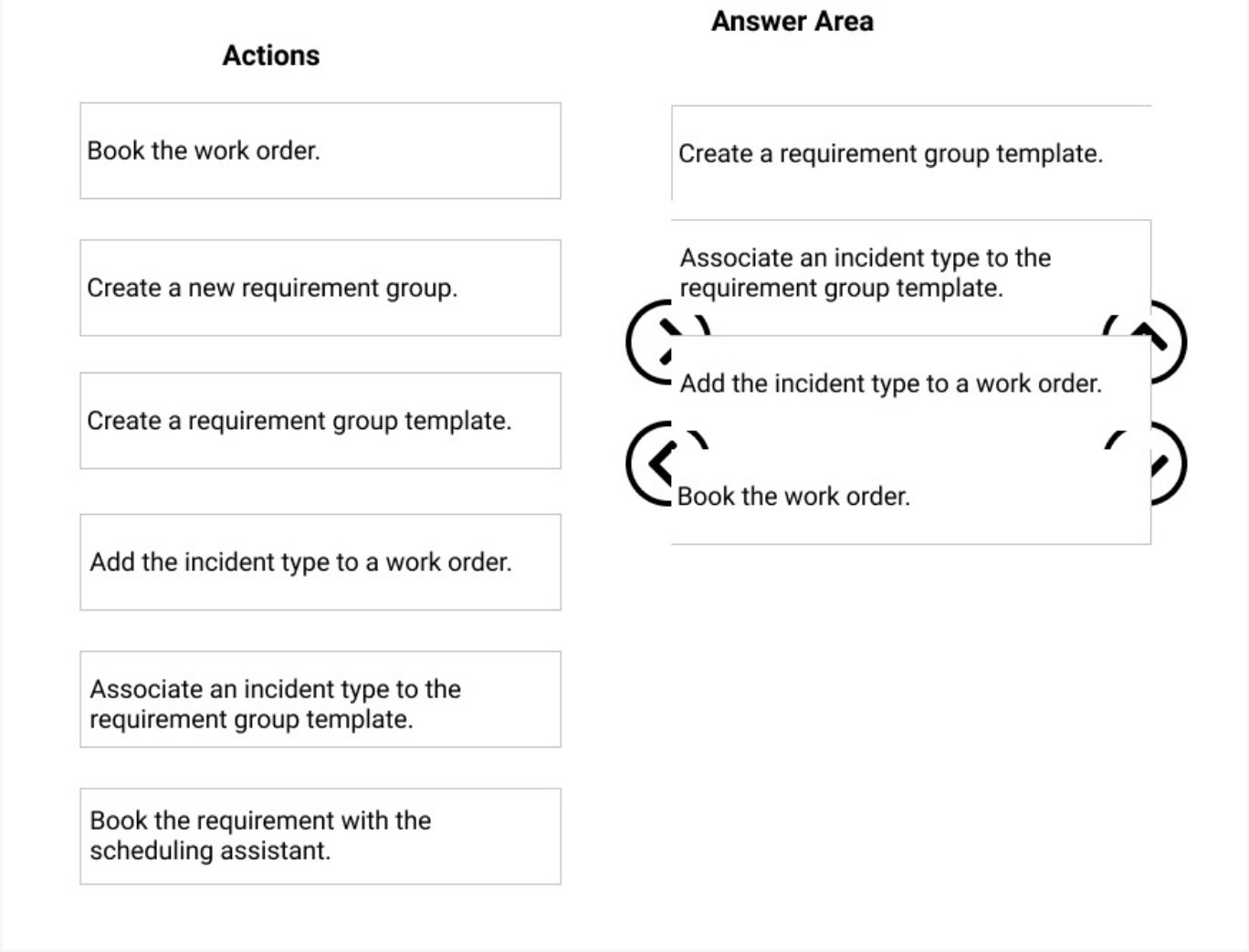
There does not seem to be a way to relate a price list to a territory, therefore I would suggest A, B, D

Question: 23 **Exam Heist**

DRAG DROP -
You are a Dynamics 365 for Field Service Dispatcher.
You need to use the schedule board to find resources for a work order. The work order can be completed by any resource who has the correct piece of equipment and who is available at 9:00 A.M during a selected week.
Which four steps must you take, in sequence, to successfully implement this capability within the schedule board?
To answer, move the appropriate actions from the list of actions to the answer area and arrange them in the correct order.
Select and Place:



Answer:



Explanation:

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

Question: 24 **Exam Heist**

You are a Dynamics 365 for Field Service administrator for a construction company.
You need to schedule a work order for a group of resources that will work together for a set number of days, week, or months.
How should you achieve the goal without scheduling the same requirements multiple times manually by using the schedule board (or with the schedule assistant)?

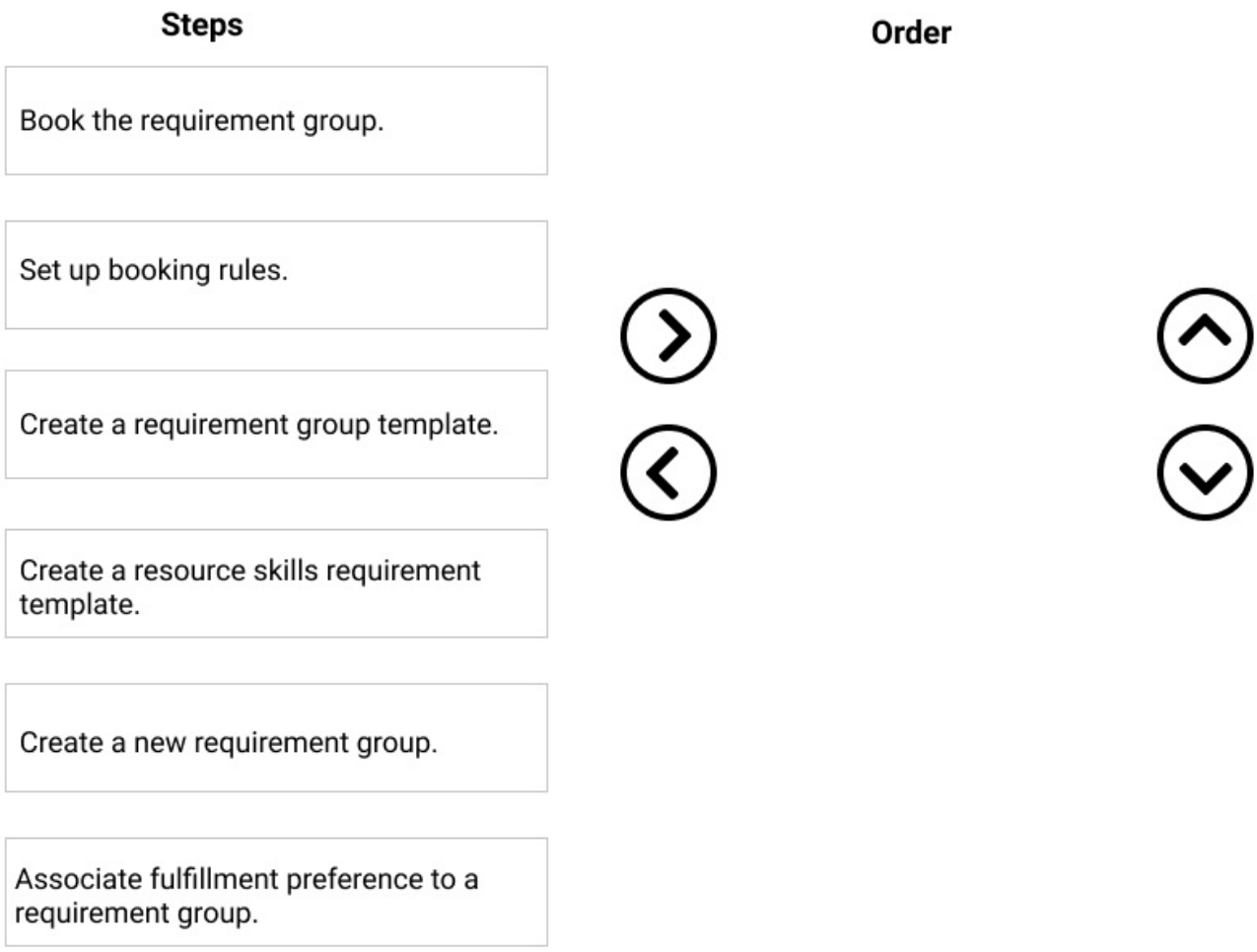
A. Use Facility Scheduling
B. Use Multi-Resource Scheduling
C. Use Resource Crew Scheduling
D. Use Universal Resource Scheduling

Answer: C

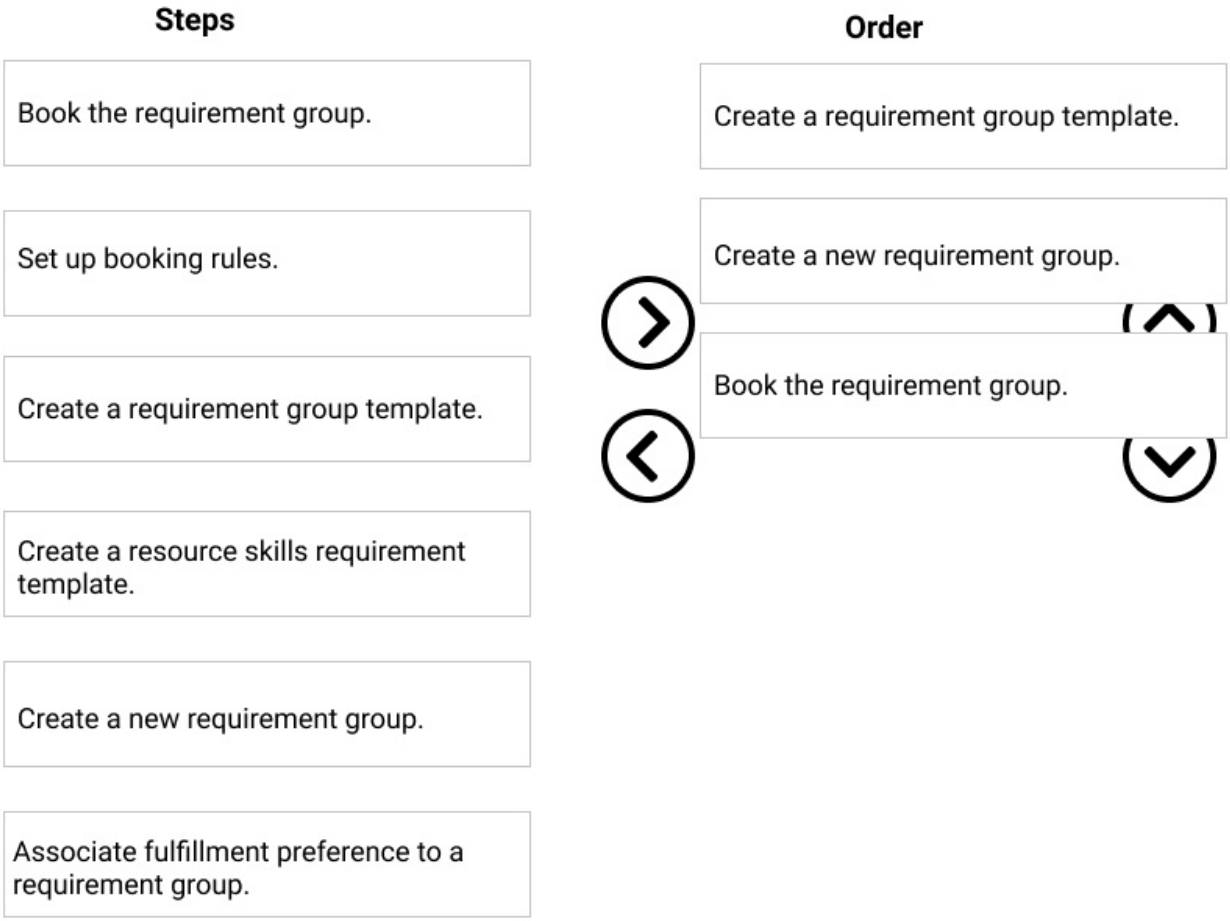
Explanation:
1. Correct answer base on link
2. C, based on references given

Question: 25 **Exam Heist**

DRAG DROP -
You work for a digital billboard manufacturing company. When manufacturing is completed, the new digital billboards are shipped to a client site for installation. As the dispatcher for your company, you need to identify and schedule the different resources that are required to complete the installation of the digital billboard.
The installation of a billboard is a complicated process and requires a large team of resources all with different skills. These installations occur frequently, so you want to dispatch the resources for installations as efficiently as possible.
You need to configure multi-resource scheduling.
Which three steps should you perform, in sequence, to enable the multi-resource scheduling? To answer, move the appropriate actions from the list of actions to the answer area and arrange them in the correct order.
Select and Place:



Answer:



Explanation:

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

Question: 26 **Exam Heist**

You are implementing Dynamics 365 for Field Service.
Your customer needs to understand how they can schedule the closest possible resource to a work order. The requirement further specifies it could be start of day from the company's site or during the middle of the day from an existing work order.
You need to provide them with the settings they need to properly configure so the closest resource is found when using the schedule assistant.
What should you suggest?

A. Update the Resources Synchronization Timeout (in sec) setting within the Schedule Board Settings.
B. Update the Load Default Filters on the Schedule Assistant.
C. Update the Starting Location to Organization Unit within Schedule Board Settings.
D. Update the filter on the Scheduler core tool tips view.

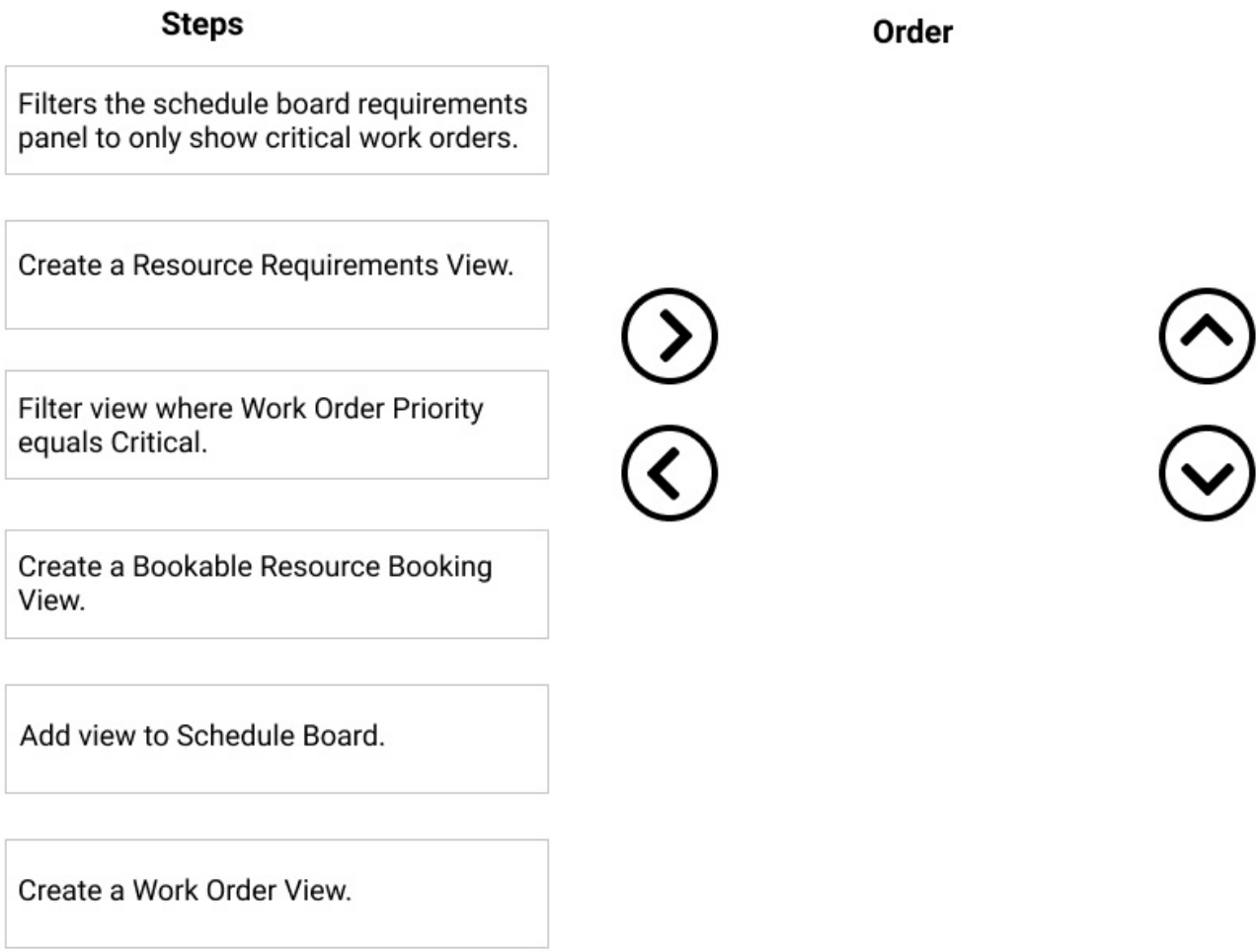
Answer: D

Explanation:
1. I will go for D. Open your work order and select Book - schedule assistant will openGo to the grid list of

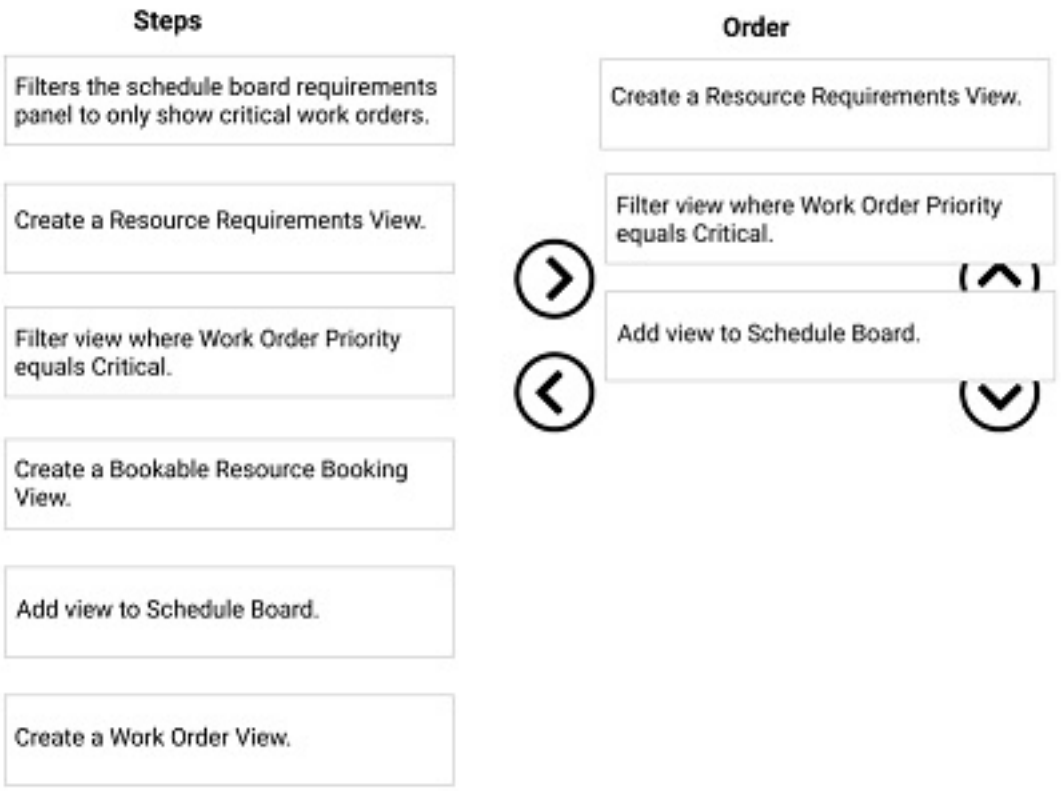
resources to the coumn Distance and change to Sort Ascending. you will see closest agents on top of the list.Does it solve the problem?

Question: 27 **Exam Heist**

DRAG DROP -
You are a Dynamics 365 for Field Service Administrator. You are working with your company's scheduling team on requirements for a new schedule board view.
The team needs a schedule board view where they only see work orders with a priority of Critical.
Which three steps should you perform, in sequence, to meet their need? To answer, move the appropriate actions from the list of actions to the answer area and arrange them in the correct order.
Select and Place:



Answer:



Explanation:

1. Create Resource requirement view

2. filter view where work order priority = critical

3. Add view to schedule board

Question: 28 **Exam Heist**

You are a Dynamics 365 for Field Service scheduler using the Schedule Assistant.
You notice the Schedule Assistant always sets the Default Radius to 25 KM.
You need to have the schedule assistant Default Radius set to 50 Miles.
Which two options should you choose? Each correct answer presents a complete solution.

A. Set the Default Radius Unit to Miles under Field Service Settings, Work Order/Booking section.
B. Set the Default Radius Value to 50 under Scheduling Parameters.
C. Set the Default Radius Value to 50 under Field Service Settings, Work Order/ Booking section.
D. Set the Default Radius Unit to Miles under Scheduling Parameters.

Answer: BD

Explanation:

B & D are correct. Both can be set in the Scheduling Parameters section.

Question: 29 **Exam Heist**

You are a Dynamics 365 for Field Service Administrator. You configure Route Scheduling Optimization (RSO) and publish the schedule.
One of your schedulers indicates two of their resources are not getting work orders assigned.
You need to determine reasons why the two resources are not assigned work orders through RSO.
Which three options should you choose? Each correct answer presents a complete solution.

A. Work Hours is not properly configured for days being optimized.

B. Optimize Schedule field is not set to Yes.

C. The Work Location field is not set to Onsite.

D. Scheduling Method is not set to Optimize.

E. Start Location and End Location fields are not the same.

Answer: ABE

Explanation:

The correct answer here should be A, B, E

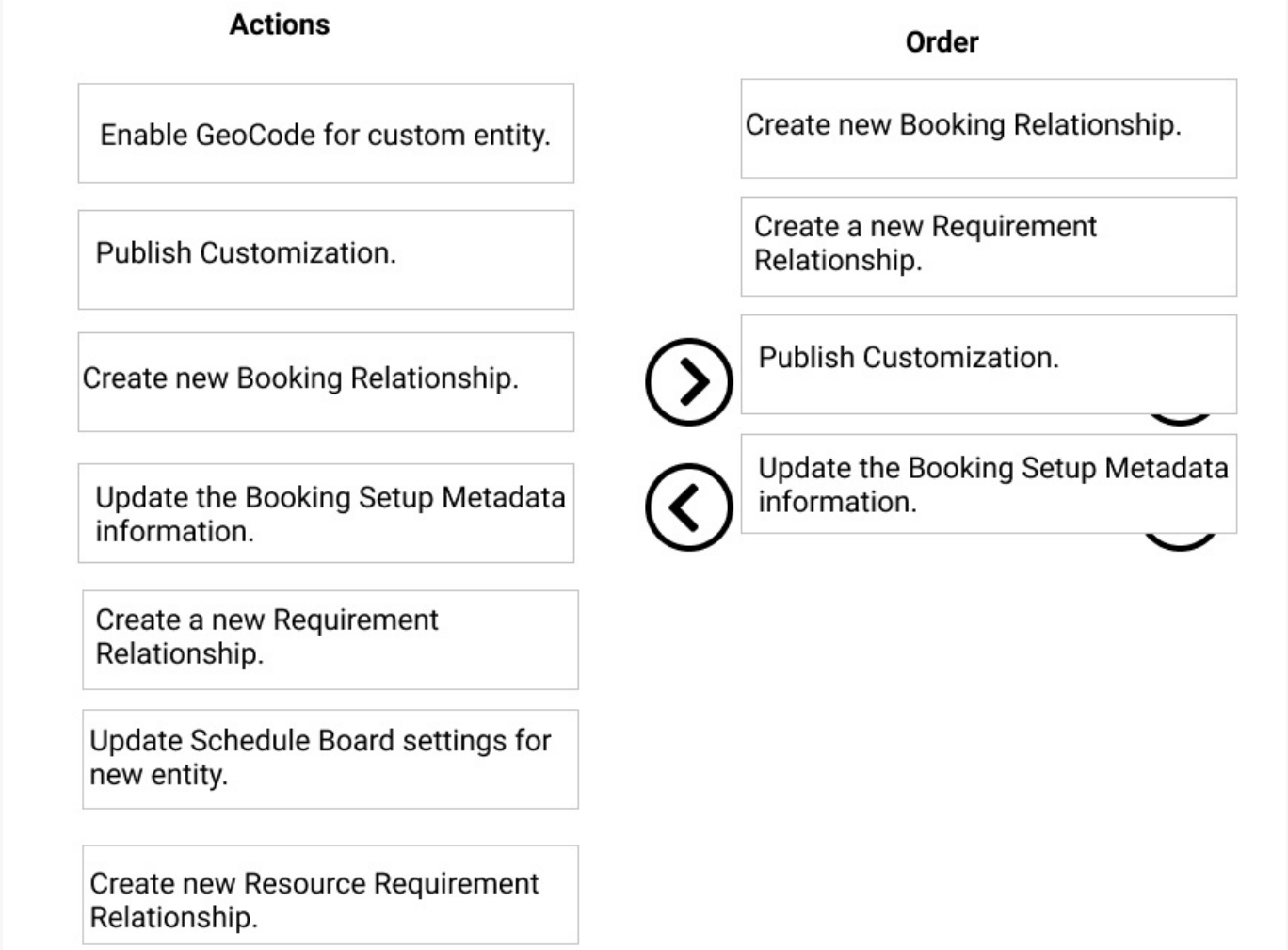
https://docs.microsoft.com/en-us/dynamics365/field-service/rso-faq

Question: 30 **Exam Heist**

DRAG DROP -
You have the Universal Resource Scheduling (URS) security role.
Your organization creates a custom entity. The records for the entity need to be scheduled to resources.
You need to enable the new entity to be scheduled. You select the entity that needs to be enabled and need to continue the set up process.
Which four actions should you perform next, in sequence, to achieve the goal? To answer, move the appropriate actions from the list of actions to the answer area and arrange them in the correct order.
Select and Place:

Actions		Order
Enable GeoCode for custom entity.		
Publish Customization.		
Create new Booking Relationship.		
Update the Booking Setup Metadata information.		
Create a new Requirement Relationship.		
Update Schedule Board settings for new entity.		
Create new Resource Requirement Relationship.		

Answer:

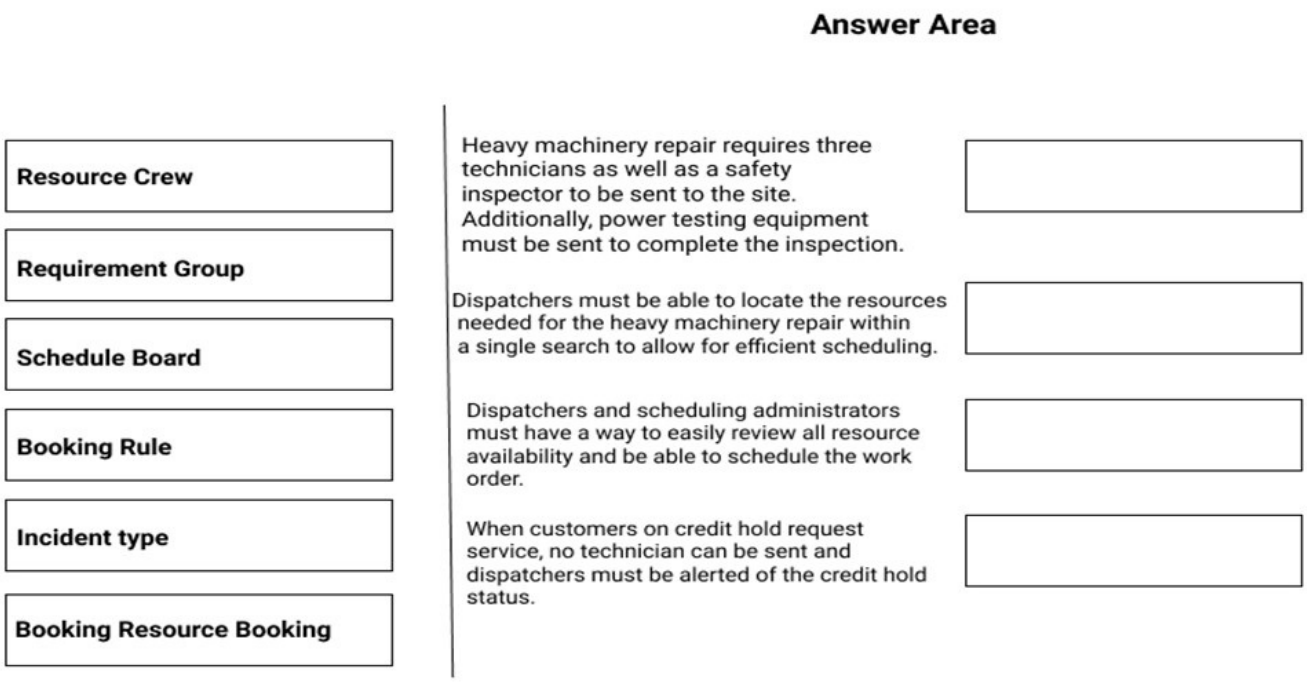


Explanation:

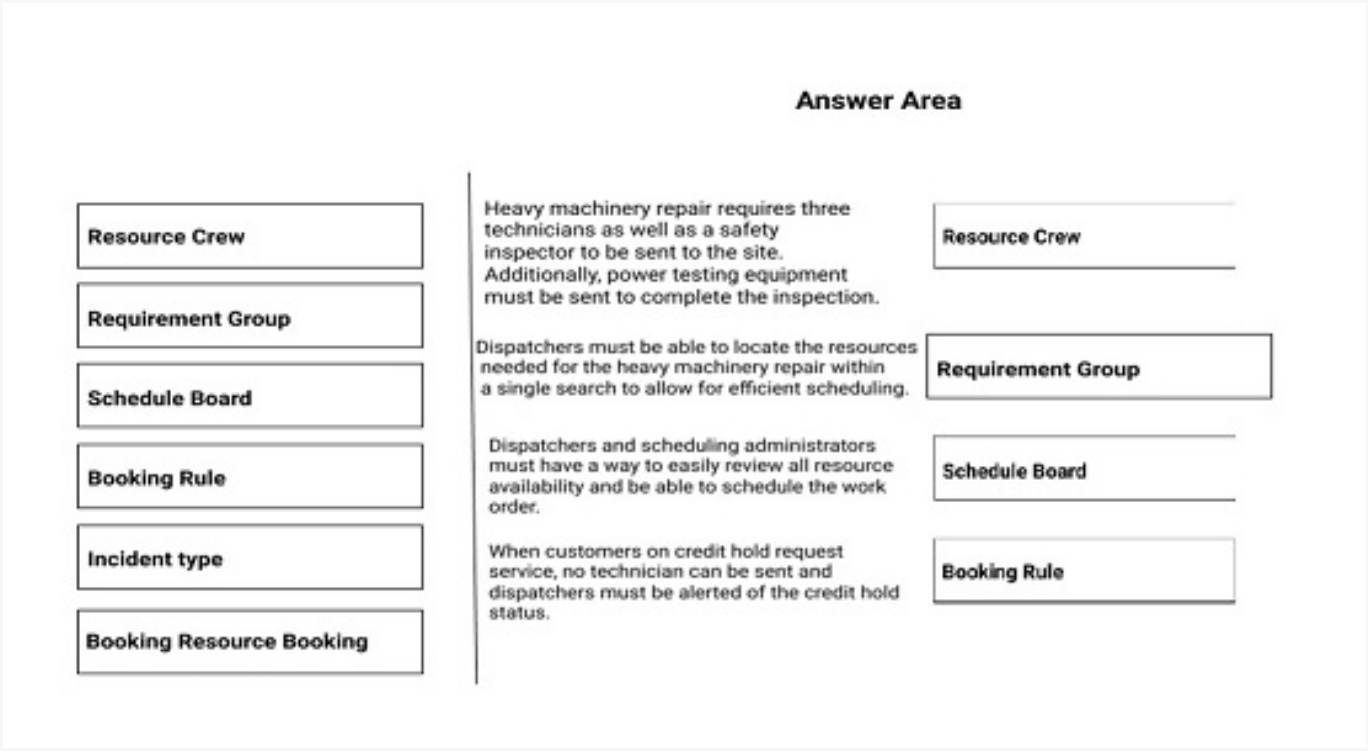
Reference:
https://docs.microsoft.com/en-us/dynamics365/customer-engagement/common-scheduler/schedule-anything-with-universal-resource-scheduling

Question: 31 **Exam Heist**

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:



Question: 32 Exam Heist

You are a 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. The resource must be able to be scheduled for other accounts.
How can you achieve this goal?

A. Create a Requirement Resource Preference record for the resource. Set the Preference Type to Restricted and Cascade to No.

B. Create a Requirement Resource Preference record for the resource. Set the Preference Type to Restricted and Account to Adventure Works.

C. Select Load the Default Filters on the Schedule Board.

D. Create a Requirement Resource Preference record for the resource.

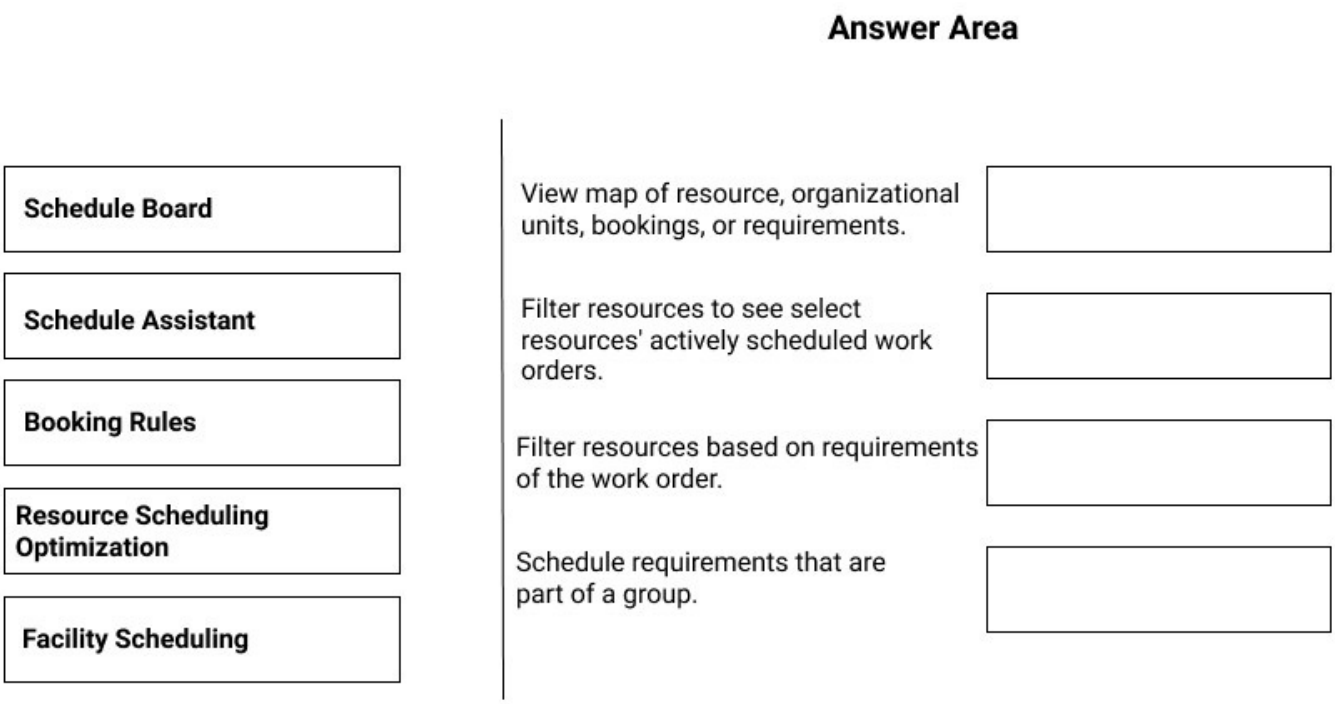
Answer: B

Explanation:

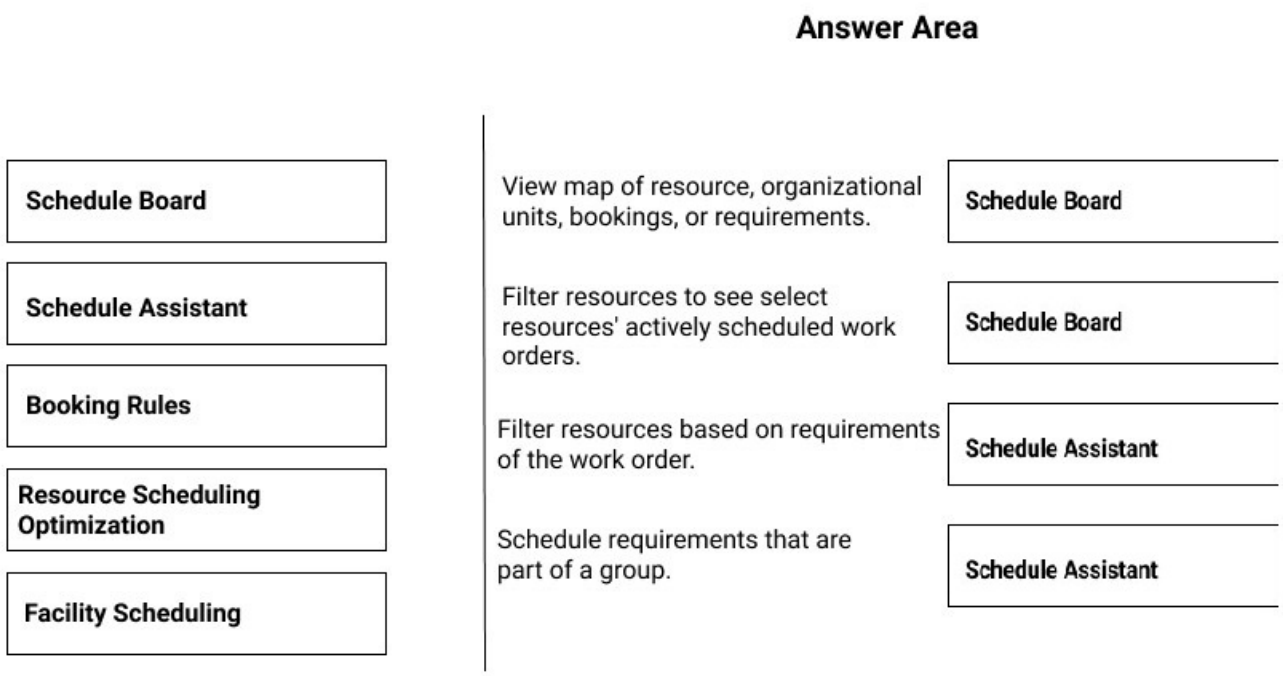
Create a Requirement Resource Preference record for the resource. Set the Preference Type to Restricted and Account to Adventure Works.

Question: 33 **Exam Heist**

DRAG DROP -
A new member of your company's scheduling department is learning which scheduling function to use in Dynamics 365 for Field Service, based on different scenarios.
You need to provide a scheduling matrix to the new team member.
Which scheduling function should be used with each scenario? To answer, drag the appropriate function to the appropriate scenario. Each function may be used once, more than once, or not at all. You may need to drag the split bar between panes or scroll to view the content.
NOTE: Each correct selection is worth one point.
Select and Place:



Answer:



Question: 34 **Exam Heist**

You are Dynamics 365 for Field Service Administrator and work for a manufacturing company. The company provides customers with large power systems for sophisticated data centers. The power systems are serviced by a field engineering team.
The field engineering team documents work done on repairs and maintenance by completing Work Orders within Dynamics 365.
You need to easily schedule work orders for the field engineering team via the schedule and enable geocoding.
Which two steps must you take to schedule resources via the schedule board and enable geocoding? Each correct answer presents part of the solution.

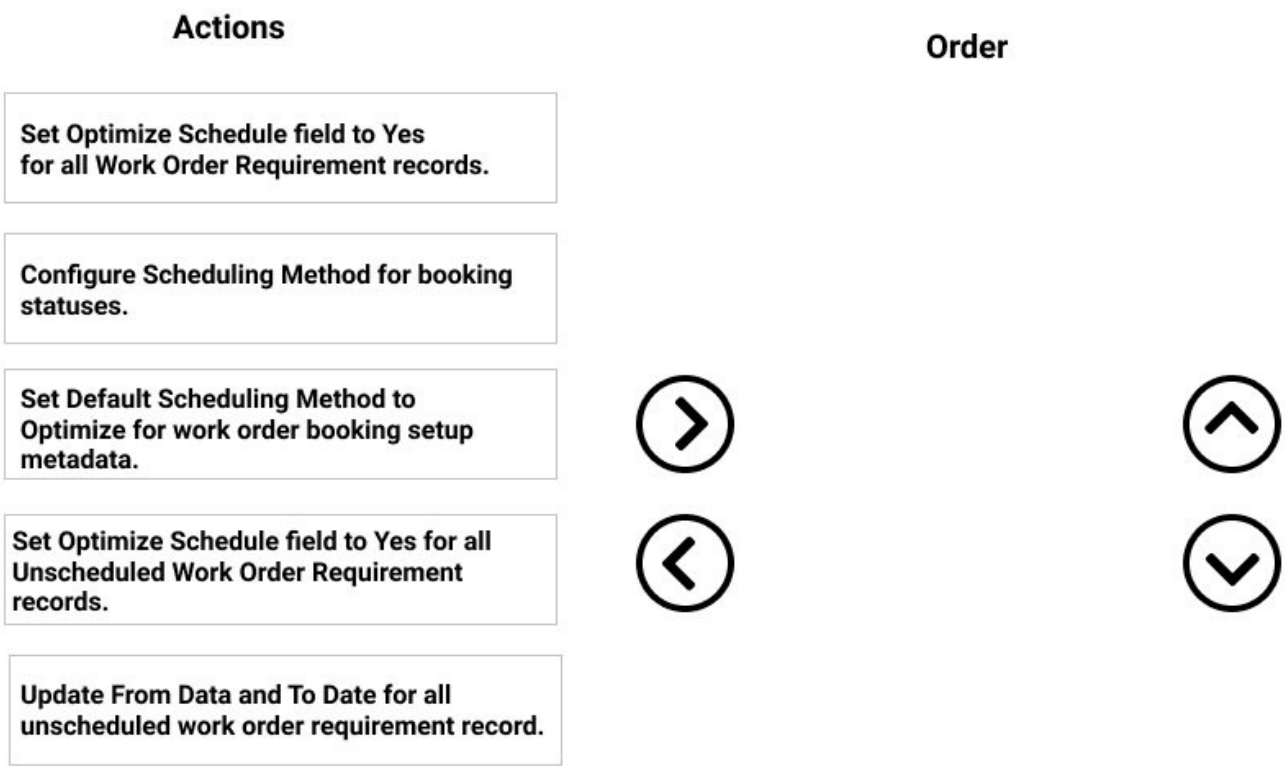
A. Connect to Maps in Resource Scheduling.
B. Configure the map on the Schedule Board.
C. Set Auto Geo Code Addresses to Yes in Resource Scheduling.
D. Set Auto Geo Code Addresses to Yes in Field Service Settings.

Answer: AD

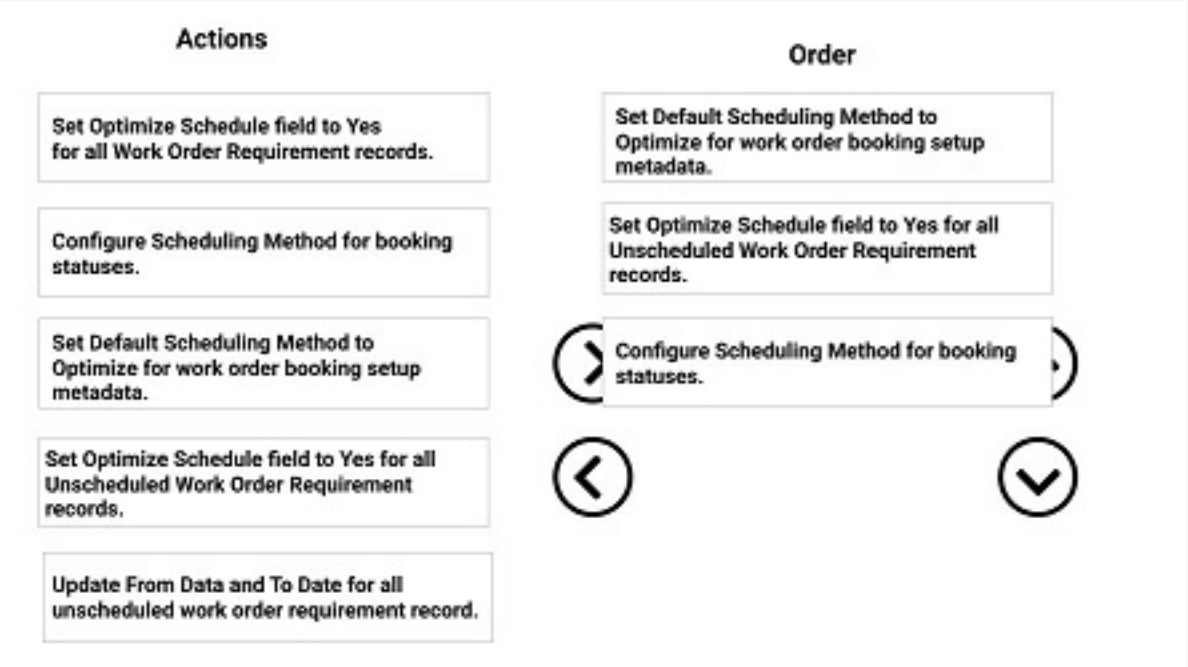
Explanation:
1. AD, Resources>Scheduling Parameters>Connect to Maps / Settings >Field Service Settings>OTHER tab-Auto Geo Code Addresses
2. A&D based on references given

Question: 35 **Exam Heist**

DRAG DROP -
You are setting your environment to use Resource Scheduling Optimization (RSO). You have enabled Optimize Schedule for all Bookable Resources.
You need to complete the remaining steps to prepare your work order data for optimization.
Which three actions should you perform, in sequence, to achieve the goal? To answer, move the appropriate actions from the list of actions to the answer area and arrange them in the correct order.
Select and Place:



Answer:



Explanation:

1.- Set default scheduling method to optimize for work order booking setup metadata

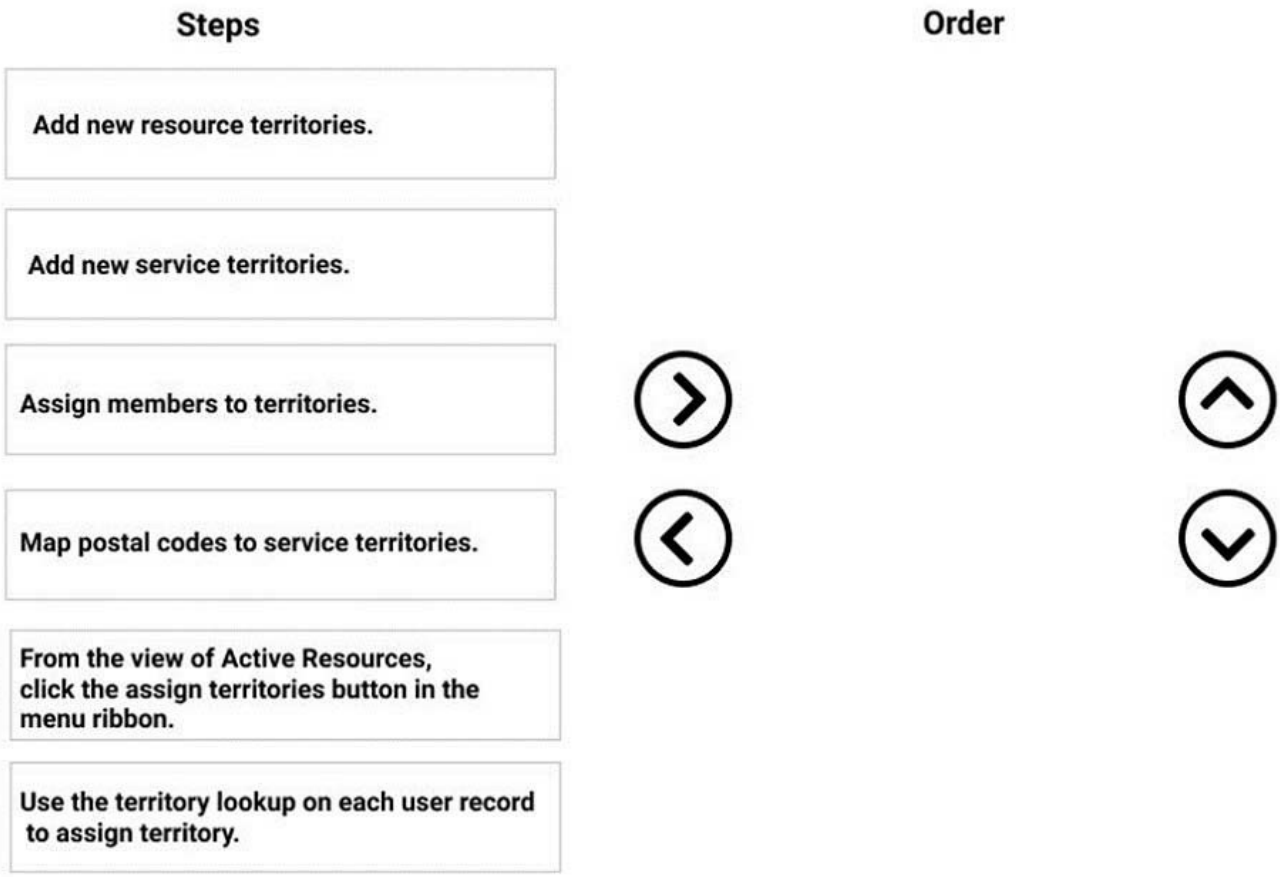
2.- Set optimize schedule field to yes for all unscheduled work order requirement records

3.- Configure scheduling method for booking statuses

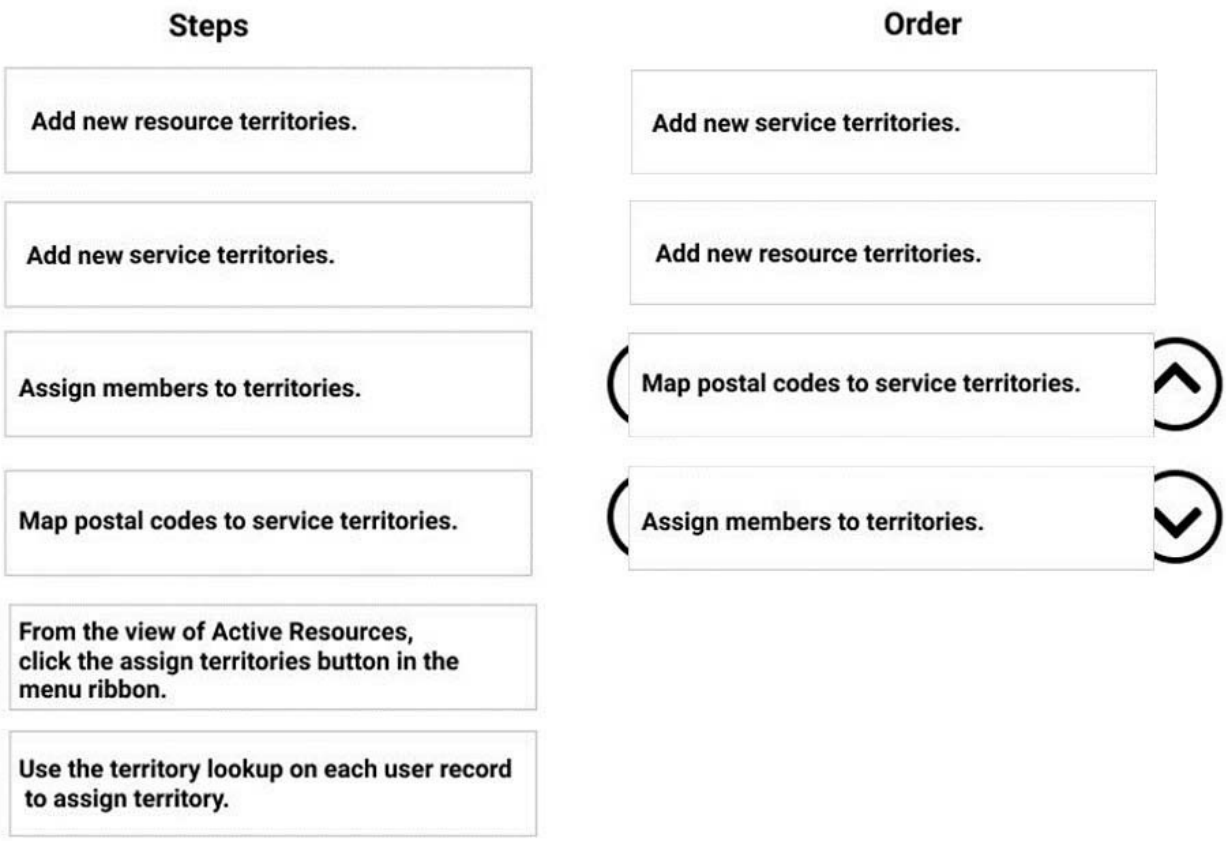
Question: 36 **Exam Heist**

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 dispatch 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:



Answer:



Question: 37 **Exam Heist**

DRAG DROP -
Your company is preparing to deploy the Dynamics Field Service with Mobile Application.
Your manager asks you to ensure that the Booking Statuses will match with the current business process the field technicians are following.
As the Field Service Administrator, you review the documentation and discover that the out-of-the-box Booking Statuses will meet your company's needs.
What is the order of the Booking Statuses for the five out-of-the box booking status fields? To answer, move the five out-of-the-box booking status fields to the answer area and arrange them in the correct order.
Select and Place:

Statuses	Order
Scheduled - A work order has been assigned to a resource.	
Traveling - The resource is traveling to the service location.	
In Progress - The work order is in progress.	
On Break - The resource is on a break.	
Complete - The work order is complete.	
Arrived - The resource has arrived on location.	



Answer:

Statuses	Order
Scheduled - A work order has been assigned to a resource.	Scheduled - A work order has been assigned to a resource.
Traveling - The resource is traveling to the service location.	Traveling - The resource is traveling to the service location.
In Progress - The work order is in progress.	In Progress - The work order is in progress.
On Break - The resource is on a break.	On Break - The resource is on a break.
Complete - The work order is complete.	Complete - The work order is complete.
Arrived - The resource has arrived on location.	

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.

Answer: D

Explanation:

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: 39 **Exam Heist**

The company has hired a new manager to set up and configure Field Service to automatically schedule work orders to the most appropriate resource scheduling.
The manager is unable to optimize requirements and bookings related to work orders.
Which three settings are required? Each correct answer presents part of the solution.

A. Assign the Field Service-Administrator security role to the RSO user.
B. Add the RSO dispatcher role to a dispatcher.
C. Enable Resource Scheduling Optimization.
D. Set Connect to Maps as Yes.
E. Add RSO to the profile Field Service-Administrator.

Answer: ACD

Explanation:

ACD

https://docs.microsoft.com/en-us/dynamics365/customer-engagement/field-service/rso-configuration

Question: 40 **Exam Heist**

You are a Field Service resource manager for Contoso, Ltd. and are setting up characteristics for field technicians who are responsible for repairs on rental equipment.
Work performed on certain types of backhones, trenchers, and excavating equipment requires different attributes to be identified for proper work order assignment and scheduling.
Which two characteristics are valid? Each correct answer presents a complete solution.

A. Certification
B. Approval Status
C. Skill
D. Rating Value

Answer: AC

Explanation:

Reference:
https://docs.microsoft.com/en-us/dynamics365/customer-engagement/field-service/set-up-bookable-resources#set-up-field-technician-resources

Question: 41 **Exam Heist**

You are a Dynamics 365 for Field Service scheduling coordinator.
When you select the Book button on a work order, TechnicianA never shows up as available.
You need to update the system to see TechnicianA's availability.
What should you do?

A. Set Enable for Availability Search to Yes on the TechnicianA bookable resource record.
B. Set Ignore Proposed Bookings to Yes on the Schedule Assistant view.
C. Set Real Time Mode to Yes on the Schedule Assistant view.
D. Set Display on Schedule Board to Yes on the TechnicianA bookable resource record.

Answer: A

Explanation:

Reference:
https://docs.microsoft.com/en-us/dynamics365/customer-engagement/field-service/set-up-bookable-resources

Question: 42 **Exam Heist**

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.	






Answer:

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

Explanation:

Reference:
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: 43 **Exam Heist**

You are a Dynamics 365 for Field Service Administrator and work for a manufacturing firm. You are receiving support requests that field engineers are unable to see a custom area entitled "Parts Requests" within the Dynamics 365 Field Service Mobile App.
You need to troubleshoot the Dynamics 365 for Field Service mobile app to ensure that the field engineers are able to view the customizations created.
What are the three steps you can take to troubleshoot the issue reported? Each correct answer presents a complete solution.

A. Ensure that the Dynamics Mobile solution with the appropriate customizations has been published.
B. Synchronize the Dynamics 365 for Field Service Mobile App.
C. Ensure that a security role has been assigned to the project.
D. Verify that the impacted field engineers are enabled to use this project.
E. Ensure that the Woodford project with the appropriate customizations has been published.

Answer: BCE

Explanation:

B. Synchronize the Dynamics 365 for Field Service Mobile App.

C. Ensure that a security role has been assigned to the project.

E. Ensure that the Woodford project with the appropriate customizations has been published.

Question: 44 **Exam Heist**

You are Dynamics 365 for Field Service Development Manager.
You need to enable customization development for multiple developers, via the Woodford solution, where customizations can be combined together to complete the development requirements.
What should you create in order to enable this capability?

A. Create a project for each developer, which publishes changes to a master project.
B. Create a project for each developer, using security roles to identify what customizations are available for modification.
C. Create a Dynamics 365 solution for each developer, which publishes changes to the Woodford solution.
D. Create a project for each developer, each within its own Woodford solution.

Answer: B

Explanation:

Create a project for each developer, using security roles to identify what customizations are available for modification.

Question: 45 Exam Heist

You are a Dynamics 365 for Field Service Mobile customizer.
Your mobile technicians indicate that when in offline mode, they do not have access to the same data set that is available online. Offline mode contains less account and work order data, and users cannot see warehouses.
You need to determine which updates to make within the mobile project so that technicians can see the appropriate information.
Which three actions should you choose? Each correct answer presents a complete solution.

A. Update Synchronization setting to Always Full Sync.
B. Update entity Sync Filter.
C. Update View filters.
D. Update the Max Sync Records setting.
E. Update the entity Mode to Online and Offline.

Answer: BDE

Explanation:

B. Update entity Sync Filter.

D. Update the Max Sync Records setting.

E. Update the entity Mode to Online and Offline.

Question: 46 Exam Heist

You are a Dynamics 365 for Field Service Administrator.
You have a requirement to make a custom attribute "Contract Status" required and to not allow invalid data to be entered in the attribute.
What are three ways that you can make an attribute required on a form within the Dynamics 365 for Field Service Mobile App and ensure invalid data cannot be entered? Each correct answer presents a complete solution.

A. Create an OnSave rule, and display a message to the user if the specific field does not meet the required conditions.
B. Create an OnChange rule, and set a simple validation for a field to check whether the field contains data.
C. Create an Option Set with all possible options for the attribute.
D. Create an OnChange rule to highlight a field when it does not contain correct field data.
E. Create an OnSave rule to check any field's data, but without highlighting the field when the condition is not met.

Answer: ADE

Explanation:

ADE check that there is data, and that it is correct format

Question: 47 Exam Heist

You are a Dynamics 365 for Field Service Mobile (FSM) customizer.
Technicians report that they are not seeing their Bookings in the FSM app.
You need to investigate why they cannot see their bookings.
What are three actions you must take to perform your investigation? Each correct answer presents a complete solution.

A. Check Drip Scheduling setting on the Bookable Resource.
B. Check sync filter on Bookable Resource Booking View.
C. Check if sync filter on Bookable Resource entity is too restrictive for offline mode.
D. Check that FSM app is synching to server.
E. Check if sync filter on Bookable Resource Booking entity is too restrictive for offline mode.

Answer: ADE

Explanation:

Correct answer is A, D and E per the link provided in the answer key.

Question: 48 **Exam Heist**

You are a Dynamics 365 for Field Service Mobile Administrator (FSM).
When technicians log into FSM, they receive the following message:
"Your organization has not configured Field Service Mobile."
You log into FSM and cannot reproduce the issue with your login.
What must you do to fix the issue?

A. Update the Security Roles for the FSM project within Woodford.
B. Update the Priority for the FSM project within Woodford.
C. Update the Security Roles for all Bookable Resources within Dynamics 365.
D. Set Enabled for Field Service Mobile to Yes for all Bookable Resources.

Answer: A

Explanation:
1. A, as per link given
2. (A)Update the Security Roles for the FSM project within Woodford.

Question: 49 **Exam Heist**

You are in charge of setting up the new Dynamics 365 CE Field Services environment for your company.
As the field Service Administrator, you need to configure the field service settings for work orders for your environment.
Which three work order settings can be configured by the Field Service Administrator? Each correct answer presents a complete solution.

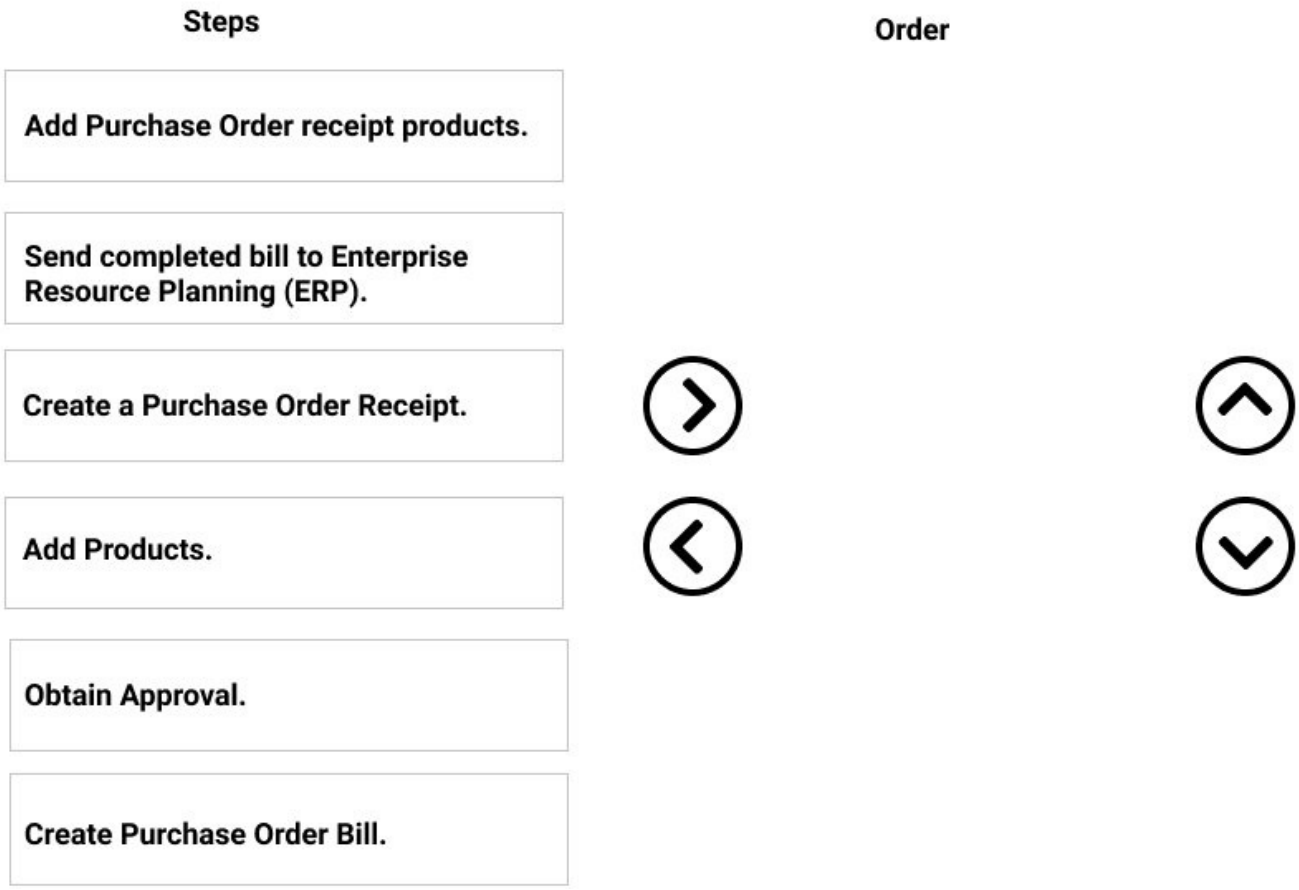
A. Default work order type
B. Auto generate resource requirement for work order
C. Work order invoice creation
D. Default work order completed status
E. Auto generate work order for agreement booking

Answer: CDE

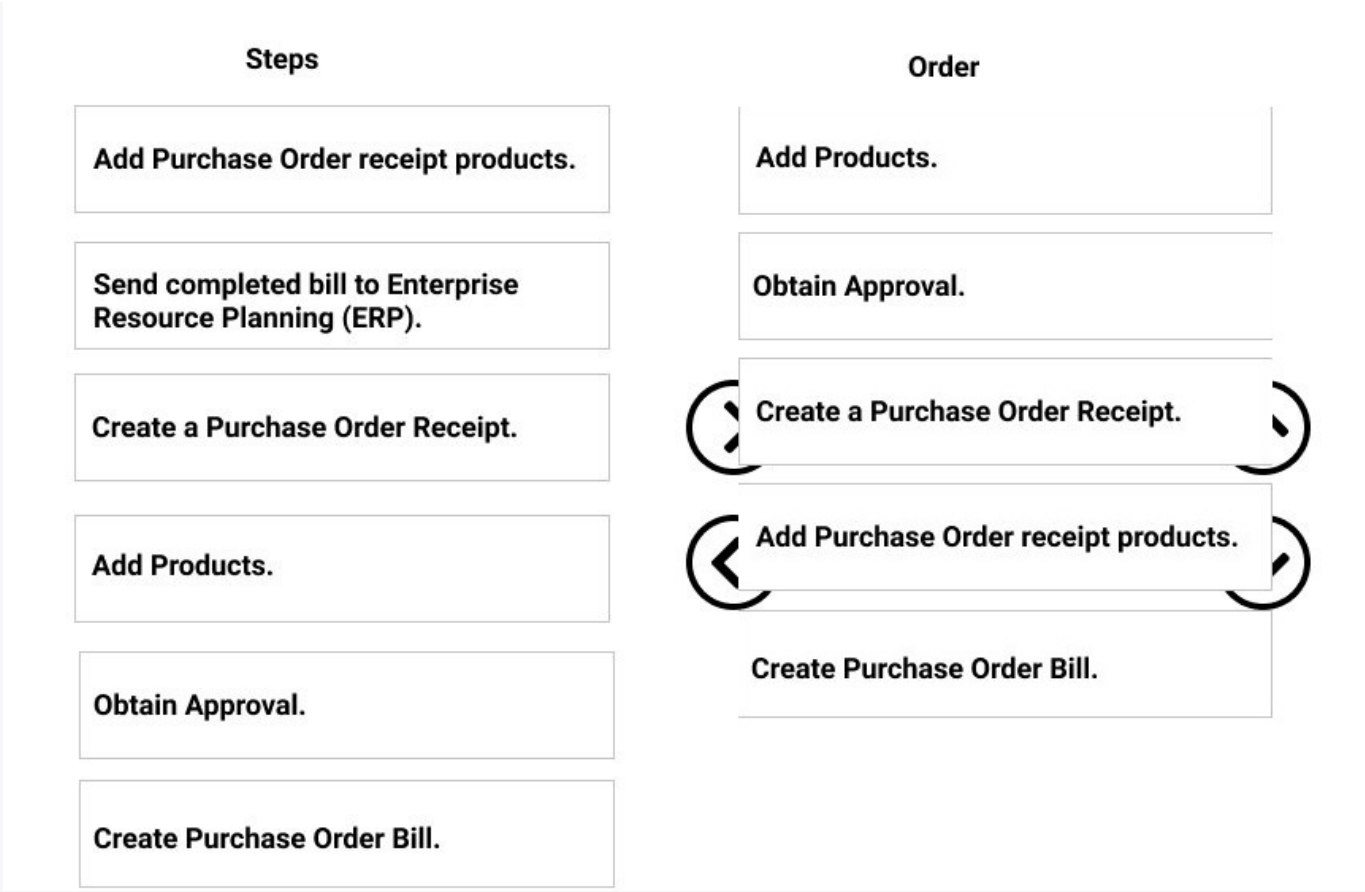
Explanation:
1. CDE as per link
2. https://docs.microsoft.com/en-us/dynamics365/field-service/configure-default-settings

Question: 50 **Exam Heist**

DRAG DROP -
You need to create a purchase order for a thermal overload cooling fan for a refrigeration unit on the shop floor. After creating a purchase order, what are the five steps, in sequence, for completing the order and receiving the products? To answer, move the appropriate actions from the list of actions to the answer area and arrange them in the correct order.
Select and Place:



Answer:



Explanation:

Reference:
https://docs.microsoft.com/en-us/dynamics365/customer-engagement/field-service/create-purchase-order

Question: 51 **Exam Heist**

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.

Answer: AB

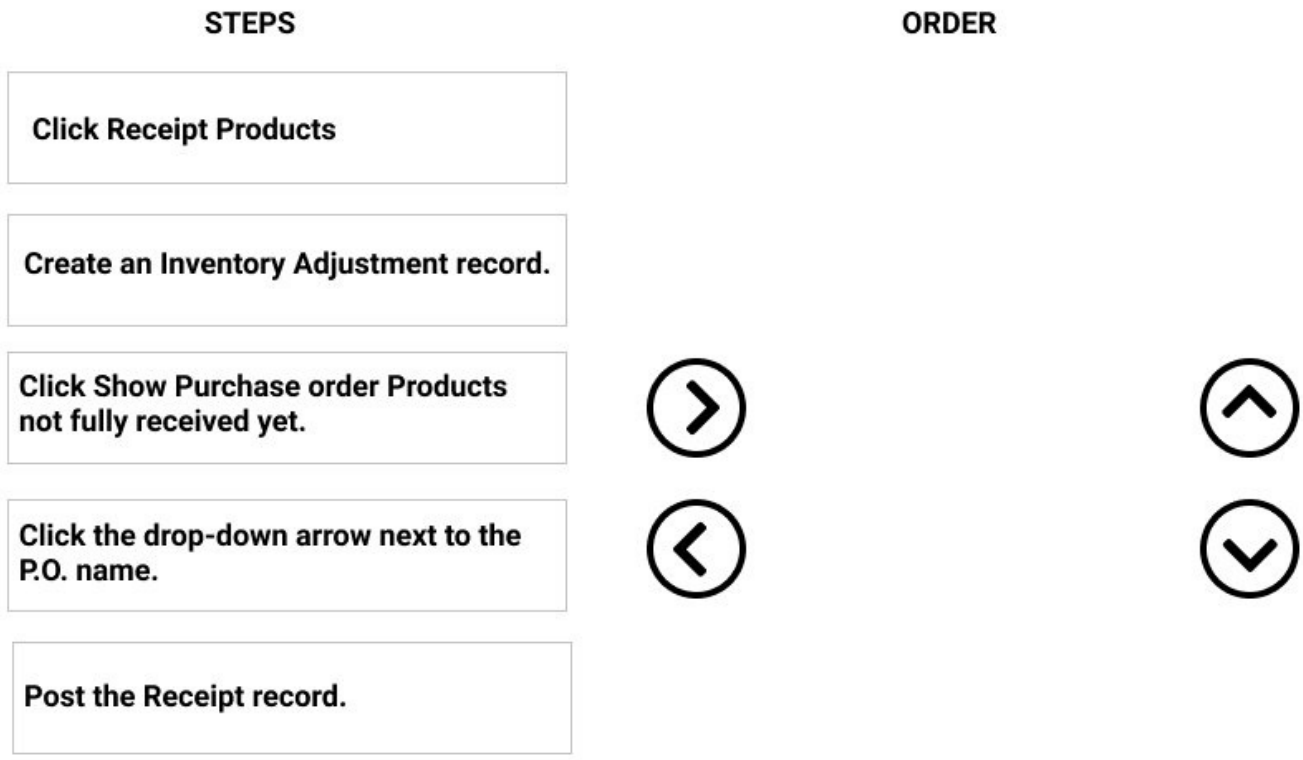
Explanation:

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

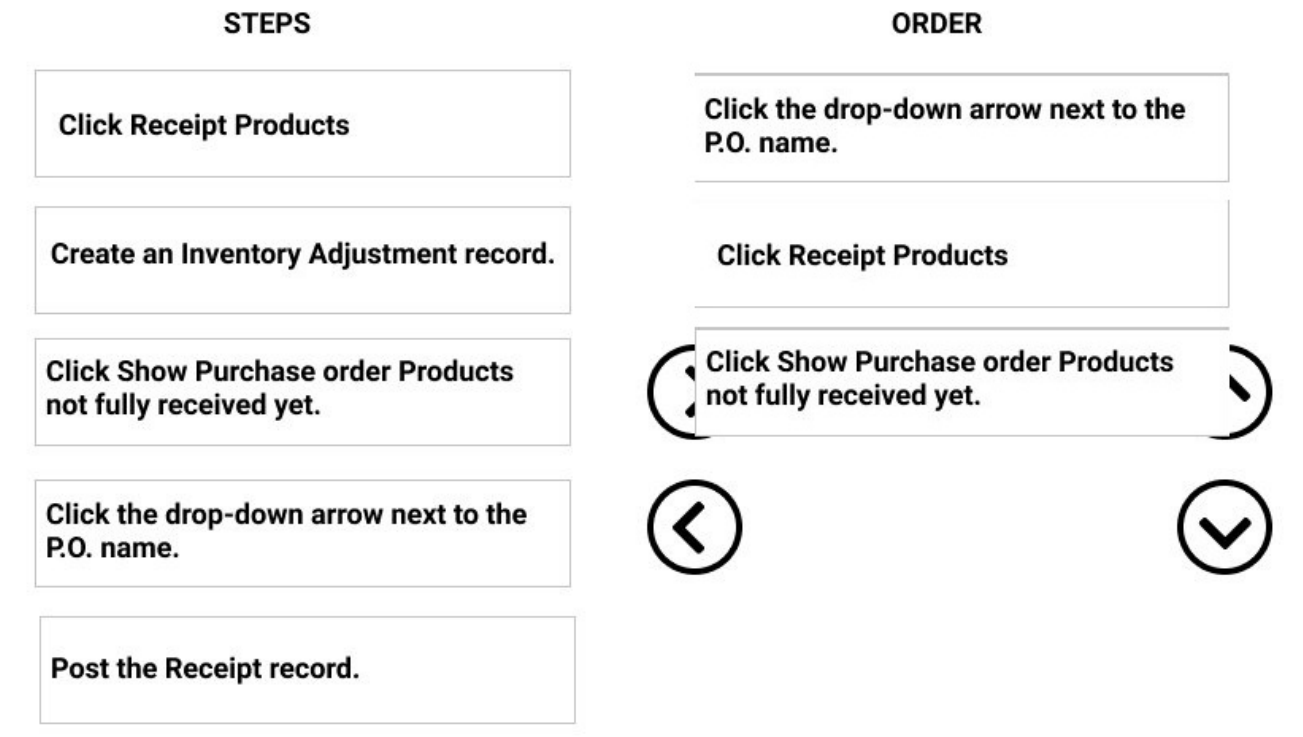
Question: 52 **Exam Heist**

DRAG DROP -
Your company's inventory clerk has received a truck shipment of parts for repair of equipment on such a rush order. The order needs to be completed as soon as possible.

Which three steps, in sequence, are needed to receive the products to the existing rush order in Field Service? To answer, move the appropriate actions from the list of actions to the answer area and arrange them in the correct order.
Select and Place:



Answer:

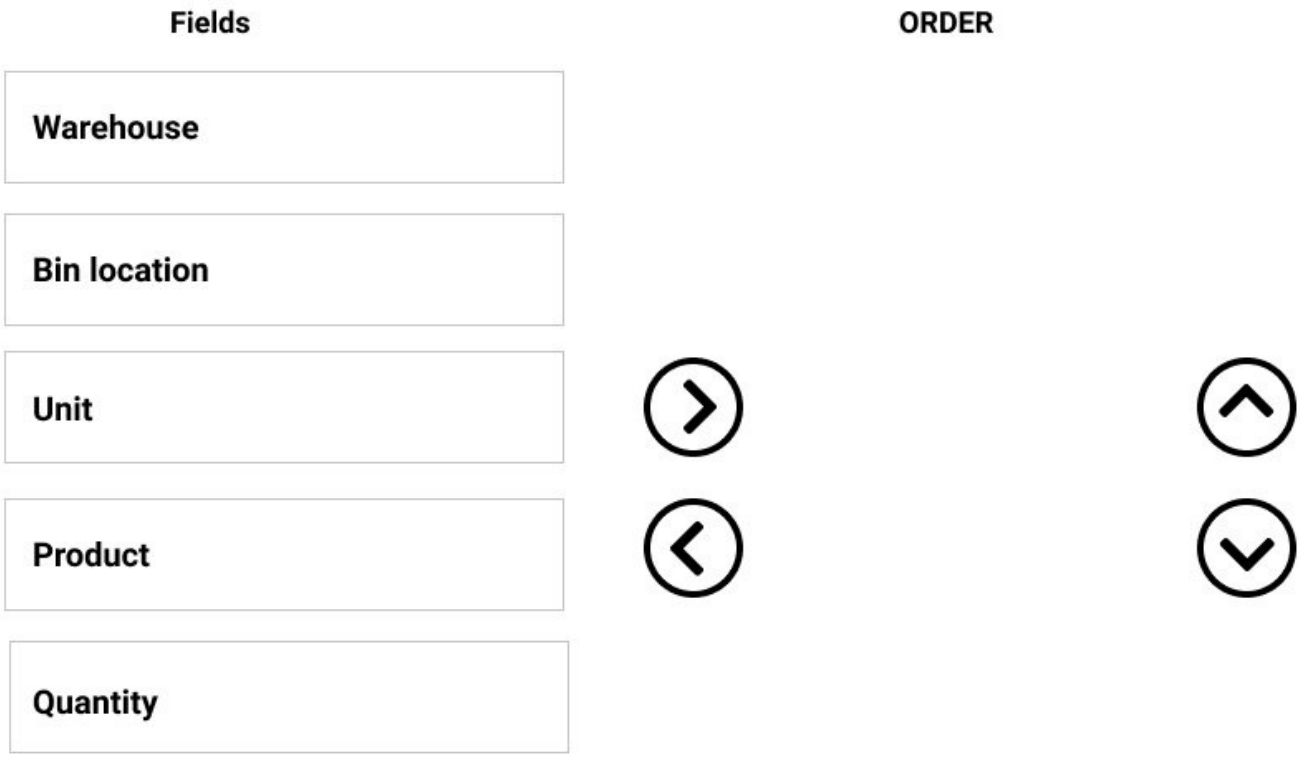


Explanation:

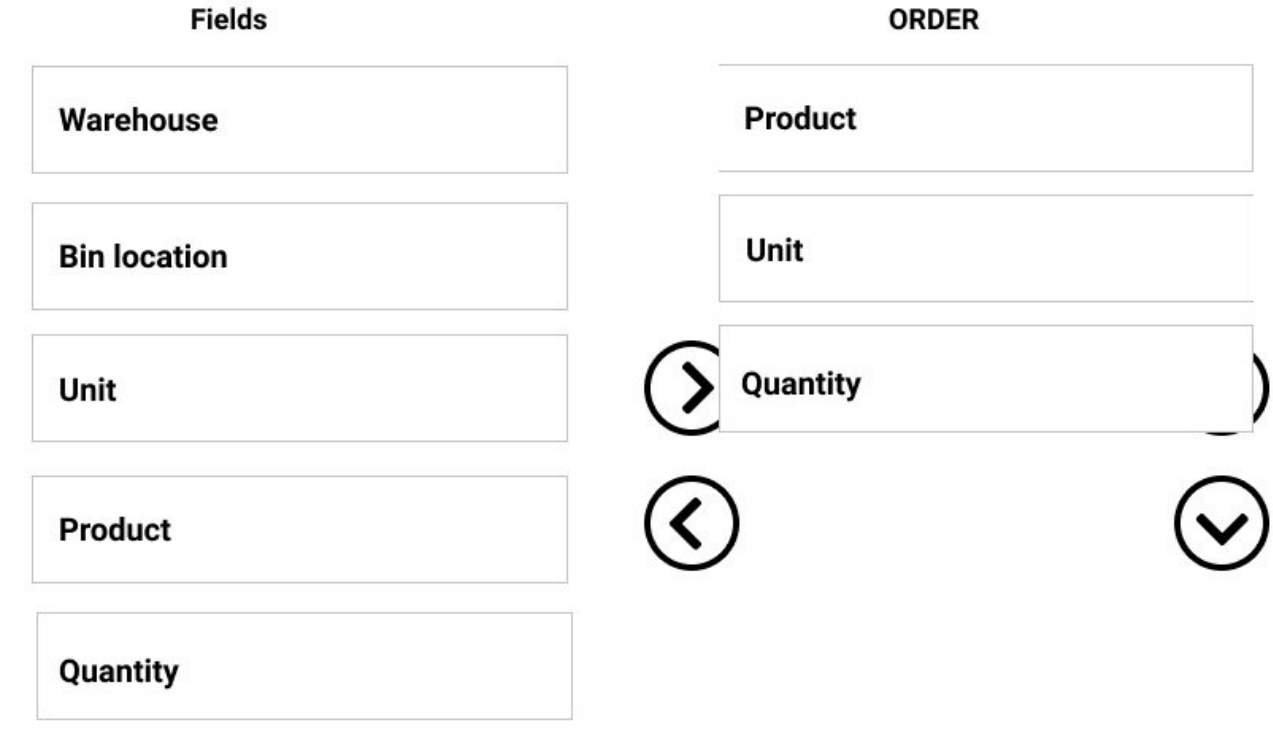
Reference:
https://docs.microsoft.com/en-us/dynamics365/customer-engagement/field-service/create-purchase-order

Question: 53 Exam Heist

DRAG DROP -
Your company uses Dynamics 365 for Field Service.
The company's inventory clerk goes to the bin location for electrical switches and discovers there are none in stock. However, the Field Service Inventory shows a quantity of one.
In which order should the required fields be entered to adjust the inventory to the correct amount? To answer, move the three appropriate actions from the list of actions to the answer area and arrange them in the correct order.
Select and Place:

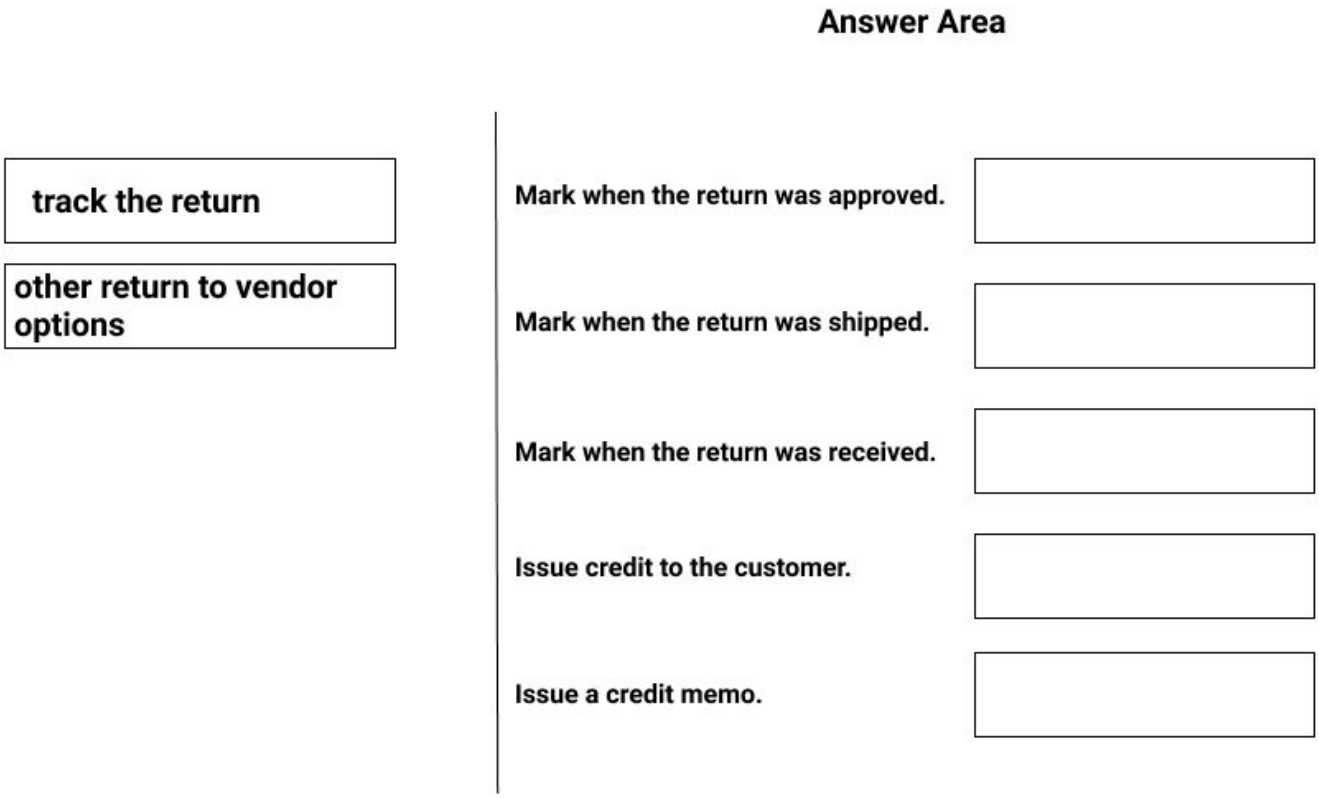


Answer:

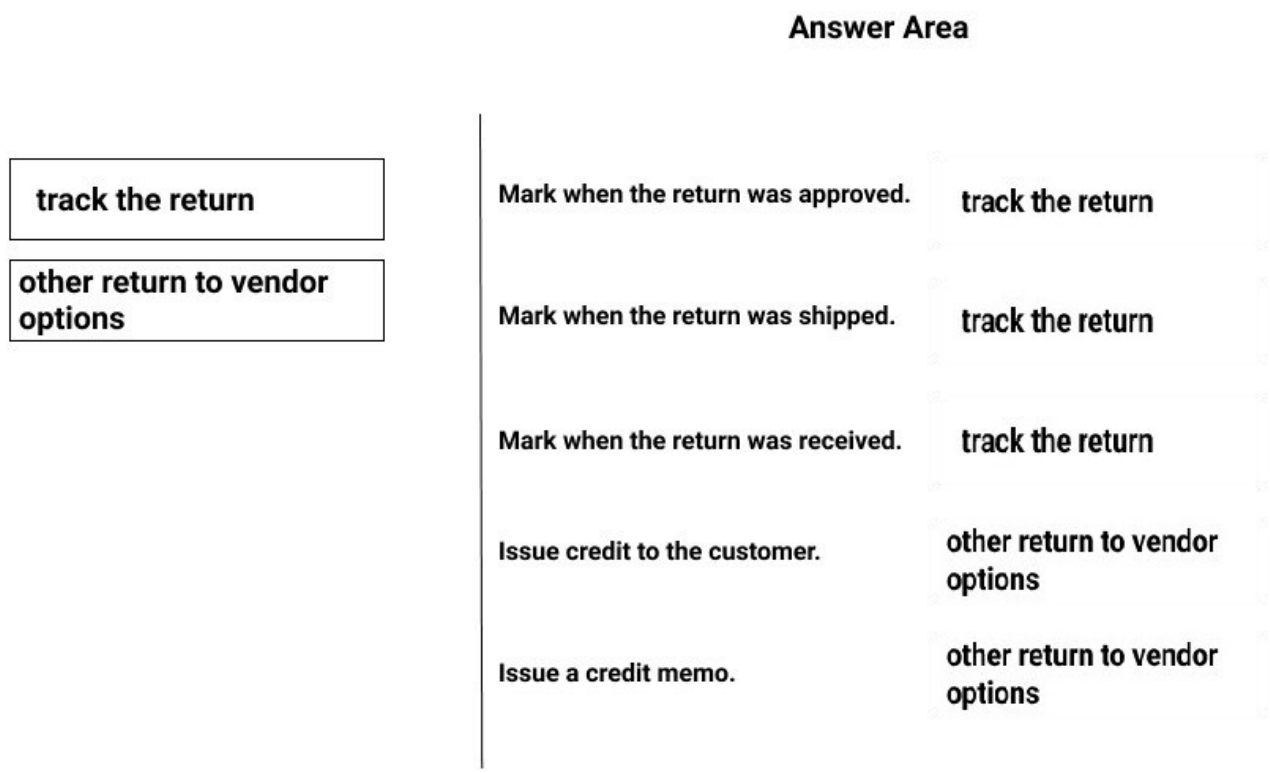


Question: 54 **Exam Heist**

DRAG DROP -
Your company's inventory clerk is using the Returning to Vendor feature in Dynamics 365 for Field Service to process a customer's request to return a wheel that is the wrong size.
The clerk needs to understand the different tracking options for returning to the vendor.
Which actions correspond with track the return and which actions correspond with another return to vendor option? To answer, drag the type of return to the action. Each type or return 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:

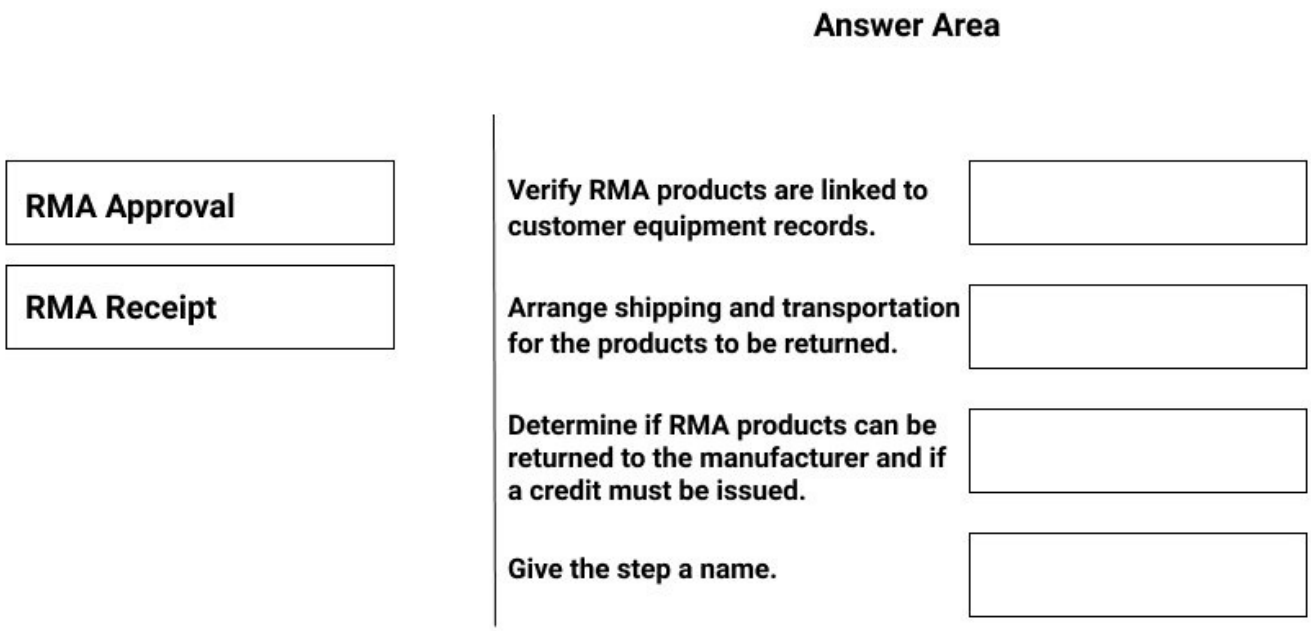


Explanation:

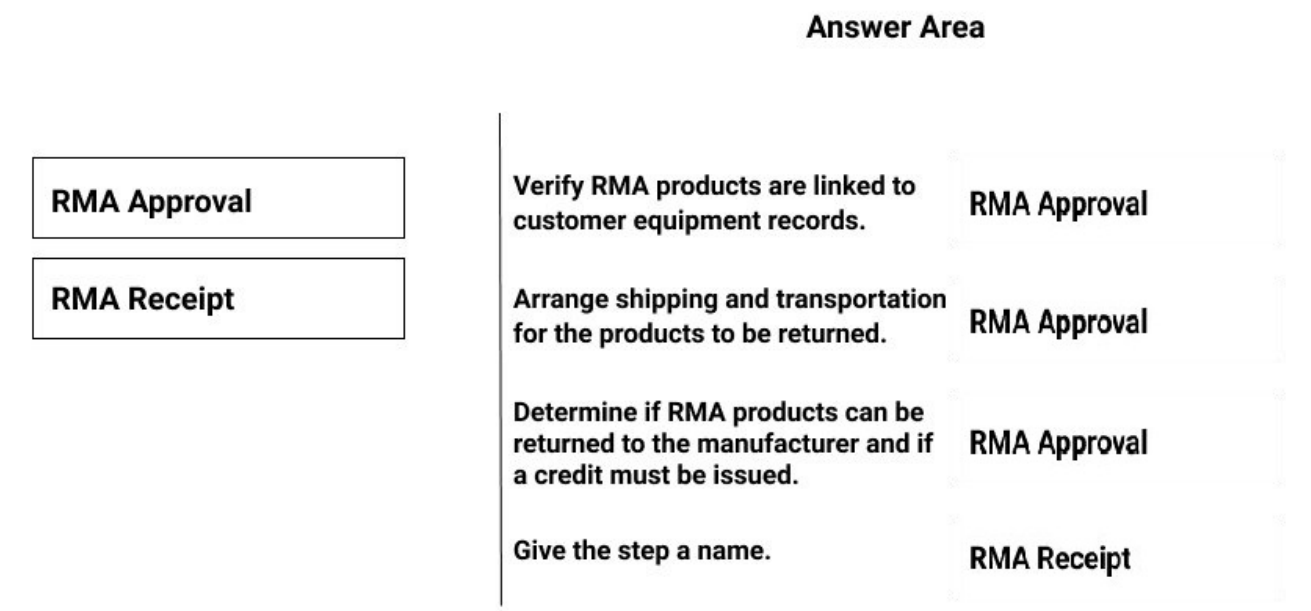
Reference:
https://docs.microsoft.com/en-us/dynamics365/customer-engagement/field-service/process-return

Question: 55 **Exam Heist**

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 an. 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:



Explanation:

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

Question: 56 **Exam Heist**

You are a Dynamics 365 for Field Service Billing Administrator. Your customer wants to purchase a series of quarterly preventative maintenance visits as well as bi-weekly site visits.
The customer wants to be billed for the preventative maintenance quarterly but billed for the site visits monthly.
What are two ways that this can be completed against a single Agreement? Each correct answer presents a complete solution.

A. Create Invoice Setup for preventative maintenance, with Invoice Products tied to Quarterly Price List.

B. Create Invoice Setup for preventative maintenance with Invoice Recurrence of every three months.

C. Create Invoice Setup for site visits, with Invoice Recurrence of each month.

D. Create Invoice Setup for site visits, with Invoice Products tied to Monthly Price List.

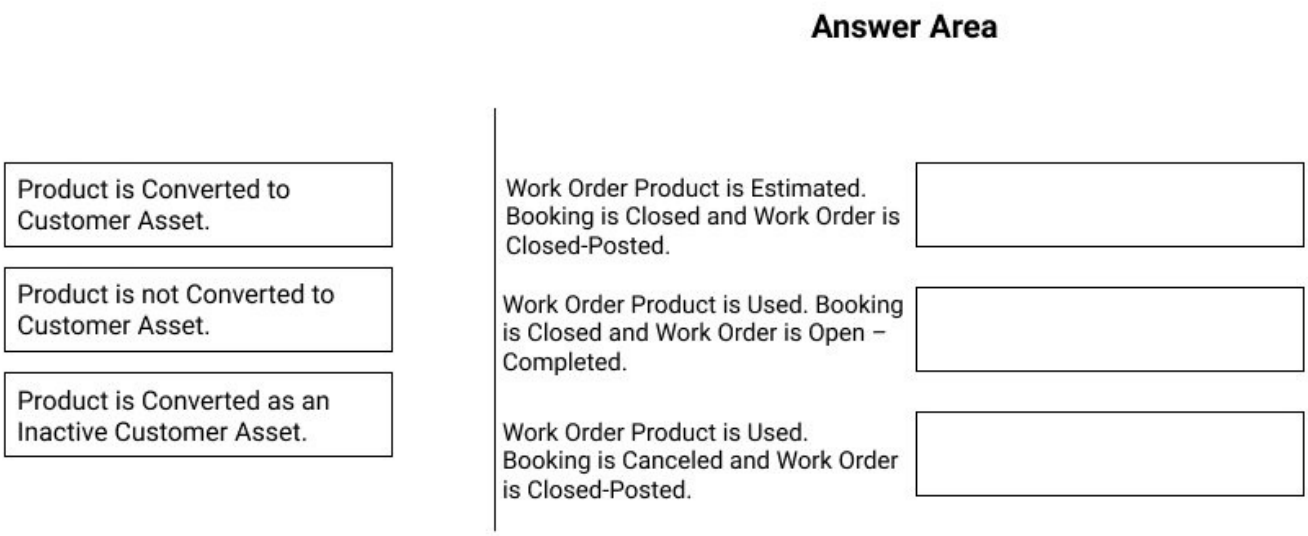
Answer: BC

Explanation:

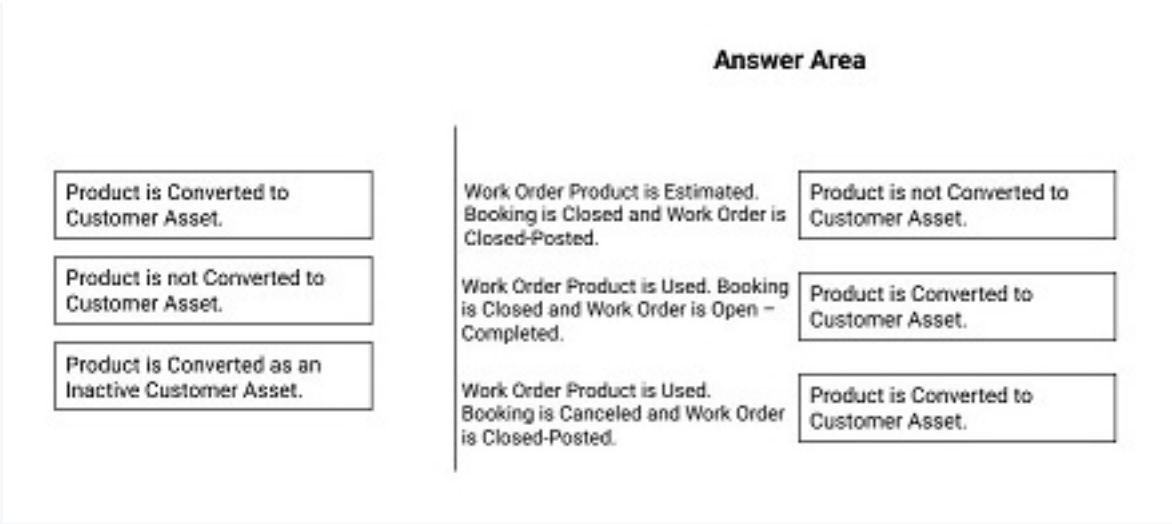
Reference:
https://docs.microsoft.com/en-us/dynamics365/customer-engagement/field-service/set-up-customer-agreements#add-invoice-setup

Question: 57 **Exam Heist**

DRAG DROP -
You are a Dynamics 365 for Field Service Administrator. All Products have the Convert to Customer Asset field set to Yes.
Some users indicate products on a customer asset are not always becoming a customer asset. Users provide you with three scenarios.
You need to review the scenarios and provide the answers.
What happens to the product for each user scenario? To answer, drag the appropriate solution to satisfy each listed requirements. Each solution may be used once, more than once, or not at all. You may need to drag the split bar between panes or scroll to view the content.
NOTE: Each correct selection is worth one point.
Select and Place:



Answer:



Explanation:

1)Product is not Converted to Customer Asset,

2)Product is Converted to Customer Asset,

3)Product is Converted to Customer Asset,

Question: 58 **Exam Heist**

You are a Dynamics 365 for Field Service Administrator.
You need to add two compressor sub-components to one of the refrigerator customer assets, in the environment and set up the sub-components for the customer asset.
What must you do to properly set up the assets?

A. Add the compressor sub-components as sub-assets on the refrigerator customer asset record.

B. Click View Hierarchy on the refrigerator customer asset record.

C. Set the Master Asset on the sub-components to the refrigerator Customer Asset record.

D. Add the compressor sub-components as customer asset records.

Answer: A

Explanation:

Add the compressor sub-components as sub-assets on the refrigerator customer asset record.

Question: 59 **Exam Heist**

You work for a recycling company that provides customers with large compactor units to collect their recyclable materials. The compactor units are comprised of two separate components: a container to collect the recyclable materials and a separate component that compacts the recyclable materials to make them easier to transport. These containers are expensive, and the components tend to break down frequently, requiring ongoing maintenance and repairs.
You need to easily track the containers that your company has at each client location and maintain a service history for each of the sub-components.

A. Configure the customer asset records hierarchically, and maintain service history at the sub-component level.

B. Configure the customer inventory records individually, in order to maintain the service history at the parent component level.

C. Configure the customer inventory records in a hierarchy, and maintain service history at the sub-component level.

D. Configure the customer asset records hierarchically, and maintain service history at the service account level.

Answer: A

Explanation:

Reference:
https://docs.microsoft.com/en-us/dynamics365/customer-engagement/field-service/configure-set-up-customer-assets

Question: 60 **Exam Heist**

Your company decided they want the Field Service territory structure to match that of the already defined sales territories within Dynamics 365. This would allow reporting by territory on the Sale and related warranty work on products in a specific territory. It will also allow scheduling of resources based on location.

You have been tasked with setting up the territories to allow for scheduling work and filtering by technicians.

Which two pieces of information must you provide when setting up Territories so work can be scheduled to the appropriate technicians? Each correct answer presents part of the solution.

A.Users assigned to one or more territory

B.Territory Name

C.Territory Manager

D.Bookable Resources assigned to one or more territory

Answer: BC

Explanation:
1. Seems correct

Question: 61 **Exam Heist**

A functional consultant needs to configure all new products for use on Work Orders in Field Service.

What are the three categories for products in Field Service? Each correct answer presents part of the solution.

A.Inventory

B.Miscellaneous

C.Equipment

D.Service

E.Non Inventory

Answer: ADE

Explanation:

Miscellaneous doesn't exist and Equipment is for Resources

Question: 62 **Exam Heist**

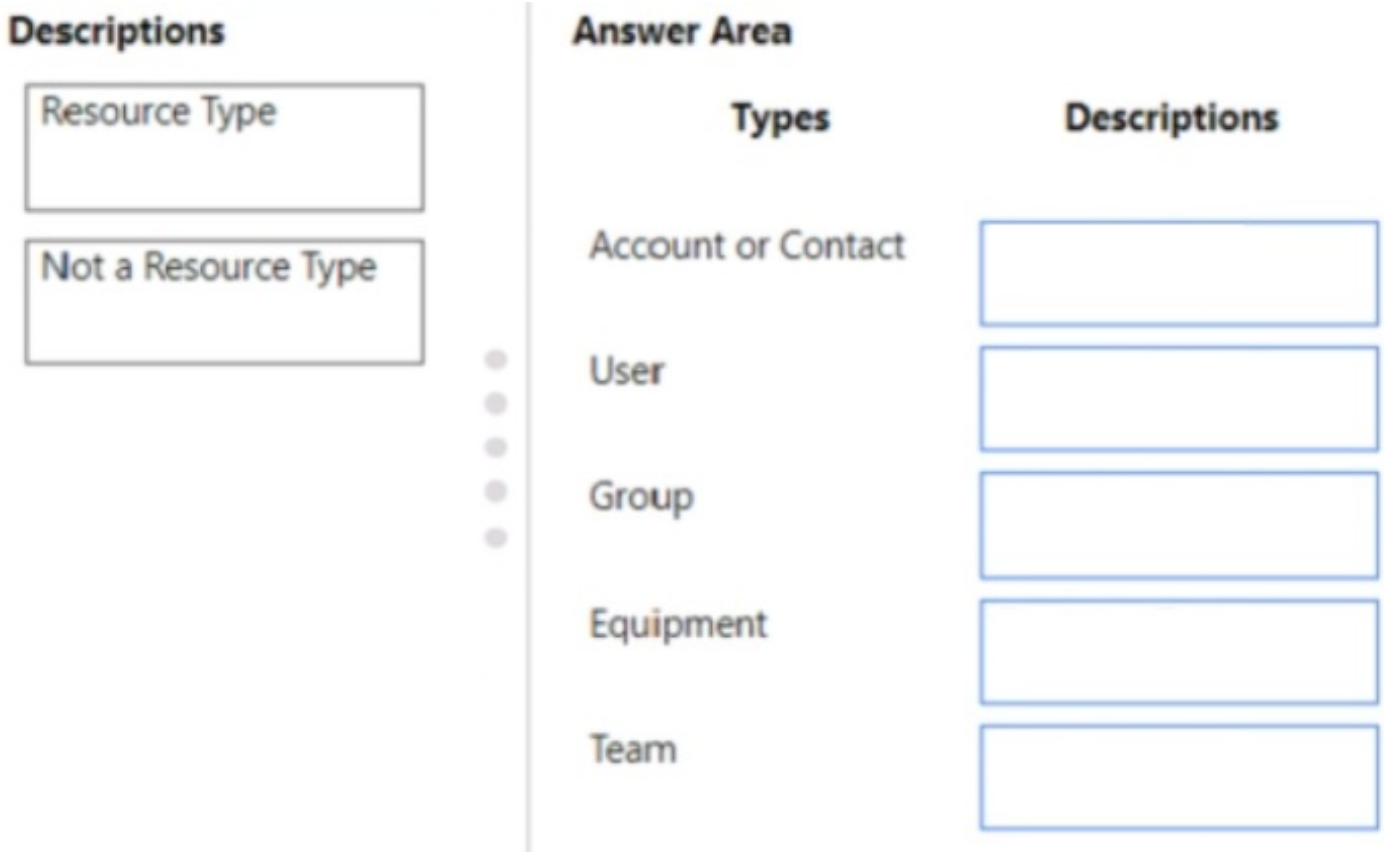
DRAG DROP
-

Your company has a requirement to use the out-of-the-box resource types to categorize active bookable resource types. This is to ensure easy Microsoft Dynamics 365 upgrades as needed.

You need to ensure that you only use the appropriate resource types.

Which types are available for your use? To answer, drag each description to the appropriate types. Each description 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 match is worth one point.



Answer:

Answer Area

Types	Descriptions
Account or Contact	Resource Type
User	Resource Type
Group	Not a Resource Type
Equipment	Resource Type
Team	Not a Resource Type

Question: 63 **Exam Heist**

Your customer asks you to create a dashboard.

The application must meet the following requirements:

•Capture work orders, asset information, and customer information.
•Allow actions to be taken directly from the dashboard.
•Allow data filtration.

You need to determine the type of dashboard you should create in the app designer.

Which type of dashboard should you create?

A. Power BI
B. Classic
C. Single-stream interactive
D. Multi-stream interactive

Answer: D

Explanation:

Correct option: D –Multi-stream interactive dashboard

Requirement alignment – A multi-stream interactive dashboard can aggregate and display multiple, unrelated data streams (e.g., work orders, assets, and customers) on a single canvas while still allowing users to filter and drill-through each stream independently. This matches the need to capture three distinct data domains and present them together.

In-app designer support – In the Dynamics365 Field Service (beta) app designer, multi-stream interactive dashboards are the only native tile type that supports real-time, interactive tiles sourced from different entities and enables actions (e.g., edit, schedule, or view details) directly from the dashboard.
Data filtration – Multi-stream dashboards expose built-in filter panes that can be bound to fields across the connected entities, letting users narrow results by status, location, customer tier, etc., without leaving the dashboard.
Actionability – Because each tile is interactive, users can perform field-service actions (assign work order, update asset, contact customer) directly from the dashboard, fulfilling the "allow actions to be taken directly from the dashboard" criterion.

Why the other options are unsuitable

A – PowerBI – PowerBI is a separate analytics platform; while it can connect to Dataverse, it is not a native tile type within the Dynamics365 Field Service app designer and does not support the same level of in-app actionability.
B – Classic – Classic dashboards are limited to a single data source and lack the multi-stream capability and interactive filtering needed to surface work orders, assets, and customers together.
C – Single-stream interactive – This tile type displays data from only one entity stream; it cannot simultaneously show three distinct data domains, making it impossible to meet the combined capture requirement.

Thus, a **Multi-stream interactive** dashboard is the only native solution that satisfies all three functional requirements within the Field Service app designer.

Question: 64 **Exam Heist**

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 tor 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

Answer: BCE

Explanation:

https://learn.microsoft.com/en-us/dynamics365/field-service/field-service-time-entry

Question: 65 **Exam Heist**

Your customer wants to set up a minimum charge of $100 for the first 45 minutes of being onsite for a work order.

You need to set up this requirement in Microsoft Dynamics 365 Field Service.

Which two actions should you perform? Each correct answer presents part of the solution.

NOTE: Each correct selection is worth one point.

A.Create a Field Service price list item where the Flat Fee is set to Yes, the Minimum Charge Duration is 45 minutes, and the Minimum Charge Amount is $100

B.Create a Field Service price list item where the Flat Fee is set to No, the Minimum Charge Duration is 45 minutes, and the Minimum Charge Amount is $100

C.Create a new product with Field Service Product Type = Inventory

D.Create a price list where the Flat Fee is set to No

E.Create a new product with Field Service Product Type = Service

Answer: AE

Explanation:

A and E. Flat Fee for 45 MIN

https://learn.microsoft.com/en-us/dynamics365/field-service/create-price-list

Question: 66 **Exam Heist**

You are implementing a Microsoft Dynamics 365 Field Service solution for a customer who has the Field Service Dispatcher security role.

You recently built a custom work order form, but the customer is having trouble viewing it when they log into Dynamics 365. You confirm that the form is set to Display to Everyone, but the customer is still not able to see the form.

You need to resolve this issue.

What should you do before selecting Save and Publish?

A.1. Navigate to the app designer.
2. In the site map designer, ensure the work order area is present.

B.1. Navigate to the app designer.
2. Under the work order, ensure the custom form is set to be visible.

C.1. Navigate to the work order form.
2. Select Enable Security Roles
3. Ensure Enabled for Fallback is selected.

D.1. Navigate to the work order form.
2. Select Enable Security Roles and Display to only these selected Security Roles
3. Ensure the Field Service Dispatcher role is applied to the form.

Answer: D

Explanation:

1. Navigate to the work order form.

2. Select Enable Security Roles and Display to only these selected Security Roles

3. Ensure the Field Service Dispatcher role is applied to the form.

Question: 67 **Exam Heist**

Your company hires a consultant to help them determine the best way to efficiently dispatch the best technicians to customer sites.

The consultant suggests that for phase one, your company should use a proficiency model that includes four ratings:

•In Training, rating 1
•Familiar, rating 3
•Proficient, rating 5
•Expert, rating 7

You need to evaluate this proficient model.

Which three statements apply to this proficiency model? Each correct answer presents a complete solution.

NOTE: Each correct selection is worth one point.

A.This proficiency model would need to be created.
B.This proficiency model can be created even though the ratings numbers have gaps.
C.This proficiency model cannot be created because the ratings numbers have gaps.
D.This information above is all that is needed to create a proficiency model.
E.There are multiple proficiency models available “out of the box” and you must choose one of them.

Answer: AD

Explanation:

AD is correct because the proficiency model can be created despite gaps in rating numbers, and sufficient information has been provided to establish the framework.

The model outlined provides a clear structure for evaluating the skill levels of technicians. Each rating corresponds to distinct training phases, facilitating straightforward categorization and assessment of technician capabilities. The presence of gaps in numerical values (specifically between 1 and 3, and between 5 and 7) does not preclude the creation of a proficiency model; it merely illustrates that the ratings can be spaced variably based on the evaluation focus. Hence, option B accurately states that the model can indeed be designed this way.

Conversely, option C is incorrect since it suggests that gaps invalidate the model's creation, which is not a requirement in proficiency assessments. Additionally, while the information given outlines the framework's structure, while option D inaccurately implies that this single set of data is alone sufficient for practical deployment without considering additional operational parameters (e.g., criteria for each rating). Lastly, option E misrepresents the scenario by suggesting that pre-existing models limit innovation, whereas a custom model may better fit the specific needs of the organization, highlighting the importance of flexibility in designing an effective field service strategy.

1. https://learn.microsoft.com/en-us/dynamics365/field-service/
2. https://learn.microsoft.com/en-us/dynamics365/customer-engagement/field-service/introduction-field-service
3. https://www.microsoft.com/en-us/microsoft-365/blog/2017/11/03/a-better-way-to-support-field-service-businesses/

Question: 68 **Exam Heist**

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.

Answer: ABD

Explanation:

https://learn.microsoft.com/en-us/dynamics365/mixed-reality/remote-assist/ra-webapp-install#features-enabled-by-the-model-driven-app

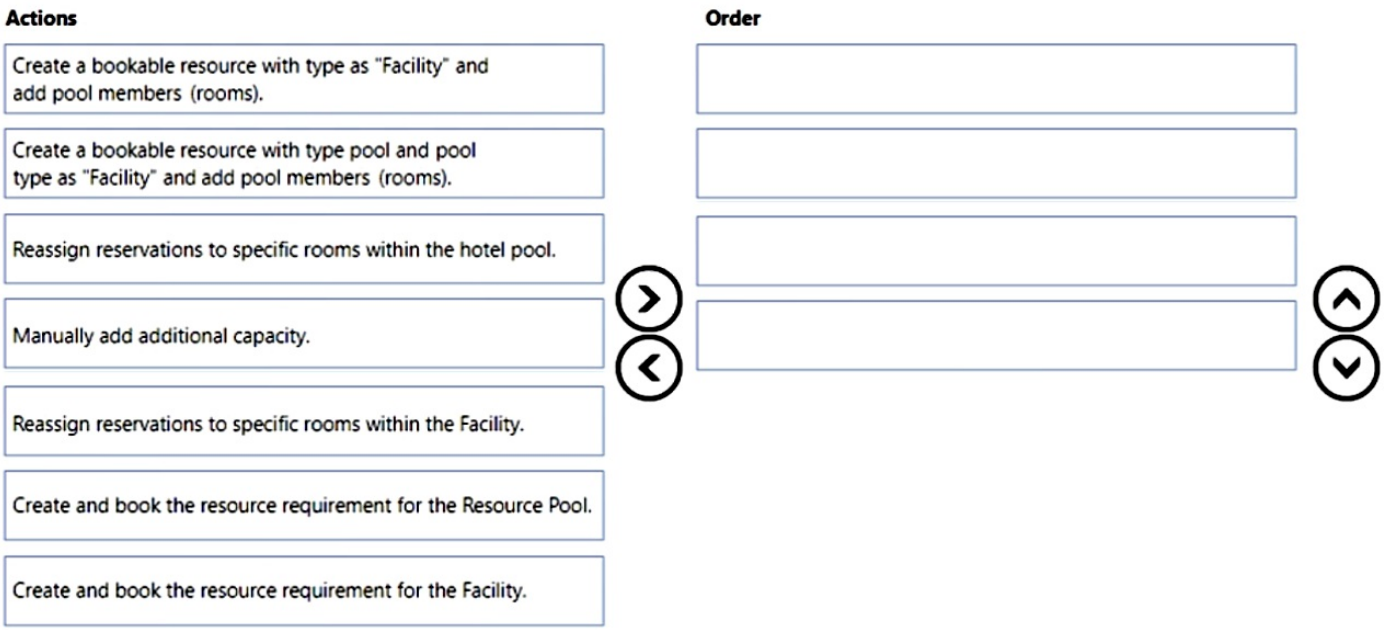
Question: 69 **Exam Heist**

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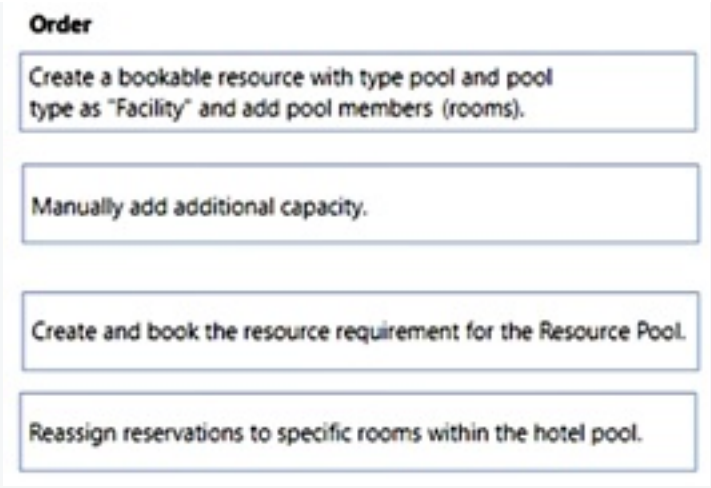
You are configuring Microsoft Dynamics 365 for a hotel chain.

The hotel managers want to make traveler reservations by first checking for specific date range availability, and then assigning the traveler to a specific room when they arrive. Furthermore, hotel managers want to overbook the hotel to account for expected cancellations.

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.



Answer:



Question: 70 **Exam Heist**

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.Resources Priority
C.Auto Generate Booking Dates in 24 hours
D.Generate Work Order Days in Advance
E.Booking Recurrence specification

Answer: ADE

Explanation:

A. Auto Generate Work Order

D. Generate Work Order Days in Advance

E. Booking Recurrence specification

Question: 71 **Exam Heist**

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

Answer: C

Explanation:

it has to be C

https://learn.microsoft.com/en-us/dynamics365/supply-chain/sales-marketing/field-service-work-order

Question: 72 **Exam Heist**

You are a consultant implementing Dynamics 365 Field Service for Contoso Manufacturing.

The Field Service director wants to set preventive maintenance schedules for sub-components that have a different maintenance routine than the top-level or parent asset.

The goal is to increase asset useful life and provide increased customer satisfaction.

How should you manage different preventive maintenance schedules for multiple sub-components of a parent or top-level asset?

A. Create Asset Properties, and associate the appropriate new Asset Property schedule to each sub-component.

B. Create an Agreement for each Asset Sub-Component to ensure the proper preventive maintenance schedule is set.

C. Create Asset Categories for each preventive maintenance schedule, and assign to the appropriate sub-component.

D. Associate an Agreement Booking Incident to the Asset Sub-Component requiring a different preventive maintenance schedule.

Answer: D

Explanation:

D is correct because associating an Agreement Booking Incident to the Asset Sub-Component allows for tailored preventive maintenance schedules specific to each sub-component, ensuring effective management of their unique maintenance needs.

Reasoning:

1. **Flexibility and Specificity**: D supports the complexity of maintenance needs for sub-components, enabling unique schedules without altering the parent asset's routine. This customization enhances both asset longevity and customer satisfaction.
2. **Centralized Management**: By leveraging agreements to encapsulate preventive maintenance directly tied to specific incidents, Dynamics 365 Field Service can streamline workflows, making scheduling and tracking more efficient.
3. **Compliance and Tracking**: This method allows for better compliance with industry standards through precise tracking of maintenance activities associated with individual components, thereby improving asset reliability and performance.

Evaluation of Other Options:

A. Create Asset Properties: While this option helps categorize assets, it does not provide the necessary structure for varied and specific maintenance schedules for sub-components. Asset properties generally relate more to attributes than procedural scheduling.

B. Create an Agreement for each Asset Sub-Component: This could lead to an overwhelming number of agreements, complicating management. It dilutes visibility across the parent asset and makes tracking and reporting cumbersome.

C. Create Asset Categories for each preventive maintenance schedule: Although this approach organizes assets by category, it lacks the dynamic capability of applying targeted maintenance schedules per sub-component, failing to leverage the relationship and distinction between equipment and their specific maintenance needs.

References:

https://docs.microsoft.com/en-us/dynamics365/field-service/
https://learn.microsoft.com/en-us/dynamics365/field-service/planning-and-scheduling-optimization
https://docs.microsoft.com/en-us/dynamics365/field-service/field-service-overview

Question: 73 **Exam Heist**

You are a Contoso, Ltd. dispatcher for Dynamics 365 Field Service application.

A technician's mobile phone is having difficulties, and the Field Service Mobile app will not open. The technician is headed to a work site and needs directions.

How can you provide the technician with directions?

A.Click on Get Driving Directions from the Work Order record.
B.Click on Get Driving Directions from the Actions menu on the Schedule Board.
C.Click Geo Code from the Work Order record.
D.Click Geo Code from the Booking record.

Answer: B

Explanation:

Click on Get Driving Directions from the Actions menu on the Schedule Board.

Question: 74 **Exam Heist**

A customer service agent fails to solve a customer's issue over the phone.

The agent needs to converted the case to a work order in order to schedule a technician visit.

What is required to successfully convert a case to a work order?

A.SLA
B.Incident Type
C.Work Order Type
D.Customer Asset

Answer: B

Explanation:

An incident type is required to convert a case to a work order.

Question: 75 **Exam Heist**

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.

Answer: BCD

Explanation:

BCD is correct because creating a new incident type in Dynamics 365 Field Service necessitates the integration of specific service tasks and products, alongside the configuration of the incident type itself.

Firstly, the creation of an incident type involves defining its parameters, which includes associating relevant service tasks and products. Thus, **Option B**, "Add all necessary service tasks and products to the incident type," is imperative as it directly informs the structure and operational capabilities of the incident type. Following this, **Option C**, "Create and save the incident type," is essential as it involves the foundational setup within the system, ensuring that the new configuration is recognized and available for further deployment. Lastly, **Option D**, “Create/save/publish all necessary service tasks and products,” while seemingly integral, is more indirect as it focuses solely on the auxiliary entities rather than the incident type itself.

In contrast, **Option A**, "Add any necessary notes for this incident type," is not critical in the initial process of creating an incident type, as notes do not affect the functional capability of the incident. Moreover, **Option E**, "Add all necessary services to the incident type," is irrelevant given the stipulation that the scenario specifically excludes existing services, thus eliminating this option's feasibility.

In sum, the correct creation of an incident type hinges on the comprehensive inclusion of new service tasks and products, and the formal establishment of the incident type itself, affirming BCD as the necessary steps.

References:

https://docs.microsoft.com/en-us/dynamics365/field-service/
https://learn.microsoft.com/en-us/dynamics365/customer-engagement/field-service/set-up-field-service
https://learn.microsoft.com/en-us/dynamics365/field-service/manage-incident-types

Question: 76 **Exam Heist**

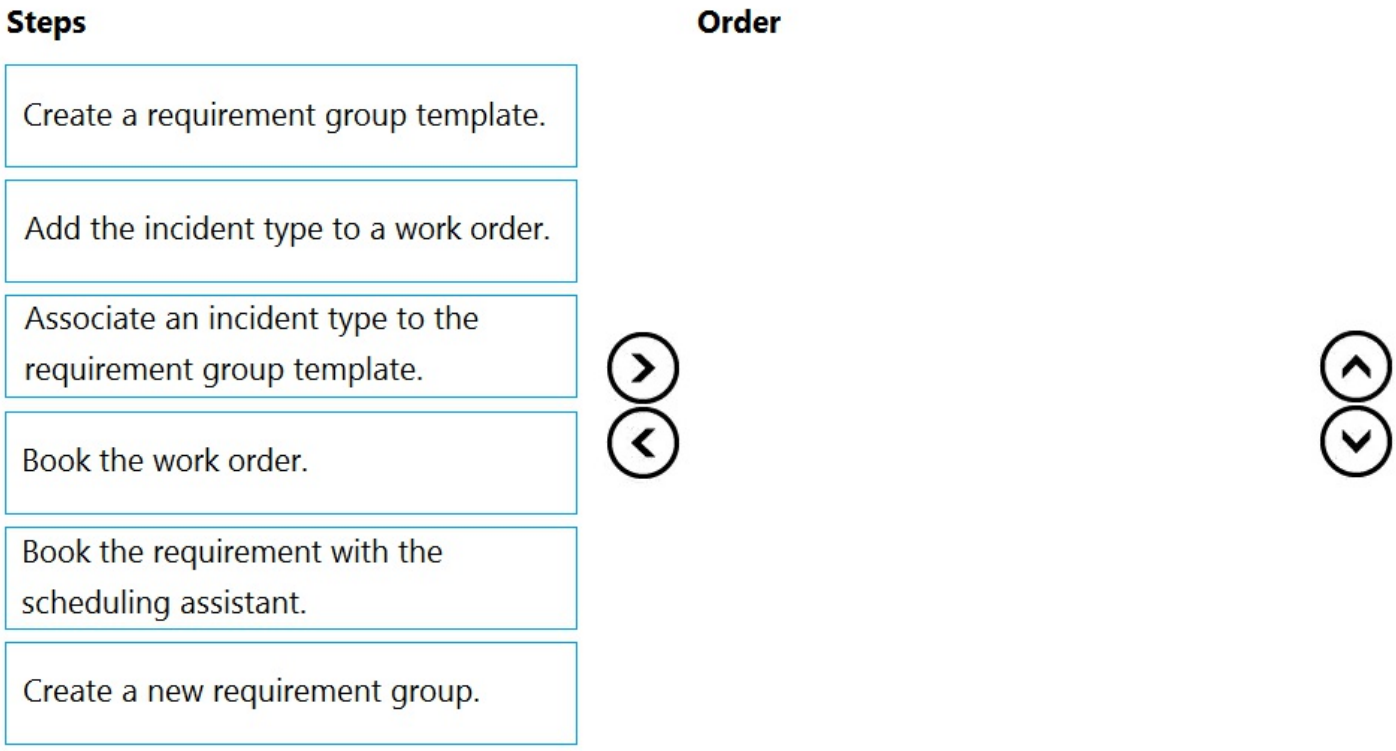
DRAG DROP
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You are a Dynamics 365 Field Service dispatcher.

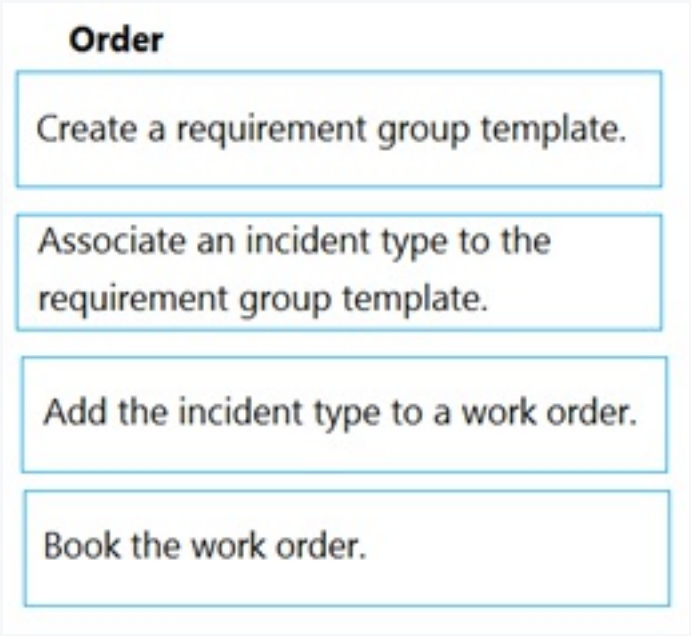
You need to implement a capability within the schedule board to allow you to find resources for a work order. The work order can be done by any resource with the right piece of equipment, who is available at 9:00 A.M. during a selected week.

Which four steps must you take, in sequence? To answer, move the appropriate actions from the list of actions to

the answer area and arrange them in the correct order.



Answer:



Question: 77 **Exam Heist**

Contoso wants to provide special customer pricing, to one of their customers, for two years. All work order products and services will be 10% off.

What should they implement?

A.Create a special price list and associate it to the Billing Account.
B.Create a special price list and associate it to the Service Account.
C.Create a special price list, associate it to an entitlement for the Billing Account.
D.Create a special price list, associate it to an entitlement for the Service Account.

Answer: C

Explanation:

https://learn.microsoft.com/en-us/dynamics365/field-service/work-order-entitlements

Question: 78 **Exam Heist**

DRAG DROP
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Contoso, Ltd. wants to understand how the out-of-the-box statuses for work orders coordinate with the automated processes included with Dynamics 365 Field Service.

Which actions below are associated with which processes? To answer, drag the action statement to the appropriate automated process. 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.

Statement
A work order is added to the calendar on the Schedule Board
A technician changes the Booking Status to Traveling
A technician changes the Booking Status to In Progress
A technician changes the Booking Status to Canceled
A technician changes the Booking Status to Completed

Automated processes	
Work Order System Status changes to Open-Scheduled	
Work Order System Status changes to Open-in Progress	
Actual Arrival Time is updated	
Work Order System Status changes to Open-Unscheduled	
Work Order System Status changes to Open-Completed	

Answer:

Automated processes	
Work Order System Status changes to Open-Scheduled	A work order is added to the calendar on the Schedule Board
Work Order System Status changes to Open-in Progress	A technician changes the Booking Status to Traveling
Actual Arrival Time is updated	A technician changes the Booking Status to In Progress
Work Order System Status changes to Open-Unscheduled	A technician changes the Booking Status to Canceled
Work Order System Status changes to Open-Completed	A technician changes the Booking Status to Completed

Question: 79 **Exam Heist**

Your company is losing money on some of the work orders they have been completing. They want to implement a pricing policy to stop the losses on work orders.

You have been asked to setup the application, where applicable, to ensure that minimum charges and fees are enforced.

Which two options are available for enforcing the pricing policy? Each correct answer presents a complete solution.

A.Minimum flat fee for work order products.

B.Minimum quantity selling option for work order products.

C.Minimum charge amount for work order services.

D.Minimum charge duration for work order services.

Answer: AC

Explanation:

https://learn.microsoft.com/en-us/dynamics365/field-service/create-price-listSince the goal is to stop losing money, we should have a flat fee and a minimum charge amount. We shouldn't be that interested in the time NOT billed to a customer

Question: 80 **Exam Heist**

You are implementing Microsoft Dynamics 365 Field Service for your organization.

You are about to finalize the updates to booking statuses. The booking statuses, and corresponding Field Service Status values are:

Booking Status	Field Service Status
Scheduled	Scheduled
Traveling	Traveling
Arrive	In Progress
Wrench Time	In Progress
On Break	On Break
Completed	Completed
Canceled	Canceled

You want technicians' time entries to be generated every time they update the booking status.

Which two steps must you set up to ensure the time entries are correctly generated? Each correct answer presents part of the solution.

NOTE: Each correct selection is worth one point.

A. Set the Timestamp Frequency setting to Auto-Generate from Booking Timestamps

B. Set the Time Entry Generation Strategy setting to Per Booking Status Change

C. Set the Timestamp Frequency setting to Per Booking Status Change

D. Set the Time Entry Generation Strategy setting to Auto-Generate from Booking Timestamps

Answer: CD

Question: 81

Exam Heist

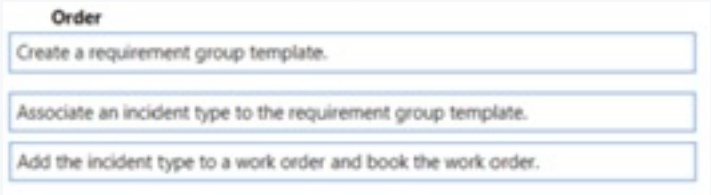
DRAG DROP
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You need to create a requirement group for a work order.

Which three steps 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.



Answer:



Explanation:

An incident type is required to convert a case to a work order.

Question: 82

Exam Heist

DRAG DROP
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Your organization has decided to add Inspections as a new source of revenue.

As a business analyst for this new process, you need to start building Inspection forms for use on a work order.

Which three actions need to be performed in sequence? To answer, move the appropriate actions from the list of steps to the answer area and arrange them in the correct order.



Answer:



Question: 83 **Exam Heist**

Your company is implementing a new CRM system. They have selected Microsoft Dynamics 365 Field Service because of its flexibility.

During the basic training sessions, you need to train the field service team on how work orders are created.

What are three out-of-the-box ways to create work orders? Each correct answer presents a complete solution.

NOTE: Each correct selection is worth one point.

A.from a purchase order
B.from the Dynamics 365 Field Service mobile app
C.from an asset
D.from a case record
E.from an agreement

Answer: BDE

Explanation:

B.from the Dynamics 365 Field Service mobile app

D.from a case record

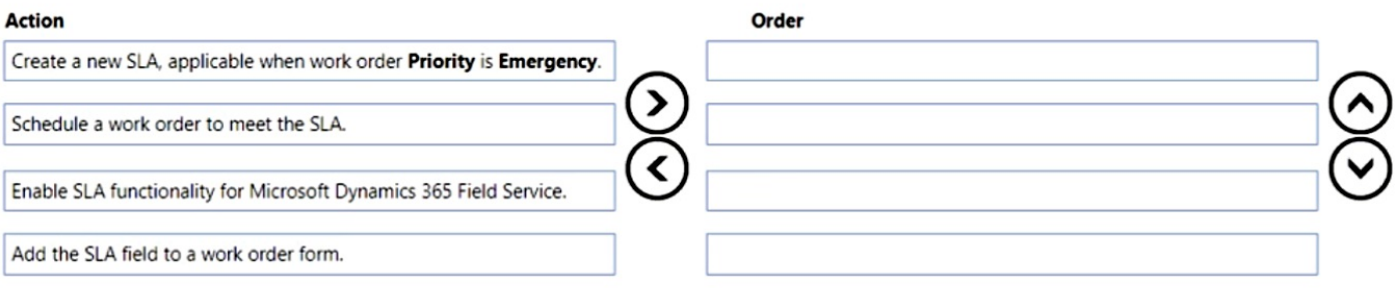
E.from an agreement

Question: 84 **Exam Heist**

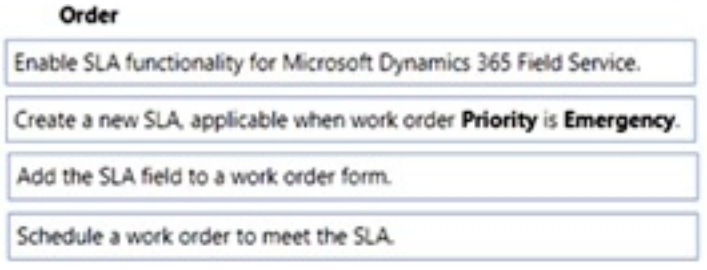
DRAG DROP
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A customer wants work orders to have Service Level Agreements (SLAs) enforced for emergency high-priority work orders.

In which order should you perform the actions? To answer, move all actions from the list of actions to the answer area and arrange them in the correct order.



Answer:



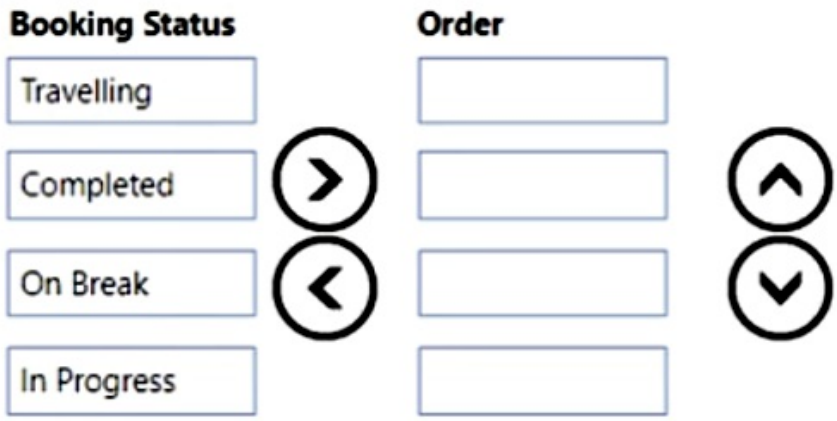
Question: 85 **Exam Heist**

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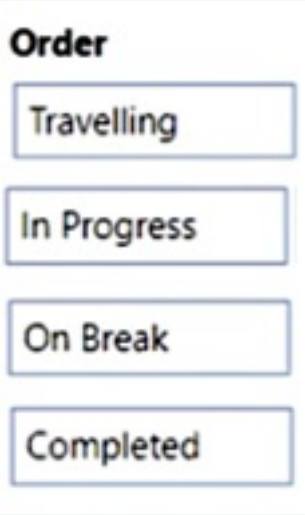
Your company implemented the Microsoft Dynamics 365 Field Service mobile app.

A dispatcher supervisor asks you to ensure that the booking statuses will match the business processes currently used by the field technicians. You will use out-of-the-box booking statuses to fulfill this need.

In which order should field technicians update their booking statuses? To answer, move all booking status fields from the list of booking status fields to the answer area, and arrange them in the correct order.



Answer:



Question: 86 **Exam Heist**

You are the Dynamics 365 Field Service technician manager for Contoso Ltd.

Your customers are indicating they are being double invoiced for certain work orders. They are receiving the quarterly invoice, and another invoice after the service is performed.

You need the system to automatically handle these scenarios, while still sending out invoices for work orders that are not generated from an agreement.

What should you do to avoid double billing your customers that have agreements?

A.Turn-off Invoice Generated on Closed-Posted work orders to avoid invoice generation when a work order is Closed-Posted.

B.Update the Invoice Journal lines to ensure the lines are $0.00.

C.Manually update the Invoice lines prior to sending to the customer.

D.Create a process using price lists and entitlements to ensure the work order subtotal and work order invoice is $0.00.

Answer: D

Explanation:

Option D is correct because creating a process using price lists and entitlements ensures that work orders generated under agreements effectively reflect a subtotal of $0.00, preventing double billing.

When utilizing agreements in Dynamics 365 Field Service, it is vital to implement safeguards against duplicative invoicing as customers often have entitlements that cover specific services. Establishing price lists tied to entitlement agreements can systematically ensure that invoices generated from such work orders do not lead to charges, given that the customers are already being billed through quarterly invoices.

Critical Evaluation of Incorrect Options:

A. Turn-off Invoice Generated on Closed-Posted work orders: While this might initially seem like a solution to stop invoicing, it could inadvertently affect all closed work orders, including those not bound by agreements. This blanket fix could result in revenue loss for legitimate service transactions.

B. Update the Invoice Journal lines to ensure the lines are $0.00: This requires manual intervention, introducing human error and inconsistency into the billing process. It does not provide a sustainable or automated solution, making it impractical for ongoing operational efficiencies.

C. Manually update the Invoice lines prior to sending to the customer: Similar to option B, manual adjustments introduce potential errors and are time-consuming. This method lacks the automation needed to maintain compliance with billing agreements and can degrade customer trust due to perceived ineffectiveness.

Employing price lists and entitlements within Dynamics 365 provides a structured and automated approach, ensuring that billing reflects the intricacies of customer agreements and preventing the risk of double invoicing.

References:

https://learn.microsoft.com/en-us/dynamics365/field-service/
https://learn.microsoft.com/en-us/dynamics365/customer-engagement/field-service/field-service-automation
https://learn.microsoft.com/en-us/dynamics365/field-service/invoice-management

Question: 87 **Exam Heist**

DRAG DROP
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Your company uses Microsoft Dynamics 365 Field Service to schedule work orders.

One of the field service operations managers needs to understand when the different resource types should be scheduled.

You need to provide the manager with a matrix of when you should schedule the various resource types on a work order.

What are the resource types you should use for each scenario? To answer, drag the appropriate resource type to the appropriate scenario. Each resource 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 the content.

NOTE: Each correct match is worth one point.

Resource types

Crew	Facility
Multi-Resource Scheduling	Equipment
Customer Assets	User
Service Center	

Answer Area

Scenarios	Resource types
A new employee is assigned to a veteran for scheduling, so that the new employee can learn a new skill.	
Schedule a truck bay to service fleet vehicles.	
Allocate specialized tools to work orders bookings.	

Answer:

Answer Area

Scenarios	Resource types
A new employee is assigned to a veteran for scheduling, so that the new employee can learn a new skill.	Crew
Schedule a truck bay to service fleet vehicles.	Facility
Allocate specialized tools to work orders bookings.	Equipment

Question: 88 **Exam Heist**

You implemented Microsoft Dynamics 365 Field Service. You are now managing changes as the team continues to use Dynamics 365. Dispatchers are reporting that the schedule board is difficult to navigate because resources can be scheduled 24 hours of the day. However, resources for this organization only work between 7am and 5pm in the Greenwich Mean Time Zone (GMT).

You need to modify the schedule board to resolve this issue.

What should you do?

A.Modify the existing schedule board tabs and ensure the working time for the tab is set to 7am to 5pm GMT.

B.Adjust the working hours of the resources to 7am to 5pm GMT.

C.Modify the existing schedule board tabs to only include resources working 7am to 5pm GMT.

D.Create a schedule board tab for the resources working 7am to 5pm GMT and ensure all the resources have been added to that tab.

Answer: A

Explanation:

Modify the existing schedule board tabs and ensure the working time for the tab is set to 7am to 5pm GMT.

Question: 89 **Exam Heist**

You are configuring the schedule board so that dispatchers can:
1. see all resources on the schedule board at once, with no filtering based on resource type, internal and subcontractors.
2. quickly look at the board, and determine who is internal versus external.

You need to ensure dispatchers can see the resource type.

In which two places should you add the Resource Type field? Each correct answer presents part of the solution.

NOTE: Each correct selection is worth one point.

A.To Resource Details View

B.To Resource Tooltips View

C.To Resource Cell Template

D.To Retrieve Resources Query

Answer: CD

Explanation:

This is the right answer, the procedure is explained here.

https://learn.microsoft.com/en-us/dynamics365/field-service/extend-schedule-board-custom-resource-attribute

Question: 90 **Exam Heist**

Note: This question is part of a series of questions that present the same scenario. Each question in the series contains a unique solution that might meet the stated goals. Some question sets might have more than one correct solution, while others might not have a correct solution.

After you answer a question in this section, you will NOT be able to return to it. As a result, these questions will not appear in the review screen.

You are a 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 create a work rule with the Type set to Excluded Resources.

Does this meet the goal?

A. Yes

B. No

Answer: B

Explanation:

Justification

The **Excluded Resources** rule type removes the selected resource from all scheduling contexts; it blocks the resource from being placed on any work order, regardless of the account.
The requirement states that the resource must remain bookable for other customers, i.e., it should only be excluded for the specific AdventureWorks account.
Using an Excluded Resources rule therefore **over-restricts** the resource and does **not** satisfy the goal.
A more appropriate approach would be to apply a **conditional work-order rule** (e.g., a rule that checks the "Account" field) or to set the resource's **availability** on a per-customer basis, which allows the resource to stay scheduled for other accounts while being blocked for AdventureWorks.

Hence, the correct answer is **B – No**, because the proposed solution does not meet the stated objective.

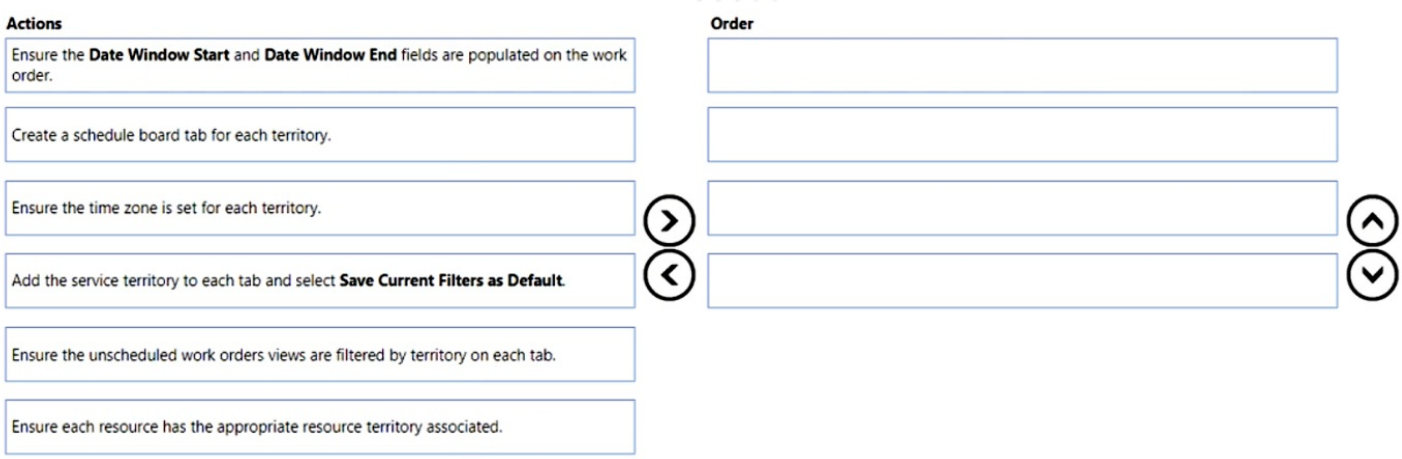
Question: 91 **Exam Heist**

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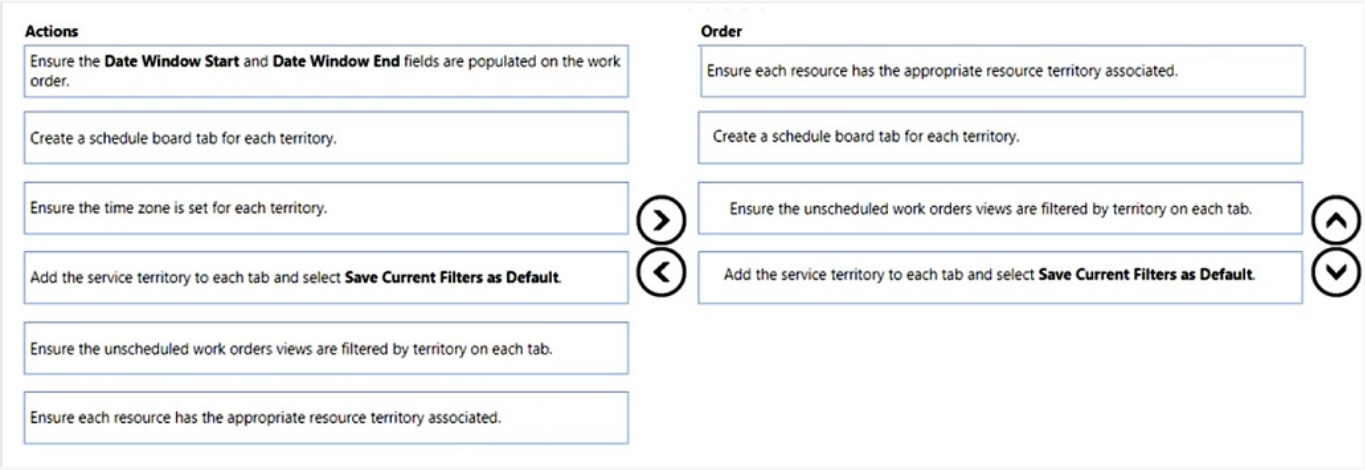
You are implementing the schedule board for a HVAC (heating, ventilation, and air conditioning) company. The company has two dispatchers in their own territories who only schedule resources within their territory.

You need to configure the schedule board so that each dispatcher only sees resources who belong in their territory, as well as work orders to be scheduled in their territory.

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.



Answer:



Explanation:

1 - Ensure each resource has the appropriate resource territory associated

2 - Create a schedule board tab for each territory

3 - Ensure the Unscheduled Work Orders are filtered bu Territory on each tab

4 - Add the Service Territory to each tab and select Save current Filters as Default

Question: 92 **Exam Heist**

Note: This question is part of a series of questions that present the same scenario. Each question in the series contains a unique solution that might meet the stated goals. Some question sets might have more than one correct solution, while others might not have a correct solution.

After you answer a question in this section, you will NOT be able to return to it. As a result, these questions will not appear in the review screen.

You are a 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 create a Requirement Resource Preference record and set the Preference Type to Restricted and select the work order.

Does this meet the goal?

A.Yes

B.No

Answer: B

Explanation:

should be set to Account

Question: 93 **Exam Heist**

You are working with your customer to define their booking timestamps and booking journals.

Your customer needs your help to understand the capabilities.

Which two explanations are appropriate? Each correct answer presents a complete solution.

NOTE: Each correct selection is worth one point.

A.Booking timestamps are used to calculate Booking Journals that calculate total travel time and working time for a specific booking.

B.Overtime is a type of booking journal. The system determines if the working duration is outside normal working hours.

C.Timesheets are required to be set up in order to properly capture booking timestamps.

D.Timestamp Frequencies are only updated Per Booking Status Change.

Answer: AB

Explanation:

https://learn.microsoft.com/en-us/dynamics365/field-service/booking-timestamps#generate-booking-journals

Question: 94 **Exam Heist**

Note: This question is part of a series of questions that present the same scenario. Each question in the series contains a unique solution that might meet the stated goals. Some question sets might have more than one correct solution, while others might not have a correct solution.

After you answer a question in this section, you will NOT be able to return to it. As a result, these questions will not appear in the review screen.

You are a 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 Load the Default Filters on the Schedule Board.

Does this meet the goal?

A. Yes
B. No

Answer: B

Explanation:

Answer: B – No

Why "Load the Default Filters" does not meet the goal

The Load the Default Filters option only restores the out-of-the-box view filters on the Schedule Board (e.g., showing all resources, work orders, and time-slots).
It does **not** add any exclusion logic that prevents a particular resource from being assigned to work orders for a specific customer.
Consequently, the resource will still appear in the scheduling grid and can be inadvertently booked on AdventureWorks work orders, defeating the requirement that the resource must be unavailable for that customer while remaining bookable for other accounts.

What you actually need to do

Use a **resource filter** or **constraint** on the Schedule Board (or on the resource's calendar) that excludes the resource based on the Customer field or a custom "Exclude from Customer" flag.
Alternatively, set the resource's **availability** for AdventureWorks to "Closed" or create a **service-level rule** that blocks scheduling for that customer but leaves the resource's overall capacity intact for other customers.
These actions directly enforce the exclusion while still allowing the resource to be scheduled for other accounts.

Why the other option (A – Yes) is incorrect

Selecting Load the Default Filters cannot achieve the business rule; it merely resets the view and provides no scheduling restriction.
Therefore it does not satisfy the requirement and is an inappropriate solution.

Conclusion: To keep a resource available for all accounts except AdventureWorks, you must apply a targeted filter or constraint, not simply load default filters. Hence, the correct response is **B – No**.

Question: 95 **Exam Heist**

Your company enabled automatic time entries for all technicians.

You need to explain to the dispatchers when the time entry actuals will be created in the work order process.

In which work order status will this occur?

A.In Progress
B.Closed-Posted
C.Completed
D.On Break

Answer: C

Question: 96 **Exam Heist**

Note: This question is part of a series of questions that present the same scenario. Each question in the series contains a unique solution that might meet the stated goals. Some question sets might have more than one correct solution, while others might not have a correct solution.

After you answer a question in this section, you will NOT be able to return to it. As a result, these questions will not appear in the review screen.

You are implementing Microsoft Dynamics 365 Field Service for a health care institution. Each day, the institution receives a large number of appointment requests for pediatricians.

You have the following requirements:
•create a daily schedule for pediatricians with a frequency of 30 minutes for each slot.
•provide a full-day schedule with start times and end times.

Solution: You create a fulfillment preference with time group details with a duration of 30 minutes for the whole day, associate it to a requirement, and then book the requirement with the schedule assistant.

Does this meet the goal?

A.Yes

B.No

Answer: A

Explanation:

A. Yes, the proposed solution meets the goal of creating a daily pediatrician schedule with 30-minute slots.

The solution effectively employs the fulfillment preference feature within Microsoft Dynamics 365 Field Service to create structured time groups that can accommodate shorter appointment durations. By defining the time group with a duration of 30 minutes for the entire day, the system can automatically allocate these time slots for each pediatrician as appointment requests come in. This aligns with the requirement for both scheduling flexibility and adherence to specific pediatrician time constraints, thereby maximizing resource utilization while ensuring patient needs are adequately met.

Furthermore, the fulfillment preference allows detailed customization of time slots, which enables a comprehensive full-day schedule to be generated, including clear start and end times for each appointment interval. The integration with the schedule assistant enhances the efficiency of booking processes, ensuring that all appointment requests can be managed seamlessly within the established schedule.

Evaluating the alternatives, options that do not leverage the fulfillment preference with time groups would either fail to meet the specified duration of 30 minutes or fail to provide a full-day schedule, undermining the operational requirements of the health care institution. Additionally, proposing methods that do not consider utilizing the schedule assistant would lead to inefficient appointment handling, further deviating from the specified objectives.

1. https://docs.microsoft.com/en-us/dynamics365/field-service/scheduling-optimization
2. https://docs.microsoft.com/en-us/dynamics365/field-service/set-up-fulfillment-preferences
3. https://docs.microsoft.com/en-us/dynamics365/field-service/bookings-and-scheduling-overview

Question: 97 **Exam Heist**

Note: This question is part of a series of questions that present the same scenario. Each question in the series contains a unique solution that might meet the stated goals. Some question sets might have more than one correct solution, while others might not have a correct solution.

After you answer a question in this section, you will NOT be able to return to it. As a result, these questions will not appear in the review screen.

You are implementing Microsoft Dynamics 365 Field Service for a health care institution. Each day, the institution receives a large number of appointment requests for pediatricians.

You have the following requirements:
•create a daily schedule for pediatricians with a frequency of 30 minutes for each slot.
•provide a full-day schedule with start times and end times.

Solution: You create a fulfillment preference with interval details with a duration of 30 minutes for the whole day, associate it to a requirement, and then book the requirement with the schedule assistant.

Does this meet the goal?

A.Yes
B.No

Answer: B

Explanation:

B is correct because the proposed solution does not effectively fulfill the daily scheduling requirements for pediatricians as specified.

The solution inaccurately assumes that a single fulfillment preference with a 30-minute interval would adequately create a comprehensive daily schedule. In reality, the scheduling functionality in Microsoft Dynamics 365 Field Service requires not only the duration of each appointment but also a clear definition of the operational hours during which these appointments occur. Without explicitly defining the start and end times for the full day's schedule, the solution fails to align with the requirement of providing a full-day scheduling structure.

Additionally, while the association with the requirement and the use of the schedule assistant are valid procedural steps within Dynamics 365, the lack of a pre-defined schedule context will likely result in scheduling conflicts or misallocations, leading to operational inefficiencies. The individual slots must not only account for the appointment length but also properly allocate resources based on the institution's operational hours.

Conversely, any solution that does not recognize the necessity of a structured daily schedule setup—complete with precise start and end times—would result in operational chaos. Moreover, poor configuration of fulfillment preferences could hinder efficient appointment management.

In summary, the original solution overlooks critical parameters necessary for effective scheduling, thus failing to meet the institutional goals.

1. https://learn.microsoft.com/en-us/dynamics365/field-service/field-service-overview
2. https://learn.microsoft.com/en-us/dynamics365/field-service/scheduling-assistant
3. https://learn.microsoft.com/en-us/dynamics365/field-service/fulfillment-preferences

Question: 98 **Exam Heist**

Note: This question is part of a series of questions that present the same scenario. Each question in the series contains a unique solution that might meet the stated goals. Some question sets might have more than one correct solution, while others might not have a correct solution.

After you answer a question in this section, you will NOT be able to return to it. As a result, these questions will not appear in the review screen.

You are implementing Microsoft Dynamics 365 Field Service for a health care institution. Each day, the institution receives a large number of appointment requests for pediatricians.

You have the following requirements:
•create a daily schedule for pediatricians with a frequency of 30 minutes for each slot.
•provide a full-day schedule with start times and end times.

Solution: You create a fulfillment preference with a start time and end time duration of 30 minutes for the whole day, create a requirement group, and book it with the schedule assistant.

Does this meet the goal?

A.Yes
B.No

Answer: B

Explanation:

B is correct because creating a fulfillment preference with a start time and end time of 30 minutes for the entire day does not adequately meet the requirement for scheduling pediatrician appointments.

The key factor in this scenario is the requirement for a daily schedule with 30-minute slots throughout the entire workday. A fulfillment preference that only specifies a single duration does not segment the day into the required intervals. The scheduling assistant's effectiveness is contingent upon the ability to identify discrete time blocks; therefore, not defining distinct time slots undermines the scheduling process.

Critical Evaluation of Other Options:

1. **Choice A - Correct Option Available:**Although not provided, if an option recommended creating individual time blocks per pediatrician's schedule, this would have been the correct approach. Individual time slots allow flexibility and can accommodate changes or specific practitioner availability.
2. **Lack of Fulfillment Preference Customization:**Any solution that fails to specifically illustrate the scheduling of individual appointments can fall short of operational efficiency. This is particularly relevant in healthcare, where back-to-back appointments must account for potential delays and varied service durations.
3. **Scheduling Complexity:**The requirements indicate a need for a full-day schedule; therefore, any solution that does not effectively manage the intricacies of concurrent scheduling and downtime is flawed. Solutions must facilitate the agile reallocation of time slots to maximize patient care.

References:

https://learn.microsoft.com/en-us/dynamics365/field-service/overview
https://learn.microsoft.com/en-us/dynamics365/customer-engagement/field-service/scheduling
https://learn.microsoft.com/en-us/dynamics365/field-service/schedule-assistant

Question: 99 **Exam Heist**

Note: This question is part of a series of questions that present the same scenario. Each question in the series contains a unique solution that might meet the stated goals. Some question sets might have more than one correct solution, while others might not have a correct solution.

After you answer a question in this section, you will NOT be able to return to it. As a result, these questions will not appear in the review screen.

You are configuring Dynamics 365 Field Service to create an option to see only a specific set of resources on the schedule board. As part of the system setup, all Resources have been assigned to a territory. You want to create the option to see only resources that are in Washington territory.

Solution: You configure the Scheduler Settings to the scenario.

Does this meet the goal?

A.Yes
B.No

Answer: B

Explanation:

B is correct because simply configuring the Scheduler Settings alone will not filter the schedule board to display only resources from the specified territory.

The primary goal is to selectively view resources tied to a specific territory, in this case, Washington. While Scheduler Settings allow you to manage various scheduling parameters, they do not inherently filter resources based on territorial assignment. To achieve the desired outcome, you should employ views or create a custom filtering process that targets the specific resources assigned to the Washington territory, ensuring that the schedule board reflects this limitation accurately.

Evaluation of Incorrect Options

1. **Option A**: Assumes that modifying Scheduler Settings alone suffices for filtering resources. This approach overlooks the necessity for a proper filtering mechanism directly linked to resource assignments, thus failing to meet the specified goal.
2. **Lack of Use of Filtering Mechanisms**: Without utilizing tools that provide territory-based filtering capabilities, the system would show all resources, defeating the purpose of the specific requirement.

References

https://learn.microsoft.com/en-us/dynamics365/field-service/schedule-board
https://techcommunity.microsoft.com/t5/microsoft-dynamics-365-blog/getting-started-with-field-service-on-dynamics-365/ba-p/2167978
https://learn.microsoft.com/en-us/dynamics365/field-service/resource-scheduling-overview

Question: 100 **Exam Heist**

Note: This question is part of a series of questions that present the same scenario. Each question in the series contains a unique solution that might meet the stated goals. Some question sets might have more than one correct solution, while others might not have a correct solution.

After you answer a question in this section, you will NOT be able to return to it. As a result, these questions will not appear in the review screen.

You are configuring Dynamics 365 Field Service to create an option to see only a specific set of resources on the schedule board. As part of the system setup, all Resources have been assigned to a territory. You want to create the option to see only resources that are in Washington territory.

Solution: You filter the Territories in the Filter section of Filter and Map View.

Does this meet the goal?

A.Yes
B.No

Answer: A

Explanation:

Yes is a correct.

Question: 101 **Exam Heist**

Note: This question is part of a series of questions that present the same scenario. Each question in the series contains a unique solution that might meet the stated goals. Some question sets might have more than one correct solution, while others might not have a correct solution.

After you answer a question in this section, you will NOT be able to return to it. As a result, these questions will not appear in the review screen.

You are configuring Dynamics 365 Field Service to create an option to see only a specific set of resources on the schedule board. As part of the system setup, all Resources have been assigned to a territory. You want to create the option to see only resources that are in Washington territory.

Solution: You highlight the Washington Territory in the Map View of the Filter and Map View section.

Does this meet the goal?

A.Yes
B.No

Answer: B

Explanation:

No is a correct answer.

Question: 102 **Exam Heist**

Your company is currently using a fixed duration for a job type while scheduling work orders. This causes cascading delays, resulting in lower utilization of the resources.

To address this issue, you propose the use of predictive work duration (powered by AI) to help provide more realistic durations.

You need to advise the management team on the factors dispatchers can use to predict the duration of any given booking or requirement.

Which three factors can be used? Each correct answer presents a complete solution.

NOTE: Each correct selection is worth one point.

A.SLA
B.Time-related changes

C.Incident Type

D.Customer Agreement

E.Customer (service account)

Answer: BCE

Explanation:

B.Time-related changes

C.Incident Type

E.Customer (service account)

Question: 103 **Exam Heist**

You are a dispatcher for Dynamics 365 Field Service. You schedule a resource to a work order using the schedule board.

The resource appears available, but informs you they put in a Time Off Request for that period.

Which two options are potential reasons why the resource appears available, but informs you they are not available? Each answer represents a complete solution.

A.The schedule board is not syncing with the resource's schedule

B.Time off request is Inactive

C.Time off request has not been approved

D.The time zone for the resource is set incorrectly

Answer: CD

Explanation:

CD is correct because the time off request is either not active or has not been approved, leading to discrepancies in the resource's availability on the schedule board.

First, when a resource submits a Time Off Request, it may not take effect immediately if the request's status is inactive. An inactive status means that the request does not alter the existing schedule, making the resource appear available. Thus, option B indicates a significant gap in synchronizing the time off request effectively with the scheduling system.

Option C is equally critical. If a Time Off Request has not been approved, the system may still reflect the resource as available, as the approval process is essential for updates to the scheduled workload. Until approval is granted, the resource remains regarded as potentially available.

In contrast, option A, which states that the schedule board is not syncing with the resource's schedule, is inaccurate. The schedule board typically maintains real-time synchronization; discrepancies arise from factors within the work order or resource context, not from synchronization issues. Option D, regarding incorrect time zone settings, could lead to misalignment in scheduling; however, it does not specifically address the status of the Time Off Request, which directly impacts availability perception on the schedule board.

https://docs.microsoft.com/en-us/dynamics365/field-service/manage-time-off-requests
https://docs.microsoft.com/en-us/dynamics365/field-service/scheduling-resources
https://docs.microsoft.com/en-us/dynamics365/field-service/troubleshoot-scheduling

Question: 104 Exam Heist

DRAG DROP
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You are a Dynamics 365 system functional consultant for a telecommunication firm.

You must configure and enable Agreements to ensure that work orders are automatically generated for customers who have contracted for that service, and that invoices are being sent at the correct intervals to the customers.

Which functions of the system support this requirement? To answer, drag the appropriate function to the appropriate scenario. Each function may be used once, more than once, or not at all. You may need to drag the split bar between panes or scroll to view the content.

NOTE: Each correct selection is worth one point.

	Answer Area	
Incident Type Agreement Booking Setup Invoice Setup Agreement Products Requirement Group	When selling service contracts, the Account Management team must be able to define the products and services for contracted jobs via a template. This should include all work estimates and tasks needed for completion of the work.	
	Contracted work defined by the Account Management team must be documented within Dynamics 365 Field Service. This documentation should support the creation of work orders and invoices for work completed.	
	Dynamics 365 Field Service must support the ability to define a schedule for when work orders are generated for a customer.	
	Dynamics 365 Field Service must support the ability to define a schedule for when billing occurs for a customer.	

Answer:

	Answer Area	
Incident Type Agreement Booking Setup Invoice Setup Agreement Products Requirement Group	When selling service contracts, the Account Management team must be able to define the products and services for contracted jobs via a template. This should include all work estimates and tasks needed for completion of the work.	Incident Type
	Contracted work defined by the Account Management team must be documented within Dynamics 365 Field Service. This documentation should support the creation of work orders and invoices for work completed.	Agreement
	Dynamics 365 Field Service must support the ability to define a schedule for when work orders are generated for a customer.	Booking Setup
	Dynamics 365 Field Service must support the ability to define a schedule for when billing occurs for a customer.	Invoice Setup

Explanation:

First should be Incident type

Question: 105 Exam Heist

You are a Microsoft Dynamics 365 Field Service dispatcher. A customer's work order has a particular characteristic and time requirement that is different from most other work orders.

You need to be shown the most suitable resources, and manually book the one that matches the customer's requirements.

What should you do?

A.Schedule by using drag and drop on the Schedule Board.
B.Schedule by building a rule to automatically assign the customer-preferred resource.
C.Schedule the using Resource Scheduling Optimization.
D.Schedule by using the Schedule Assistant.

Answer: D

Explanation:

https://learn.microsoft.com/en-us/dynamics365/field-service/schedule-assistant

Question: 106 **Exam Heist**

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.

Answer: AB

Explanation:

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.

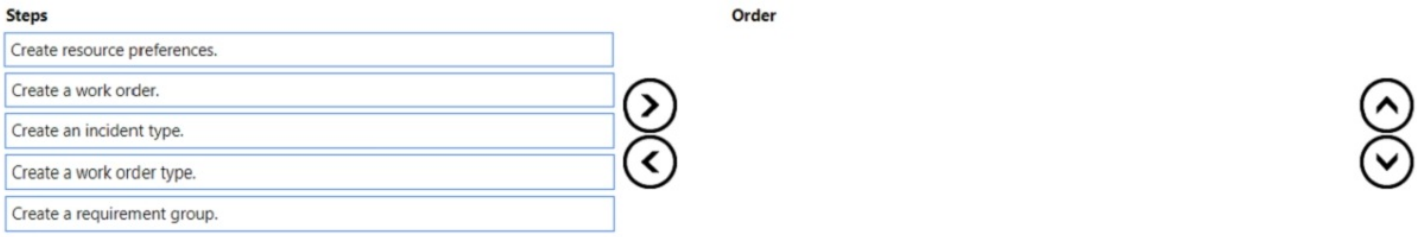
Question: 107 **Exam Heist**

DRAG DROP
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Your customer is offering a new service that requires two resources.

You need to ensure that the right resource requirements are created, so that the technician with the right skill set will be assigned.

What are the first three steps you should perform in sequence? To answer, move the appropriate actions from the list of steps to the answer area and arrange them in the correct order.



Answer:



Question: 108

Exam Heist

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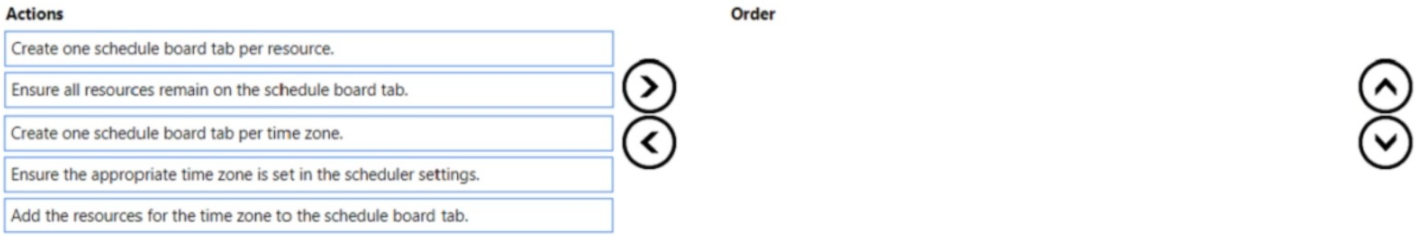
You are implementing Microsoft Dynamics 365 Field Service for an organization.

The organization has a dispatcher who schedules resources across multiple time zones. The dispatcher requests for the resources categorized by time zone, so they could quickly schedule the appropriate resources and visualize multiple resources per time zone on the schedule.

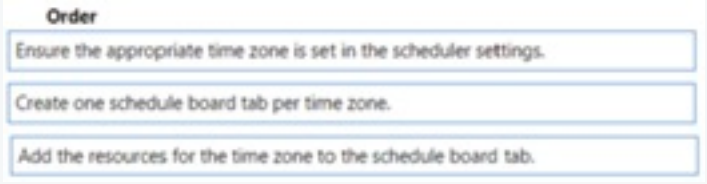
You need to configure the schedule board to accommodate this request.

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

NOTE: Each correct selection is worth one point.



Answer:



Question: 109

Exam Heist

Note: This question is part of a series of questions that present the same scenario. Each question in the series contains a unique solution that might meet the stated goals. Some question sets might have more than one correct solution, while others might not have a correct solution.

After you answer a question in this section, you will NOT be able to return to it. As a result, these questions will not appear in the review screen.

You are working with your customer to define their schedule board.

Your customer needs you to add or create additional views for their scheduling team.

Solution: Edit the Schedule Board Settings, and update the Requirements Panel to include the new or existing view.

Does this meet the goal?

A.Yes
B.No

Answer: B

Explanation:

B is correct because editing the Schedule Board Settings alone does not suffice for adding or creating additional views; it requires other steps to implement new views for effective scheduling.

The Schedule Board in Microsoft Dynamics 365 for Field Service is a complex tool that must be managed with precision to meet specific needs. Adding or creating views for the scheduling team typically involves not just editing the Requirements Panel, but also configuring the views themselves within the system's settings. This may entail selecting specific columns, filters, and grouping options, which are not addressed by merely updating the Requirements Panel. Effective scheduling hinges on customizing these visual representations to align with operational workflows, ensuring scheduling personnel can operate efficiently and accurately.

In contrast, other potential options might suggest alternative methods, such as involving custom development or process flows, which may not necessarily meet the goal either if not done in conjunction with proper view management. The misconception that the requirements alone can dictate the view overlooks the dependency on system capabilities for view customization, which is essential for optimal performance in real-world scenarios.

References:

https://learn.microsoft.com/en-us/dynamics365/field-service/schedule-board-overview
https://learn.microsoft.com/en-us/dynamics365/field-service/configure-schedule-board
https://learn.microsoft.com/en-us/dynamics365/field-service/set-up-schedule-board

Question: 110 **Exam Heist**

Note: This question is part of a series of questions that present the same scenario. Each question in the series contains a unique solution that might meet the stated goals. Some question sets might have more than one correct solution, while others might not have a correct solution.

After you answer a question in this section, you will NOT be able to return to it. As a result, these questions will not appear in the review screen.

You are working with your customer to define their schedule board.

Your customer needs you to add or create additional views for their scheduling team.

Solution: Create a new view in the Resource Requirements Views. Edit the Scheduler Settings, and add the new view.

Does this meet the goal?

A.Yes
B.No

Answer: A

Explanation:

Schedule Board only shows "Resource requirement" views so answer would be A, create the appropiate view and add it to the schedule.

https://learn.microsoft.com/en-us/dynamics365/field-service/schedule-board-tab-settings#requirement-panels

Question: 111 **Exam Heist**

Note: This question is part of a series of questions that present the same scenario. Each question in the series contains a unique solution that might meet the stated goals. Some question sets might have more than one correct solution, while others might not have a correct solution.

After you answer a question in this section, you will NOT be able to return to it. As a result, these questions will not appear in the review screen.

You are working with your customer to define their schedule board.

Your customer needs you to add or create additional views for their scheduling team.

Solution: Create a new view in the Bookable Resource Bookings Views. Then, edit or create a new tab on the schedule board, and update the Requirements Panel with the new view.

Does this meet the goal?

A.Yes
B.No

Answer: B

Explanation:

Bookable resource booking isn't a view that can be added to the schedule board, only views that can be added are from Resource requirement table.

Question: 112 **Exam Heist**

Your organization wants to use the new Microsoft Dynamics 365 Field Service mobile app. You need to install this app for the technicians.

In order to run the initial tests, you install the mobile app and connect with the Sandbox environment to verify that everything is working as expected.

Now, you want to connect the mobile app to the Production environment.

Which two actions should you take? Each correct answer presents a part of the solution.

NOTE: Each correct selection is worth one point.

A.Sign out, and then log in as your new production user.
B.Stay logged in, and select Reconfigure to delete data and clear cache from your device.
C.Go to the main menu, then select the Settings icon.

D.Go to the main menu, then select the Person icon.

Answer: AD

Explanation:
1. The answer should be A and D you cannot log out from the Settings menu in the app

Question: 113 **Exam Heist**

You have created a new entity to tie to the Asset to capture key data. You launch the Microsoft Dynamics 365 Field Service mobile app in offline mode.

You need to ensure that you can see the entity.

What should you do?

A. Sign in to Power Apps, and ensure the entity is enabled for mobile offline.
B. Sign in to Power Apps, and ensure the entity is enabled for Microsoft Outlook mobile offline.
C. Sign in to the System Business Settings to ensure the entity is enabled for mobile offline.
D. Enable the entity for mobile.

Answer: A

Explanation:

Justification

Correct option – A. Sign in to Power Apps, and ensure the entity is enabled for mobile offline.

In Dynamics365 Field Service (beta), custom entities must be explicitly marked as mobile-offline capable in the Power Apps portal. This setting propagates the entity definition to the offline cache used by the Field Service mobile app, allowing users to view and edit records while disconnected.
Enabling the entity for mobile offline also ensures that any form scripts, business rules, and navigation metadata are packaged into the offline solution, guaranteeing consistent behavior on the device.

Why the other options are unsuitable

B. Enable for Microsoft Outlook mobile offline – Outlook mobile is a separate channel for email and calendar sync; it does not control entity availability in the Field Service mobile app. Selecting this option would have no impact on the entity's visibility in the Field Service offline client.
C. System Business Settings → enable for mobile offline – System settings control global mobile offline behavior (e.g., default sync intervals) but do not individually activate a specific custom entity. The entity must still be marked as mobile-offline capable at the app/field level.
D. Enable the entity for mobile – "Enable for mobile" is a generic statement that lacks the required qualifier offline. Without explicitly enabling mobile offline in Power Apps, the entity may be visible online on the device but will not be cached for offline use, which is the requirement of the scenario.

Conclusion
Only option **A** directly addresses the need to make the custom entity available in the offline cache of the Dynamics365 Field Service mobile app, ensuring the entity can be viewed and interacted with while the device is disconnected.

Question: 114 Exam Heist

You are a Dynamics 365 Field Service functional consultant.

A field resource is given instructions on how to install the mobile app on an iPhone. After installing the app and signing in, a message appears: "You're almost there."

What should you do?

A. Verify that the field resource has been assigned the right security role.
B. Create a Bookable Resource related to the user.
C. Set up the field resource as a Bookable Resource.
D. Set up the field resource as a user in the system.

Answer: A

Explanation:

Correct option: A – Verify that the field resource has been assigned the right security role.

The “You’re almost there” prompt appears when the mobile app can locate the user record but cannot grant access because the user’s security permissions are insufficient for the Field Service mobile experience. Assigning the appropriate security role (e.g., **Field Service Mobile** or a custom role that includes the **Mobile** privilege) enables the app to complete provisioning and move past the message.
This step directly addresses the root cause: missing or incorrect role-based access, which is the standard prerequisite for successful mobile app activation.

Why the other options are not appropriate

B – Create a Bookable Resource related to the user – A Bookable Resource is used for scheduling and dispatch; it does not affect the mobile app’s authentication flow, so it will not resolve the “You’re almost there” message.
C – Set up the field resource as a Bookable Resource – Similar to B, this configuration is about resource scheduling, not about granting the mobile app the necessary security rights.
D – Set up the field resource as a user in the system – The user already exists (the app can sign in), so the issue is not the existence of a user record but the permissions attached to that record. Adding a user record alone does not grant the required mobile access.

Therefore, confirming and correcting the assigned security role is the precise, technical action that resolves the activation message.

Question: 115 Exam Heist

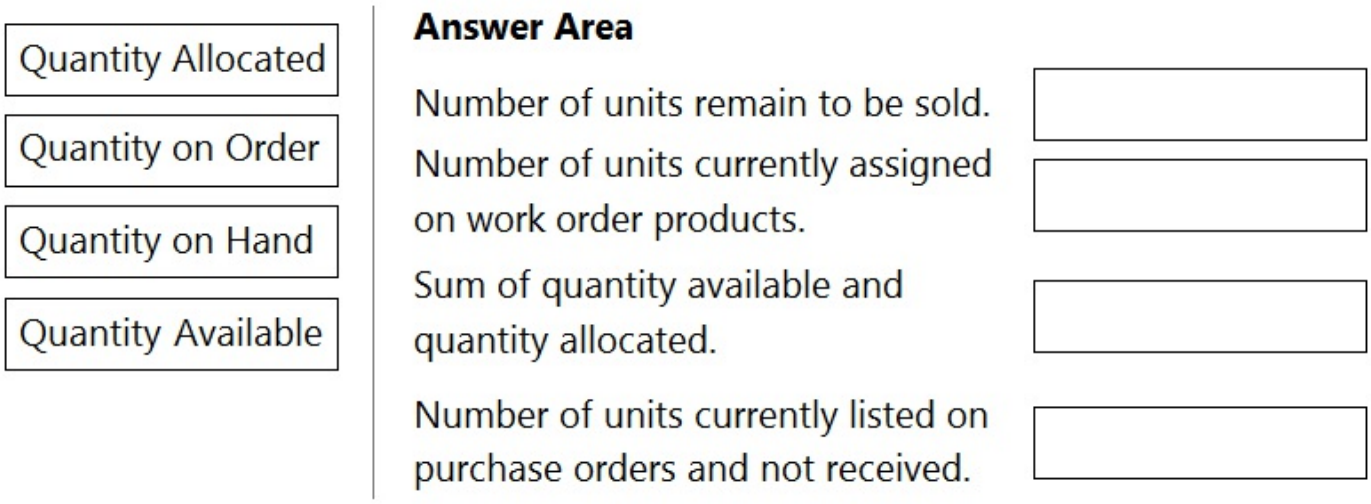
DRAG DROP
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You are a technician at Contoso Electronic, using the Microsoft Dynamics 365 Field Service mobile app to track and manage service requests and inventory.

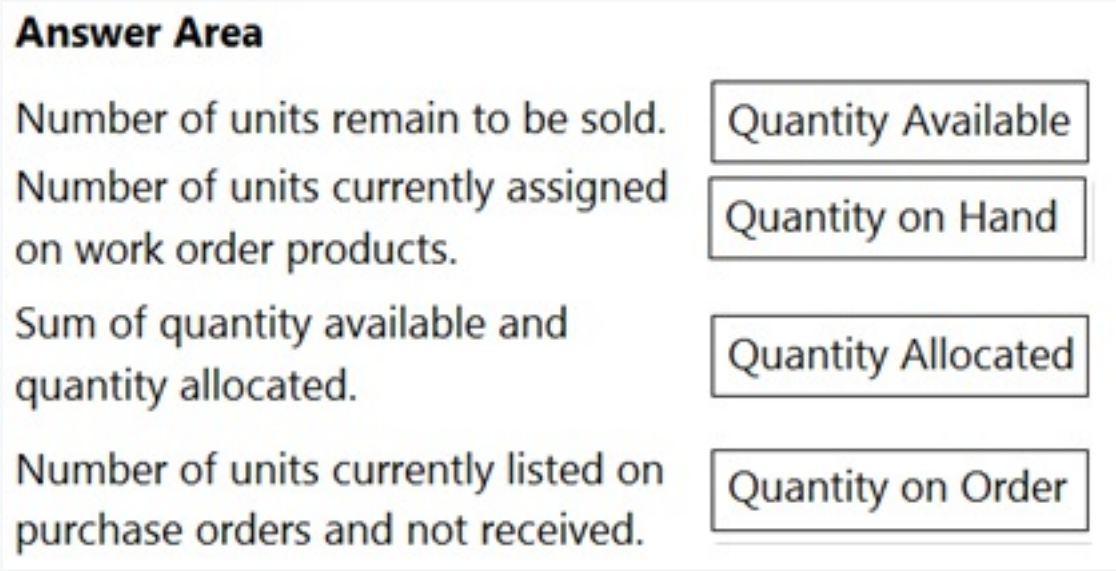
Your supervisor asks you to explain how Field Service keeps track of inventory based on the quantities at the warehouse.

To answer, drag the appropriate type of quantity at the warehouse to the explanation of the quantity. Each type of quantity will be used once. You may need to drag the split bar between panes or scroll to view the content.

NOTE: Each correct selection is worth one point.



Answer:



Question: 116 **Exam Heist**

You are implementing Microsoft Dynamics 365 Field Service.

The customer wants to use the system to capture changes in various system readings when a technician is onsite servicing an asset.

What should you recommend?

A.Train the field technicians to take detailed notes on the asset on the work order.
B.Create asset categories and track the changes from each work order.
C.Use the Asset Property Log history to track the changes.
D.Use the Asset Category Log history to track the changes.

Answer: C

Explanation:

Correct answer is C:Use the Asset Property Log history to track the changes.

Reference:

https://learn.microsoft.com/en-us/dynamics365/field-service/property-logs

Question: 117 **Exam Heist**

You need to configure the Microsoft Dynamics 365 Field Service mobile app to provide field technicians with access to custom entities.

What should you do?

A.Go to the mobile offline profile, and add the entity.

B.Create a new role and assign it to the technicians.

C.Add the entity to the site map of the Field Service mobile model-driven app.

D.In the mobile offline profile, add a custom data filter to the entity.

Answer: C

Explanation:

Correct answer is C: Add the entity to the site map of the Field Service mobile model-driven app.

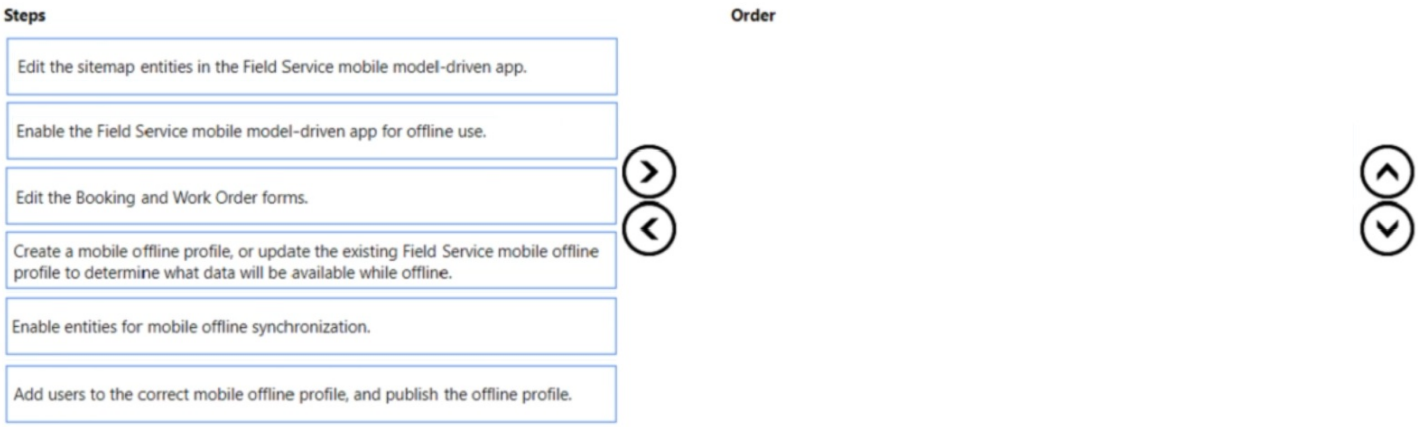
Question: 118 **Exam Heist**

DRAG DROP
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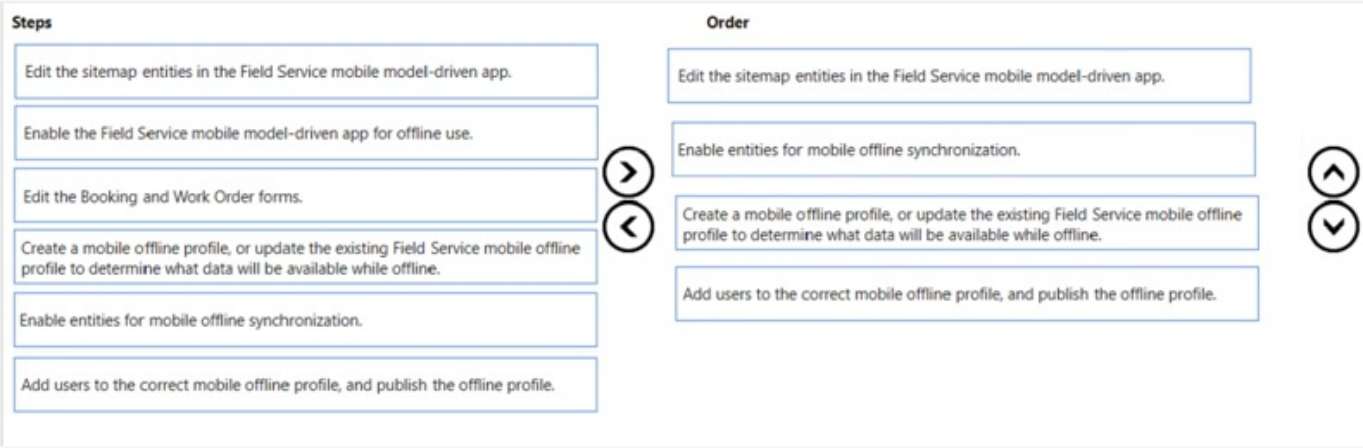
Your customer wants to enable their Microsoft Dynamics 365 Field Service mobile app for offline use.

You need to configure the mobile app for technicians, including custom entity offline usage.

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



Answer:



Explanation:

1) Edit sitemap entities in Field Service Mobile model-driven app (so they are available to mobile online)2) Enable entities for mobile offline sync (so that we can add them to mobile offline profile)3) Create a mobile offline profile or update the existing... (so we add entities to mobile offline profile)4) Add users to the correct mobile profile, and publish (so specific users can see entities added previously to mobile offline profile)

Question: 119 **Exam Heist**

You are configuring work orders for technicians to complete the onsite service.

When a work order is completed, the customer needs to receive an invoice for the labor charge time spent by the technician to complete the service.

Which option should the technician use to enter their time spent?

A.Work Order Service
B.Field Service Product Type as Non-Inventory
C.Field Service Product Type as Inventory
D.Work Order Resource Booking

Answer: D

Explanation:

D is correct because using the Work Order Resource Booking directly attributes the time spent by the technician to a specific work order, ensuring accurate billing and efficient tracking of labor costs.

In a Field Service context, Work Order Resource Booking is designed to detail the booking of resources, including labor hours, towards specific service tasks tied to a work order. This integration allows for seamless invoicing based on actual labor recorded against completed service tasks, ensuring the customer receives an accurate invoice reflective of the technician's time on-site.

Evaluation of Other Options:

A. **Work Order Service**: While this option pertains to the services rendered, it does not specifically record the time spent by the technician, which is critical for accurate invoicing.

B. **Field Service Product Type as Non-Inventory**: This configuration is not applicable for labor tracking, as non-inventory items typically refer to materials or consumables rather than labor hours. It would not capture the dynamics of service time.

C. **Field Service Product Type as Inventory**: Using inventory classifications pertains to physical goods rather

than service labor, which misaligns with the objective of tracking technician hours.

For further reading, please refer to the following resources:

Microsoft Dynamics 365 for Field Service Documentation
Work Order Management in Dynamics 365
Resource Scheduling in Dynamics 365

Question: 120 **Exam Heist**

You are managing a Microsoft Dynamics 365 Field Service implementation with model-driven apps for each workstream. Users are reporting that they see all workstream model-driven apps when they log into Dynamics 365, even though only a single workstream is relevant to their work.

You need to configure the model-driven apps to ensure users can only see the single model-driven app relevant to their work.

What should you do?

A.Ensure each model-driven app is saved with the workstream security roles applied, and each user is given the system administrator security role.

B.Ensure each model-driven app is saved with the workstream security roles applied, and each user is given the system customizer security role.

C.Ensure each model-driven app is saved with the workstream security roles applied, each user is only given the security role relevant for their workstream.

D.Ensure each model-driven app is saved with all security roles applied, and each user is only given the security role relevant for their workstream.

Answer: C

Explanation:

C is correct because it ensures that each user sees only the model-driven app relevant to their specific workstream, optimizing user experience and productivity.

In Microsoft Dynamics 365, each model-driven app can be configured with specific security roles that dictate access and visibility. By applying workstream-specific security roles and ensuring that each user is assigned only the security role relevant to their respective workstream, you effectively restrict access to unrelated apps. This targeted approach aligns with the principle of least privilege, minimizing confusion and enhancing efficiency for users who only need to interact with specific functionalities.

Evaluation of Other Options:

Option A: Incorrect because granting users the system administrator security role provides them with excessive permissions, including access to all apps, contradicting the goal of restricting visibility.

Option B: Also incorrect, as the system customizer role does not grant visibility restrictions to model-driven apps and, like option A, allows potential access to unnecessary applications.

Option D: This option fails by suggesting that all security roles are applied to each app. This can lead to clutter and user confusion, as users would still potentially access multiple apps that are irrelevant to their tasks.

Adopting a structured security model not only adheres to best practices in user role management but also aligns with compliance standards that advocate for specific access control tailored to user requirements.

References:

https://learn.microsoft.com/en-us/powerapps/developer/data-platform/security-roles
https://learn.microsoft.com/en-us/dynamics365/customer-engagement/admin/manage-security-roles
https://learn.microsoft.com/en-us/powerapps/maker/data-platform/model-driven-apps-security-roles

Question: 121 **Exam Heist**

DRAG DROP
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You are implementing Microsoft Dynamics 365 Field Service for an electronics company.

You need to identify when a compressor is used from the technician's warehouse inventory.

How does the inventory journal record the transactions? To answer, drag the appropriate inventory journal record to the correct scenario. Each inventory journal record 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 Area	
Increase Allocated quantity by one.	When a compressor is allocated to a work order.	
Decrease On Hand quantity by one.	When the allocated compressor is used in the work order.	
Increase On Hand quantity by one.		

Answer:

Answer Area	
When a compressor is allocated to a work order.	Increase Allocated quantity by one.
When the allocated compressor is used in the work order.	Decrease On Hand quantity by one.

Question: 122 **Exam Heist**

You are implementing Microsoft Dynamics 365 Field Service.

Your organization is using the Dynamics 365 Field Service mobile app as a standalone application. There are no integrations planned for the first year. You realize all the products in the Main Warehouse have product inventory records, however, the quantity On Hand for all are set to 0.

You need to update the quantity on hand of all the products within the Main Warehouse?

What should you do?

A. Navigate to the Product Inventory sub-area. Go to Product Inventory View and manually update the Quantity On Hand value for the products associated with the Main Warehouse.

B. Import an updated product inventory file with the updated quantity On Hand value for the products associated with the Main Warehouse.

C. Create an inventory adjustment and inventory adjustment product record for each product that requires an update within the Main Warehouse.

D. Create an Inventory Transfer from an Adjustment Warehouse for the proper quantity On Hand value.

Answer: C

Explanation:

Why optionC is the correct choice

Inventory Adjustment is the native mechanism for correcting on-hand quantities when the initial load contains a zero balance.
It creates a single **adjustment transaction** that can be posted for multiple SKUs, preserving auditability and ensuring the quantity is recorded against the correct **warehouse (Main Warehouse)**.
The adjustment can be generated **programmatically or manually** for all affected products, allowing bulk updates without needing separate records per item.
This approach aligns with the **standard Field Service data model** (Product→Product Inventory→Inventory Adjustment) and avoids introducing custom integrations or external files.

Why the other options are less suitable

OptionA – Manually editing each product's quantity in the Product Inventory view is possible but **inefficient and error-prone** for many SKUs; it does not leverage the platform's bulk-adjustment capabilities and would not be recommended for a production-scale correction.
OptionB – Importing an updated inventory file would require a **data import project**, additional mapping, and potentially disrupt existing integrations; since no integrations are planned for the first year, this adds unnecessary complexity for a simple quantity correction.
OptionD – An **Inventory Transfer** moves stock from one warehouse to another; it does not **adjust** the on-hand count of a single warehouse, and creating a transfer from a non-existent "Adjustment Warehouse" would be misleading and not achieve the goal of setting the correct quantity in the Main Warehouse.

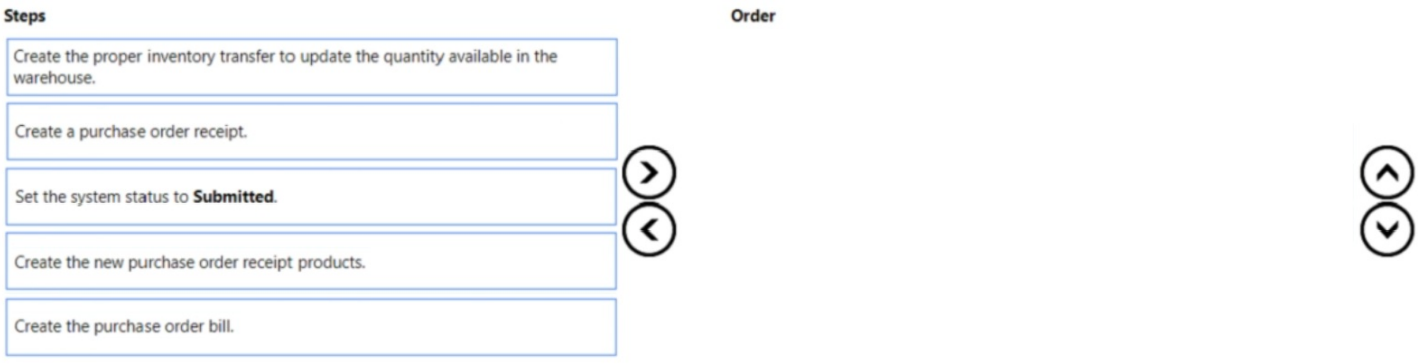
Conclusion – Using an **Inventory Adjustment** (OptionC) provides the most direct, auditable, and platform-supported method to correct the on-hand quantities for all products in the Main Warehouse.

Question: 123 **Exam Heist**

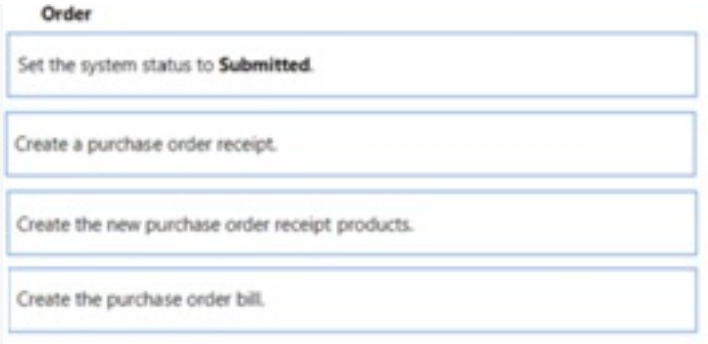
DRAG DROP
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You need to create a purchase order for a thermal overload cooling fan for the refrigeration unit on the shop floor. You create a purchase order and add products.

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



Answer:



Question: 124 **Exam Heist**

Your customer recently implemented Return Merchandise Authorization (RMA).

Your customer wants to streamline the return process. When items are returned to the warehouse, the returned item should be scanned with a mobile device when it is received. This is the only function to be performed by the RMA Receipts user.

What is your recommendation for the most efficient solution?

A.Enable RMA Receipts on the Dynamics 365 Field Service mobile app.

B.Use the web client on a device similar to Windows Surface or Apple MacBook, and attach a scanner using a USB cable.

C.Suggest a Warehouse Management System (WMS) for this customer.

D.Build a Power App to streamline the RMA Receipt process to run either on a phone or on a device such as a tablet.

Answer: D

Explanation:

Build a Power App to streamline the RMA Receipt process to run either on a phone or on a device such as a tablet.

Question: 125 **Exam Heist**

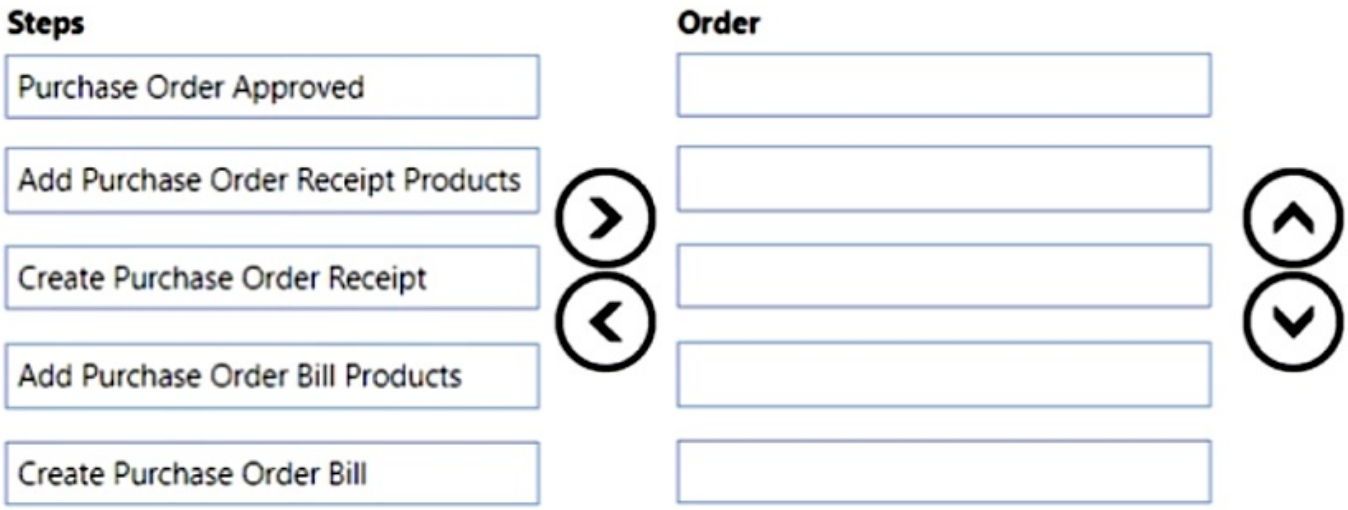
DRAG DROP
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You need to create a purchase order for a tape dispenser machine.

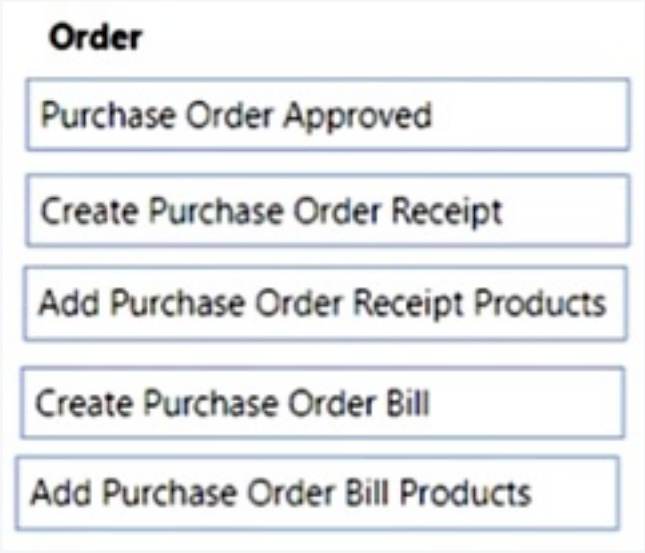
You have:
1. created a purchase order,
2. added tape dispensers as products, and
3. submitted the purchase order.

You need to complete the order and receive the tape dispenser.

In which order should you perform the actions? To answer, move all actions from the list of actions to the answer area and arrange them in the correct order.



Answer:



Question: 126 **Exam Heist**

DRAG DROP
-

You are a Dynamics 365 Field Service functional consultant.

Your organization has recently implemented Connected Field Service (CFS) for Azure IoT Hub. Your organization is using Smart Thermostats to monitor the readings of their cold storage facilities and have registered them as IoT Devices.

If the reading (in Fahrenheit) on the IoT device exceeds 70 degrees, an IoT Alert is generated in CFS.

You need to achieve the following using workflow:

1. If the device reading (in Fahrenheit) is between 70 degrees and 85 degrees, have CFS automatically send a command to remotely reset the device.
2. If the device reading (in Fahrenheit) is greater than 85 degrees, have CFS automatically create a case.

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

Steps	Order
Write the output value returned to a custom field on the Device record, for example, Device Reading.	
Use the same workflow to either send the reset command or create a case based on the Device Reading.	
Execute the JSON-Based Field Value – Get String action to capture the value of the "reading" property.	
Execute the JSON-Based Field Value – Get Number action to capture the value of the "reading" property.	
Write the output value returned to a custom field on the IoT Alert record: for example, Device Reading.	
Trigger another workflow on the update of the Device Reading field, to either send the reset command or create a case based on the reading.	

Answer:

Steps	Order
Write the output value returned to a custom field on the Device record, for example, Device Reading.	Execute the JSON-Based Field Value – Get Number action to capture the value of the "reading" property.
Use the same workflow to either send the reset command or create a case based on the Device Reading.	Write the output value returned to a custom field on the IoT Alert record: for example, Device Reading.
Execute the JSON-Based Field Value – Get String action to capture the value of the "reading" property.	Trigger another workflow on the update of the Device Reading field, to either send the reset command or create a case based on the reading.
Execute the JSON-Based Field Value – Get Number action to capture the value of the "reading" property.	
Write the output value returned to a custom field on the IoT Alert record: for example, Device Reading.	
Trigger another workflow on the update of the Device Reading field, to either send the reset command or create a case based on the reading.	

Explanation:

1) Execute the JSON-Based Field Value - Get Number

2) Write the output value returned to a custom field on the IoT Alert record

3) Trigger another workflow on the update of the Device Reading field, to either send the reset command or create a case based on the reading.

https://learn.microsoft.com/en-us/training/modules/remotely-monitor-and-service-customer-equipment/4-

automating-connected-field-service#:~:text=with%20the%20item.-,Practical%20application,-Now%2C%20a%20look

Question: 127 **Exam Heist**

A functional consultant needs to enable Internet of Things (IoT) access.

Which two actions need to be taken? Each answer presents a complete solution.

A.Assign access to IoT entities in the Field Service – Dispatcher role.
B.Assign access to IoT entities in the Field Service – Technician role.
C.Assign access to IoT entities in the Field Service – Administrator role.
D.Add dispatchers to the Connected Field Service – Technician role.
E.Add technicians to the Connected Field Service – Technician role.

Answer: CD

Explanation:

CD is correct because both the Field Service – Administrator role and the Connected Field Service – Technician role provide the necessary permissions for IoT access essential for effective field service management.

The Field Service – Administrator role encompasses a broader spectrum of permissions, thereby allowing the functional consultant to implement necessary configurations, enforce security policies, and manage IoT entity access. In contrast, the Connected Field Service – Technician role specifically allows technicians to interact directly with IoT data, ensuring they can receive real-time insights related to their tasks and operational efficiency.

Option A, assigning access through the Dispatcher role, is incorrect as this role typically focuses on scheduling and logistical oversight rather than direct interaction with IoT entities. Likewise, Option B, which involves the Technician role, fails to address the primary requirement of enabling IoT access due to the foundational configuration needed, thus making it an inadequate solution for setting up IoT functionalities.

Option D suggests adding dispatchers to the Connected Field Service – Technician role; however, dispatchers do not interact directly with IoT data in ways that require technician-specific permissions. Finally, Option E, while relevant, does not fulfill the complete scenario as adding technicians alone does not encompass the necessary administrative configuration steps required for enabling IoT access.

For effective implementation and understanding, it is crucial that all users have designated roles that match their operational needs, establishing a robust framework for seamless IoT integration within Microsoft Dynamics 365 for Field Service.

References:

https://docs.microsoft.com/en-us/dynamics365/field-service/connected-field-service-iot
https://docs.microsoft.com/en-us/dynamics365/field-service/overview
https://docs.microsoft.com/en-us/dynamics365/field-service/roles-permissions

Question: 128 **Exam Heist**

Your organization uses Microsoft Dynamics 365 Connected Field Service with Microsoft Azure IoT Hub to manage its IoT devices.

The device management team reports an issue where they are unable to register devices since the start of their day.

You need to troubleshoot this issue.

What are the two main reasons for this issue? Each correct answer presents a complete solution.

NOTE: Each correct selection is worth one point.

A.Dynamics 365 still needs to be connected to Azure.
B.Azure is offline.
C.The Service Administrator security role is missing in Azure.
D.The IoT Administrator security role is missing in Dynamics 365.

Answer: AB

Explanation:

Reference:

https://learn.microsoft.com/en-us/dynamics365/field-service/cfs-register-devices#registration-error

Question: 129 **Exam Heist**

You are managing your organization's assets.

You need to give your organization's technicians better visibility on their locations in order to reduce travel time and time spent searching for the asset when the technicians on site.

How should you structure the system to manage this request?

A. Attach a detailed map of the asset's location to the work order.
B. Create a detailed service account tree.
C. Create a custom entity to house asset location details.
D. Attach a functional location to each asset.

Answer: D

Explanation:

Why optionD is the best choice

Functional location is the native construct for representing physical sites, rooms, or zones within the asset hierarchy. By attaching a functional location to each asset you create a searchable, hierarchical record that technicians can view directly from the mobile app or the schedule board.
Location data drives dispatch and routing logic. When a work order is created, the system can automatically suggest the nearest functional location, calculate travel time, and present turn-by-turn directions, which directly reduces travel time and eliminates on-site "search-and-find" delays.
Integrated with scheduling, resource allocation, and asset history. The functional location is linked to the asset's service record, so all related service histories, preventive-maintenance plans, and inventory balances are instantly accessible from the same location view.
Supports mobile offline capabilities. Technicians can download the location hierarchy to their device, enabling them to navigate to the exact spot without needing an external map attachment.

Why the other options are less suitable

A – Attach a detailed map to the work order – Maps are static images; they do not provide dynamic routing, real-time updates, or integration with scheduling. Technicians still have to manually interpret the map and cannot leverage the system's dispatch engine.
B – Create a detailed service account tree – Service accounts represent customer or contract relationships, not physical asset locations. Using them for location tracking would add unnecessary complexity and would not be exposed to technicians as a navigable site.
C – Create a custom entity for asset location details – While a custom entity could store location data, it would require additional development, custom pages, and integration work to become usable in the mobile experience. The out-of-the-box functional location entity already offers the required hierarchy, navigation, and scheduling integration with minimal effort.

Conclusion – Attaching a **functional location** to each asset leverages the built-in asset-location model, enables real-time routing and visibility for technicians, and integrates seamlessly with scheduling and dispatch, making it the most efficient and standards-compliant solution.

Question: 130 **Exam Heist**

Your organization is planning to use Microsoft Azure IoT Hub to manage the IoT devices which monitor the temperature of the cold storage.

You need to install the Microsoft Dynamics 365 Connected Field Service solution with Azure IoT Hub.

Which Azure security role is a prerequisite to the installation?

A.Account Administrator
B.Cloud Device Administrator
C.Application Administrator
D.Dynamics 365 Administrator

Answer: A

Explanation:
1. https://learn.microsoft.com/en-us/dynamics365/field-service/cfs-azure-subscription#prerequisites

Question: 131 **Exam Heist**

Note: This question is part of a series of questions that present the same scenario. Each question in the series contains a unique solution that might meet the stated goals. Some question sets might have more than one correct solution, while others might not have a correct solution.

After you answer a question in this section, you will NOT be able to return to it. As a result, these questions will not appear in the review screen.

You are 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 create each serialized component as a sub-asset to its parent asset.

Does this meet the goal?

A. Yes
B. No

Answer: A

Explanation:

A. Yes is correct because creating each serialized component as a sub-asset allows users to visualize the hierarchical relationships and dependencies between the components and the parent asset.

Hierarchical asset structures enhance asset management by ensuring that all serialized components are clearly associated with their parent asset, thereby improving tracking, maintenance planning, and operational efficiency. This setup aligns with the VP of Field Service's objective for greater visibility, as it allows for easier access to information regarding each component's status, maintenance history, and performance metrics. Moreover, the hierarchical view aids technicians in understanding the asset's composition, facilitating more effective service delivery.

Other options, such as associating components in a flat structure or using tags for identification, would not provide the same level of clarity. A flat structure lacks the inherent visibility of relationships, making it difficult to ascertain which components belong to which asset. Similarly, a tagging system lacks an intuitive visual representation, impeding quick assessments of assets and potentially leading to inefficiencies in field service operations.

1. https://learn.microsoft.com/en-us/dynamics365/field-service/asset-management
2. https://learn.microsoft.com/en-us/dynamics365/field-service/hierarchy-assets
3. https://learn.microsoft.com/en-us/power-platform/guidance/architecture/hierarchy-data-models

Question: 132 **Exam Heist**

Note: This question is part of a series of questions that present the same scenario. Each question in the series contains a unique solution that might meet the stated goals. Some question sets might have more than one correct solution, while others might not have a correct solution.

After you answer a question in this section, you will NOT be able to return to it. As a result, these questions will not appear in the review screen.

You are 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

Answer: B

Explanation:

B is correct because simply defining a hierarchical structure of parent-child assets does not inherently provide greater visibility into serialized components without an effective integration of visibility features.

To meet the goal of increasing visibility for serialized components, the solution must incorporate advanced features that allow for real-time tracking and reporting of serialized assets. Using a hierarchy of sub-assets may not effectively display details critical for management oversight, such as status, condition, and operational metrics. Visibility can be significantly enhanced by implementing specialized dashboards, real-

time monitoring tools, and analytical features that present actionable insights from the asset data.

Other options are incorrect because they may either overlook essential operational metrics that quantify asset performance or fail to integrate user-friendly interfaces that aggregate the necessary data efficiently. Merely organizing the assets hierarchically does not provide the requisite context or analytics needed for comprehensive visibility. Hence, a solution lacking in these capabilities would not achieve the VP's goal.

Therefore, it is crucial to emphasize that effective monitoring and decision-making tools complement the structured asset hierarchy, ensuring a well-rounded enhancement of visibility into serialized components.

References:

1. https://docs.microsoft.com/en-us/dynamics365/field-service/asset-management
2. https://docs.microsoft.com/en-us/dynamics365/field-service/field-service-common-terms
3. https://docs.microsoft.com/en-us/dynamics365/field-service/overview

Question: 133 **Exam Heist**

Note: This question is part of a series of questions that present the same scenario. Each question in the series contains a unique solution that might meet the stated goals. Some question sets might have more than one correct solution, while others might not have a correct solution.

After you answer a question in this section, you will NOT be able to return to it. As a result, these questions will not appear in the review screen.

You are 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 create Asset Properties to describe each component for viewing in a hierarchy.

Does this meet the goal?

A. Yes
B. No

Answer: B

Explanation:

B is correct because creating Asset Properties does not inherently provide a hierarchical view of serialized components.

To achieve the VP's goal of greater visibility into serialized components, a more suitable approach would involve using a parent-child relationship among assets, specifically leveraging asset hierarchies where serialized components are defined as child assets linked to a parent asset. This relational structure allows for an intuitive representation of complex systems, where each component can be detailed and displayed under its corresponding parent asset in a hierarchy.

The use of Asset Properties, while useful for storing descriptive metadata about an asset, does not facilitate the hierarchical arrangement or visibility required. Properties are static attributes and do not provide a dynamic relationship structure; therefore, they fail to meet the requirement of visualizing components in a hierarchical context.

Critically evaluating alternatives not chosen:

1. **Creating Asset Hierarchies**: This is the best approach to achieve the desired visibility. It allows each serialized component of an asset to be associated directly with its parent, thus fulfilling the hierarchical view requirement.
2. **Utilizing Component Records**: The creation of component records linked to the parent asset might also be considered. However, if these components are not visually structured in a hierarchical user interface, it would not satisfy the VP's goal.
3. **Implementing Custom Views**: While customizing views can help display asset-related information, without an underlying hierarchical structure, it remains inadequate for demonstrating interrelationships among the components.

In essence, while Asset Properties can enrich asset details, they do not contribute to hierarchical visibility, which is critical for effective asset management in a Field Service context.

References:

https://learn.microsoft.com/en-us/dynamics365/field-service/assets
https://learn.microsoft.com/en-us/dynamics365/field-service/asset-hierarchy
https://learn.microsoft.com/en-us/dynamics365/field-service/field-service-management

Question: 134 **Exam Heist**

You are implementing Connected Field Service.

You need to provide the list of IoT components that can be used within Connected Field Service.

Which three IoT components are applicable? Each correct answer presents a complete solution.

A.Azure Cosmos Database
B.Cognitive Services
C.Stream Analytics
D.Azure Blob Storage
E.App Services
F.Azure SQL Database

Answer: CDF

Explanation:

https://learn.microsoft.com/en-us/dynamics365/field-service/connected-field-service

Question: 135 **Exam Heist**

You are the lead consultant on a Microsoft Dynamics 365 Field Service implementation.

Your customer is interested in seeing an example of how IoT works with Field Service.

Without an actual device, what is the best tool to use to provide the best experience for your customer?

A. Simulator
B. Logic Apps
C. IoT Hub

D. Stream analytics

Answer: A

Explanation:

A. Simulator is the best tool to provide a realistic experience for showcasing IoT integration with Microsoft Dynamics 365 Field Service.

The Simulator allows users to generate simulated IoT device data, enabling a tangible representation of how connected devices interact within the Field Service framework. Utilizing a Simulator contextualizes the experience, allowing stakeholders to visualize the full implications of IoT features in a controlled environment without the need for physical devices. This clarity can drive user understanding of proactive maintenance, remote monitoring, and real-time diagnostics, integral to the Field Service experience.

Evaluation of Alternatives:

B. Logic Apps: Although vital for orchestrating workflows between various systems, Logic Apps do not inherently replicate IoT device functionality. They serve a broader integration purpose without the need for device-specific simulations, thereby not illustrating IoT's operational impact directly.

C. IoT Hub: This is a critical service for connecting, monitoring, and managing IoT devices, providing real-time data ingestion. However, it requires physical devices or simulators to showcase interactions meaningfully. Without an actual setup, it falls short of demonstrating IoT capabilities effectively.

D. Stream Analytics: This tool excels at analyzing real-time data streams but presupposes the existence of data sources to process. In absence of real devices, it cannot independently convey IoT scenarios, thus limiting its applicability in a purely demonstrative context.

Therefore, utilizing the Simulator provides the most cohesive and meaningful demonstration of IoT capabilities relevant to Microsoft Dynamics 365 Field Service.

References:https://docs.microsoft.com/en-us/dynamics365/field-service/iot-exampleshttps://docs.microsoft.com/en-us/azure/iot-hub/iot-hub-what-is-iot-hubhttps://docs.microsoft.com/en-us/azure/stream-analytics/stream-analytics-introduction

Question: 136 **Exam Heist**

You are setting up a new agreement for one of your customers in Dynamics 365 Field Service, so that your dispatchers and technicians are informed, and scheduled to work on the appropriate equipment.

Based on the contract details, you create the agreement and enter the work order and booking settings information. The work order is scheduled, but the technician is unable to see any details about which asset is included, nor any of the parts and services that are also included.

You need to ensure the technician can view the missing details.

What should you do?

A.Create an Agreement Service and Service Task record, and add the appropriate details.
B.Create an Agreement Incident Record and associated Service Task record, and add the appropriate details.
C.Add the Customer Asset to the Work Order Settings details, and add the appropriate details.
D.Add the Customer Asset to the agreement record, and add the appropriate details.

Answer: B

Explanation:

1. https://learn.microsoft.com/en-us/dynamics365/field-service/set-up-customer-agreements
2. Agreement Incident Record is needed to associate Customer Asset

Question: 137 **Exam Heist**

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

Answer: CD

Explanation:

https://learn.microsoft.com/en-us/dynamics365/customer-voice/customize-sender-email

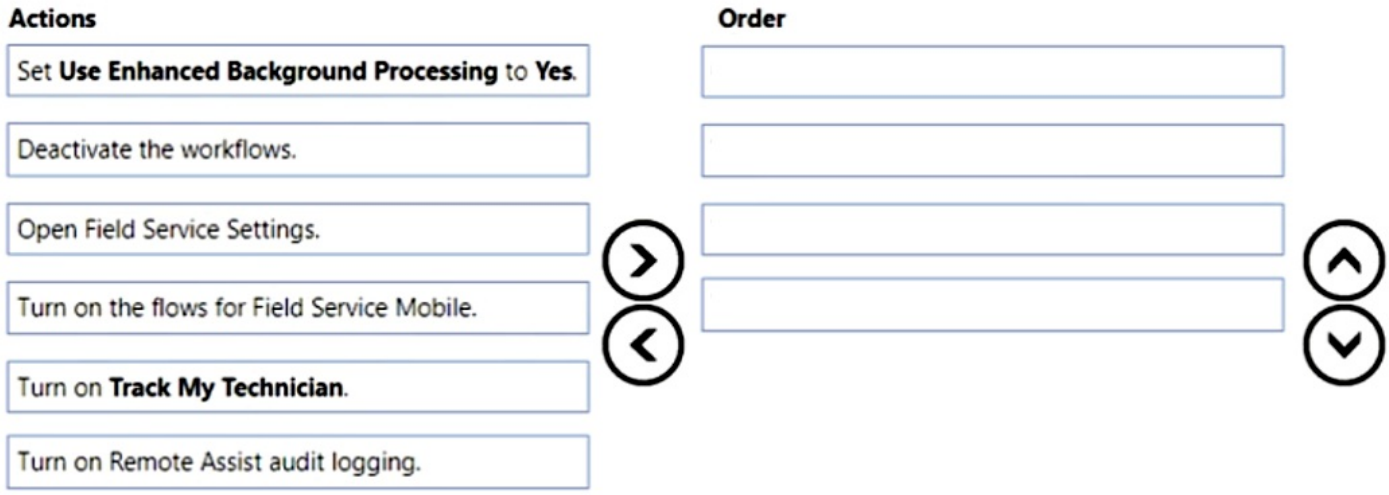
Question: 138 **Exam Heist**

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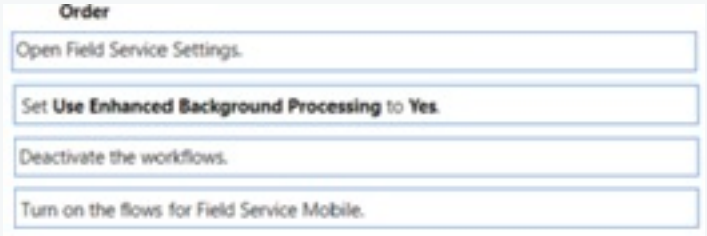
Your client wants to build some workflows to automate certain approvals.

You need to enable Microsoft Power Automate flows in the Microsoft Dynamics 365 Field Service settings.

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.



Answer:



Question: 139 **Exam Heist**

You install and configure Connected Field Service with Azure IoT Central. Several of your connected devices sent alerts back to Dynamics 365 and work orders were created. However, the work orders were never received back in IoT Central.

You need to resolve the issue.

Which should you do?

A. Confirm that the Power Automate When a work order is created in Connected Field Service, update IoT Central is set up properly.

B. Create an IoT Command in Dynamics 365 to trigger an update in IoT Central.

C. Reconfigure the devices and send an update to IoT Central.

D. Create an IoT action in Dynamics 365 to trigger an update in IoT Central.

Answer: A

Explanation:

A is correct because confirming that the Power Automate flow is configured correctly ensures that updates from Dynamics 365 are effectively communicated back to IoT Central.

Power Automate is integral to the communication chain between Dynamics 365 and IoT Central; if the flow Here is misconfigured or inactive, it can prevent updates, such as the delivery of work orders, from occurring. Proper configuration includes ensuring the triggers and actions are set according to system requirements, directly linking the creation of work orders in Dynamics 365 to the appropriate update notifications in IoT Central.

Option B, creating an IoT Command, is incorrect as it implies initiating a status change or command trigger manually rather than streamlining an automatic response flow, which Power Automate is designed to facilitate. Option C involves reconfiguring devices, which typically addresses device connectivity issues but does not directly pertain to the integration flow or updates to IoT Central. Lastly, option D suggests creating an IoT action, which also does not address the need for ensuring proper execution of the existing Power Automate integration for sync actions. Each of these alternatives fails to recognize that the crux of the problem lies in the seamless orchestration of update mechanisms between the two platforms.

References:

https://learn.microsoft.com/en-us/dynamics365/field-service/connected-field-service
https://docs.microsoft.com/en-us/power-automate/getting-started
https://docs.microsoft.com/en-us/azure/iot-central/core/iot-central-overview

Question: 140 **Exam Heist**

You are implementing a Microsoft Dynamics 365 Field Service solution for a client. The client is overwhelmed with all the options available in the site map.

The client wants one group called “My Work” with work orders, schedule board, accounts, contacts, and assets included.

What should you do before saving and publishing the model-driven app?

A. 1. Navigate to the app designer.
2. Select Use existing solution to create the app.
3. Remove all groups and areas other than “My Work.”

B. 1. Navigate to the app designer.
2. Select the site map designer.
3. Remove all areas other than “My Work.”
4. Add work orders, schedule board, accounts, contacts, and assets.

C. 1. Create a new model-driven app.
2. Select Use existing solution to create the app.
3. Select the Field Service site map.

D. 1. Create a new model-driven app.
2. Select the site map designer.
3. Add sub-area work orders, schedule board, accounts, contacts, and assets to “My Work.”
4. Remove all other groups and areas.

Answer: D

Explanation:

D is correct because it ensures a tailored site map configuration that meets the client's preferences while maintaining a structured approach to app design.

To justify the choice, Option D effectively utilizes the site map designer to create a focused user interface by adding only the relevant components — work orders, schedule board, accounts, contacts, and assets — under a singular group labeled "My Work." This method not only enhances user experience by minimizing clutter but also aligns with best practices in user-centered design, which advocate for a clear and concise navigation structure to optimize workflow in field service operations.

In contrast, Option A is incorrect as it mentions removing all groups and areas without utilizing the site map designer, potentially leading to a disorganized or incomplete configuration. Option B also fails because it does not specify utilizing the site map designer to group items effectively, and it suggests just removing areas without the added value of optimizing the grouping structure. This could result in missing important connections between related entities. Lastly, Option C is misleading as it suggests using the existing Field Service site map without any customization, which does not focus on the client's specific requirement for a single, consolidated group.

For further insight into Dynamics 365 best practices, consider these references:

https://learn.microsoft.com/en-us/dynamics365/customer-engagement/developer/app-components
https://learn.microsoft.com/en-us/powerapps/developer/data-platform/get-started
https://learn.microsoft.com/en-us/dynamics365/field-service/overview

Question: 141 **Exam Heist**

You are configuring forms in model-driven apps.

You need to show a set of fields from a related table and ensure the fields are read-only.

Which form should you use?

A. Card
B. Quick View
C. Main
D. Interactive

Answer: B

Explanation:

B is correct because the Quick View form is specifically designed to display read-only information from related entities in model-driven apps.

The Quick View form allows developers to show fields from a related table without enabling edit capabilities, making it ideal for scenarios where users need to view pertinent data without modifying it. This aligns with the requirement of displaying related information in a read-only format, enabling streamlined data access while preserving data integrity.

Evaluating other options:

A. Card forms focus on compactly displaying summaries of data but do not inherently emphasize the ability to show related entity fields in a read-only format, diminishing their applicability for detailed related data views.

C. Main forms are designed for creating and editing records, thus inherently permitting read-write access to the data displayed. This contradicts the requirement for fields to remain read-only.

D. Interactive forms are intended for more dynamic user experiences with editing capabilities and interactions, thus failing to meet the criteria for static read-only information from a related table.

Given these evaluations, the Quick View form stands out as the optimal choice for the task.

References:

https://learn.microsoft.com/en-us/powerapps/developer/data-platform/model-driven-apps-quick-view-forms
https://learn.microsoft.com/en-us/powerapps/developer/data-platform/model-driven-apps-forms
https://learn.microsoft.com/en-us/powerapps/developer/data-platform/model-driven-apps-card-forms

Question: 142 **Exam Heist**

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

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

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

NOTE: Each correct selection is worth one point.

A.Work Order type
B.Communication Type
C.Service Product
D.Service Type

Answer: CD

Explanation:

C.Service Product

D.Service Type

Question: 143 **Exam Heist**

You have configured Microsoft Dynamics 365 Customer Voice, along with Dynamics 365 Field Service.

Your manager wants to add the customer's First Name, Last Name, and Work Order Number to the survey.

In which two survey elements can you add these variables? Each correct answer presents a complete solution.

NOTE: Each correct selection is worth one point.

A.Section description
B.Footer text
C.Post-survey message heading
D.Survey header

Answer: AC

Explanation:

https://learn.microsoft.com/en-us/dynamics365/customer-voice/personalize-survey#add-variables-in-a-survey

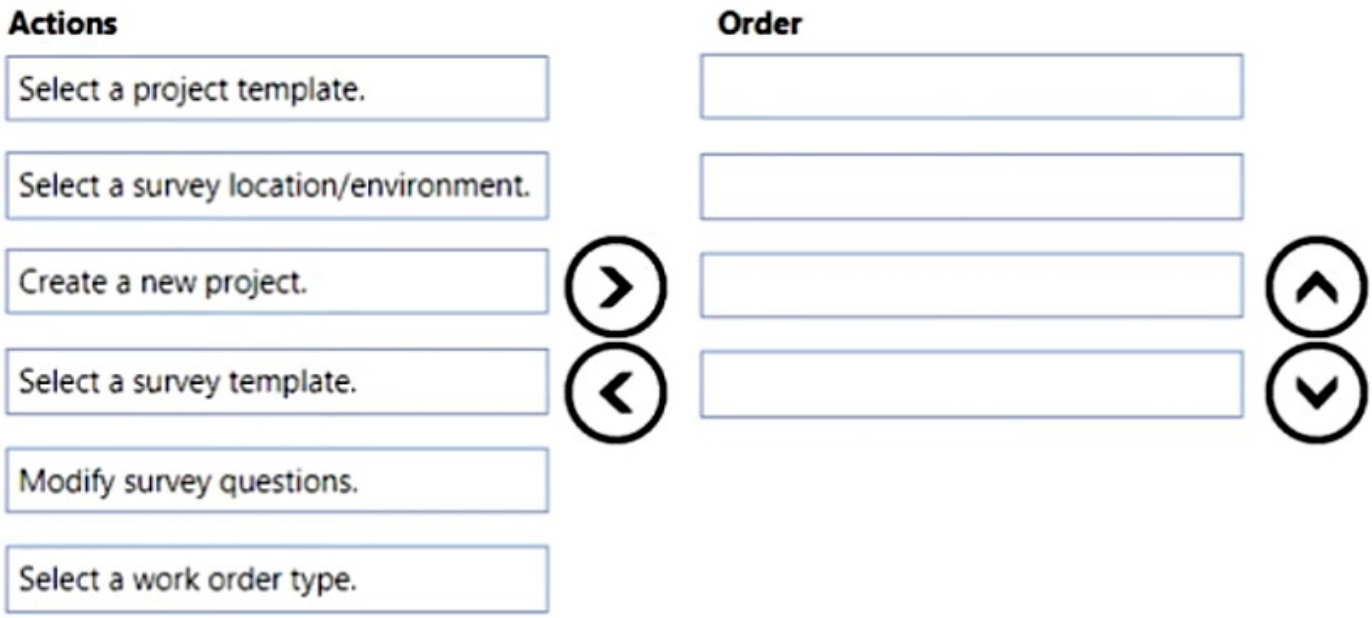
Question: 144 **Exam Heist**

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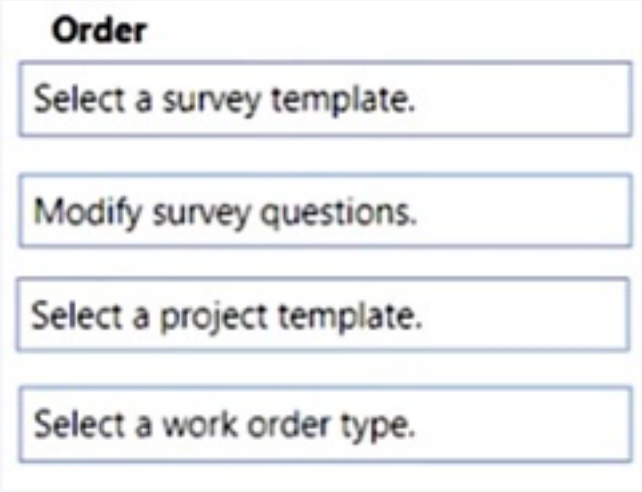
Your company wants use Microsoft Dynamics 365 Customer Voice to obtain feedback on their customers' on-site service experience.

You need to create a survey which will be sent automatically to a customer once their work order is completed.

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.



Answer:



Question: 145 **Exam Heist**

You are deploying the Microsoft Dynamics 365 Field Service mobile app at your organization.

You are in the process of creating push notifications for the mobile app, and you have the following requirement:

When a field service technician is assigned an emergency priority work order, the technician should be immediately notified on their mobile phone.

What should you do?

A. Create a notification Power Automate flow using a scheduled flow. The condition within the flow should look at the Work Order entity where the out-of-the-box priority field has a value of Emergency priority.

B. Create a notification Power Automate flow using an instant flow. The condition within the flow should look at the Bookable Resource Booking entity where the out-of-the-box priority field has a value of Emergency priority.

C. Create a notification Power Automate flow using an automated flow. The condition within the flow should look at the Resource Requirement entity where the out-of-the-box priority field has a value of Emergency priority.

D. Create a notification Power Automate flow using a scheduled flow. The condition within the flow should look at Bookable Resource Bookings where the out-of-the-box priority field has a value of Emergency priority.

Answer: C

Explanation:

C is correct because it utilizes an automated flow that triggers notifications based on real-time updates to the Resource Requirement entity associated with emergency priority work orders.

Using an automated flow ensures immediate notifications directly tied to workflows initiated by the creation or modification of a Resource Requirement, which encompasses urgent assignments. This approach leverages Dynamics 365's capability to manage and respond to real-time events, granting field technicians timely information necessary for efficient operations. The Resource Requirement entity is critical as it handles the details concerning the resources required for specific tasks, including emergencies, thereby ensuring accurate notifications to technicians.

Evaluation of Incorrect Options:

Option A: A scheduled flow is inappropriate as it does not address real-time requirements. Notification delays occur, which contradicts the need for immediate alerts; thus, it is fundamentally misaligned with the urgency required for emergency work orders.

Option B: An instant flow is triggered by user actions rather than system events. It lacks the capability to automatically notify technicians without their direct intervention, which is contrary to the premise of unprompted notifications tied to emergency assignments.

Option D: Similar to Option A, a scheduled flow is inadequate for immediate notification needs. It fails to utilize the proactive features of Dynamics 365, leading to potential delays while also misaligning with the dynamics of field service operations that necessitate prompt communication.

In conclusion, Option C not only satisfies the immediate notification requirement but also aligns with the automated workflow capabilities inherent to the Dynamics 365 platform.

References:

https://docs.microsoft.com/en-us/power-automate/automated-flow
https://docs.microsoft.com/en-us/dynamics365/field-service/mobile-app
https://docs.microsoft.com/en-us/powerApps/developer/data-platform/working-with-entities

Question: 146 **Exam Heist**

One of your Microsoft Dynamics 365 customers is an existing user of Microsoft Power Pages for their clients and partners. They want to enable the Field Service feature in the portal to allow their clients to track technicians and book an appointment from the portal.

You need to provide a recommendation about the Field Service customer experience portal.

What should you recommend?

A.Select the Customer Self-service portal template to deploy the Field Service customer experience portal.
B.Deploy the Field Service customer portal as a standalone experience.
C.Deploy the Field Service customer experience package with any portal.
D.Select the Partner portal template to deploy the Field Service customer experience portal.

Answer: B

Explanation:

Deploy the Field Service customer portal as a standalone experience.

Question: 147 Exam Heist

Your customer wants to give its clients the ability to book appointments and track their technicians. They will do so using Customer Experience homepages.

You need to set this up for your customer.

Which two actions do you need to perform? Each correct answer presents part of the solution.

NOTE: Each correct selection is worth one point.

A.Ensure the resource's image has been uploaded.
B.Create a Field Service portal.
C.Create the Customer Experience homepages in the Administrative settings.
D.Set Track My Technician and self-scheduling options to Yes in the customer portal settings.

Answer: BD

Explanation:

https://learn.microsoft.com/en-us/dynamics365/field-service/create-configure-customer-portal

Question: 148 Exam Heist

You implemented Microsoft Dynamics 365 Field Service for an electronics company.

The technician reports that they are unable to view the customer asset hierarchy and the functional location at the customer's location.

•While setting up the Dynamics 365 Field Service mobile app, you assigned the Field Service Resource security role to a technician.
•While working at the customer site, there were some internet connectivity issues and so the technician had to work offline.

Why was the technician unable to view customer asset hierarchy and functional location?

A.The offline profile still needs to be published.
B.The security role assigned needs to be Field Service Admin
C.The functional location still needs to be assigned to the work order.
D.Internet connectivity is required.

Answer: A

Explanation:

Offline Profile

Question: 149 Exam Heist

You are working on a Microsoft Dynamics 365 Field Service project.

The Field Service director wants to give the field technicians more detailed visual asset information in the field to

reduce reliance on the internal help desk. The budget is limited and the director does not want to burden the technician with extra steps.

What should you suggest?

A.Leverage Microsoft Dynamics 365 Guides for use on Microsoft HoloLens.
B.Implement Microsoft Dynamics 365 Remote Assist.
C.Enable the 3D Model functionality to be viewable on the Field Service mobile customer asset record.
D.Have the field technician download an asset video before going to the job site.

Answer: C

Explanation:

Enable the 3D Model functionality to be viewable on the Field Service mobile customer asset record.

Question: 150 **Exam Heist**

Contoso Ltd., wants to provide special customer pricing to one of their customers. For the next two years, all work order products and services will be 10% off.

You need to implement this requirement. You create a special price list.

What should you do next?

A.Associate the price list to an entitlement for the Billing Account.
B.Associate the price list to an entitlement for the Service Account.
C.Associate the price list to the Service Account.
D.Associate the price list to the Billing Account.

Answer: B

Explanation:

B is correct because associating the price list with an entitlement for the Service Account ensures that customer-specific prices are applied directly to the relevant service interactions.

In Dynamics 365 for Field Service, entitlements define what a customer is eligible for in terms of services and pricing. By associating the special price list with the Service Account through an entitlement, Contoso Ltd. can ensure that all work order products and services are accurately billed at the discounted rate for the specific customer. This method centralizes pricing adjustments and automatically applies them during service transactions.

Critical Evaluation of Other Options:

A. Associating the price list to an entitlement for the Billing Account would be inappropriate since billing accounts generally manage payment processing rather than directly applying service-specific pricing. Thus, it does not ensure the correct discount is applied during service execution.

C. Associating the price list directly to the Service Account would not utilize the entitlement system, which is crucial for managing and enforcing specific contract terms and conditions related to services provided to the customer. Without the entitlement, the pricing model may not be enforceable consistently across work orders.

D. Associating the price list to the Billing Account lacks the necessary link to service delivery, which is fundamental in field service scenarios. The Billing Account is more concerned with financial transactions rather than service execution details, making it an unsuitable option for applying specific service-related

discounts.

For a comprehensive understanding of entitlements and price lists in Dynamics 365 for Field Service, please refer to the following resources:

1. https://docs.microsoft.com/en-us/dynamics365/customer-service/entitlements
2. https://docs.microsoft.com/en-us/dynamics365/field-service/price-lists
3. https://docs.microsoft.com/en-us/dynamics365/field-service/service-account-overview

Question: 151 **Exam Heist**

Your customer asks you to create several work order reports that can be run on-demand. After a discussion about the requirements, you determine that the Report Wizard is the best option.

You need to train your customer on Report Wizard features and customization.

Which three features are available? Each correct answer presents a complete solution.

NOTE: Each correct selection is worth one point.

A.Data filters
B.Use an existing view
C.Power BI Charts
D.Grouping
E.Calculation column
F.Data insights

Answer: ABD

Explanation:

A.Data filters

B.Use an existing view

D.Grouping

Question: 152 **Exam Heist**

DRAG DROP
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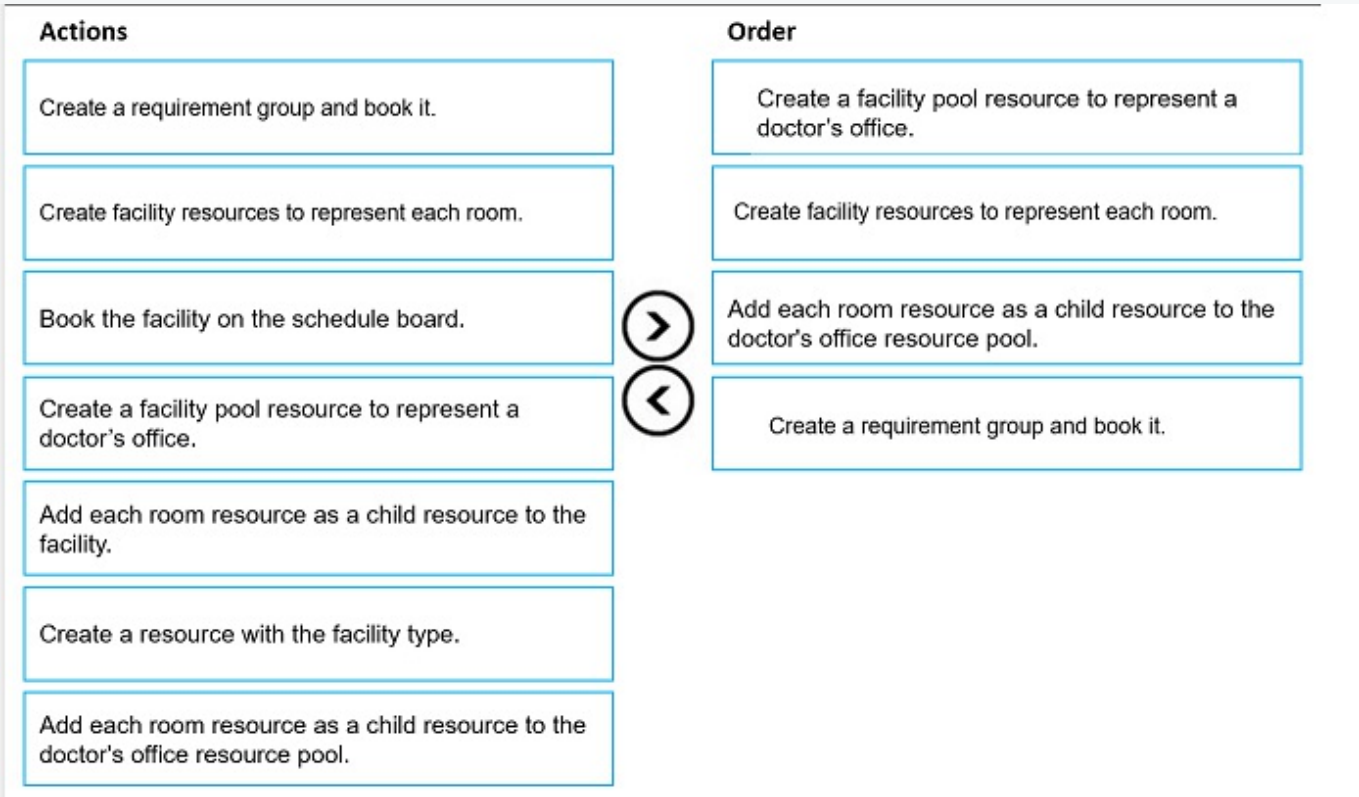
You are implementing Microsoft Dynamics 365 Field Service for a health care institution.

Your schedulers want to track all examination rooms within a doctor's office, and schedule each individual room to a patient.

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 requirement group and book it.	
Create facility resources to represent each room.	
Book the facility on the schedule board.	
Create a facility pool resource to represent a doctor’s office.	
Add each room resource as a child resource to the facility.	
Create a resource with the facility type.	
Add each room resource as a child resource to the doctor's office resource pool.	

Answer:



Explanation:

Step 4 should be "Create a requirement group and book it".

https://learn.microsoft.com/en-us/dynamics365/field-service/facility-scheduling

Question: 153 Exam Heist

A new technician wants to access Microsoft Dynamics 365 Remote Assist from their Dynamics 365 Field Service mobile app, but cannot find the option to launch it.

You need to advise the new technician on the first step they should take.

What should you suggest?

A.Ensure Microsoft Teams is installed on their mobile device.
B.Ensure the Remote Assist app is installed on their mobile device.
C.Ensure their mobile app and Remote Assist passwords are the same.
D.Ensure they are set up as a Bookable Resource.

Answer: B

Explanation:

Ensure the Remote Assist app is installed on their mobile device.

Question: 154 Exam Heist

You are creating booking dates for a manufacturing customer based on agreements within the system.

The customer is not able to generate the appropriate booking dates within the system.

You need to ensure that booking dates are created for this customer.

What should you do?

A.Set Copy Incident Items to Agreement to Yes
B.Ensure service tasks are set up on the booking
C.Set Generate Agreement Invoices 7 Days in Advance
D.Set Auto Generate Booking to Yes

Answer: D

Explanation:

Set Auto Generate Booking to Yes

Question: 155 Exam Heist

Your company recently implemented Microsoft Dynamics 365 Field Service. You helped set up and configure the required components to ensure that a work order can be created and completed successfully.

One of the dispatchers reports to their manager that the duration in the work order is missing.

You need to ensure the duration is rolled-up to the work order duration.

Which component must you configure?

A. Estimated Duration in Service Task
B. Hourly Rate of the Resources

C. Pricing in Product / Service

D. Start Date and End Date in Service Task

Answer: A

Explanation:

A. Estimated Duration in Service Task is correct because it directly influences the overall duration calculated in a work order by aggregating the time estimates of individual service tasks.

The work order duration is a holistic representation of time allocated for the completion of a service task, and the estimated durations assigned to those tasks are crucial for this calculation. This ensures that all tasks within a work order have a clear temporal structure, enabling effective scheduling and resource management.

Evaluating the other options:

B. Hourly Rate of the Resources is incorrect because it pertains to the financial aspect of service delivery rather than the duration of tasks. While pricing can affect budget projections, it does not contribute to the aggregate duration calculation necessary for work orders.

C. Pricing in Product / Service does not impact the duration of service tasks either. Pricing elements are focused on cost management and financial outcomes, rather than the logistical time management required for task completion and work order duration.

D. Start Date and End Date in Service Task may indicate a timeframe but do not automatically compute the total duration required for the work order. The explicit definition of an estimated duration is essential for accurate aggregation, which the start and end dates alone cannot achieve.

References:

1. https://docs.microsoft.com/en-us/dynamics365/field-service/field-service-overview
2. https://docs.microsoft.com/en-us/dynamics365/field-service/work-order-management
3. https://docs.microsoft.com/en-us/dynamics365/field-service/service-task-configuration

Question: 156 **Exam Heist**

You are managing your organization's assets.

You need to give your organization's technicians better visibility on their locations in order to reduce travel time and time spent searching for the asset when the technicians arrive on site.

How should you structure the system to manage this request?

A. Ensure each asset is properly geo-coded.

B. Attach a functional location to each asset.

C. Create a detailed service account tree.

D. Attach a detailed map of the asset’s location to the work order.

Answer: B

Explanation:

Option B is correct because attaching a functional location to each asset provides context within a geographic and operational framework, allowing technicians to efficiently locate assets and minimizing travel time.

Justification: Functional locations enable organizations to categorize assets based on their physical location

within the operational landscape. This facilitates a systematic approach to asset management, enhancing visibility through geographical tagging. By delineating assets within a functional location hierarchy, technicians can rapidly identify nearby assets and their corresponding maintenance requirements, ultimately leading to reduced operational downtime and optimized resource allocation.

Critical Evaluation of Other Options:

A. Ensure each asset is properly geo-coded. While geo-coding assets can provide location data, it lacks the contextual integration intrinsic to functional locations. Geo-coding alone does not account for operational processes and relationships that affect technician movements.

C. Create a detailed service account tree. A service account tree is beneficial for managing customer relationships and service agreements. However, it does not directly enhance technicians' visibility of asset locations, as it primarily addresses administrative concerns rather than operational efficiency.

D. Attach a detailed map of the asset's location to the work order. Although mapping can visually convey asset locations, it can be cumbersome and inefficient in practice. A static map may not provide real-time updates or operational context, making it less effective than functional locations for everyday asset management.

By implementing functional locations, organizations can achieve a holistic view of asset management, facilitating better decision-making and optimizing technician performance.

1. https://docs.microsoft.com/en-us/dynamics365/field-service/assets
2. https://docs.microsoft.com/en-us/dynamics365/field-service/locations
3. https://docs.microsoft.com/en-us/dynamics365/field-service/asset-management

Question: 157 **Exam Heist**

You create an incident type with an estimated duration of 1 hour. After adding products, services, and service tasks to the incident type, you notice the estimated duration is now 4 hours.

You need to set the estimated duration to 1 hour.

What two actions can you take? Each correct answer presents a complete solution.

NOTE: Each correct selection is worth one point.

A.Update the services records to equal a total of 1 hour.
B.Update the estimated duration to 1 hour.
C.Update both the service tasks and services records to ensure each one equals 1 hour.
D.Update the service tasks records to equal a total of 1 hour, and change the estimated duration to 0.

Answer: AD

Explanation:

A.Update the services records to equal a total of 1 hour.

D.Update the service tasks records to equal a total of 1 hour, and change the estimated duration to 0.

Question: 158 **Exam Heist**

Your organization is implementing a Microsoft Dynamics 365 Field Service solution and plans to use inspections.

When creating inspections, you need to ensure that technicians are able to add additional rows on the inspection dynamically to capture information.

Which element should you add to the inspection?

A.Matrix
B.Dropdown
C.Entity lookup
D.Textbox

Answer: A

Explanation:

Matrix (Dynamic): Adds a grid of questions. More rows can be added dynamically while performing the inspection.

https://learn.microsoft.com/en-us/dynamics365/field-service/inspections

Question: 159 **Exam Heist**

DRAG DROP
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You company wants to enable their sales managers to use agreements by making it an integral part of their sales life cycle.

You need to enable agreements to be used with Microsoft Dynamic 365 Sales process from Lead to Order.

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

Steps		Order
Create quote lines as service-based lines.		
Add opportunity lines with service based lines.		
Add a quote booking setup.		
Categorize a lead as a service-maintenance lead.		
Create a work order recurrence pattern in the order entity.		

Answer:

Order

Categorize a lead as a service-maintenance lead.

Add opportunity lines with service based lines.

Create quote lines as service-based lines.

Add a quote booking setup.

Explanation:

https://learn.microsoft.com/en-us/dynamics365/field-service/set-up-customer-agreements

Question: 160 **Exam Heist**

Note: This question is part of a series of questions that present the same scenario. Each question in the series contains a unique solution that might meet the stated goals. Some question sets might have more than one correct solution, while others might not have a correct solution.

After you answer a question in this section, you will NOT be able to return to it. As a result, these questions will not appear in the review screen.

You are a 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

Answer: A

Explanation:

Technically if you use the filter restricted, the resource doesn't show on the schedule board for that order. Doesn't mean it's efficient. You filter that resource out.

Question: 161 **Exam Heist**

You are a scheduler for Contoso Manufacturing.

You need to configure the Requirement Panel Views.

Which Microsoft Dynamics 365 Field Service view do you need to add or modify to meet this request?

A.Bookable Resource Booking
B.Resource Requirement
C.Resource Request
D.Resource Assignment

Answer: B

Explanation:

B is correct because the Resource Requirement view directly correlates to the specific needs of scheduling tasks in Microsoft Dynamics 365 Field Service.

In the context of Field Service scheduling, the Resource Requirement view is essential as it defines the specific resources needed for service tasks based on customer requirements. This view allows schedulers to evaluate what resources are currently available against the defined needs, facilitating more efficient and effective deployment of resources. The Configuration of Requirement Panel Views often focuses on optimizing this process to improve response times and service delivery, emphasizing the importance of this particular view.

Evaluation of Other Options:

A. Bookable Resource Booking:
This option addresses the allocation of identified bookable resources to specific tasks but does not include the details of requirements from the customer perspective, making it less suitable for configuring Requirement Panel Views.

C. Resource Request:
While this reflects requests for resources, it is more related to the initiation of resource needs rather than the management and scheduling of those resources, thus being less relevant to the Requirement Panel configurations, which focus more on the real-time assessment of capacity against requirements.

D. Resource Assignment:
This option relates to the assignment of resources already specified but does not encompass the full requirement analysis process, which is crucial in establishing effective and efficient scheduling in Field Service contexts.

In summary, the Resource Requirement view aligns with the scheduling needs by precisely capturing and displaying the resources required for tasks, while other options serve different aspects of resource management.

References:

https://learn.microsoft.com/en-us/dynamics365/field-service/
https://learn.microsoft.com/en-us/dynamics365/field-service/resources-field-service
https://learn.microsoft.com/en-us/dynamics365/customer-service/knowledge-base-articles

Question: 162 **Exam Heist**

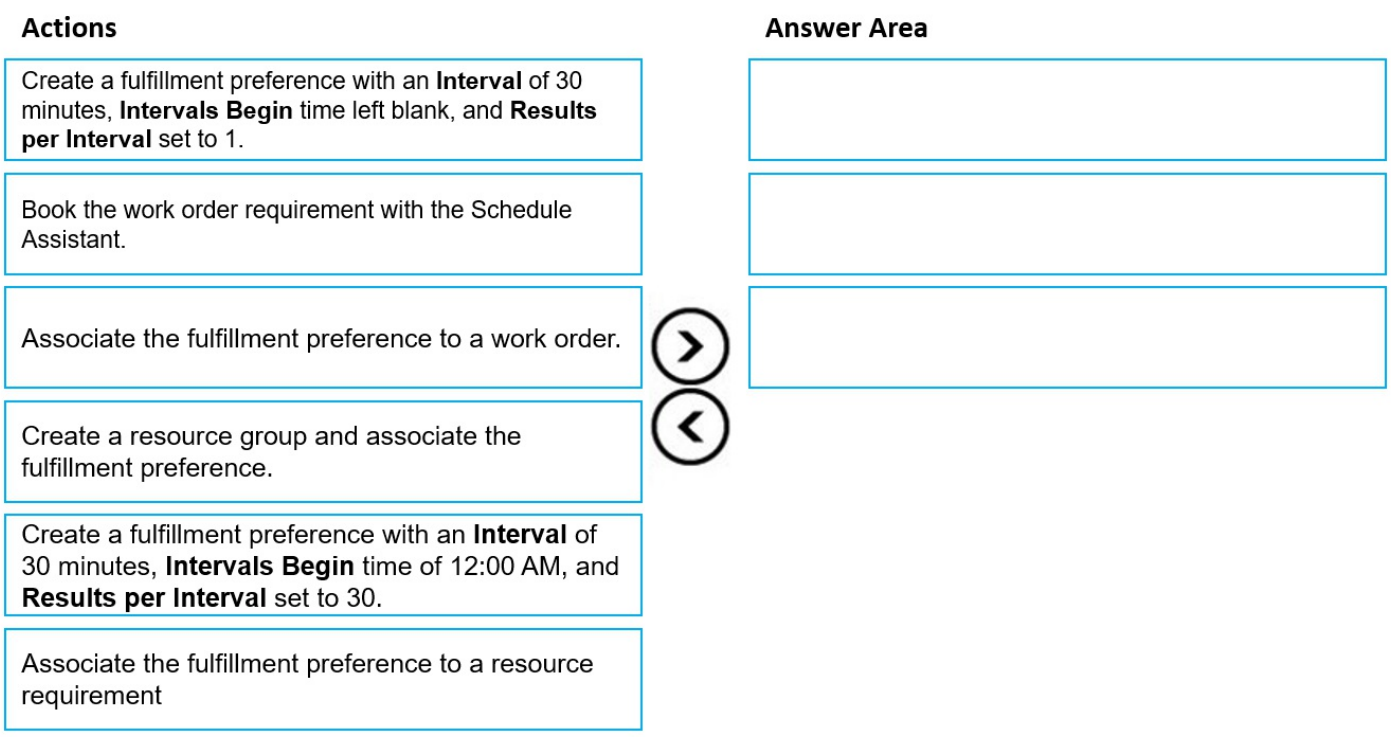
DRAG DROP
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You have the following requirements from the scheduling team:

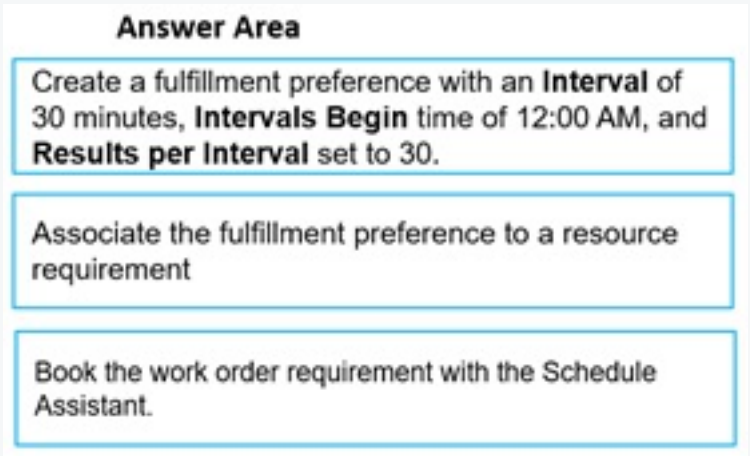
•Scheduling assistant results should display in neat 30-minute time slots that dictate the start time of subsequent bookings.
•Functionality should display for all 30 resources within the company.
•Time slots should align to the top of the hour and half past the hour.

To meet these requirements, you need to implement Intervals within Universal Resource Scheduling.

Which three 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.



Answer:



Question: 163 **Exam Heist**

DRAG DROP
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A customer wants to understand how to get their dispatchers to adopt scheduling.

What are the five stages of scheduling adoption? To answer, move the appropriate actions from the list of actions to the answer area and arrange them in the correct order.

Actions	Order
Manual scheduling	
Single resource optimization	
Automated overnight scheduling + manual exception handling (RSO)	
Fully automated (RSO) scheduling	
Schedule assistant	
Multi-resource optimization	

Answer:

Order

1. Manual scheduling
2. Schedule assistant
3. Automated overnight scheduling + manual exception handling (RSO)
4. Single resource optimization
5. Fully automated (RSO) scheduling

Question: 164 **Exam Heist**

You are scheduling a customer for preventative maintenance performed on a predictable schedule.

The customer wants the work performed within two (2) days of the 15th of each month, and an Agreement has already been created.

Which three elements of the booking setup are valid? Each correct answer presents part of the solution.

NOTE: Each correct selection is worth one point.

A.Auto Generate Work Order = Yes

B.Preferred Resource contains data

C.Auto Generate Work Order = No

D.Preferred Resource either contains data or is blank

E.Pre-Booking Flexibility = 2 and Post Booking Flexibility = 2

Answer: ADE

Explanation:

A. Auto Generate Work Order = Yes

D. Preferred Resource either contains data or is blank

E. Pre-Booking Flexibility = 2 and Post Booking Flexibility = 2

Question: 165 **Exam Heist**

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

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

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

NOTE: Each correct selection is worth one point.

A.Booking Canceled

B.Booking Reminder

C.Booking Complete

D.Technician Traveling

E.Booking Committed

Answer: ACD

Explanation:

Reference:

https://learn.microsoft.com/en-us/dynamics365/field-service/customer-portal-self-scheduling#view-different-states-of-the-booking-on-the-portal

Question: 166 **Exam Heist**

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.

Answer: AB

Explanation:

AB is correct because both prerequisites ensure necessary system compatibility and role fulfillment for effective app installation and utilization.

The installation of the Microsoft Dynamics 365 Field Service mobile app necessitates that the minimum supported version of the Field Service solution is present (Option A). This compatibility is critical as newer app versions may rely on specific features or functionalities introduced in updated Field Service solutions. Additionally, ensuring that the user has the Field Service-Resource security role (Option B) is imperative, as this role governs access permissions, thereby allowing users to leverage essential app functionalities pertinent to their responsibilities in field service operations.

In contrast, Option C, which suggests that the user must be correctly set up in the Woodford solution, is incorrect. While configuration in Woodford may be relevant for app customization, it does not affect the basic installation of the app on mobile devices. Option D states that the user must have the appropriate Microsoft Power Apps license. Although licensing is vital for using any Microsoft application, specific licenses are not a direct barrier to the installation and initial testing of the mobile app. Thus, while Option D is important for ongoing access, it does not address the basic prerequisites for installation outlined in the question.

1. https://learn.microsoft.com/en-us/dynamics365/field-service/mobile-apps
2. https://learn.microsoft.com/en-us/power-platform/admin/powerapps-admin-guide
3. https://learn.microsoft.com/en-us/dynamics365/field-service/security-roles-field-service

Question: 167 **Exam Heist**

You are implementing the Microsoft Dynamics 365 Field Service mobile app for an air conditioning (AC) repair company. A field technician installed an AC unit at a customer location and completed the booking.

The technician now needs to create a follow-up work order in order to schedule the first service on the installed AC unit.

What will happen once the follow-up work order is created?

A. The work order will be available for scheduling by the dispatcher.

B. The system will auto-assign the work order to the same technician for a future date.

C. The technician will need to manually assign the work order to the dispatcher.

D. The system will auto schedule the work order to the same technician to begin work immediately.

Answer: A

Explanation:

A. The work order will be available for scheduling by the dispatcher.

The creation of a follow-up work order in the Microsoft Dynamics 365 Field Service environment enables efficient management of service requests by making the newly created work order accessible to dispatchers for scheduling. This process adheres to the organizational structure typically present in field service operations, where dispatchers are responsible for coordinating technician schedules based on availability, skill set, and geographic proximity.

Critical Evaluation of Incorrect Options:

B. The system will auto-assign the work order to the same technician for a future date.
This option is incorrect because auto-assignment requires specific configurations or rules to be set within the system. Standard behavior upon simply creating a work order does not imply automatic assignment without dispatcher intervention.

C. The technician will need to manually assign the work order to the dispatcher.
This assertion is inaccurate as the process is designed to streamline operations; once created, the work order naturally enters the scheduling queue for the dispatcher, eliminating the need for manual intervention by the technician.

D. The system will auto schedule the work order to the same technician to begin work immediately.
This option misrepresents the workflow as it assumes immediate scheduling is standard. Generally, follow-up work orders require proper scheduling processes involving the dispatcher to allocate resources effectively, preventing overlap and ensuring service efficacy.

The fundamental structure of Microsoft Dynamics 365 Field Service emphasizes dispatch efficiency and supports user roles aligned with strategic operational goals, reinforcing the validity of Option A.

References:

https://learn.microsoft.com/en-us/dynamics365/field-service/field-service-overview
https://learn.microsoft.com/en-us/dynamics365/field-service/work-orders
https://learn.microsoft.com/en-us/dynamics365/field-service/field-service-mobile-app

Question: 168 **Exam Heist**

During User Acceptance Testing, mobile technicians receive the message "Contact your administrator for access to your organization's mobile apps." when logging into the Dynamics 365 Field Service mobile app.

You need to determine which areas to update within the mobile project so that technicians can see the appropriate information.

What is a possible way to troubleshoot the issue?

A.Update the mobile offline profile to include the correct Field Service security roles.

B.Ensure you have the correct security role (Field Service - Resource), and that the security role is assigned to the Dynamics 365 Field Service mobile app.

C.Update the mobile offline profile to include the users that require access.

D.Ensure you have the correct security role (Field Service - Offline Resource), and that the security role is assigned to the Dynamics 365 Field Service mobile app.

Answer: B

Explanation:

B is correct because it directly addresses the requirement for the appropriate security role necessary for mobile access within Dynamics 365 Field Service.

In Dynamics 365, user access to mobile applications is intricately linked to security roles that define permissions for application usage. The mobile roles must be specifically allocated to ensure that users have adequate access to the necessary resources. By verifying that technicians possess the "Field Service - Resource" role, we ensure that they can interact with the mobile application and access relevant data.

Critical Evaluation of Other Options:

A. Update the mobile offline profile to include the correct Field Service security roles.
This option is misleading as it pertains to offline capabilities rather than direct access to the mobile app. While offline profiles are important, they do not address the upfront issue of logging into the app.

C. Update the mobile offline profile to include the users that require access.
Similar to option A, this suggestion targets offline access rather than resolving the immediate access issue. The requirement lies in the assignment of roles, not merely the inclusion of users in an offline profile.

D. Ensure you have the correct security role (Field Service - Offline Resource), and that the security role is assigned to the Dynamics 365 Field Service mobile app.
While this role is important for offline scenarios, it is not the primary concern for first-time access. The "Field Service - Resource" role is the one needed to initially access the app, rendering this option not relevant to the core issue.

In summary, proper assignment of the "Field Service - Resource" role is essential for enabling mobile application access, as it grants the necessary permissions and privileges for the technicians to operate effectively.

References:

https://docs.microsoft.com/en-us/dynamics365/customer-engagement/on-premises/user-security-roles
https://learn.microsoft.com/en-us/dynamics365/field-service/mobile-app-user-guide
https://learn.microsoft.com/en-us/dynamics365/field-service/security-role-overview

Question: 169 **Exam Heist**

DRAG DROP
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Your company receives a call from a customer saying that the hydraulic pump they received from your company is defective. The pump is manufactured by your company.

You need to process a return.

Which three actions should be performed 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 Return to Vendor record.		
Create an RMA.		
Add RMA products.		
Create an RMA Receipt indicating the product(s) received.		
Create an Ownership Change record.		

Answer:

Order

Create an RMA.

Add RMA products.

Create an RMA Receipt indicating the product(s) received.

Explanation:

https://learn.microsoft.com/en-us/dynamics365/field-service/process-return

Question: 170 **Exam Heist**

You are a field service technician. You need to supply a fan belt for a compressor at a customer site. When checking the stock in your van you realize your fan belt inventory is showing 0.

You need to initiate a transfer from the stock at the home office.

Which two fields must you use to complete the transfer of stock? Each correct answer presents part of the solution.

NOTE: Each correct selection is worth one point.

A.To Location
B.Destination Warehouse
C.Source Warehouse
D.From Location

Answer: BC

Explanation:

BC is correct because these fields are essential in facilitating a stock transfer between different inventory locations within Microsoft Dynamics 365.

The **Destination Warehouse** (B) specifies where the stock is being sent, vital for tracking and inventory management, allowing the software to register the receiving end of the transfer. The **Source Warehouse** (C) indicates the origin of the inventory, confirming the actual location from which the stock is allocated, which is fundamental to inventory accuracy and operational efficiency. This direct flow of information ensures the integrity of stock movement and assists in maintaining accurate records in the system.

In contrast, **To Location** (A) and **From Location** (D) are not suitable choices in this context. While they may imply spatial references, they lack the specificity required for logistics and inventory transfer in Dynamics 365. "To Location" generally refers to a broader physical address rather than a defined warehouse, potentially leading to confusion regarding transfer procedures. Similarly, "From Location" does not designate a specific inventory source, which is critical when managing stock levels and understanding where inventory is drawn from, thus risking discrepancies in stock levels.

In summary, B and C are indispensable for effecting accurate stock transfers within the Dynamics 365 system while A and D fail to encapsulate the operational demands of effective inventory management.

References:

https://learn.microsoft.com/en-us/dynamics365/field-service/overview
https://learn.microsoft.com/en-us/dynamics365/field-service/inventory
https://learn.microsoft.com/en-us/dynamics365/field-service/manage-inventory-transfers

Question: 171 **Exam Heist**

You need to set up a new mobile warehouse for a technician and add inventory to the warehouse.

Which three entities, when updated, will also update the warehouse inventory? Each correct answer presents a complete solution.

NOTE: Each correct selection is worth one point.

A. Adjustments
B. Agreements
C. Work Order Products
D. Purchase Order Receipt Product
E. Work Order Services

Answer: ACD

Explanation:

ACD is correct because Adjustments, Work Order Products, and Work Order Services directly impact warehouse inventory management in Dynamics 365.

Reasoning:

1. **Adjustments (A)**: Adjustments are critical for accurately reflecting inventory levels. When adjustments are made, they directly increase or decrease the number of items in the warehouse, thus modifying the overall inventory count.
2. **Work Order Products (C)**: When products are added to or consumed from a work order, the inventory reflects these transactions. Work Order Products are directly tied to the inventory management system, ensuring real-time updates as parts are allocated to specific tasks.
3. **Work Order Services (D)**: Although they don't involve physical inventory changes, they often correlate with inventory usage. The services rendered may necessitate specific materials from the warehouse, which communicates changes to inventory management.

Evaluation of Incorrect Options:

1. **Agreements (B)**: While service agreements define terms of service and may outline inventory use, they do not directly alter inventory counts upon updates.
2. **Purchase Order Receipt Product (E)**: This entity is related to acquiring stock rather than adjusting existing warehouse inventory. While it impacts the flow of inventory, a receipt itself does not influence the current inventory levels until the goods are added to the warehouse.

These evaluations ensure clarity in understanding inventory management and the connectivity of its components within Microsoft Dynamics 365.

Authoritative References:

https://learn.microsoft.com/en-us/dynamics365/field-service/
https://learn.microsoft.com/en-us/dynamics365/business-central/acquire-inventory/items-purchase-orders
https://learn.microsoft.com/en-us/dynamics365/field-service/warehouse-inventory-management

Question: 172 **Exam Heist**

Note: This question is part of a series of questions that present the same scenario. Each question in the series contains a unique solution that might meet the stated goals. Some question sets might have more than one correct solution, while others might not have a correct solution.

After you answer a question in this section, you will NOT be able to return to it. As a result, these questions will not appear in the review screen.

You are 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 create an Asset Category and associate it with each component, and use the Location Tree for viewing.

Does this meet the goal?

A. Yes
B. No

Answer: B

Explanation:

B is correct because the proposed solution does not effectively provide a hierarchical view of serialized components for assets as required.

The creation of an Asset Category and its association with each component does not inherently establish a hierarchical relationship among the serialized components themselves. An Asset Category primarily functions to classify assets but lacks the structural capacity to delineate the interdependencies or compositions between different serialized components. A hierarchical view necessitates a clear parent-child relationship that the Asset Category framework does not support, thus failing to meet the visibility goal set by the VP of Field Service.

Furthermore, relying on the Location Tree for visualization may misalign with the intended purpose, as the Location Tree is designed for geographic or spatial representation rather than the detailed hierarchical visibility of asset components. It is essential to have a solution that integrates and displays serialized components in a parent-child structure, such as using Asset Parent-Child relationships or a dedicated Asset Hierarchy feature within Microsoft Dynamics 365.

Other potential solutions might involve using the Asset Hierarchy or functionality specifically designed for tracking components, but those alternatives are not addressed herein, which could offer a more satisfactory outcome in visualizing serialized components.

References:

https://docs.microsoft.com/en-us/dynamics365/customer-engagement/field-service/asset-management
https://docs.microsoft.com/en-us/dynamics365/customer-engagement/field-service/hierarchy-asset-management
https://docs.microsoft.com/en-us/dynamics365/customer-engagement/field-service/product-configuration-field-service

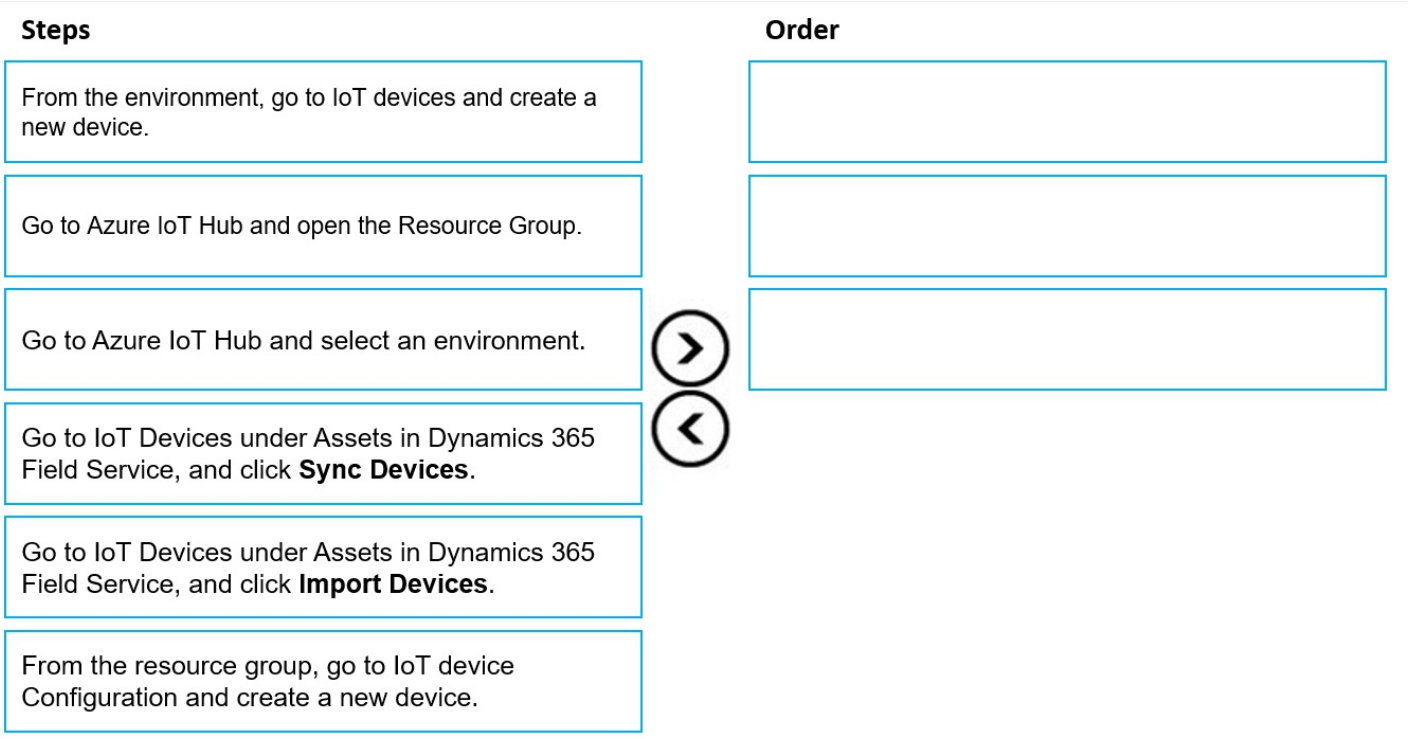
Question: 173 Exam Heist

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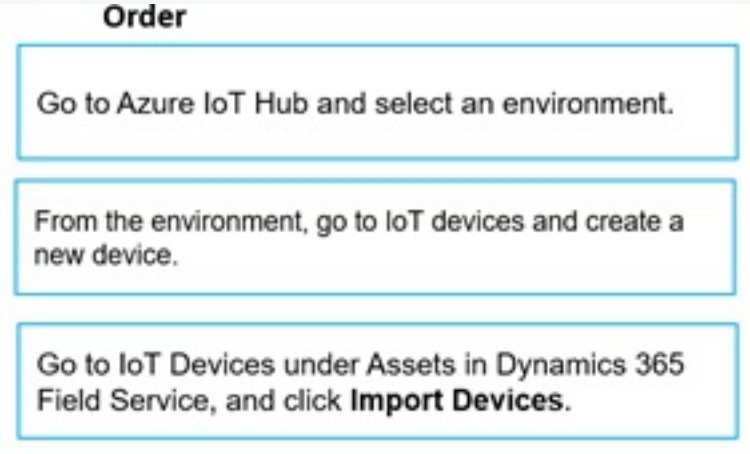
Your organization recently implemented the Connected Field Service for Azure IoT Hub to remotely monitor IoT devices.

You need to register IoT devices from IoT Hub.

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



Answer:



Question: 174 Exam Heist

You work for an equipment rental company which rents tower cranes to construction companies.

A tower crane consists of several components such as operator s cabin, trolley, et cetera, which requires regular maintenance and are very expensive.

You need to maintain the service history of all the sub components and track each equipment by client location.

What should you do?

A.Configure the customer assets hierarchically, and maintain service history at the service account level.

B.Configure the customer assets hierarchically, and maintain service history at the sub-component level.

C.Configure the customer inventory records in a hierarchy, and maintain service history at the sub-component level.

D.Configure the customer inventory records individually, in order to maintain the service history at the parent component level.

Answer: B

Explanation:

Configure the customer assets hierarchically, and maintain service history at the sub-component level.

Question: 175 **Exam Heist**

Your customer is interested in embedding canvas apps to leverage the flexibility of canvas apps in model-driven forms.

You need to explain the benefits achieved by embedding a canvas app in a model-driven form.

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

NOTE: Each correct selection is worth one point.

A. It eliminates the requirement for a full user license.

B. It provides the ability to use and update data from other data sources.

C. It converts JavaScript to low-code or no-code logic.

D. It performs complex logic in model-driven app forms that is otherwise only possible with coding.

E. It triggers Microsoft Power Automate flows from buttons in the embedded canvas app.

F. It provides an iFrame for a Microsoft Power BI report.

Answer: BDE

Explanation:

B, D, and E are correct because they encapsulate the core advantages of embedding canvas apps within model-driven forms, enhancing user experience, data interaction, and workflow automation.

Option B is valid as it highlights the versatility of canvas apps in connecting with diverse data sources beyond the Dataverse, allowing for richer, more integrated app experiences. This enables users to automate data exchanges and access real-time information from various systems, significantly enhancing functionality.

Option D is pertinent since canvas apps allow for the implementation of complex logic in a straightforward manner, circumventing traditional coding requirements. Instead of using JavaScript, users can leverage low-code configurations to introduce intricate functionalities that are often unattainable through model-driven forms alone.

Option E is significant because embedding canvas apps enables interactive components that can invoke Microsoft Power Automate flows directly. This provides seamless automation capabilities, facilitating workflow processes that enhance app efficiency and user productivity.

Conversely, option A is incorrect; while embedding canvas apps may simplify some user interactions, it does

not eliminate the need for a full user license for accessing certain features or data within the Microsoft ecosystem.

Option C is not accurate as while low-code logic can replace some JavaScript functions, it does not imply a direct translation of JavaScript into low-code; it focuses on simplifying complex expressions rather than being an outright conversion.

Option F is also incorrect since while an iFrame can display Power BI reports, this feature is not a primary benefit of embedding canvas apps, which is distinct from the capabilities associated with data visualization reporting.

For further reference:

https://docs.microsoft.com/en-us/powerapps/developer/data-platform/canvas-apps-in-model-driven-apps
https://docs.microsoft.com/en-us/powerapps/maker/canvas-apps/functions/function-reference
https://docs.microsoft.com/en-us/powerautomate/get-started-logic-flow

Question: 176 **Exam Heist**

You are advising your customer on how to configure their territories.

You need to identify the options that are related to territories during the configuration.

Which three relationships are available? Each correct answer presents a complete solution.

NOTE: Each correct selection is worth one point.

A.Territory Hierarchies
B.Accounts
C.Contacts
D.Postal Codes
E.Resources

Answer: BDE

Explanation:

Reference:

https://learn.microsoft.com/en-us/dynamics365/field-service/set-up-territories

Question: 177 **Exam Heist**

A customer is using Microsoft Dynamics 365 Guides with their new HoloLens devices for technicians.

You need to ensure technicians can see and use Dynamics 365 Guides within Microsoft Dynamics 365 Field Service.

What must you do?

A.Attach the guide to a work order service task record.
B.Attach the guide to a work order activity record.
C.Create a work order and attach the guide to the work order record.
D.Attach the guide to a bookable resource booking record.

Answer: A

Explanation:

Reference:

https://learn.microsoft.com/en-us/dynamics365/mixed-reality/guides/field-service#enable-your-technicians-to-use-dynamics-365-guides-for-work-orders

Question: 178 **Exam Heist**

You created a work order and added a price list to that work order.

You need to anticipate what will happen when you add an additional work order product which is missing from the work order price list.

What is the outcome?

A.The application allows the product to be added and sets the price to zero during the calculations.
B.There will be an error indicating that the product does not belong to the work order price list.
C.The application provides an option to add the product to the work order price list.
D.The list price on the newly-added product record will be used in the calculations.

Answer: A

Explanation:

The application allows the product to be added and sets the price to zero during the calculations.

Question: 179 **Exam Heist**

You are a Microsoft Dynamics 365 Field Service technician at a customer site. Three additional existing customer assets need to be added to the work order.

You need to add these customer assets to the work order.

What should you do?

A.Add the customer assets to the primary work order incident.
B.Add the customer assets directly to the work order.
C.Add additional incidents with the associated existing asset.
D.Add the customer assets at the work order product level.

Answer: A

Explanation:

Add the customer assets to the primary work order incident.

Question: 180 **Exam Heist**

Your organization uses the Microsoft Dynamics 365 Field Service solution to perform inspections on customer

assets.

Recently, technicians made changes to the service task and completed the inspection again. The analytics team reports that they are unable to get the responses in this instance.

You need to troubleshoot the issue.

Which two actions should you perform to fix this issue? Each correct answer presents a complete solution.

NOTE: Each correct selection is worth one point.

A.Enable Deserialization of Inspection Response Flow.
B.Change the Analytics frequency setting to Daily.
C.Set the Analytics frequency to Immediately.
D.Change the Analytics frequency setting to Custom.

Answer: AC

Explanation:

A.Enable Deserialization of Inspection Response Flow.

C.Set the Analytics frequency to Immediately.

Question: 181 **Exam Heist**

You are viewing the Microsoft Dynamics 365 Field Service historical insights report.

You need to determine the options available for filtering on the reports.

Which three options are available for filtering? Each correct answer presents a complete solution.

NOTE: Each correct selection is worth one point.

A.Service task
B.Service territory
C.Asset
D.Technician
E.Date range

Answer: BDE

Explanation:

B. Service territory.

D. Technician

E. Date range

Question: 182 **Exam Heist**

Your customer is asking about metrics to meet Service Level Agreement (SLA) job completion.

You need to recommend metrics from the work order summary report that your customer can use.

Which two metrics should you recommend? Each correct answer presents a complete solution.

NOTE: Each correct selection is worth one point.

A. Mean time to complete
B. Mean time to schedule
C. Mean time to complete by work order type
D. Broken Promise %
E. Mean time to travel

Answer: AD

Explanation:

Correct selections: A. Mean time to complete D. Broken Promise %

Why these metrics are the best fit

Mean time to complete (MTTC) – Directly measures the elapsed time from work-order creation to its closure, which is the core indicator of whether the SLA for job completion is being met. It can be tracked per work order, per team, or per region, giving the customer a clear, quantitative view of actual performance against the promised completion window.

Broken Promise % – Calculates the proportion of work orders that were not finished within the SLA-defined timeframe. This metric translates raw timing data into a business-focused KPI (percentage of missed promises), enabling the customer to quickly assess SLA compliance and prioritize corrective actions.

Why the other options are less suitable

Mean time to schedule – Focuses on the interval from work-order creation to scheduling, which is useful for capacity planning but does not reflect the actual completion of the job, the metric the customer cares about.

Mean time to complete by work order type – While providing useful granularity, it adds unnecessary complexity for a high-level SLA review; the customer needs a single, overall completion metric rather than a breakdown by type unless specifically requested.

Mean time to travel – Relates to field-technician travel time and is relevant for routing efficiency, not for evaluating whether the promised job completion time was met.

Thus, **Mean time to complete** supplies the raw duration data, and **Broken Promise %** converts that data into an actionable SLA compliance indicator, making them the optimal pair for the customer's SLA job-completion reporting needs.

Question: 183 **Exam Heist**

Your client recently started using the inspections functionality in Microsoft Dynamics 365 Field Service. The client has many instances where work orders are not required for carrying out inspections.

You need to provide a solution so that field technicians can carry out inspections without work orders.

What should you do?

A.Add inspections to customer assets.
B.Add inspections to a crew.
C.Add inspections to cases.

D.Add inspections to a field technician.

Answer: A

Explanation:

Reference:

https://learn.microsoft.com/en-us/dynamics365/field-service/inspections-customer-assets

Question: 184 **Exam Heist**

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

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

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

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

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

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

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

Answer: C

Explanation:

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

Question: 185 **Exam Heist**

Note: This question is part of a series of questions that present the same scenario. Each question in the series contains a unique solution that might meet the stated goals. Some question sets might have more than one correct solution, while others might not have a correct solution.

After you answer a question in this section, you will NOT be able to return to it. As a result, these questions will not appear in the review screen.

You are implementing a Microsoft Dynamics 365 Field Service solution for a client.

The client needs to be able to view the Parent Asset and Master Asset when the Primary Incident Customer Asset is associated to a work order. The asset data should not be stored directly on the work order. It should only be visible when the Customer Asset is selected.

Solution:
1. Create a quick view form on the work order.
2. Add the Parent Asset and Master Asset to the new quick view form.
3. Publish the customizations.

Does this meet the goal?

A.Yes

B.No

Answer: B

Explanation:

B is correct because creating a quick view form on the work order does not provide the necessary context of the Parent Asset and Master Asset in relation to the Primary Incident Customer Asset as per the client's requirements.

Firstly, while a quick view form enables viewing associated data, it does not fulfill the functional requirement of dynamically linking the Parent and Master Asset to the work order itself without direct storage on the work order. The inherent limitation is that a quick view form merely reflects information without maintaining a live associative relationship, which is essential for the scenario. Instead, an appropriate solution should involve configuring the entity relationships to ensure that the desired asset details appear automatically based on the primary asset context rather than through a static form.

Critical evaluation of alternatives highlights the inadequacy of solely relying on quick views:

1. **Relationship Configuration**: Utilizing relationship configurations to link assets to work orders inherently defines a dynamic connection that satisfies visibility without direct storage. This method allows for automated data retrieval without user intervention.
2. **Custom Business Rules**: Implementing custom business rules could facilitate visibility conditions based on asset selection, ensuring dynamic display of relevant information when the Primary Incident Customer Asset is chosen, which the quick view does not offer.
3. **Power Automate Flows**: Using Power Automate to push asset data visibility to the work order context dynamically could achieve the goal, overcoming any static representation limitations typical of quick views.

In conclusion, while the proposed method does offer some visual reference capability, it fails to meet the full functional requirement of effectively managing the data relationships integral to the client's operations.

References:

https://learn.microsoft.com/en-us/dynamics365/field-service/overview
https://learn.microsoft.com/en-us/dynamics365/customer-engagement/customize/quick-views
https://learn.microsoft.com/en-us/power-automate/connection-relationships

Question: 186 **Exam Heist**

Note: This question is part of a series of questions that present the same scenario. Each question in the series contains a unique solution that might meet the stated goals. Some question sets might have more than one correct solution, while others might not have a correct solution.

After you answer a question in this section, you will NOT be able to return to it. As a result, these questions will not appear in the review screen.

You are implementing a Microsoft Dynamics 365 Field Service solution for a client.

The client needs to be able to view the Parent Asset and Master Asset when the Primary Incident Customer Asset is associated to a work order. The asset data should not be stored directly on the work order. It should only be visible when the Customer Asset is selected.

Solution:
1. Create a quick view form on the Customer Asset.

2. Add the Parent Asset and Master Asset to the new quick view form.
3. Add the Customer Asset quick view form to the work order.
4. Publish the customizations.

Does this meet the goal?

A.Yes
B.No

Answer: A

Explanation:

This solution does meet the goal of allowing the client to view the Parent Asset and Master Asset when the Primary Incident Customer Asset is associated with a work order, without storing the asset data directly on the work order.

Question: 187 **Exam Heist**

Note: This question is part of a series of questions that present the same scenario. Each question in the series contains a unique solution that might meet the stated goals. Some question sets might have more than one correct solution, while others might not have a correct solution.

After you answer a question in this section, you will NOT be able to return to it. As a result, these questions will not appear in the review screen.

You are implementing a Microsoft Dynamics 365 Field Service solution for a client.

The client needs to be able to view the Parent Asset and Master Asset when the Primary Incident Customer Asset is associated to a work order. The asset data should not be stored directly on the work order. It should only be visible when the Customer Asset is selected.

Solution:
1. Create the Parent Asset and Master Asset on the work order.
2. Use Microsoft Power Automate to populate fields when the Customer Asset contains data.

Does this meet the goal?

A.Yes
B.No

Answer: B

Explanation:

This solution does not meet the goal as stated. The client's requirement is that the asset data should not be stored directly on the work order but should only be visible when the Customer Asset is selected. The proposed solution involves creating fields for the Parent Asset and Master Asset directly on the work order and then populating these fields using Power Automate when the Customer Asset contains data. This approach contradicts the requirement because it involves storing asset data directly on the work order.

Question: 188 **Exam Heist**

You are implementing Dynamics 365 Field Service. Your customer needs to understand how they can schedule the closest possible resource to a work order. The requirement further specifies it could be start of day from the company’s site or during the middle of the day from an existing work order.

You need to provide them with the settings they need to properly configure so the closest resource is found when using the schedule assistant.

What should you suggest to the customer?

A. Update the Starting Location to Organization Unit within Schedule Board Settings.
B. Update the filter on the Scheduler resource tool tips view.
C. Select the Real-Time Mode option in the Schedule Assistant filter window.
D. Update the Load Default Filters on the Schedule Assistant.

Answer: C

Explanation:

Correct option: C – Select the Real-Time Mode option in the Schedule Assistant filter window.

Why it works:

Real-Time Mode forces the Schedule Assistant to evaluate resources against the current context (including the work-order's location and timing) each time the schedule is refreshed.
It enables the "closest resource" logic to consider both the **starting location** (e.g., the company's site at the beginning of the day) and **dynamic mid-day shifts** from an existing work order, delivering the optimal resource match in real time.

Why the other options are unsuitable:

A – Update the Starting Location to Organization Unit within Schedule Board Settings – This only changes the default "starting point" for new schedules; it does not activate the real-time proximity calculation needed for mid-day switches.
B – Update the filter on the Scheduler resource tool-tips view – The tool-tips view is a visual aid; altering its filter does not affect the underlying scheduling engine's resource selection algorithm.
D – Update the Load Default Filters on the Schedule Assistant – Changing default filters merely pre-populates the view with static criteria; it does not enable the dynamic, real-time proximity search required for "closest resource" scenarios.

Implementation tip: In the Schedule Assistant dialog, enable **Real-Time Mode** and ensure the **"Use Current Location"** option is checked. This configures the assistant to continuously recalculate the nearest available resource based on the work-order's location and the current time, satisfying both start-of-day and mid-day scheduling needs.

Question: 189 **Exam Heist**

You need to make sure that only a specific set of resources are allowed to be scheduled to perform certain work orders.

Which type should you select when you create a resource requirement preference?

A.Must choose from
B.Preferred
C.Restricted
D.Auto-suggested

Answer: C

Explanation:

C. RestrictedWhen you need to ensure that only a specific set of resources are allowed to be scheduled to perform certain work orders, the "Restricted" type should be selected when creating a resource requirement preference. This type of requirement preference explicitly restricts the assignment of the work order to only the resources that are specified in the requirement. It ensures that the scheduling system does not consider resources outside of this specified set for the particular work order.

Question: 190 Exam Heist

You are installing the Microsoft Dynamics 365 Field Service mobile app for a customer.

You need to highlight the features that are available on the mobile app to the customer.

Which three features are available? Each correct answer presents a complete solution.

NOTE: Each correct selection is worth one point.

A.Route Schedule Optimization
B.Offline Capability
C.Guides
D.Capture Customer Signature
E.Barcode Scanning

Answer: BDE

Explanation:

RSO is typically used by a dispatcher and guides is a separate application. Both features require additional subscription.

Question: 191 Exam Heist

You are working for a heating, ventilation, and air conditioning (HVAC) service organization.

The field technicians in your organization are working in the Microsoft Dynamics 365 Field Service mobile app. The technicians report that they are able to access customer assets, but unable to access functional location and customer asset hierarchy in offline mode.

You need to ensure technicians can view the functional location and customer asset hierarchy in their mobile app.

What should you do?

A.Ensure there is internet connectivity in the mobile app.
B.Add the technicians to the mobile app’s offline profile.
C.Enable asset hierarchy for the mobile app.
D.Download offline data to the mobile app.

Answer: A

Explanation:

Customer asset hierarchies only available in online mode:"Technicians can view the functional location of a

work order in the Dynamics 365 Field Service mobile app. If the app is connected to the Internet, they can also view and interact with customer asset and functional location hierarchies.

"https://learn.microsoft.com/en-us/dynamics365/field-service/functional-locations#functional-locations-in-the-mobile-app

Question: 192 **Exam Heist**

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.

Answer: B

Explanation:

The correct answer is B, as permissions for specific entities in the Security role directly impact a user's ability to perform functions in the Dynamics 365 Field Service mobile app.

In Dynamics 365, security roles are the foundation for entity-level permissions, dictating what a user can view, create, update, and delete across various entities. Without the necessary permissions assigned within the security role, the technician may encounter limitations when attempting to access critical functionalities on the mobile app. Therefore, verifying the permissions for specific entities within the assigned security role ensures that the technician has the requisite access needed for their tasks.

Evaluation of Incorrect Options:

A. Checking the user's permissions to the mobile app is not sufficient since the mobile app permissions are inherently tied to the underlying security roles. If the security role lacks permissions, the mobile app permissions will be irrelevant.

C. While access to the Field Service model-driven app is important, it is the security role's specific permissions that govern the functionality within the app. Access alone does not guarantee operational capability.

D. Though field security profiles can limit access to specific fields, the issue reported pertains more broadly to the functional capabilities within the app, which are determined by the security role's entity permissions rather than specific field-level security.

In conclusion, ensuring that the user has the appropriate permissions defined in the security role is paramount for effective mobile app functionality.

References:

https://learn.microsoft.com/en-us/dynamics365/customer-engagement/admin/security-roles-overview
https://learn.microsoft.com/en-us/dynamics365/customer-engagement/admin/security-user-types
https://learn.microsoft.com/en-us/dynamics365/customer-engagement/developer/security-roles-entity-

permissions

Question: 193 **Exam Heist**

Contoso Ltd. is looking to improve the up time of their customer assets and also make better repair and maintenance decisions by tracking the service history.

Contoso wants metrics around the service history of each customer asset, including tracking performance for each scheduled maintenance per the service agreement. The metrics need to be displayed in the form of reports/dashboards.

You need to build the service history and achieve the requirements.

Which two actions should you perform? Each correct answer presents a complete solution.

NOTE: Each correct selection is worth one point.

A.Add the customer asset on the work order incident.
B.Add the customer asset on the agreement incident.
C.Use the audit history of each customer asset.
D.Use notes and the timeline feature.

Answer: AB

Explanation:

A.Add the customer asset on the work order incident.

B.Add the customer asset on the agreement incident.

Question: 194 **Exam Heist**

Your organization wants to use Connected Field Service for existing customer assets.

You install Connected Field Service and set up Azure IoT Central, but no alerts are being received in Dynamics 365 for the devices.

You need to find the issue and resolve it.

Which action should you choose?

A. Create the IoT Connected Device connection role to link devices to customer assets.
B. Register the device in Dynamics 365 Connected Field Service.
C. Configure the Create CFS alerts from IoT Central workflow within Dynamics 365.
D. Check that the Create CFS alerts from IoT Central within Microsoft Flow Automate is set up properly.

Answer: D

Explanation:

Justification

Correct option – D.Check that the “Create CFS alerts from IoT Central within Microsoft Flow Automate” is set up properly.

Connected Field Service (CFS) relies on a PowerAutomate (Flow) connector to translate IoT Central alert events into Dynamics365 Field Service alerts.
If the Flow is not configured, disabled, or lacks the required permissions (e.g., missing “Create Alert” action on the CFS entity), IoT Central can publish telemetry but no alerts will appear in Dynamics365.
Verifying the Flow’s trigger (IoT Central alert), the “Create CFS alert” action, and the connection credentials directly addresses the symptom of “no alerts being received.”

Why the other options are less suitable

A. Create the IoT Connected Device connection role to link devices to customer assets.

This step is required only when you need to associate a device with a specific asset in the asset hierarchy. It does not affect the alert-generation pipeline; without a proper Flow, alerts will still not be created even if the role is defined.
B. Register the device in Dynamics365 Connected Field Service.

Device registration is a prerequisite for any IoT integration, but once the device is registered, the missing link is the automated translation of IoT Central alerts into CFS alerts. Registration alone does not guarantee alert delivery.
C. Configure the “Create CFS alerts from IoT Central workflow within Dynamics365.”

This wording suggests a native Dynamics365 workflow, which does not exist for IoT Central-to-CFS integration. The actual mechanism is a PowerAutomate flow; referencing a non-existent workflow can mislead the troubleshooter and does not target the real configuration point.

Conclusion
The root cause is the missing or mis-configured PowerAutomate flow that bridges IoT Central alerts to Dynamics365 Field Service alerts. Confirming and correcting the “Create CFS alerts from IoT Central within Microsoft Flow Automate” setup (OptionD) directly resolves the issue, whereas the other steps address ancillary configuration aspects that do not impact alert generation.

Question: 195 **Exam Heist**

You need to register an IoT device so that it can communicate with Microsoft Dynamics 365 Field Service.

Which two steps should you take? Each correct answer presents part of the solution.

NOTE: Each correct selection is worth one point.

A.Associate an IoT device to a customer asset.
B.In Azure IoT Central, enter a device ID value and select Register Devices.
C.Create the IoT Devices in Dynamics 365 Field Service, then import them as devices in Azure IoT Central.
D.In Azure IoT Hub, enter a device ID value and select Register Devices.
E.In Dynamics 365 Field Service, create a new IoT device and select Register.

Answer: AE

Explanation:

AE is correct because associating an IoT device with a customer asset ensures it is part of a predefined structure within Dynamics 365, while registering the device in Azure IoT Central facilitates its communication capabilities.

Justification for A: Associating an IoT device to a customer asset creates the necessary linkage between

physical devices and service management workflows within Dynamics 365 Field Service. This association ensures that service requests, maintenance, and analytics are effectively tied to the respective customer and asset.

Justification for E: Creating a new IoT device directly within Dynamics 365 and selecting the register option is crucial for establishing the device's identity and enabling tracking. This process integrates the device into the Field Service system, ensuring data from the device can be collected, managed, and acted upon effectively.

Evaluation of B: Entering a device ID in Azure IoT Central and selecting "Register Devices" implies a level of device management that does not directly associate the device with customer assets in Dynamics 365 Field Service. While it's a step toward registration, without the integration with asset management in Dynamics, it fails to establish the comprehensive service linkage needed.

Evaluation of C: Although creating IoT devices in Dynamics and importing them into Azure IoT Central is a valid approach, this disrupts the streamlined process required for immediate registration. The dual-step process increases complexity, which can lead to oversights in ensuring devices are properly configured within Dynamics 365.

Evaluation of D: Registering devices directly within Azure IoT Hub lacks the necessary connection to customer assets within Dynamics 365, resulting in missed opportunities for comprehensive service management and real-time data integration needed in Field Service applications.

References:

1. https://docs.microsoft.com/en-us/dynamics365/field-service/iot-setup
2. https://docs.microsoft.com/en-us/azure/iot-central/iot-central-overview
3. https://learn.microsoft.com/en-us/azure/iot-hub/iot-hub-devguide-sdks

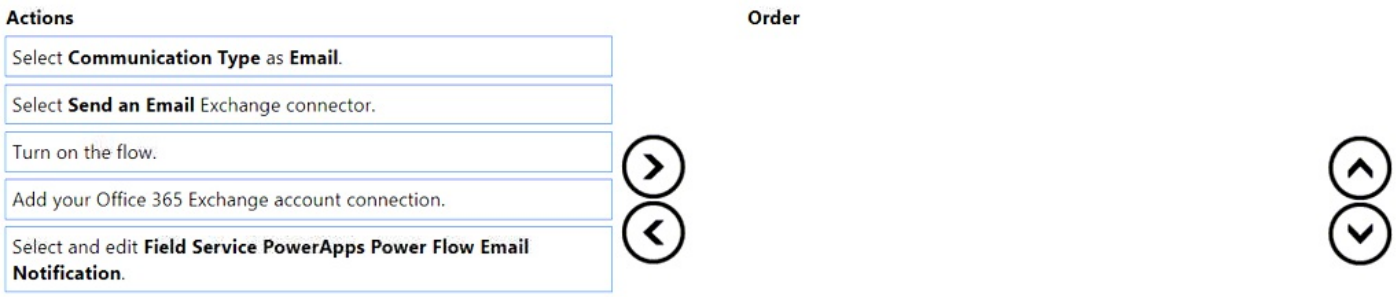
Question: 196 **Exam Heist**

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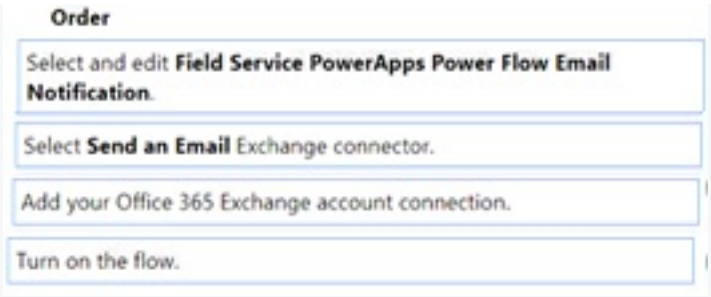
A customer experience manager wants to send unique portal links to each of their customers by email.

You need to enable an existing Microsoft Power Automate flow to send emails with unique links.

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.



Answer:



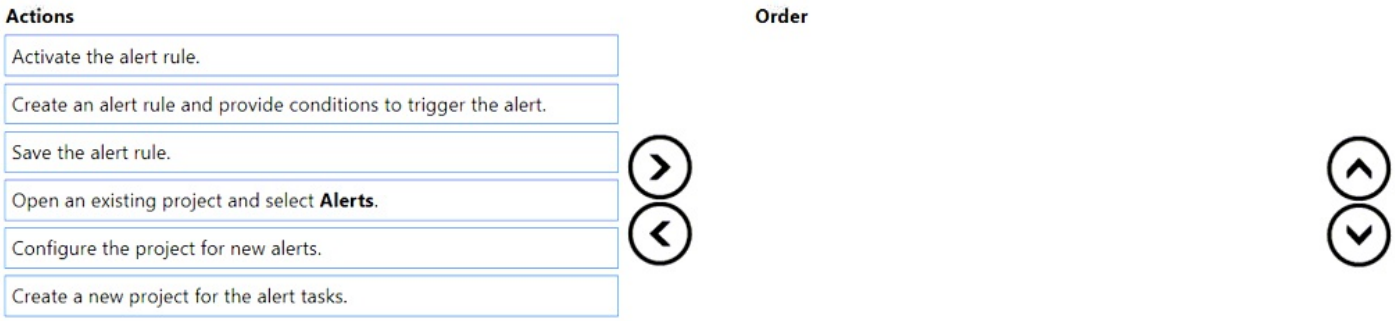
Question: 197 Exam Heist

DRAG DROP
-

Your company wants to use Microsoft Dynamics 365 Customer Voice to obtain feedback on their customers' on-site service experience.

You need to create an alert based on the survey results.

Which three 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.



Answer:



Explanation:

Open an existing project and select alerts.

create an alert rule and provide conditions to trigger the alert.

Save the alert rule.

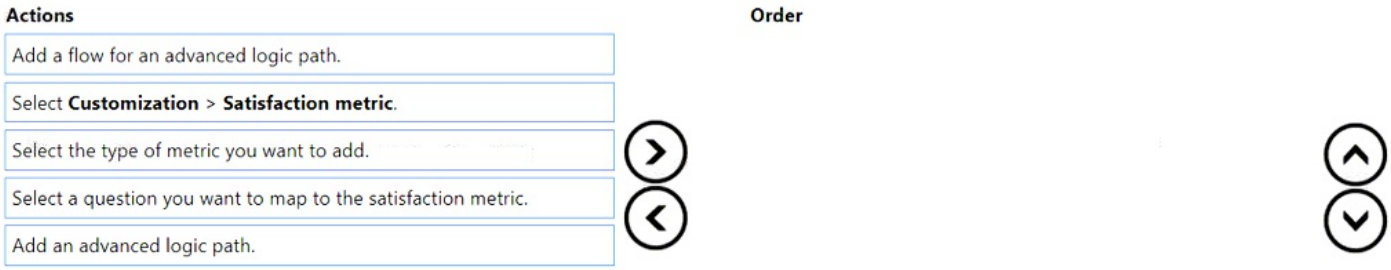
Question: 198 Exam Heist

DRAG DROP
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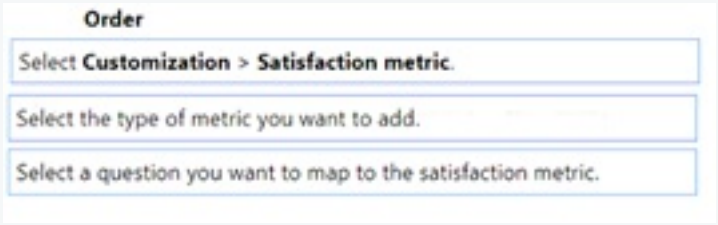
Your organization recently started using Dynamics 365 Customer Voice to capture surveys after completing on-site window installations. The customer experience manager wants to add a new satisfaction metric to capture the overall opinion of the customer.

You need to add a new satisfaction metric to the survey.

Which three 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.



Answer:



Question: 199 **Exam Heist**

Case study -

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Overview. Company structure -

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

Litware, Inc. has stores located throughout the United States and Canada. The company has three main types of stores:

1. DIY Stores are retail and contractor stores with supply items for DIY projects.
•Offer electrical, lightning and other home improvement items.
•Only offer delivery and installation services for major appliances.

2. Pro Stores offer design ideas for major home renovations.
•Staffed with design experts for every major category, expert installation services, service technicians, and site coordinators.

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.

Overview. Staff -

Each type of store has a different combination of designers, service technicians and installers.

DIY Stores -
• Installers
- Work 8am-6pm Monday to Friday.
- Saturdays and Sundays are generally off days.
• Delivery
- Pick up at the local warehouse for each store.
- Delivery personnel have a rotating work schedule. Monday to Friday every other week. Wednesday to Sunday every other week.

Pro Stores -
• Designers
- Work various hours and days of the week.
- Assigned to a department based on skills and expertise.
• Installers
- Work 8am-6pm Monday to Friday.
- Assigned to a geographic region.
• Repair Technicians
- Normal work hours 8am-6pm Monday to Friday.
- Nights and weekends for emergencies only, based on availability.
- These are all subcontractors.

Home Improvement Stores -
• Designers
- Assigned to a department based on skills and expertise.
• Delivery
- Pick up at the local warehouse for each store.
- Delivery personnel have a rotating work schedule. Monday to Friday every other week. Wednesday to Sunday every other week.
• Installers
- Work 8am-6pm Monday to Friday.
- Assigned to multiple stores in a geographic region.
• Repair Technicians
- Normal work hours 8am-6pm Monday to Friday.
- Nights and weekends for emergencies only, based on availability.
- These are all subcontractors.
• Dispatchers
- Assigned to all territories in the region.
- 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 will have full-service licenses, while subcontractors will not.

Overview. Regions -

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

The United States regions are:



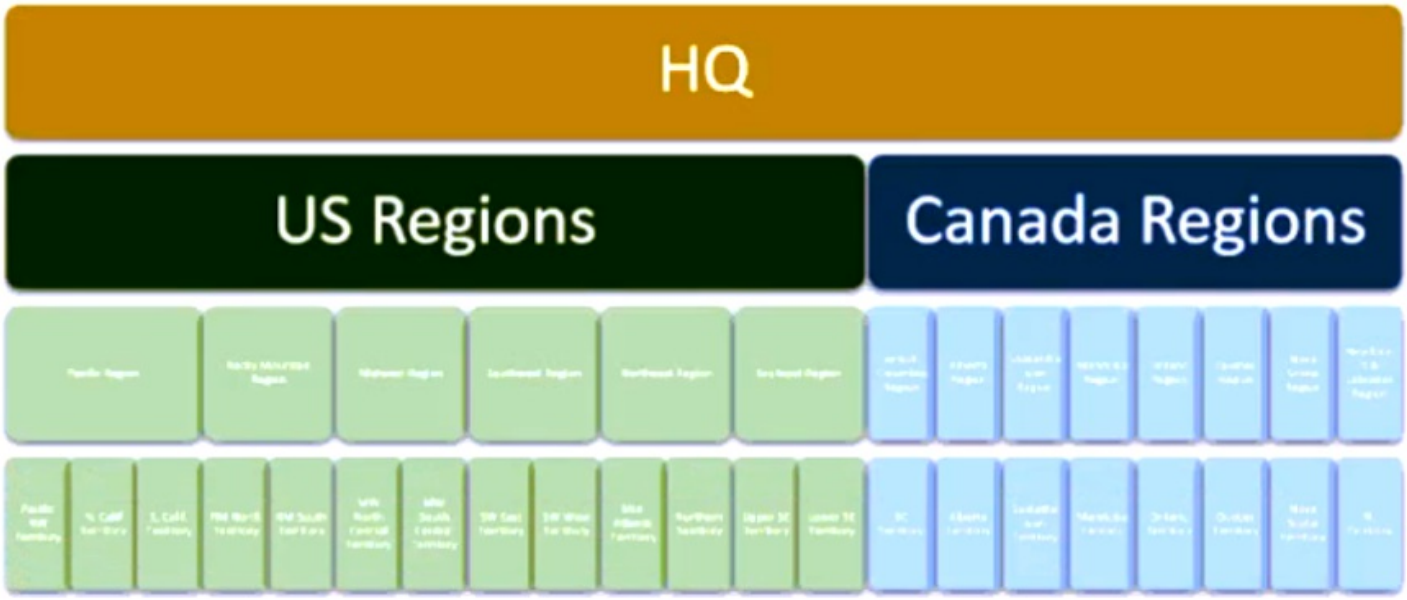
Canadian regions are broken down by province where Litware, Inc. either has stores or provides services:



Existing Environment. 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:



Existing Environment. 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.

Existing Environment. Customer base

Currently all customers and their 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.
•Some are Non-Profit Organizations (NPOs) and they receive a flat 15% discount.

Requirements. 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, NPO, 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.

System -
•Geocoding will be activated throughout the system.
•Territories will be used for Accounts, Resources and Work Orders.
•Enable SharePoint integration.

Requirements. 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.
- Certifications set to expire over the next 120 days should show highlighted in Yellow.
- 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.
- 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.

Accounts -
•NPO customers should be assigned the NPO pricing.
•NPO customers are tax exempt. They are the only customers that do not get charged tax on products or services.
•Construction-Based customers should be assigned the Construction-based pricing.

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

Answer: B

Question: 200 **Exam Heist**

DRAG DROP
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Case study
-

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Overview. 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.

Overview. 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.

Existing environment. 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	• Global HQ • North America HQ	• Executive Management • Sales Executives
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Montreal, QC	North America Canada Regional Office	• Sales Reps • Sales Managers • Regional Sales Manager
City of Manila, Philippines	• APAC HQ • Philippines Regional Office	• Sales Reps • Sales Managers • Sales Director • Regional Sales Manager • Executive Management
Kolkata, India	• APAC India Regional Office	• Sales Reps • Sales Managers • Regional Sales Manager

Existing environment. Data management structure

Contoso's sales teams currently can only see data within their region. HQ locations for each region have visibility to data for all locations in their regions only. All of the data rolls-up to Contoso Global HQ for executive management reporting. Sales Reps who work with global accounts struggle to obtain the data they need to support their clients.

The current data access structure appears as follows:



Existing environment. Field Service structure

Contoso's 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.

Existing environment. 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.

Requirements. 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.

Requirements. 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.

Requirements. 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.

You need to create a Preventative Maintenance Agreement that meets Contoso standards and requirements.

Which five steps 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.



Answer:



Question: 201 **Exam Heist**

DRAG DROP
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Case study
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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.

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Contoso plans to keep the current data structure and extend it to the new Field Service functionality.

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• Dispatchers will be able to see all work orders and bookings for the region.

Requirements. Planned changes
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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.

Requirements. Technical requirements

Contoso identified the following technical requirements:

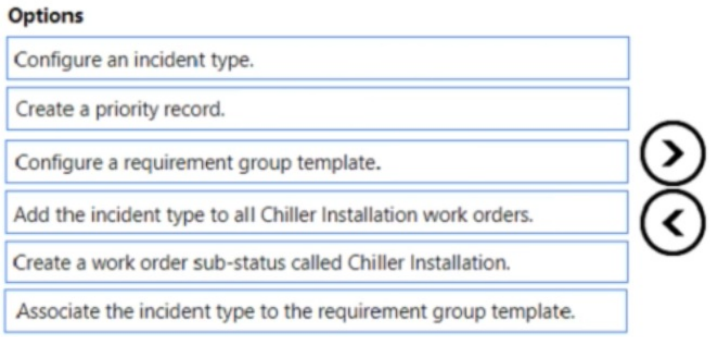
1. Invoicing
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o The system must track the price of resources based on holidays and after-hours scenarios at a rate of one and a half times the normal billing rate.
o Travel time is billable for all field service technicians, pay type Travel, which should 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.

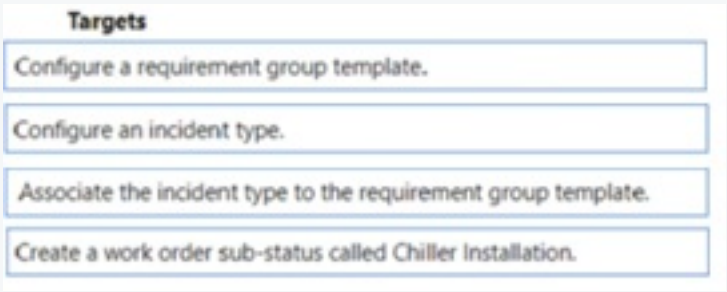
A dispatcher in Indianapolis, Indiana receives an emergency service call on July 4 and assigns the booking to a third-party contractor, attaching the emergency SLA The contractor receives notification of the work order and travels from his home to the job site, arriving 3.5 hours after the work was assigned.

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.

What do you need to configure to handle this scenario? Put the required steps in the correct order.



Answer:



Question: 202 **Exam Heist**

Case study -

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To start the case study -

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Overview. 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.

Overview. 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.

Existing environment. 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	• Global HQ • North America HQ	• Executive Management • Sales Executives
Chicago, IL	North America Midwest Regional Office	• Sales Reps • Sales Managers • Regional Sales Manager
Los Angeles, CA	North America West Coast Regional Office	• Sales Reps • Sales Managers • Regional Sales Manager
New York, NY	North America East Coast Regional Office	• Sales Reps • Sales Managers • Regional Sales Manager
Montreal, QC	North America Canada Regional Office	• Sales Reps • Sales Managers • Regional Sales Manager
City of Manila, Philippines	• APAC HQ • Philippines Regional Office	• Sales Reps • Sales Managers • Sales Director • Regional Sales Manager • Executive Management
Kolkata, India	• APAC India Regional Office	• Sales Reps • Sales Managers • Regional Sales Manager

Existing environment. Data management structure

Contoso's sales teams currently can only see data within their region. HQ locations for each region have visibility to data for all locations in their regions only. All of the data rolls-up to Contoso Global HQ for executive management reporting. Sales Reps who work with global accounts struggle to obtain the data they need to support their clients.

The current data access structure appears as follows:



Existing environment. Field Service structure

Contoso's 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.

Existing environment. 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.

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o Geocoding will be activated throughout the system.

Requirements. Technical requirements

Contoso identified the following technical requirements:

1. Invoicing
o Auto creation of invoices upon work completion.
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Contoso. Ltd. 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. Inspection
B. Returns
C. Preventative Maintenance
D. Installation
E. Agreement

Answer: ACD

Question: 203 **Exam Heist**

DRAG DROP
-

Case study
-

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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.

Record types

- Work Order / Booking
- Invoice
- Customer Asset

Answer Area

Statements	Record types
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	

Answer:

Answer Area

Statements	Record types
Travel time charged from the third-party Organizational Unit Address to the jobsite	Invoice
Two new records created, one for each chiller	Customer Asset
One Product with a status of **Used**	Work Order / Booking
Labor time charged for 2 hours @ 1.5 time	Invoice
Warning message saying the SLA was exceeded	Work Order / Booking

Question: 204 **Exam Heist**

DRAG DROP
-

Case study
-

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Overview. Company structure
-

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

Litware, Inc. has stores located throughout the United States and Canada. The company has three main types of stores:

1. DIY Stores are retail and contractor stores with supply items for DIY projects.
•Offer electrical, lightning and other home improvement items.
•Only offer delivery and installation services for major appliances.

2. Pro Stores offer design ideas for major home renovations.
•Staffed with design experts for every major category, expert installation services, service technicians, and site coordinators.

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.

Overview. Staff
-

Each type of store has a different combination of designers, service technicians and installers.

DIY Stores
-
• Installers
- Work 8am-6pm Monday to Friday.
- Saturdays and Sundays are generally off days.
• Delivery
- Pick up at the local warehouse for each store.
- Delivery personnel have a rotating work schedule. Monday to Friday every other week. Wednesday to Sunday every other week.

Pro Stores
-
• Designers
- Work various hours and days of the week.
- Assigned to a department based on skills and expertise.
• Installers
- Work 8am-6pm Monday to Friday.
- Assigned to a geographic region.
• Repair Technicians
- Normal work hours 8am-6pm Monday to Friday.
- Nights and weekends for emergencies only, based on availability.
- These are all subcontractors.

Home Improvement Stores
-
• Designers
- Assigned to a department based on skills and expertise.
• Delivery

- Pick up at the local warehouse for each store.
- Delivery personnel have a rotating work schedule. Monday to Friday every other week. Wednesday to Sunday every other week.
• Installers
- Work 8am-6pm Monday to Friday.
- Assigned to multiple stores in a geographic region.
• Repair Technicians
- Normal work hours 8am-6pm Monday to Friday.
- Nights and weekends for emergencies only, based on availability.
- These are all subcontractors.
• Dispatchers
- Assigned to all territories in the region.
- 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 will have full-service licenses, while subcontractors will not.

Overview. Regions
-

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

The United States regions are:



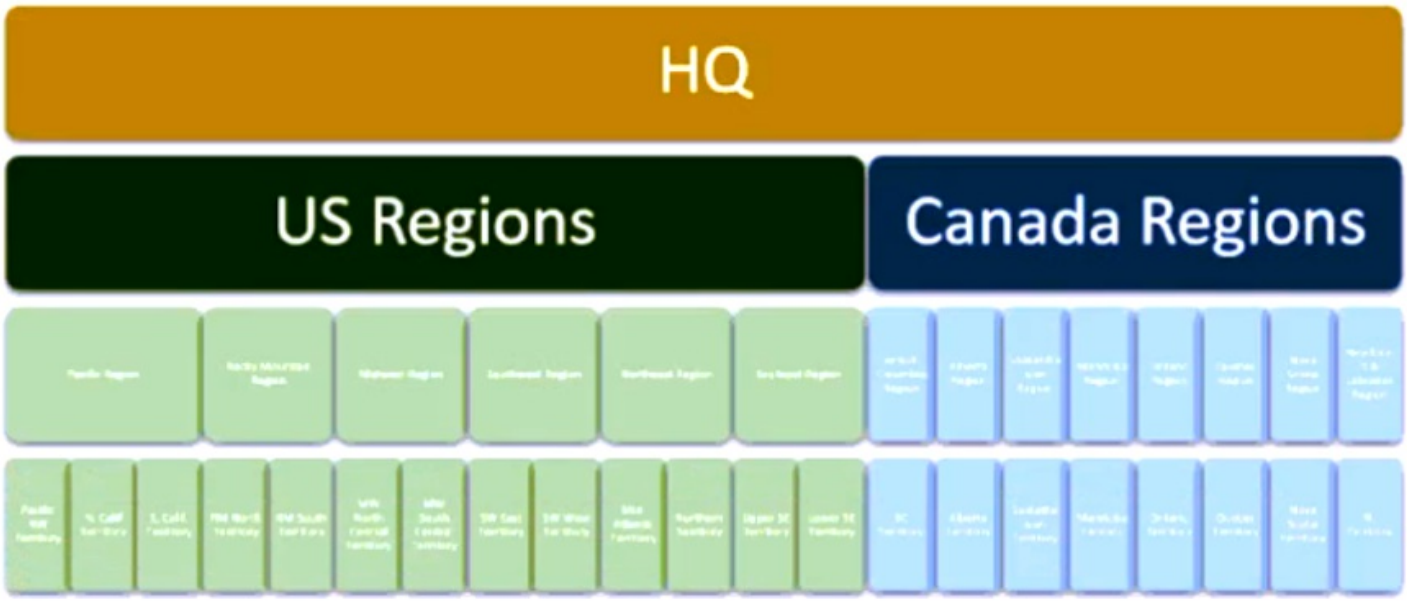
Canadian regions are broken down by province where Litware, Inc. either has stores or provides services:



Existing Environment. 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:



Existing Environment. 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.

Existing Environment. Customer base

Currently all customers and their 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.
•Some are Non-Profit Organizations (NPOs) and they receive a flat 15% discount.

Requirements. 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, NPO, 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.

System
-
•Geocoding will be activated throughout the system.
•Territories will be used for Accounts, Resources and Work Orders.
•Enable SharePoint integration.

Requirements. 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.
- Certifications set to expire over the next 120 days should show highlighted in Yellow.
- 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.
- 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.

Accounts
-
•NPO customers should be assigned the NPO pricing.
•NPO customers are tax exempt. They are the only customers that do not get charged tax on products or services.
•Construction-Based customers should be assigned the Construction-based pricing.

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.

Configurations

Work Order Type	Incident Type
Business Rule	Service Level Agreement
Booking Rule	Booking Alert
Resource Schedule Optimization	

Answer Area

Categories	Configurations
Classify work order for HVAC Down.	
Automatically set work order Priority to HIGH for HVAC Down issues. Do not allow Priority to be changed.	
Assign HVAC down work order within 1 hour and have service tech onsite within 2 hours.	
Do not allow HVAC booking to be moved once a resource is assigned.	

Answer:

Answer Area

Categories	Configurations
Classify work order for HVAC Down.	Work Order Type
Automatically set work order Priority to HIGH for HVAC Down issues. Do not allow Priority to be changed.	Incident Type
Assign HVAC down work order within 1 hour and have service tech onsite within 2 hours.	Booking Alert
Do not allow HVAC booking to be moved once a resource is assigned.	Booking Rule

Question: 205 **Exam Heist**

Case study -

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Overview. Company structure -

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

Litware, Inc. has stores located throughout the United States and Canada. The company has three main types of stores:

1. DIY Stores are retail and contractor stores with supply items for DIY projects.
•Offer electrical, lightning and other home improvement items.
•Only offer delivery and installation services for major appliances.

2. Pro Stores offer design ideas for major home renovations.
•Staffed with design experts for every major category, expert installation services, service technicians, and site coordinators.

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.

Overview. Staff -

Each type of store has a different combination of designers, service technicians and installers.

DIY Stores -
• Installers
- Work 8am-6pm Monday to Friday.
- Saturdays and Sundays are generally off days.
• Delivery
- Pick up at the local warehouse for each store.
- Delivery personnel have a rotating work schedule. Monday to Friday every other week. Wednesday to Sunday every other week.

Pro Stores -
• Designers
- Work various hours and days of the week.
- Assigned to a department based on skills and expertise.
• Installers
- Work 8am-6pm Monday to Friday.
- Assigned to a geographic region.
• Repair Technicians
- Normal work hours 8am-6pm Monday to Friday.
- Nights and weekends for emergencies only, based on availability.
- These are all subcontractors.

Home Improvement Stores -
• Designers
- Assigned to a department based on skills and expertise.
• Delivery

- Pick up at the local warehouse for each store.
- Delivery personnel have a rotating work schedule. Monday to Friday every other week. Wednesday to Sunday every other week.
• Installers
- Work 8am-6pm Monday to Friday.
- Assigned to multiple stores in a geographic region.
• Repair Technicians
- Normal work hours 8am-6pm Monday to Friday.
- Nights and weekends for emergencies only, based on availability.
- These are all subcontractors.
• Dispatchers
- Assigned to all territories in the region.
- 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 will have full-service licenses, while subcontractors will not.

Overview. Regions -

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

The United States regions are:



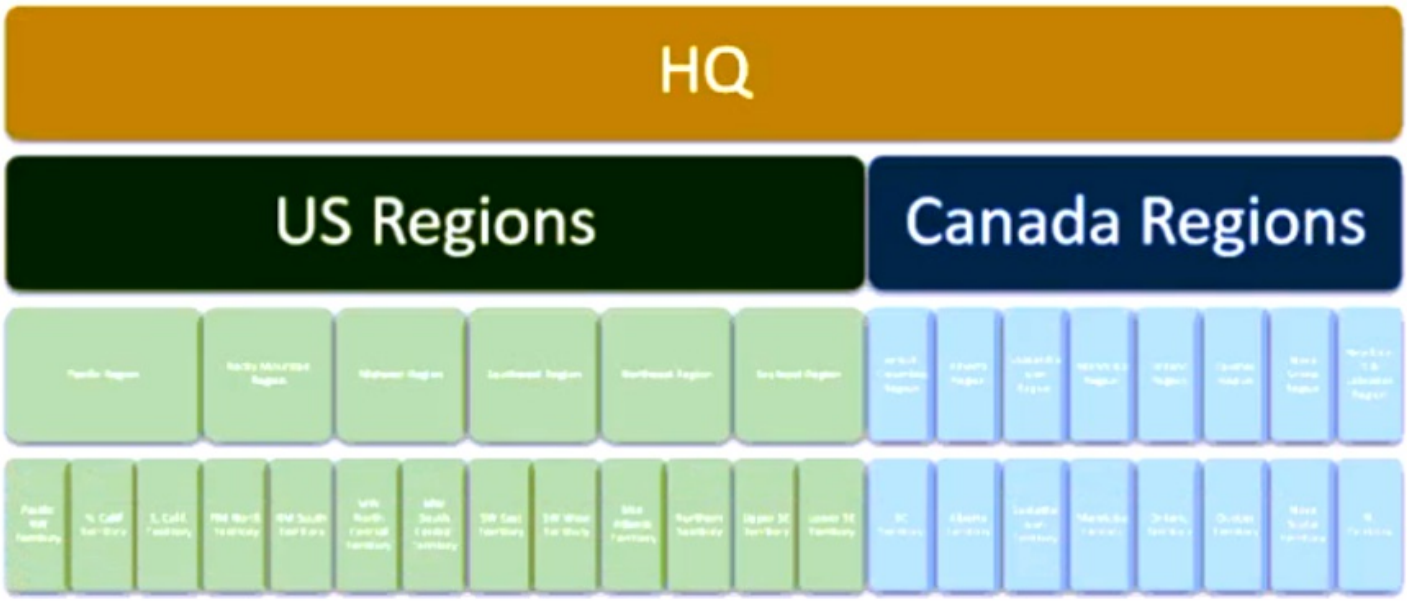
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•Implement company holidays for US and Canada.
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Optimize resource schedules -
•Access to jobs assigned for the day.
•Specialty equipment scheduled on work orders as needed.

System -
•Geocoding will be activated throughout the system.
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Requirements. 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.
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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.

Accounts -
•NPO customers should be assigned the NPO pricing.
•NPO customers are tax exempt. They are the only customers that do not get charged tax on products or services.
•Construction-Based customers should be assigned the Construction-based pricing.

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 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.

B.Create a Delivery Charge Product Record. Set Field Service Product Type to Service.

C.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.

D.Add the Delivery Charge product to the delivery incident type. Set Quantity to 1.

E.Create a Delivery Charge Product Record. Set Field Service Product Type to Non-Inventory.

Answer: ABD

Question: 206 **Exam Heist**

DRAG DROP
-

Case study
-

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Overview. 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.

Overview. 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.

Existing environment. 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	• Global HQ • North America HQ	• Executive Management • Sales Executives
Chicago, IL	North America Midwest Regional Office	• Sales Reps • Sales Managers • Regional Sales Manager
Los Angeles, CA	North America West Coast Regional Office	• Sales Reps • Sales Managers • Regional Sales Manager
New York, NY	North America East Coast Regional Office	• Sales Reps • Sales Managers • Regional Sales Manager
Montreal, QC	North America Canada Regional Office	• Sales Reps • Sales Managers • Regional Sales Manager
City of Manila, Philippines	• APAC HQ • Philippines Regional Office	• Sales Reps • Sales Managers • Sales Director • Regional Sales Manager • Executive Management
Kolkata, India	• APAC India Regional Office	• Sales Reps • Sales Managers • Regional Sales Manager

Existing environment. Data management structure

Contoso's sales teams currently can only see data within their region. HQ locations for each region have visibility to data for all locations in their regions only. All of the data rolls-up to Contoso Global HQ for executive management reporting. Sales Reps who work with global accounts struggle to obtain the data they need to support their clients.

The current data access structure appears as follows:



Existing environment. Field Service structure

Contoso's 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.

Existing environment. 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.

Requirements. 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.

Requirements. 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.

Requirements. Technical requirements

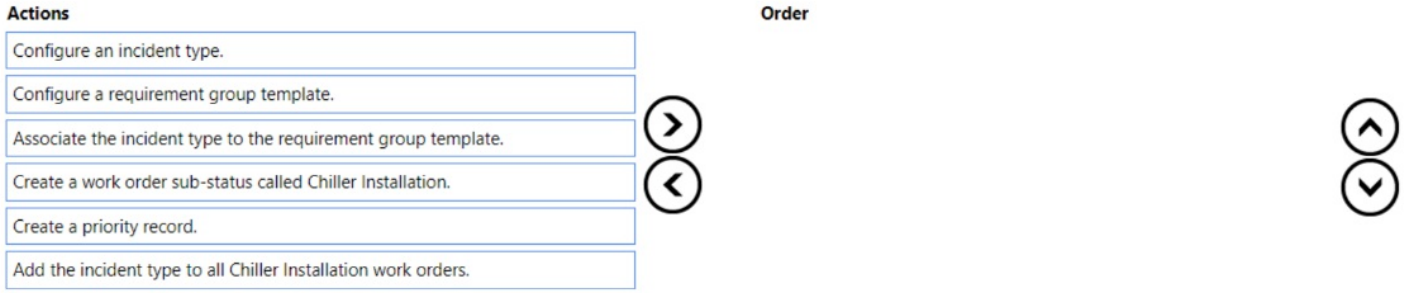
Contoso identified the following technical requirements:

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.

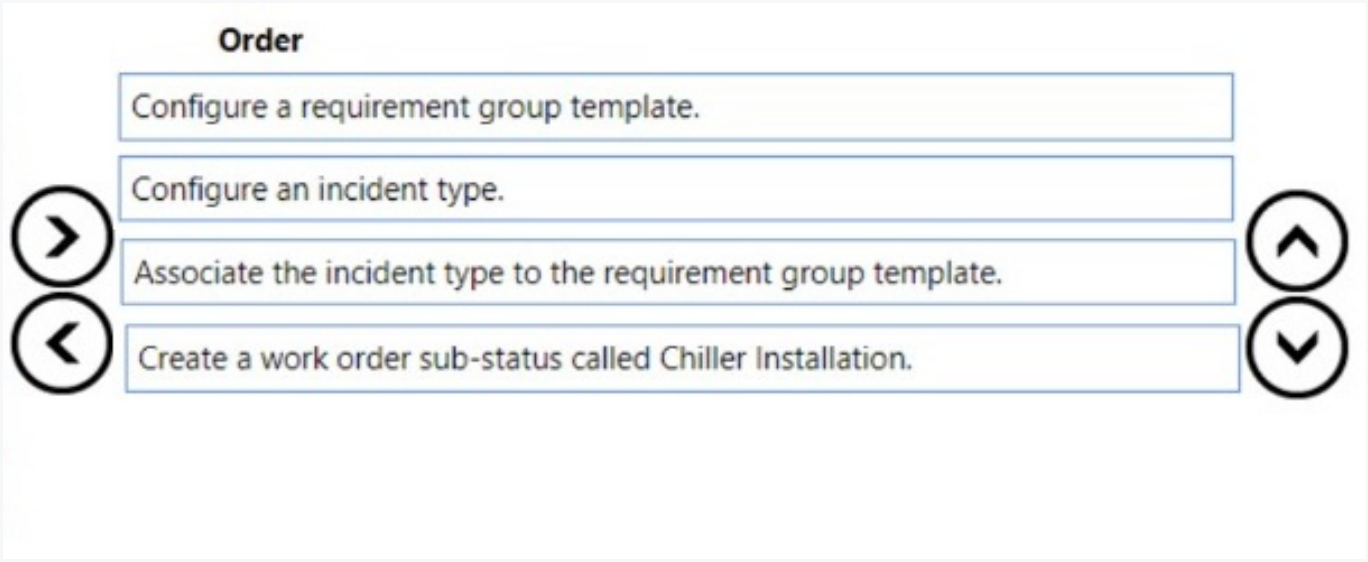
When Contoso installs chillers for customers, they are expected to follow the same procedure for each install.

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.



Answer:



Question: 207 **Exam Heist**

DRAG DROP
-

Case study
-

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2. Pro Stores offer design ideas for major home renovations.
•Staffed with design experts for every major category, expert installation services, service technicians, and site coordinators.

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.

Overview. Staff
-

Each type of store has a different combination of designers, service technicians and installers.

DIY Stores
-
• Installers
- Work 8am-6pm Monday to Friday.
- Saturdays and Sundays are generally off days.
• Delivery
- Pick up at the local warehouse for each store.
- Delivery personnel have a rotating work schedule. Monday to Friday every other week. Wednesday to Sunday every other week.

Pro Stores
-
• Designers
- Work various hours and days of the week.
- Assigned to a department based on skills and expertise.
• Installers
- Work 8am-6pm Monday to Friday.
- Assigned to a geographic region.
• Repair Technicians
- Normal work hours 8am-6pm Monday to Friday.
- Nights and weekends for emergencies only, based on availability.
- These are all subcontractors.

Home Improvement Stores
-
• Designers
- Assigned to a department based on skills and expertise.
• Delivery
- Pick up at the local warehouse for each store.
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every other week.
• Installers
- Work 8am-6pm Monday to Friday.
- Assigned to multiple stores in a geographic region.
• Repair Technicians
- Normal work hours 8am-6pm Monday to Friday.
- Nights and weekends for emergencies only, based on availability.
- These are all subcontractors.
• Dispatchers
- Assigned to all territories in the region.
- 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 will have full-service licenses, while subcontractors will not.

Overview. Regions
-

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

The United States regions are:



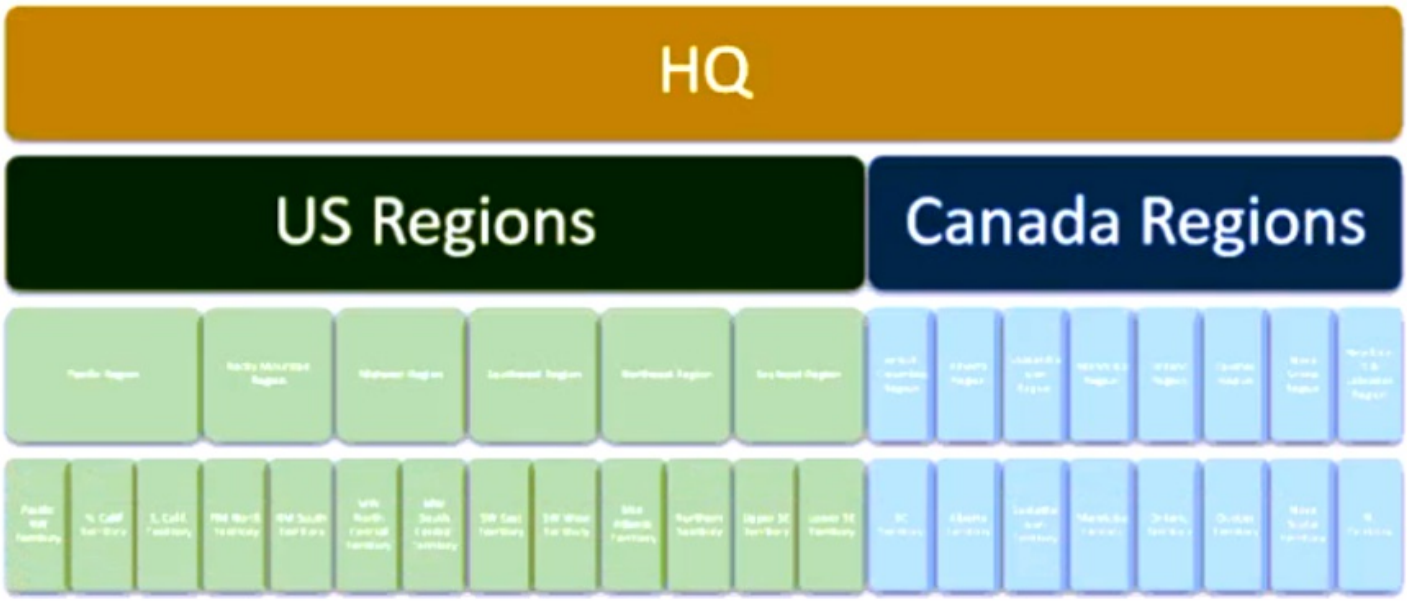
Canadian regions are broken down by province where Litware, Inc. either has stores or provides services:



Existing Environment. 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:



Existing Environment. 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.

Existing Environment. Customer base

Currently all customers and their 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.
•Some are Non-Profit Organizations (NPOs) and they receive a flat 15% discount.

Requirements. 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, NPO, 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.

System
-
•Geocoding will be activated throughout the system.
•Territories will be used for Accounts, Resources and Work Orders.
•Enable SharePoint integration.

Requirements. 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.
- Certifications set to expire over the next 120 days should show highlighted in Yellow.
- 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.
- 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.
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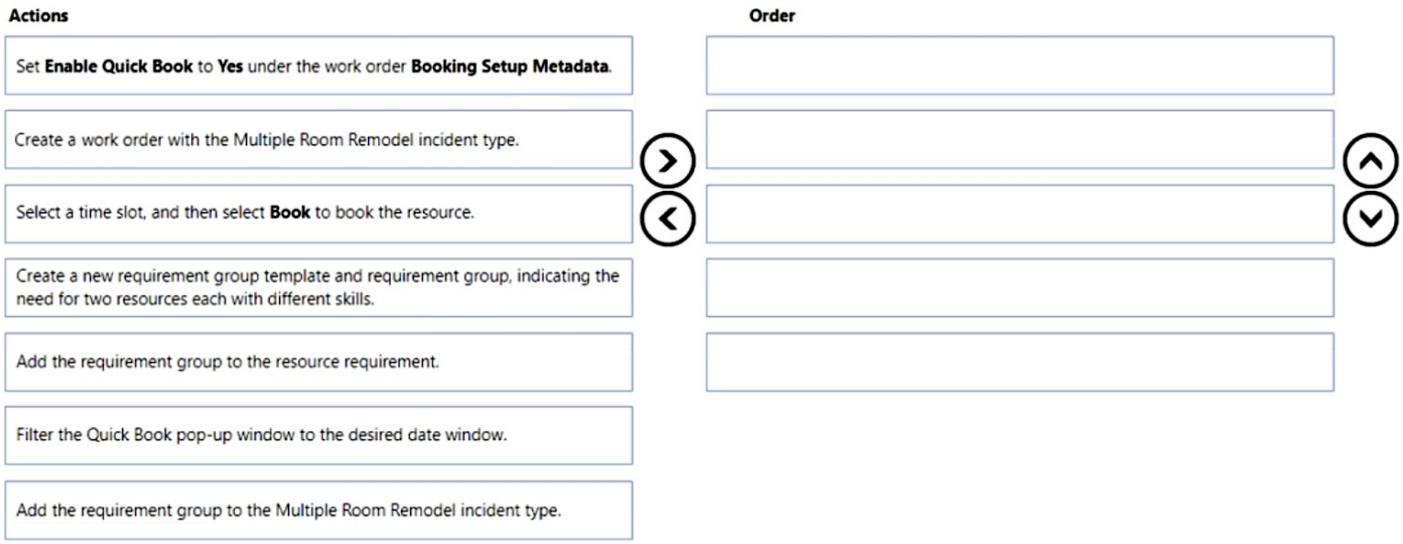
Accounts
-
•NPO customers should be assigned the NPO pricing.
•NPO customers are tax exempt. They are the only customers that do not get charged tax on products or services.
•Construction-Based customers should be assigned the Construction-based pricing.

Litware, Inc. designers sometimes have to schedule an experienced technician and trainee to go out to a customer's home to take measurements.

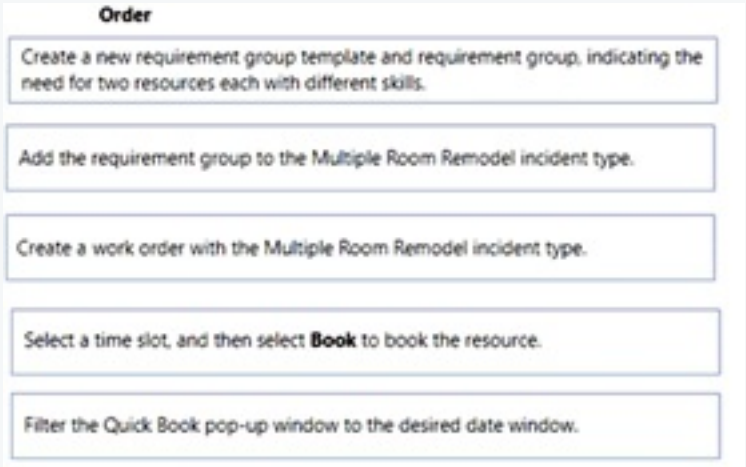
One of their customers, wants a kitchen and bathroom remodel completed during the same timeframe. The customer has asked for Litware, Inc. to have both measurements completed at the same time.

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.



Answer:



Question: 208 **Exam Heist**

DRAG DROP
-

Case study
-

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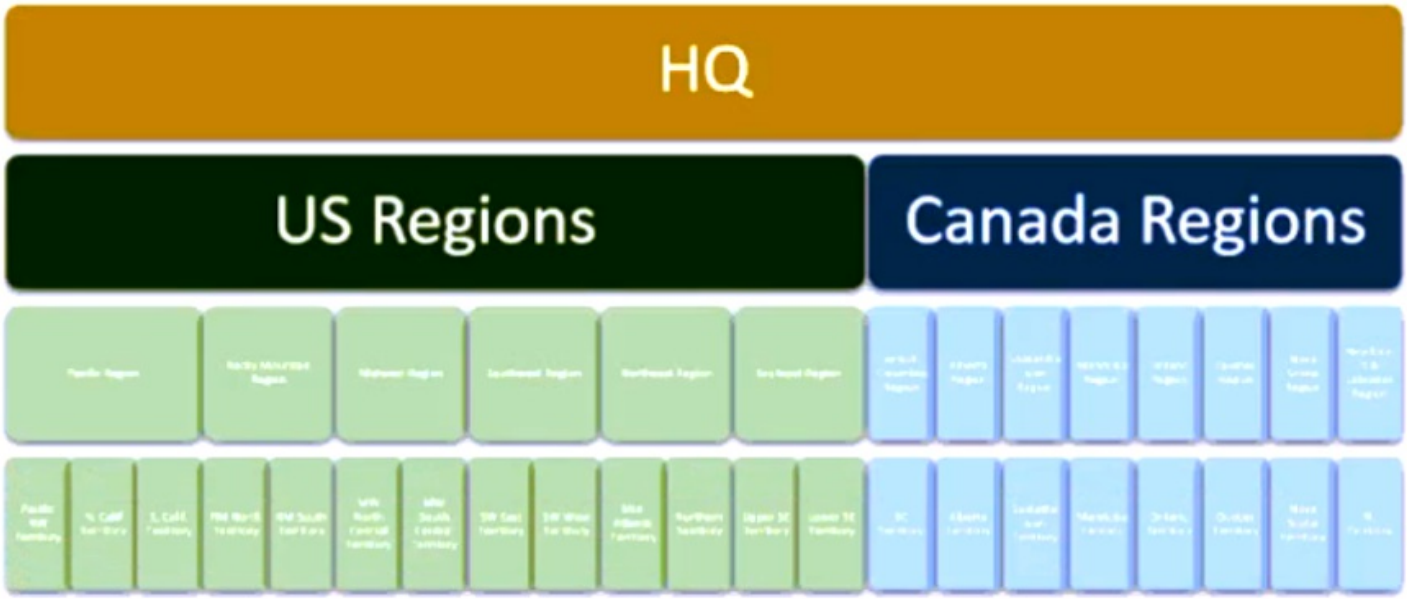
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Optimize resource schedules
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•Access to jobs assigned for the day.
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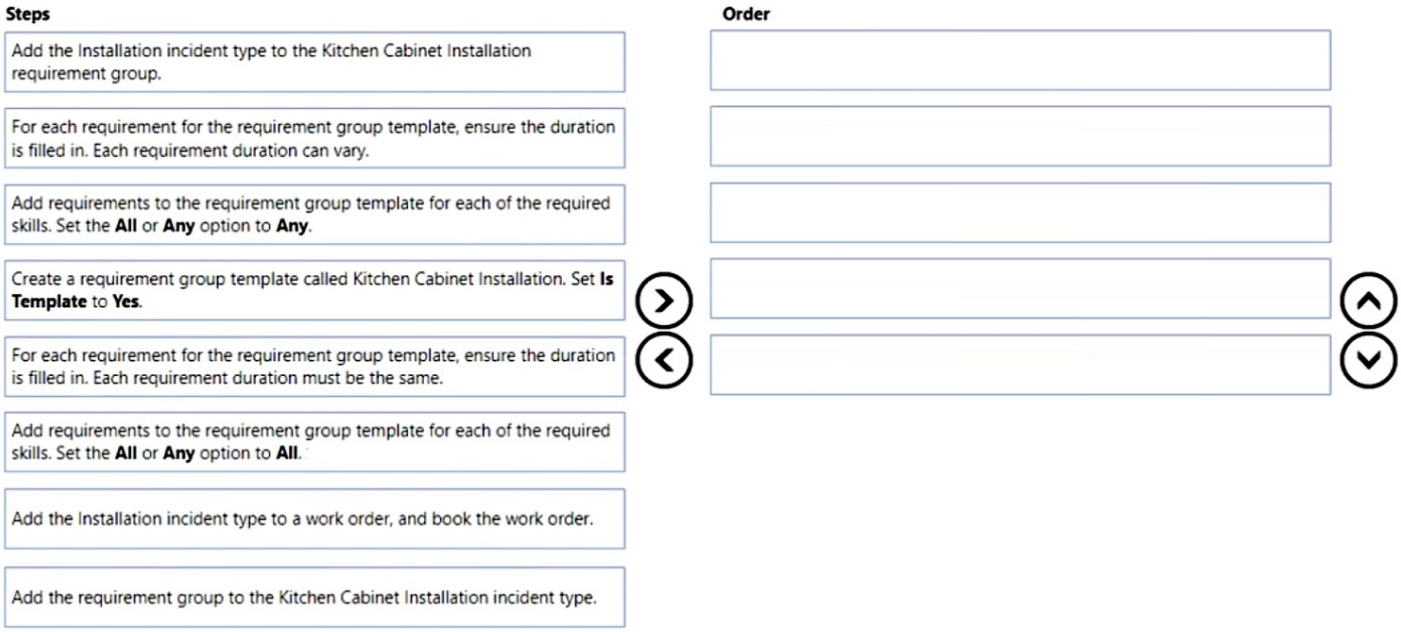
Security and access
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•Technicians in the field should only see work orders scheduled for today.
•Field Service administrators need the ability to update the defaults for the schedule assistant.

Accounts
-
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•NPO customers are tax exempt. They are the only customers that do not get charged tax on products or services.
•Construction-Based customers should be assigned the Construction-based pricing.

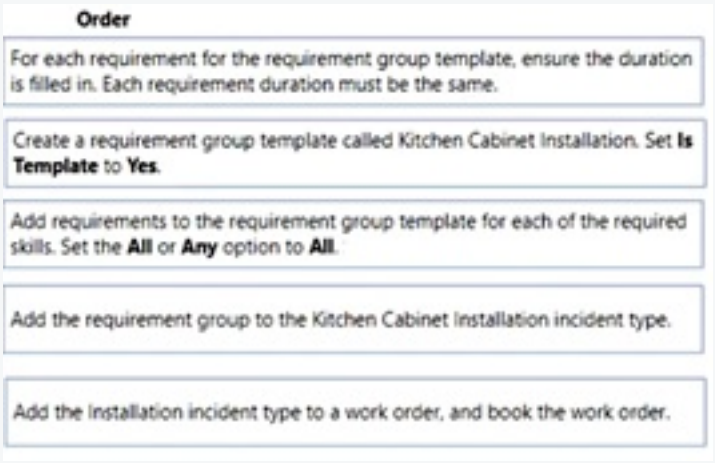
Litware, Inc. needs your company to suggest a best practice for implementing multi-resource work order scheduling for kitchen cabinet installation jobs, that includes a new, inexperienced technician.

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

Using the requirements provided, which five steps 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.



Answer:



Question: 209 **Exam Heist**

DRAG DROP
-

Case study
-

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-

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North America (Canada, US, Mexico) Territories
• US – 600 Service Technicians, 60 Call Center Agents, 30 Dispatchers
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Contoso Compressor sales channels include direct and via distributors.

Contoso Compressor service and installation channels include direct and via service partners.

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Existing systems:
• SAP for ERP
• Siebel for Sales and Customer Service
• Home grown for Field Service and Installations

Dynamics 365 has been selected for Sales, Customer Service, and Field Service.

Azure IoT and Azure Machine Learning have been selected for Connected Field Service.

Sales and Service Overview
-

Sales and Service Overview. B2B Sales and Service Overview

Sales
-
• 70% of total Sales & Service Revenue
• 20% new sales revenue is through distributors

Installations
-
• Variety of large compressors
• Scheduled with Dispatch when equipment has been shipped
• Take a crew of 2-3 technicians

Service
-
• 95% of service calls handled by Contoso Call Center
• All calls come to a regional service center
• Break Fix
• Planned/Preventive Maintenance
• Both Break Fix and Planned/Preventive Maintenance Work Orders require 1 technician
• Planned/Preventive Maintenance
○ Requires a detailed Inspection prior to restart of equipment

Sales and Service Overview. B2C Sales and Service Overview

Sales
-
• 30% of total Sales & Service Revenue
• 100% of new Sales revenue from distributors

No Installation
-

Service
-
• 95% of all service issues handled by partners/distributors
• Service calls to Contoso Call Center are routed to a partner/distributor for service
• Only 1% of all Service Revenue

Sales and Service Overview. Business Goals

Contoso Compressor desires to double both their Sales and Service Revenue over the next 5 years.

To achieve this, they have developed the following goals as part of implementing a new CRM Sales, Service, and Field Service application:
1. New Acquisitions
2. Partner/Distribution network expansion for B2B and B2C
3. New B2B Service Offerings
4. Increase Customer Satisfaction/NPS

Current Challenges
-

Current Challenges. Call Center

• Siloed systems
• Disconnected from other regions
• Poor Return tracking
• Poor partner visibility

Current Challenges. Work Order Management

• No visibility to truck stock
• No task breakdown on Work Orders
• Poor reconciliation to partners/distributors

Current Challenges. Resource Management

• No crew capability for installs
• No visibility across regions

Current Challenges. Contract/Agreement Management

• Service is often given away due to poor entitlement tracking
• No tickler system for renewals

Current Challenges. Asset Management

• No sub-asset tracking
• No work Order history
• No visibility to detailed location tracking
• No ability to connect to IoT

Current Challenges. Mobile Technician Capability

• No offline mode
• Inspections are done manually
• No quoting, signature, or job summary/print capability

Current Challenges. Scheduling
-

• Lack of status updates from technicians
• Manual crew scheduling for installs
• No ability to estimate travel time
• No filter capability to search for the best technician

Desired Functionality
-

Desired Functionality. Call Center

• Customer 360 capability with Knowledge Base
• Visibility to Partner/Distributor information
• Portal capability for customer visibility to Knowledge, equipment owned, open work orders and cases

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• Conditional logic for Gas Compressor pressure reading failure
○ By looking at the reading, a technician can see if it's in the red, indicating failure. If fail, must shut down, clean or replace pressure valve
• Impromptu Inspections – the ability to create inspections at a customer site on assets without a work order while

working on another work order at the customer site.
• Inspection results are critical to review with the customer after the inspection is performed

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• Flexible Work Hours
• Crews, equipment tracking as resources for scheduling
• Skills with proficiency levels
• Drip Scheduling for planned maintenance jobs

Desired Functionality. Asset Management

• Track Asset sub-components
• Connected Service for new equipment
• Azure Machine Learning to offer a new chargeable service for machine uptime
• Capture defined asset readings to feed the Azure Machine Learning model
• Many internal assets are used on jobs. We need to be able to schedule those assets with a technician on a job.
○ We also perform our own maintenance on internal assets
○ These would not be needed for RS

Desired Functionality. Contract/Agreement Management

• Generate Planned Maintenance jobs 3 months in advance for capacity planning
• Tickler system to notify customers of expirations
• Track covered equipment and related entitlements

Desired Functionality. Mobile Technician Capability

• Offline
• Digitized Inspections
• Geo-fencing for no-touch arrival and departure
• "Uber-like" functionality, notifying customers when a technician will be arriving
• Remote Assist functionality to quickly get junior technicians in the field and increasing first time fix rate

Desired Functionality. Scheduling

• Schedule Boards visible to each region
• Assign resources based on skills and proficiency
• Visibility to access resources from other regions
• Drip Scheduling for inspection jobs
• Scheduling optimization for small jobs
• Automated crew assignment for installation jobs

Desired Functionality. Returns Management

• RMA's
○ Tied to Customer Service
○ Track open Returns to reduce part/asset leakage & charge for not returned items
○ The biggest issue we face today is that we can't track an item that a customer has returned

• RTV
○ Ability to send in-warranty parts back to vendor for credit or exchange

Desired Functionality. IoT
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• IoT devices will be place on all new and existing equipment.
• Devices will measure compressor temperature and motor pressure of the equipment.
• Azure Machine Learning is desired to predict failure based on trends of compressor temperature and pressure readings.
• Currently, there is no way to capture backflow pressure because it can only be measured during the onsite inspection by a technician.
• Contoso Compressor would like to capture that value and feed it back to the machine-learning algorithm to better measure performance and predict failure.

You are the lead consultant on a Dynamics 365 Field Service implementation for Contoso Compressor.

One of your assignments is to define a Requirements View to show Installation Work Orders for India Territories on the Schedule Board.

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

- Add the Mumbai Resource Requirements View to the Mumbai schedule board and the Chennai Resource Requirements View to the Chennai schedule board.
- Create an Installations Schedule Board that filters on the India Org.
- Create a Work Order Type Installation and two territories, Mumbai and Chennai.
- Create two schedule boards that filter resources in Mumbai and Chennai Territories.
- Create two Resource Requirements Views – one that filters on Chennai resources, and one that filters on Mumbai resources.
- Create two Resource Requirements Views – one that filters on Work Order Type = Installation and Territory = Mumbai, and one that filters on Work Order Type = Installation and Territory = Chennai.

Order

Answer:

Order

- Create a Work Order Type Installation and two territories, Mumbai and Chennai.
- Create two Resource Requirements Views – one that filters on Work Order Type = Installation and Territory = Mumbai, and one that filters on Work Order Type = Installation and Territory = Chennai.
- Create two schedule boards that filter resources in Mumbai and Chennai Territories.
- Add the Mumbai Resource Requirements View to the Mumbai schedule board and the Chennai Resource Requirements View to the Chennai schedule board.

Question: 210 Exam Heist

Case study -

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3. New B2B Service Offerings
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• Poor Return tracking
• Poor partner visibility

Current Challenges. Work Order Management

• No visibility to truck stock
• No task breakdown on Work Orders
• Poor reconciliation to partners/distributors

Current Challenges. Resource Management

• No crew capability for installs

• No visibility across regions

Current Challenges. Contract/Agreement Management

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• Currently, there is no way to capture backflow pressure because it can only be measured during the onsite inspection by a technician.
• Contoso Compressor would like to capture that value and feed it back to the machine-learning algorithm to better measure performance and predict failure.

You are the lead consultant on a Dynamics 365 Field Service implementation for Contoso Compressor. The company uses internal assets on jobs and also maintains them.

What would be the most efficient way of handling the company's needs?

A.Enable the Customer Asset table for scheduling, then add it as a Resource Type.

B.Set the internal assets up as a User so they can be used for Resource Scheduling Optimization (RSO) as well.

C.Set up the equipment as a Contact in the system, then add it as a Contact Resource.

D.Create a Facility/Equipment for the Asset, then add it as a Resource Type.

Answer: B

Explanation:

B is correct because setting internal assets up as Users allows for optimal utilization of Resource Scheduling Optimization (RSO), enhancing tracking and management.

In implementing Dynamics 365 Field Service for Contoso Compressor, effectively managing internal assets as resources is crucial. By designating these assets as Users, they can be included in RSO, enabling better scheduling and resource allocation based on skills and availability. This method supports the need for an efficient and responsive service operation, given that internal assets are integral to job execution and maintenance.

Evaluation of Other Options:

1. **A. Enable the Customer Asset table for scheduling, then add it as a Resource Type.**

   This option is less effective because the Customer Asset table primarily focuses on customer-specific equipment rather than internal assets. Consequently, it does not provide the comprehensive capabilities necessary for optimizing resource scheduling across various operational contexts. It would fail to maximize the potential of internal assets in job configurations.

2. **C. Set up the equipment as a Contact in the system, then add it as a Contact Resource.**

   Using Contacts for equipment misconstrues the nature of customer management, which is intended for people rather than machinery. This approach would lead to confusion in the system, hampering effective scheduling and accountability of assets as resources, thus not aligning with the operational requirements for asset tracking and management.

3. **D. Create a Facility/Equipment for the Asset, then add it as a Resource Type.**

   While creating a Facility/Equipment entry could involve assets, it limits their function in RSO. This classification does not include features essential for flexible scheduling and would not leverage full resource optimization capabilities necessary for efficient field service management.

By leveraging the User setup for internal assets, Contoso Compressor can significantly improve its service workflow and enhance maintenance operations effectively.

References:

https://docs.microsoft.com/en-us/dynamics365/field-service/overview
https://docs.microsoft.com/en-us/dynamics365/field-service/scheduling-optimization
https://docs.microsoft.com/en-us/dynamics365/field-service/manage-assets

Question: 211 **Exam Heist**

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You are the lead consultant on a Dynamics 365 Field Service implementation for Contoso Compressor.

Which two things must the technician do to set up the system frequency results and meet Contoso's requirements from the Case Study? Each correct answer presents part of the solution.

A.Mark the inspection as complete.

B.Make sure Analytics are enabled and that the frequency is set to 'daily.'

C.Save and close the work order.

D.Make sure Analytics are enabled and that the frequency is set to 'immediate.'

E.Mark the Incident Type Inspection Task as complete.

Answer: AD

Explanation:

AD is correct as both actions ensure that the system captures frequency results accurately in alignment with Contoso's requirements.

To meet Contoso Compressor's desires for effective inspection management, marking the inspection as

complete (option A) is essential. This action confirms that the inspection is finalized and allows the system to register the results accordingly. It ensures that all critical data collected during the inspection is stored and available for future analysis, fulfilling the business need for detailed reporting and customer communication post-inspection. Furthermore, ensuring that Analytics are enabled and set to 'daily' (option B) underpins the need for continual assessment and recommendation-making based on inspection frequencies. A daily analytics frequency enables proactive monitoring and immediate corrective actions, which align with Contoso's goals for improving service rates and customer satisfaction.

The other options fail to meet specific requirements. Option C, saving and closing the work order, is essential but is a procedural step that does not directly relate to capturing frequency results. Similarly, option D's frequency setting to 'immediate' is unsuitable, as daily analytics provide a sustainable approach aligned with the need for routine performance assessments. Lastly, marking the Incident Type Inspection Task as complete (option E) does not inherently relate to the frequency results setup; it merely indicates the completion status of a task rather than managing frequency for reporting or analytics.

For comprehensive understanding, please refer to these authoritative materials:
Microsoft Learn: Introduction to Dynamics 365 Field Service
Microsoft Learn: Work Orders in Dynamics 365 Field Service
Microsoft Learn: Configure Field Service Analytics

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Company background -

Company background. General overview

Contoso Ltd. is a leading provider of technology services, with clients all around the world.

Contoso Ltd. has over 1,000 offices globally and over 10,000 employees servicing those buildings, from janitorial service people, repair technicians and new project (office setup, painting, furniture) setup resources. Each day, they dispatch these resources to work on and/or repair items in the cluster of buildings within their geographical area.

The major offices are located in North America, Asia Pacific, Europe, and Latin America.



Company background. Concerns -

Contoso Ltd. has several key challenges and issues in managing their day-to-day operations and facilities.

Many of their facilities have issues spanning five-to-ten days, before the proper personnel begins to work on the request. In some cases, issues within their facilities cause significant issues for the employees in the building or cause disruptions to customers. For example: An air conditioning issue causes servers to reach a critical temperature. It forces servers to shut down, and Contoso Ltd. must employ their emergency disruption plans.

Additional concerns:
1. Many different and siloed systems to manage requests, and track history and progress.
2. No concise and definitive processes to log, manage and complete requests throughout the organization.
3. No tools and technology to make technicians more effective.
4. Lack of ease for internal customers to log a request for work, provide updates and track progress.
5. The inability to monitor equipment performance and check for anomalies, and then interpret and act upon the data.
6. Lack of insight of historical details for the technicians and building management.
7. Field technicians experience issues trying to work in areas that do not have internet connectivity. Most of the requests are details within an email. As a result, they always carry paper copies of all the requests.
8. The current system lacks the ability to capture real-time data for system critical components, such as air conditioning and heating units, and energy consumption details.
9. Technicians in the field do not have standard devices. Some have iPhones and Android devices, while some use Windows-based laptops, such as the Surface Pro 7.

Field Service background and pain points

Field Service background and pain points. Scheduling and work orders challenges

During several discovery sessions, key users (subject matter experts) mentioned the following areas of operation pain points.

Scheduling and work orders -
• Outlook and Excel is used to schedule technicians.
• Technicians receive email appointments with the applicable details, and self-schedule work based on their availability.
• Technicians and contractors work primarily in email, and print out the work order details from the email. This has turned into a large amount of paper work orders with cryptic email notes.
• There is zero reporting or insight, and in-house technicians cannot monitor critical equipment to ensure it is working as expected.

• Since the equipment is not monitored, often the breakdown of equipment is what leads to recognition of a potential issue and the scheduling of a work request.

The implementation team recognized, during the initial implementation, that technicians need access to several custom entities. Without that visibility, the technicians will not be able to complete their work.

Field Service background and pain points. Visibility challenges

Technicians and dispatchers have either limited or zero visibility to:
• Install-base history.
• Real-time readings of equipment.
• Customer Information including detailed request information.
• Customer updates.
• Correct equipment they should be working on. Cannot search or see serial number or barcode of equipment.

There is also no ability to work offline with the data.

Field Service background and pain points. Challenges associated with the team

IT staff:
• Are inexperienced when it comes to implementing and managing software implementations, and the ongoing maintenance. They quickly find themselves experiencing issues implementing changes required by the users.
• Struggle with the concept of connected field service. They do not understand the different options, benefits, or the security model.
• Need a solution that can store device data for longer time periods to perform data analysis to better predict device failures.

Technicians:
• Have issues gaining access to the mobile app and receive error messages when trying to connect.
• Cannot access the data offline.

Managers:
• Need mobile access.
• Need access to historical data.
• Need access to a broader and larger amount of data than the technicians.

Field Service background and pain points. Asset management data challenges

As a large global company, Contoso Ltd.'s lack of consolidated systems, and systems that track and maintain asset history, has become a significant issue for technicians.

In addition, technicians are constantly being forced to leave in-progress low priority jobs to handle emergency issues. If Contoso Ltd. had the ability to determine when a system would experience a failure, and alert them ahead of time, many of the emergency issues could have been avoided. This capability needs to be in the new system.

Desired solution and requirements

Desired solution and requirements. Overall Field Service requirements

During requirement gathering workshops, the following high-level Field Service requirements were captured:
• Standardize systems onto a single platform.
• Provide an effective tool for employees and third-party contractors to digitally manage work.
• Streamline the service request process; automating processes where possible.
• Implement Dynamics 365 Field Service Mobile app, along with Connected Field Service capabilities.
○ Connected Field Service solution needs to allow for development capabilities, such as sending remote commands.
• Implement scheduling to ensure successful adoption.
• Provide insight and analytics to key personnel.
• Receive automated prescriptive guidance.

Further, there is a need to secure data and access for technicians and management to see only the data they need to see.

Technicians need access to:	• location data, including key contact • asset Data • equipment Readings, current and historical • work Requests • custom entities, in online mode only, as outlined above to be more effective at their jobs
Additional technician and IT requirements:	• offline capabilities • ability to enter time and perform key inspections within one system • IT needs device management capabilities for mobile implementation • ability to set up filters to only allow technicians access to data they need to see • different alerts to technicians for work order assignments, based on severity and priority • receive notifications for assigned work • receive a different notification for emergency or priority work
Tech managers need:	• mobile and mobile offline capabilities • the same access levels as technicians, but less restrictions with offline data • access to more data and areas than technicians

Desired solution and requirements. Install-base requirements

1. Access to all service history and historical readings.
2. Access to warranty and service contract details.
3. Proactive monitoring of the install base health, including alerts to the internal call center team.
4. Details of the customer asset, including BOM (bill of material) and various key properties that are maintained over time.

Desired solution and requirements. Connected Field Service requirements

1. Configure and setup Connected Field Service.
2. Implement a solution that will capture large amounts of data to accurately predict failures.
3. The solution should allow for additional developer capabilities.
4. Allow Field Administrators and administrators access to Connected Field Service data.
5. Anomaly detection and auto work order creation.

Each internal technician needs to be immediately notified by mobile phone when assigned work, based on the requirements in the case study.

Which solution will meet the requirement?

A.Create a notification Power Automate flow using an instant flow. The condition within the flow should look at the Resource Requirement entity where the out-of-the-box priority field has a value of Emergency priority.

B.Create a notification Power Automate flow using an automated flow. The condition within the flow should look at the Work Order entity where the out-of-the-box priority field has a value of Emergency priority.

C.Create a notification Power Automate flow using a scheduled flow. The condition within the flow should look at the Work Order entity where the out-of-the-box priority field has a value of Emergency priority.

D.Create a notification Power Automate flow using an instant flow. The condition within the flow should look at the Work Order entity where the out-of-the-box priority field has a value of Emergency priority.

Answer: B

Question: 213 **Exam Heist**

DRAG DROP
-

Case study
-

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Third-party contractors handle work outside of normal work hours at a higher rate.

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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.
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Dispatchers:
• Work at the Main office for their region.
• Assigned to all territories in the region.
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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.

Existing environment. Org structure setup

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Kolkata, India	• APAC India Regional Office	• Sales Reps • Sales Managers • Regional Sales Manager

Existing environment. Data management structure

Contoso's sales teams currently can only see data within their region. HQ locations for each region have visibility to data for all locations in their regions only. All of the data rolls-up to Contoso Global HQ for executive management reporting. Sales Reps who work with global accounts struggle to obtain the data they need to support their clients.

The current data access structure appears as follows:



Existing environment. Field Service structure

Contoso's 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.

Existing environment. 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.

Requirements. 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.

Requirements. 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.

Requirements. Technical requirements

Contoso identified the following technical requirements:

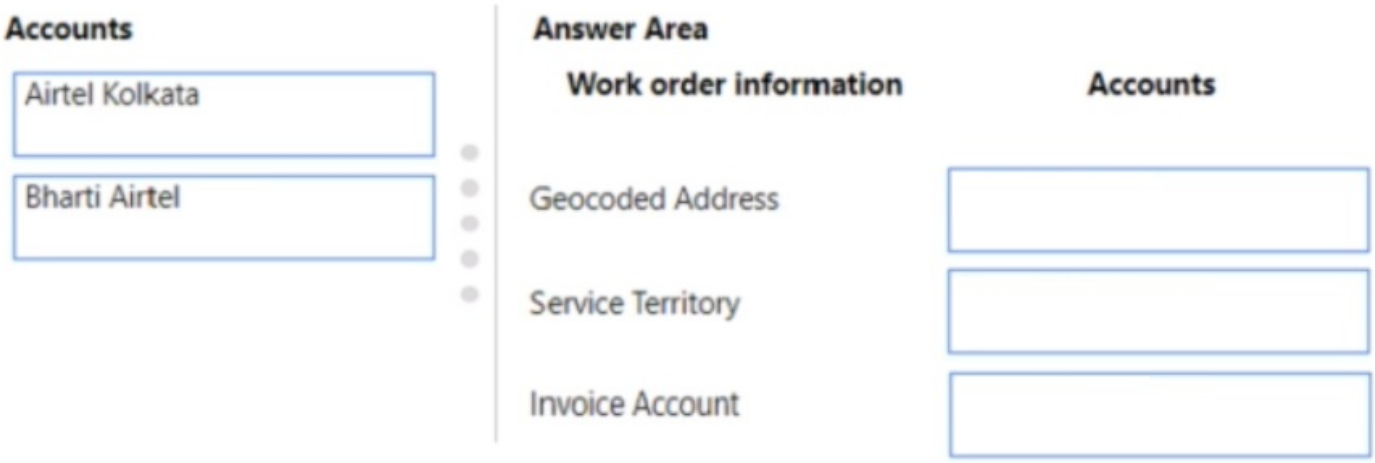
1. Invoicing
o Auto creation of invoices upon work completion.
o The system must track the price of resources based on holidays and after-hours scenarios at a rate of one and a half times the normal billing rate.
o Travel time is billable for all field service technicians, pay type Travel, which should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

A work order has been created with Bharti Airtel as the Billing Account and Airtel Kolkata as the Service Account.

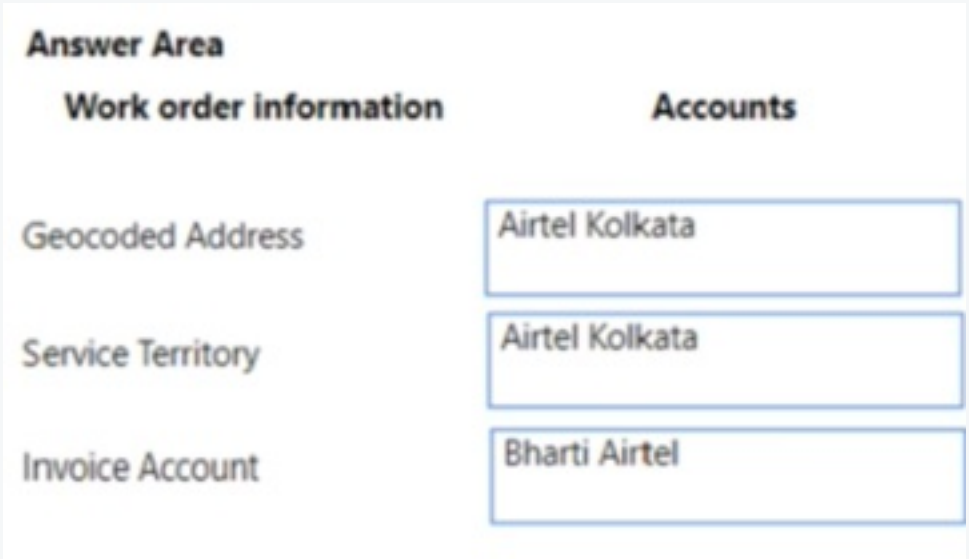
You need to determine the account where various work order information originates. The selected work order type and entitlement do not have any of this information.

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 piece of work order information 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:



Question: 214 **Exam Heist**

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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 daily 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. In the Scheduler Settings, select one Territory.

C. On the Filter & Map View window, select a Resource Type, then select Save Current Filters as Default.

D. Add a Booking Requirements tab.

Answer: A

Question: 215 **Exam Heist**

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Field Service background and pain points

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Scheduling and work orders -
• Outlook and Excel is used to schedule technicians.
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• Need a solution that can store device data for longer time periods to perform data analysis to better predict device failures.

Technicians:
• Have issues gaining access to the mobile app and receive error messages when trying to connect.
• Cannot access the data offline.

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• Need mobile access.
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Which three actions should you take for mobility for tech managers? Each correct answer represents a partial solution.

A.Add the Field Service Manager role to the offline profile for field service managers.

B.Add the mobile offline profile for Field Service to the Field Service mobile model-driven app.

C.Create a new Field Service mobile offline profile record for the Field Service Manager. Then, publish the profile.

D.Add Field Service Manager users to the offline profile for field service managers.

E.Clone the Field Service mobile offline profile for the field service manager. Then, add additional entities and update sync filters for key entities.

Answer: ABE

Question: 216 **Exam Heist**

DRAG DROP
-

Case study
-

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You are a Dynamics 365 Field Service functional consultant.

In the process of getting the mobile solution ready, you need to consider Contoso Ltd.'s requirements and pain points.

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

Steps	Order
Edit the Booking and Work Order forms.	
Edit the sitemap entities in the Field Service mobile model-driven app.	
Create a mobile offline profile, or update the existing Field Service mobile offline profile to determine what data will be available while offline.	
Enable the Field Service mobile model-driven app for offline use.	
Add users to the correct mobile profile, and publish the offline profile.	
Enable entities for mobile offline synchronization.	

Answer:

Order
Enable entities for mobile offline synchronization.
Create a mobile offline profile, or update the existing Field Service mobile offline profile to determine what data will be available while offline.
Add users to the correct mobile profile, and publish the offline profile.
Enable the Field Service mobile model-driven app for offline use.

Question: 217 **Exam Heist**

Case study -

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During User Acceptance Testing, technicians receive the message "Contact your administrator for access to your organization's mobile apps."

As the functional consultant, what should you do to correct the error?

A.Ensure you have the correct security role (Field Service – offline resource), and that the security role is assigned to the Field Service Mobile app.

B.Select the menu icon on the top left, and toggle Show non-production apps to Yes.

C.Sign in again, pull down the screen to refresh, and wait for at least a few minutes.

D.Update the mobile offline profile to include the users that require access.

Answer: B

Explanation:

Select the menu icon on the top left, and toggle Show non-production apps to Yes.

Question: 218 **Exam Heist**

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Contoso Ltd.'s technicians are not receiving mobile notifications.

What is a possible cause?

A. The Power Automate flow is turned off.

B. The Field Service - Resource security role is not assigned to the Field Service Mobile app.

C. Push notifications are not supported for Windows-based devices.

D. The technicians are not assigned the correct security role. They should be assigned to Field Service - Resource.

Answer: A

Question: 219 **Exam Heist**

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Company Overview -

Company Overview. Company Structure

Contoso Compressor Ltd. is a large global manufacturer with 12,000 employees. Contoso Compressor produces, installs, and services large B2B and small B2C gas and air compressors.

They have manufacturing plants and service centers in:

North America (Canada, US, Mexico) Territories
• US – 600 Service Technicians, 60 Call Center Agents, 30 Dispatchers
• Canada – 300 Service Technicians, 30 Call Center Agents, 15 Dispatchers
• Mexico – 200 Service Technicians, 20 Call Center Agents, 10 Dispatchers

Europe Territories -
• Germany – 200 Service Technicians, 20 Call Center Agents, 10 Dispatchers
• France – 150 Service Technicians, 15 Call Center Agents, 7 Dispatchers
• Italy – 100 Service Technicians, 10 Call Center Agents, 5 Dispatchers

South America Territories -
• Brazil – 200 Service Technicians, 20 Call Center Agents, 10 Dispatchers
• Argentina – 100 Service Technicians, 10 Call Center Agents, 5 Dispatchers

India Territories -
• Mumbai – 100 Service Technicians, 10 Call Center Agents, 5 Dispatchers

• Chennai – 150 Service Technicians, 15 Call Center Agents, 7 Dispatchers Contoso

Contoso Compressor sales channels include direct and via distributors.

Contoso Compressor service and installation channels include direct and via service partners.

Company Overview. Existing Systems

Existing systems:
• SAP for ERP
• Siebel for Sales and Customer Service
• Home grown for Field Service and Installations

Dynamics 365 has been selected for Sales, Customer Service, and Field Service.

Azure IoT and Azure Machine Learning have been selected for Connected Field Service.

Sales and Service Overview -

Sales and Service Overview. B2B Sales and Service Overview

Sales -
• 70% of total Sales & Service Revenue
• 20% new sales revenue is through distributors

Installations -
• Variety of large compressors
• Scheduled with Dispatch when equipment has been shipped
• Take a crew of 2-3 technicians

Service -
• 95% of service calls handled by Contoso Call Center
• All calls come to a regional service center
• Break Fix
• Planned/Preventive Maintenance
• Both Break Fix and Planned/Preventive Maintenance Work Orders require 1 technician
• Planned/Preventive Maintenance
○ Requires a detailed Inspection prior to restart of equipment

Sales and Service Overview. B2C Sales and Service Overview

Sales -
• 30% of total Sales & Service Revenue
• 100% of new Sales revenue from distributors

No Installation -

Service -
• 95% of all service issues handled by partners/distributors
• Service calls to Contoso Call Center are routed to a partner/distributor for service
• Only 1% of all Service Revenue

Sales and Service Overview. Business Goals

Contoso Compressor desires to double both their Sales and Service Revenue over the next 5 years.

To achieve this, they have developed the following goals as part of implementing a new CRM Sales, Service, and Field Service application:
1. New Acquisitions

2. Partner/Distribution network expansion for B2B and B2C
3. New B2B Service Offerings
4. Increase Customer Satisfaction/NPS

Current Challenges -

Current Challenges. Call Center -

• Siloed systems
• Disconnected from other regions
• Poor Return tracking
• Poor partner visibility

Current Challenges. Work Order Management

• No visibility to truck stock
• No task breakdown on Work Orders
• Poor reconciliation to partners/distributors

Current Challenges. Resource Management

• No crew capability for installs
• No visibility across regions

Current Challenges. Contract/Agreement Management

• Service is often given away due to poor entitlement tracking
• No tickler system for renewals

Current Challenges. Asset Management

• No sub-asset tracking
• No work Order history
• No visibility to detailed location tracking
• No ability to connect to IoT

Current Challenges. Mobile Technician Capability

• No offline mode
• Inspections are done manually
• No quoting, signature, or job summary/print capability

Current Challenges. Scheduling -

• Lack of status updates from technicians
• Manual crew scheduling for installs
• No ability to estimate travel time
• No filter capability to search for the best technician

Desired Functionality -

Desired Functionality. Call Center

• Customer 360 capability with Knowledge Base
• Visibility to Partner/Distributor information
• Portal capability for customer visibility to Knowledge, equipment owned, open work orders and cases

Desired Functionality. Work Order management

• Defined Work Order Tasks
• Inventory tracking
• Digital Inspections with Branch Logic and Reporting

• Integration to ERP for proper pricing and invoicing

Desired Functionality. Inspections

• Conditional logic for Gas Compressor pressure reading failure
○ By looking at the reading, a technician can see if it's in the red, indicating failure. If fail, must shut down, clean or replace pressure valve
• Impromptu Inspections – the ability to create inspections at a customer site on assets without a work order while working on another work order at the customer site.
• Inspection results are critical to review with the customer after the inspection is performed

Desired Functionality. Resource Management

• Flexible Work Hours
• Crews, equipment tracking as resources for scheduling
• Skills with proficiency levels
• Drip Scheduling for planned maintenance jobs

Desired Functionality. Asset Management

• Track Asset sub-components
• Connected Service for new equipment
• Azure Machine Learning to offer a new chargeable service for machine uptime
• Capture defined asset readings to feed the Azure Machine Learning model
• Many internal assets are used on jobs. We need to be able to schedule those assets with a technician on a job.
○ We also perform our own maintenance on internal assets
○ These would not be needed for RS

Desired Functionality. Contract/Agreement Management

• Generate Planned Maintenance jobs 3 months in advance for capacity planning
• Tickler system to notify customers of expirations
• Track covered equipment and related entitlements

Desired Functionality. Mobile Technician Capability

• Offline
• Digitized Inspections
• Geo-fencing for no-touch arrival and departure
• "Uber-like" functionality, notifying customers when a technician will be arriving
• Remote Assist functionality to quickly get junior technicians in the field and increasing first time fix rate

Desired Functionality. Scheduling

• Schedule Boards visible to each region
• Assign resources based on skills and proficiency
• Visibility to access resources from other regions
• Drip Scheduling for inspection jobs
• Scheduling optimization for small jobs
• Automated crew assignment for installation jobs

Desired Functionality. Returns Management

• RMA's
○ Tied to Customer Service
○ Track open Returns to reduce part/asset leakage & charge for not returned items
○ The biggest issue we face today is that we can't track an item that a customer has returned

• RTV
○ Ability to send in-warranty parts back to vendor for credit or exchange

Desired Functionality. IoT -

• IoT devices will be place on all new and existing equipment.
• Devices will measure compressor temperature and motor pressure of the equipment.

• Azure Machine Learning is desired to predict failure based on trends of compressor temperature and pressure readings.
• Currently, there is no way to capture backflow pressure because it can only be measured during the onsite inspection by a technician.
• Contoso Compressor would like to capture that value and feed it back to the machine-learning algorithm to better measure performance and predict failure.

You are the lead consultant on a Dynamics 365 Field Service implementation for Contoso Compressor.

You are working with data scientists to help provide better IoT machine-learning capability for compressor performance and for predicting failure.

What must the technician capture during an inspection to feed back into the machine-learning algorithm?

A.Backflow pressure
B.Compressor temperature
C.Current outside weather temperature
D.Motor pressure

Answer: B

Explanation:

B is correct because the compressor temperature is a crucial parameter for predicting equipment performance and potential failures through machine learning analysis.

Reasoning:

Capturing the compressor temperature during inspections directly influences the ability to develop predictive maintenance models within Azure Machine Learning. Elevated or abnormal temperature readings can indicate imminent mechanical failures, thus enhancing the accuracy of the predictive models. Unlike general operational data, temperature provides critical insights tied to equipment stress, energy consumption, and functional performance, making it significant for real-time decision-making and preemptive maintenance actions (Microsoft Dynamics 365, 2023).

Critical Evaluation of Other Options:

A. **Backflow Pressure**: While essential for assessing immediate operational integrity, backflow pressure measurements primarily contribute to safety and regulatory compliance rather than predictive analytics. As it can only be measured on-site, it does not fit the continuous data capture required for machine learning models.

C. **Current Outside Weather Temperature**: Although external temperature may influence operational conditions, it bears less direct correlation to the mechanical performance of compressors. Including this variable could introduce noise into predictive models, complicating data interpretation without yielding significant value.

D. **Motor Pressure**: Similar to compressor temperature, motor pressure is vital for understanding equipment functionality. However, effective predictive analytics relies heavily on temperature variances, as they often provide early signs of mechanical failure or inefficiencies. Motor pressure alone does not offer the same immediacy in indicating potential breakdowns as temperature fluctuations.

References:

https://docs.microsoft.com/en-us/dynamics365/field-service/internet-of-things
https://azure.microsoft.com/en-us/services/machine-learning/
https://www.forbes.com/sites/bernardmarr/2019/06/10/how-machine-learning-is-transforming-the-manufacturing-industry/

Question: 220 **Exam Heist**

Case study -

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Company background -

Company background. General overview

Contoso Ltd. is a leading provider of technology services, with clients all around the world.

Contoso Ltd. has over 1,000 offices globally and over 10,000 employees servicing those buildings, from janitorial service people, repair technicians and new project (office setup, painting, furniture) setup resources. Each day, they dispatch these resources to work on and/or repair items in the cluster of buildings within their geographical area.

The major offices are located in North America, Asia Pacific, Europe, and Latin America.



Company background. Concerns -

Contoso Ltd. has several key challenges and issues in managing their day-to-day operations and facilities.

Many of their facilities have issues spanning five-to-ten days, before the proper personnel begins to work on the request. In some cases, issues within their facilities cause significant issues for the employees in the building or cause disruptions to customers. For example: An air conditioning issue causes servers to reach a critical temperature. It forces servers to shut down, and Contoso Ltd. must employ their emergency disruption plans.

Additional concerns:
1. Many different and siloed systems to manage requests, and track history and progress.
2. No concise and definitive processes to log, manage and complete requests throughout the organization.
3. No tools and technology to make technicians more effective.
4. Lack of ease for internal customers to log a request for work, provide updates and track progress.
5. The inability to monitor equipment performance and check for anomalies, and then interpret and act upon the data.
6. Lack of insight of historical details for the technicians and building management.
7. Field technicians experience issues trying to work in areas that do not have internet connectivity. Most of the requests are details within an email. As a result, they always carry paper copies of all the requests.
8. The current system lacks the ability to capture real-time data for system critical components, such as air conditioning and heating units, and energy consumption details.
9. Technicians in the field do not have standard devices. Some have iPhones and Android devices, while some use Windows-based laptops, such as the Surface Pro 7.

Field Service background and pain points

Field Service background and pain points. Scheduling and work orders challenges

During several discovery sessions, key users (subject matter experts) mentioned the following areas of operation pain points.

Scheduling and work orders -
• Outlook and Excel is used to schedule technicians.
• Technicians receive email appointments with the applicable details, and self-schedule work based on their availability.
• Technicians and contractors work primarily in email, and print out the work order details from the email. This has turned into a large amount of paper work orders with cryptic email notes.
• There is zero reporting or insight, and in-house technicians cannot monitor critical equipment to ensure it is working as expected.
• Since the equipment is not monitored, often the breakdown of equipment is what leads to recognition of a potential issue and the scheduling of a work request.

The implementation team recognized, during the initial implementation, that technicians need access to several custom entities. Without that visibility, the technicians will not be able to complete their work.

Field Service background and pain points. Visibility challenges

Technicians and dispatchers have either limited or zero visibility to:
• Install-base history.
• Real-time readings of equipment.
• Customer Information including detailed request information.
• Customer updates.
• Correct equipment they should be working on. Cannot search or see serial number or barcode of equipment.

There is also no ability to work offline with the data.

Field Service background and pain points. Challenges associated with the team

IT staff:
• Are inexperienced when it comes to implementing and managing software implementations, and the ongoing maintenance. They quickly find themselves experiencing issues implementing changes required by the users.
• Struggle with the concept of connected field service. They do not understand the different options, benefits, or the security model.

• Need a solution that can store device data for longer time periods to perform data analysis to better predict device failures.

Technicians:
• Have issues gaining access to the mobile app and receive error messages when trying to connect.
• Cannot access the data offline.

Managers:
• Need mobile access.
• Need access to historical data.
• Need access to a broader and larger amount of data than the technicians.

Field Service background and pain points. Asset management data challenges

As a large global company, Contoso Ltd.'s lack of consolidated systems, and systems that track and maintain asset history, has become a significant issue for technicians.

In addition, technicians are constantly being forced to leave in-progress low priority jobs to handle emergency issues. If Contoso Ltd. had the ability to determine when a system would experience a failure, and alert them ahead of time, many of the emergency issues could have been avoided. This capability needs to be in the new system.

Desired solution and requirements

Desired solution and requirements. Overall Field Service requirements

During requirement gathering workshops, the following high-level Field Service requirements were captured:
• Standardize systems onto a single platform.
• Provide an effective tool for employees and third-party contractors to digitally manage work.
• Streamline the service request process; automating processes where possible.
• Implement Dynamics 365 Field Service Mobile app, along with Connected Field Service capabilities.
○ Connected Field Service solution needs to allow for development capabilities, such as sending remote commands.
• Implement scheduling to ensure successful adoption.
• Provide insight and analytics to key personnel.
• Receive automated prescriptive guidance.

Further, there is a need to secure data and access for technicians and management to see only the data they need to see.

Technicians need access to:	• location data, including key contact • asset Data • equipment Readings, current and historical • work Requests • custom entities, in online mode only, as outlined above to be more effective at their jobs
Additional technician and IT requirements:	• offline capabilities • ability to enter time and perform key inspections within one system • IT needs device management capabilities for mobile implementation • ability to set up filters to only allow technicians access to data they need to see • different alerts to technicians for work order assignments, based on severity and priority • receive notifications for assigned work • receive a different notification for emergency or priority work
Tech managers need:	• mobile and mobile offline capabilities • the same access levels as technicians, but less restrictions with offline data • access to more data and areas than technicians

Desired solution and requirements. Install-base requirements

1. Access to all service history and historical readings.
2. Access to warranty and service contract details.
3. Proactive monitoring of the install base health, including alerts to the internal call center team.
4. Details of the customer asset, including BOM (bill of material) and various key properties that are maintained over time.

Desired solution and requirements. Connected Field Service requirements

1. Configure and setup Connected Field Service.
2. Implement a solution that will capture large amounts of data to accurately predict failures.
3. The solution should allow for additional developer capabilities.
4. Allow Field Administrators and administrators access to Connected Field Service data.
5. Anomaly detection and auto work order creation.

You are asked to provide the list of IoT components that are available to handle the requirements in the case study.

Which three IoT components are used to satisfy the requirements? Each correct answer presents part of the solution.

A.Azure Cosmos Database

B.Cognitive Services

C.Stream Analytics

D.Azure Blob Storage

E.App Services

F.Azure SQL Database

Answer: CDF

Question: 221 **Exam Heist**

You are managing your organization's assets.

You need to give your organization's technicians better visibility on their locations in order to reduce travel time and time spent searching for the asset when the technicians arrive on site.

How should you structure the system to manage this request?

A.Create a custom entity to house asset location details.

B.Use asset properties to provide location details.

C.Update all the incident types with the proper service account.

D.Create a functional location tree.

Answer: A

Explanation:

Create a custom entity to house asset location details.

Question: 222 **Exam Heist**

You are implementing Microsoft Dynamics 365 Field Service for a service company.

A supervisor wants to understand the combination of work order and booking statuses in order to stay up-to-date with the work orders.

Which is a correct combination of work order and booking status?

A. Work order is: Open - Completed -
Booking status is: On Break

B. Work order is: Open - In Progress
Booking status is: Travelling

C. Work order is: Open - Scheduled -
Booking status is: Open - In Progress

D. Work order is: Closed - Cancelled
Booking status is: In Progress

Answer: B

Explanation:

Why optionB is the only valid combination

Work-order status follows the standard lifecycle: **Open → In Progress → Completed → Closed** (or Cancelled).

Open indicates the order has been created but no work has started.
In Progress indicates that field resources are actively performing the service.

Booking status reflects the resource's current engagement relative to the order:

Travelling is a legitimate sub-status that appears when a resource has been assigned to the order and is en route to the job site. It is used while the order is still **Open** or **In Progress**, but the actual service work has not yet begun.

Therefore, the pair **"Work order: Open – In Progress; Booking status: Travelling"** correctly represents a situation where the order is open and work is underway, while the resource is currently travelling to the site. This alignment matches the out-of-the-box status model used by Dynamics365 Field Service.

Why the other options are incorrect

OptionA – Mixes Open with Completed for the work-order status, which is contradictory; a completed order cannot remain open. The booking status On Break is unrelated to the "travelling" condition described.

OptionC – Uses Scheduled as a work-order status, but Scheduled is a planning stage, not a formal work-order status in the system. Additionally, the booking status is presented as two values (Open – In Progress), whereas the booking status field holds a single value at any time.

OptionD – Combines Closed and Cancelled for the work-order status, both of which are terminal states. A cancelled or closed order cannot have a Booking status: In Progress, because no active resource engagement exists once the order is finished or cancelled.

Hence, only **OptionB** accurately reflects a permissible and technically consistent pairing of work-order and booking statuses in Dynamics365 Field Service.

Question: 223 **Exam Heist**

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

Answer: B

Explanation:

Why optionB is the correct choice

Service tasks are the native mechanism in Dynamics365 Field Service for defining repeatable, step-by-step actions that technicians must complete on a work order.
They can be **attached to a specific work-order type (or incident type)** and automatically appear on the technician's mobile grid view, forcing the required checklist items to be marked off before the job can be closed.
Service tasks support **conditional logic, required fields, and custom scripts**, enabling the exact validation and sequencing the organization needs for field-service compliance.
Because they are tied directly to the work-order record, they are displayed in the **mobile app, portal, and schedule board**, ensuring the checklist travels with the work order throughout its lifecycle.

Why the other options are less suitable

A – Business process flow (BPF) – BPFs model high-level, end-to-end business processes across multiple entities. They are not designed to capture granular, technician-level checklists on a work order; they add unnecessary complexity for this use case.
C – Service activities – Service activities represent scheduled or performed work (e.g., "Installation" or "Repair") and are used for planning, resource allocation, and time tracking. They do not provide a checklist UI for technicians to verify each step.
D – Inspection form – Inspection forms are intended for capturing ad-hoc inspection data or audit results, not for enforcing a predefined sequence of service steps. They lack the integration with work-order status that a checklist requires.

Conclusion
Creating **service tasks** and associating them with the appropriate **incident/work-order type** delivers a lightweight, enforceable checklist that technicians can complete in the field, aligns with Dynamics365 Field Service's native capabilities, and satisfies the organization's requirement for step-by-step verification.

Question: 224 **Exam Heist**

DRAG DROP
-

You are responsible for setting up Dynamics 365 Field Service for proper billing and servicing.

Your client needs to understand the difference between billing accounts and service accounts for their multi-company organization.

Match the account type to the applicable scenario. To answer, drag the appropriate account type from the column on the left to the applicable scenario on the right. Each account type may be used once, more than once, or not at all.

NOTE: Each correct match is worth one point.

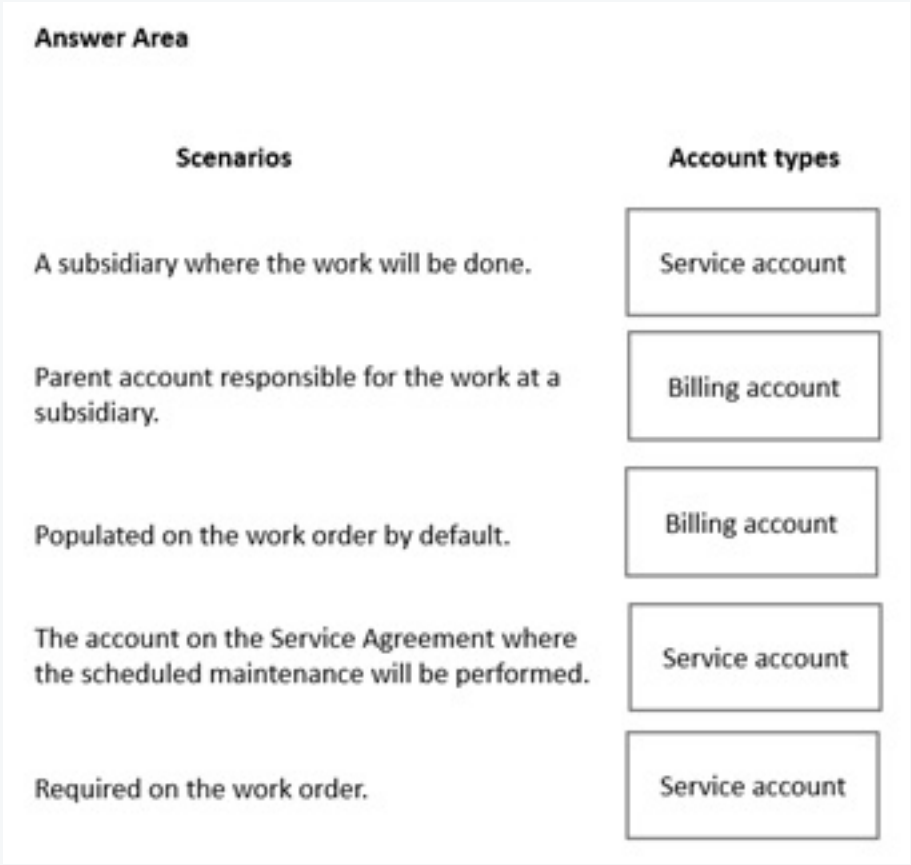
Account types

Billing account | Service account

Answer Area

Scenarios	Account types
A subsidiary where the work will be done.	
Parent account responsible for the work at a subsidiary.	
Populated on the work order by default.	
The account on the Service Agreement where the scheduled maintenance will be performed.	
Required on the work order.	

Answer:



Question: 225 **Exam Heist**

DRAG DROP
-

Case study
-

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Overview. 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.

Overview. 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.

Existing environment. 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	• Global HQ • North America HQ	• Executive Management • Sales Executives
Chicago, IL	North America Midwest Regional Office	• Sales Reps • Sales Managers • Regional Sales Manager
Los Angeles, CA	North America West Coast Regional Office	• Sales Reps • Sales Managers • Regional Sales Manager
New York, NY	North America East Coast Regional Office	• Sales Reps • Sales Managers • Regional Sales Manager
Montreal, QC	North America Canada Regional Office	• Sales Reps • Sales Managers • Regional Sales Manager
City of Manila, Philippines	• APAC HQ • Philippines Regional Office	• Sales Reps • Sales Managers • Sales Director • Regional Sales Manager • Executive Management
Kolkata, India	• APAC India Regional Office	• Sales Reps • Sales Managers • Regional Sales Manager

Existing environment. Data management structure

Contoso's sales teams currently can only see data within their region. HQ locations for each region have visibility to data for all locations in their regions only. All of the data rolls-up to Contoso Global HQ for executive management reporting. Sales Reps who work with global accounts struggle to obtain the data they need to support their clients.

The current data access structure appears as follows:



Existing environment. Field Service structure

Contoso's 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.

Existing environment. 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.

Requirements. 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.

Requirements. 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.
oAutomated and suggestion-based scheduling.
oScheduling based on required technician skills and number of technicians needed.
oSchedule resources based on location, minimizing travel time when possible.
oTechnicians must be onsite within 3 hours of an emergency Work Order being assigned to them.
oThe travel time should automatically update upon changing a booking.
2.Agreements
oSetup and create work orders, bookings and invoices for preventative maintenance with work orders automatically created 14 days before PM is due.
oEscalation of Work Orders based upon agreed customer commitment.
oAbility to designate clients as Preferred, with special pricing.
3.Products and Services
oWarehousing and inventory management processes will be implemented, including tracking products moved onto trucks for installation at customer sites.
oImplement a parts return process that includes having a technician uninstall the part to be returned.
oMultiple price lists will be used, divided into Gold, Silver and Bronze levels, based on the spending level of each customer.
oInternal teams need the capability to associate a 3D image to a Customer Asset record.
oProducts added to a work order should be set to Allocated.
4.Resources
oImplement Company Holidays for North American regions,
oImplement Paid Time Off for all regions,
oSpecialty equipment will be scheduled on work orders as needed,
oTraining and skill levels will be noted as appropriate for resources.

5.System
oGeocoding will be activated throughout the system.
oTerritories will be used for Accounts, Resources and Work Orders.

Requirements. Technical requirements

Contoso identified the following technical requirements:

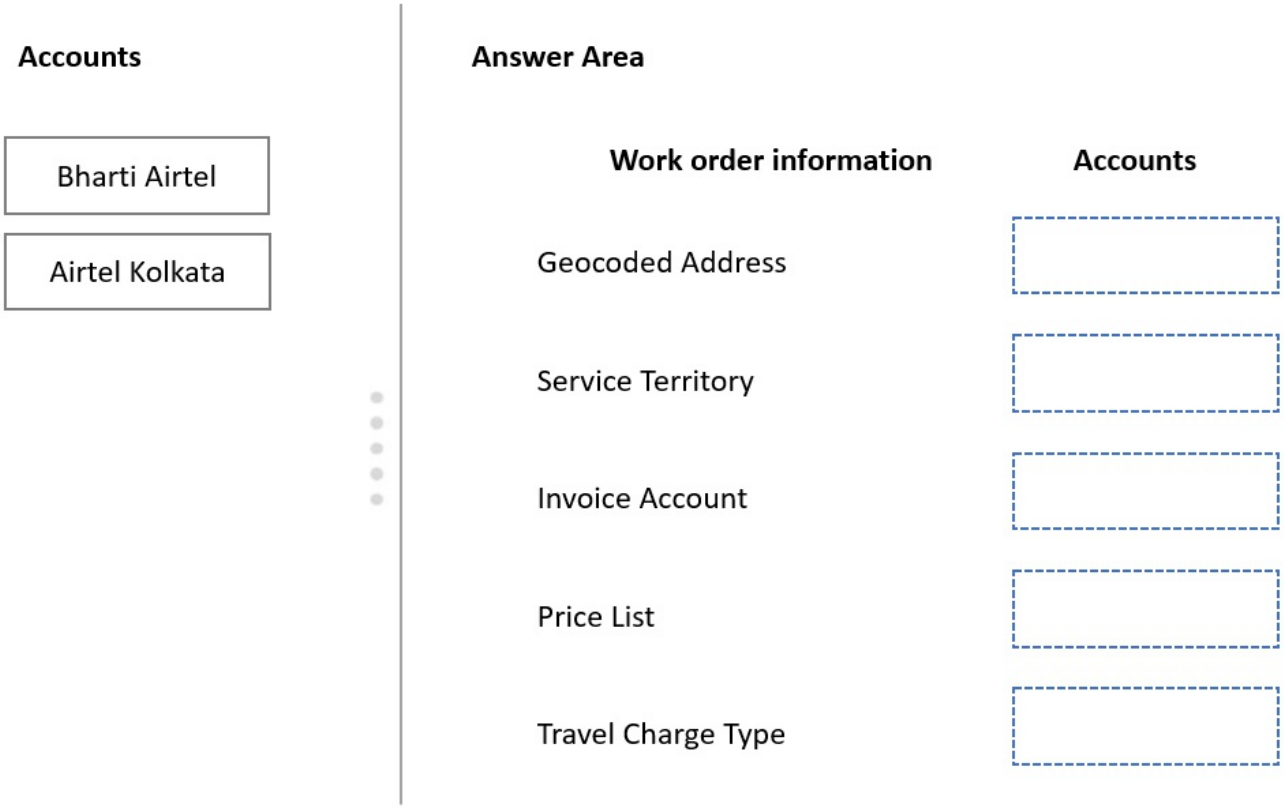
1.Invoicing
oAuto creation of invoices upon work completion.
oThe system must track the price of resources based on holidays and after-hours scenarios at a rate of one and a half times the normal billing rate.
oTravel time is billable for all field service technicians, pay type Travel, which should be noted on all Service Accounts.
2.Resources
oContractor technicians require access to work order and customer details once assigned to a booking.
oDispatchers need a schedule board for their region(s).
3.Products and Services
oAll parts that are removed from a customer s equipment must be returned to the Main warehouse.
oProducts to be marked as Assets will be configured accordingly.
oAll products that will become Assets require installation by a technician.
oAll products are received into the Main warehouse.
4.Work Orders
oThe ability to have templates for work orders: The templates will provide guidance for technicians along with recommended products and default services.
oOnce a work order is posted it should no longer show on views.
oContoso 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
oOnce a work order is scheduled, do not change the time.
oWork Orders scheduled to technician(s) who do not have the desired skill set and level should show a warning.
6.Security and access
oSafeguards must be in place for the data on the Field Service Mobile App if a technician loses his mobile phone or tablet device.
oThe Field Service Administrator needs the ability to update the defaults for the schedule assistant.
7.Accounts
oAny Service Accounts that do not have a Billing Account noted should show a warning.
oAny Billing Accounts that do not have a Price List noted should show a warning.

A work order has been created with Bharti Airtel as the Billing Account and Airtel Kolkata as the Service Account.

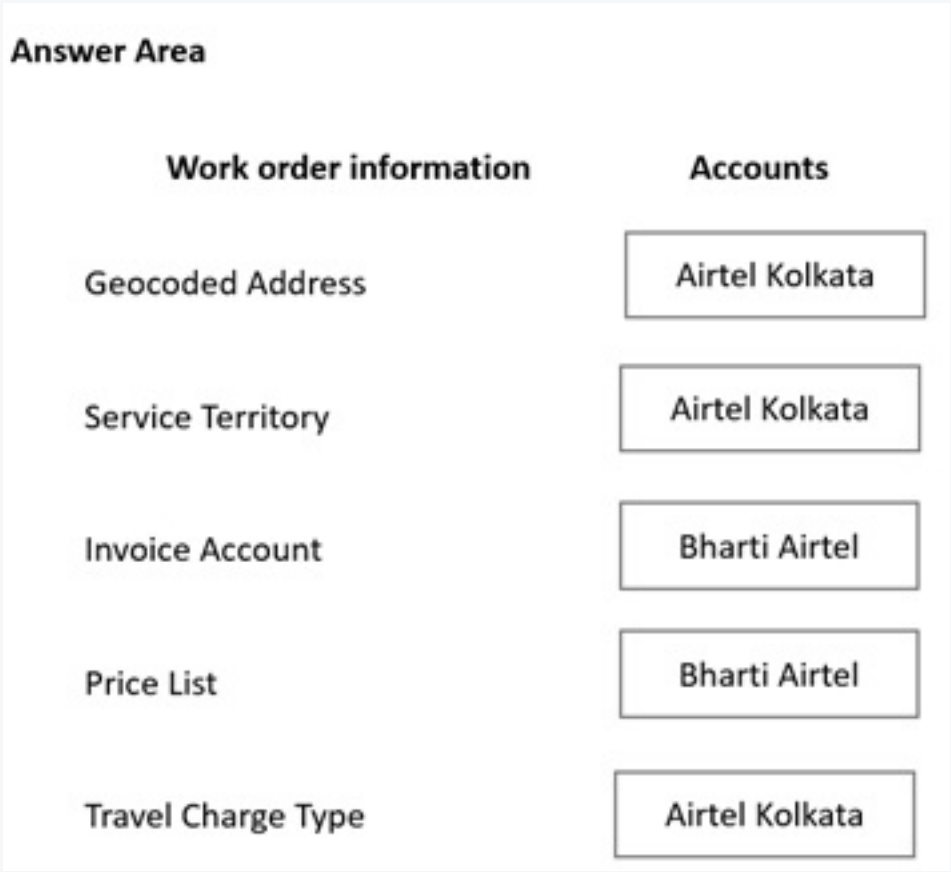
You need to determine the account where various work order information originates. The selected work order type and entitlement do not have any of this information.

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 piece of work order information 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:



Question: 226 **Exam Heist**

You are managing your organization's assets.

You need to give your organization's technicians better visibility on their locations in order to reduce travel time and time spent searching for the asset when the technicians arrive on site.

How should you structure the system to manage this request?

A. Use asset properties to provide location details.
B. Attach a functional location to each asset.
C. Create a detailed service account tree.
D. Create a custom entity to house asset location details.

Answer: B

Explanation:

Correct option: B – Attach a functional location to each asset.

Functional locations in Dynamics365 Field Service represent physical or logical places (e.g., a building, floor, room, or site) where assets are stored or serviced.
By assigning a functional location to an asset, the system automatically propagates that location to work orders, service schedules, and mobile apps, giving technicians a clear, searchable view of where the asset resides before they arrive on site.
This eliminates the need for manual look-ups or custom data entry, reduces travel time (technicians can plan the most efficient route to the exact functional location), and speeds up asset identification on-site.
Functional locations are natively integrated with the **Asset Management** and **Field Service** modules, ensuring data consistency and leveraging existing navigation, mapping, and reporting capabilities.

Why the other options are less suitable

A. Use asset properties to provide location details – Asset properties are primarily descriptive fields (e.g., model, serial number) and are not designed for hierarchical location tracking; they do not drive routing or on-site visibility.
C. Create a detailed service account tree – A service account tree is used for organizing customer or contract hierarchies, not for pinpointing physical asset locations; it adds unnecessary complexity without directly benefiting field technicians.
D. Create a custom entity to house asset location details – Building a custom entity introduces extra development, maintenance, and integration overhead, and it bypasses the built-in functional location framework that already provides the required visibility and routing support.

Therefore, attaching a functional location to each asset is the most efficient, out-of-the-box solution to improve technician visibility, reduce travel time, and eliminate on-site search effort.

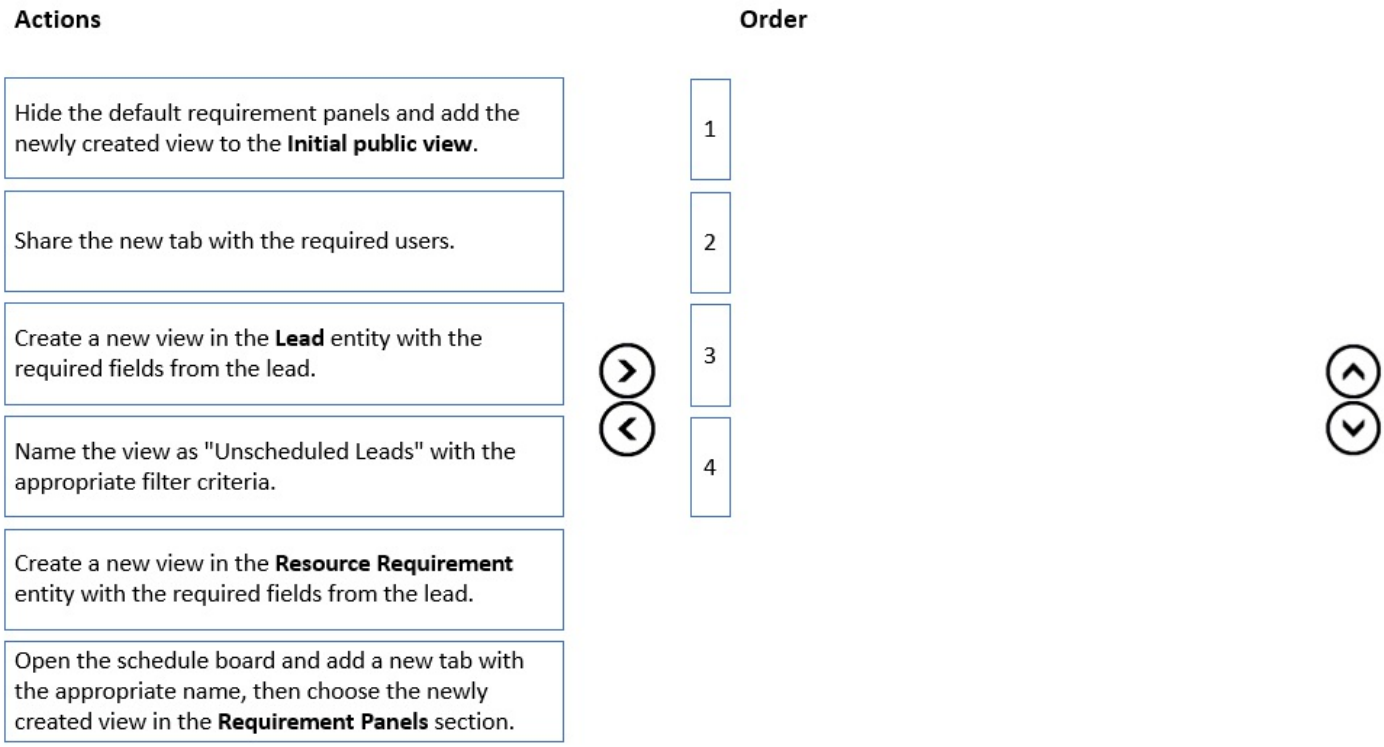
Question: 227 **Exam Heist**

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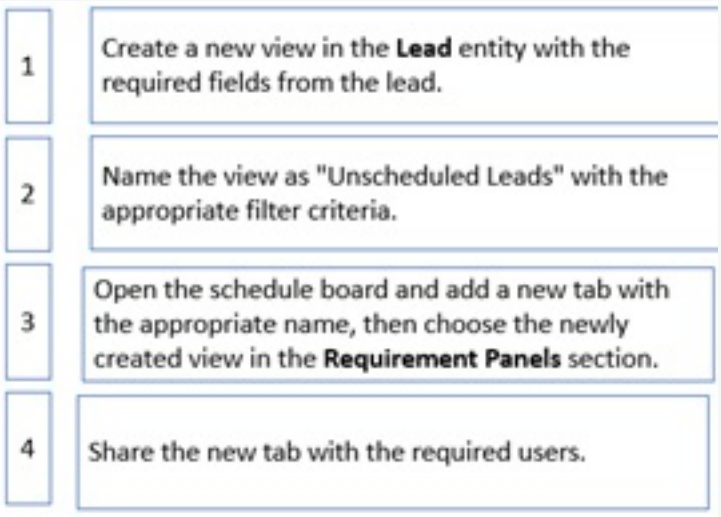
Your organization recently started using the Universal Resource Scheduling feature. You enabled the Lead entity for scheduling.

You need to have a dedicated tab in the schedule board to see all the unscheduled leads.

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.



Answer:



Question: 228 **Exam Heist**

Note: This question is part of a series of questions that present the same scenario. Each question in the series contains a unique solution that might meet the stated goals. Some question might have more than one correct solution, while others might not have a correct solution.

After you answer a question in this section, you will NOT be able to return to it. As a result, these questions will not appear in the review screen.

You are working with your customer to define their schedule board.

Your customer needs you to add or create additional views for their scheduling team.

Solution: Create or edit an existing view in the Bookable Resource Bookings Views, and add it to the Schedule Assistant.

Does this meet the goal?

A. Yes
B. No

Answer: B

Explanation:

Why the correct answer is “No” (OptionB)

The objective is to **add or create additional scheduling views** that the scheduling team can use on the schedule board.
Modifying an existing view in **Bookable Resource Bookings Views** and then adding it to the **Schedule Assistant** only changes a single, pre-existing view; it does **not** create a new, distinct view for the team.
The Schedule Assistant is primarily a **resource-allocation helper** and does not expose custom view definitions to end-users; custom views must be defined on the **Schedule Board** (or in the **Views** node of the board) and then shared with the appropriate security role.
Consequently, the described solution does not fulfill the requirement of providing **new, separate scheduling perspectives** for the team, making it an incomplete implementation.

Why the alternative (“Yes”) is unsuitable

Selecting “Yes” would imply that the proposed action fully satisfies the goal, but as explained, it merely edits an existing view and attaches it to a tool that does not expose it as a separate scheduling view.
Therefore, choosing “Yes” would be technically inaccurate and would not meet the exam-style expectation of delivering a complete, goal-oriented solution.

Conclusion
The correct response is **B – No**, because the suggested steps do not actually create or add new scheduling views for the team; they only adjust an existing view within a tool that does not provide the required view-creation capability. To meet the goal, you must create a new view definition on the Schedule Board (or in the Views node) and make it available to the scheduling team through the appropriate security role or sharing settings.

Question: 229 **Exam Heist**

You are configuring work orders for technicians to complete the onsite service.

When a work order is completed, the customer needs to receive an invoice for the labor charge time spent by the technician to complete the service.

Which option should the technician use to enter their time spent?

A.Work Order Service Task Type
B.Field Service Product Type as Non-Inventory
C.Work Order Incident Type
D.Field Service Product Type as Service

Answer: A

Explanation:

A. Work Order Service Task Type is the most appropriate option for technicians to enter their time spent, as it captures specific labor-related activities associated with the service rendered.

This option allows technicians to log detailed service tasks, thus ensuring precise tracking of labor costs that

can then inform invoicing processes. By utilizing Work Order Service Task Types, organizations can create a structured framework for documenting hours worked, which is vital for accurate billing and client transparency. This meticulous logging aligns with best practices in service management, enhancing efficiency and accountability.

Evaluation of Other Options:

B. Field Service Product Type as Non-Inventory: This option primarily categorizes physical goods rather than services rendered. It fails to capture time or labor details, which are essential for service invoicing. Non-inventory tracking does not reflect the nuances of labor time, thus inadequately addressing the customer's need for an invoice based solely on technician labor.

C. Work Order Incident Type: While this option identifies service issues and problems, it does not facilitate the granular logging of time spent by technicians on specific tasks. It serves a broader purpose in the customer relationship management process but does not suffice for detailed time-tracking necessary for invoicing labor.

D. Field Service Product Type as Service: Although this option pertains to services, it is typically used for categorizing service offerings rather than tracking actual time spent working on those services. Thus, while it may seem relevant, it does not fulfill the requirements of time logging integral to invoicing labor charges.

In conclusion, the structured approach provided by Work Order Service Task Type allows for efficient time-tracking and accurate invoicing, making it the best choice among the options evaluated.

Microsoft Dynamics 365 Documentation
Field Service Management Strategies
Time Tracking Best Practices

Question: 230 **Exam Heist**

You are configuring work orders for technicians to complete the onsite service.

When a work order is completed, the customer needs to receive an invoice for the labor charge time spent by the technician to complete the service.

Which option should the technician use to enter their time spent?

A.Field Service Product Type as Non-Inventory
B.Work Order Service Task Type
C.Work Order Incident Type
D.Work Order Service

Answer: D

Explanation:

D is correct because the Work Order Service directly associates labor with the service provided, facilitating accurate invoicing for customer billing.

Work Order Service (Option D) is specifically designed for tracking services rendered, including labor time accounted for on customer invoices. It supports detailed entry of time spent by technicians on site, ensuring compliance with financial and operational standards. This method streamlines the invoicing process, presenting a clear linkage between service delivery and billing.

In contrast, Option A (Field Service Product Type as Non-Inventory) is inappropriate as it pertains mainly to

physical products rather than labor services. This option does not allow for tracking time spent, as it focuses on inventory classification rather than service records.

Option B (Work Order Service Task Type) represents a task but may not comprehensively encapsulate the entirety of labor charges related to the service; it is limited in scope when compared to the holistic approach of Work Order Service.

Option C (Work Order Incident Type) is designed for categorizing the nature of incidents rather than tracking labor. It does not facilitate capturing time spent by technicians directly, thus failing to support effective invoicing practices.

In summary, only Option D effectively meets the requirements for billing labor time, while the others provide either peripheral or irrelevant functionalities.

References:https://docs.microsoft.com/en-us/dynamics365/field-service/https://www.microsoft.com/en-us/microsoft-365/roadmaphttps://learn.microsoft.com/en-us/dynamics365/customer-engagement/field-service/overview

Question: 231 **Exam Heist**

Note: This question is part of a series of questions that present the same scenario. Each question in the series contains a unique solution that might meet the stated goals. Some question sets might have more than one correct solution, while others might not have a correct solution.

After you answer a question in this section, you will NOT be able to return to it. As a result, these questions will not appear in the review screen.

You are implementing a Microsoft Dynamics 365 Field Service solution for a client.

The client needs to be able to view the Parent Asset and Master Asset when the Primary Incident Customer Asset is associated to a work order. The asset data should not be stored directly on the work order. It should only be visible when the Customer Asset is selected.

Solution:
1. Create the Parent Asset and Master Asset on the work order.
2. Use a business rule to populate the fields from the Customer Asset.

Does this meet the goal?

A. Yes
B. No

Answer: B

Explanation:

Answer: B – No

The proposed solution creates Parent Asset and Master Asset records **on the work order** and then populates them via a business rule.
This directly violates the requirement that **asset data must not be stored on the work order**; the assets should remain on the **Customer Asset** record and only be displayed when that asset is selected.
Storing the assets on the work order makes them permanently tied to the work order, preventing the “visible only when Customer Asset is selected” behavior and causing data redundancy.
A correct implementation would keep the Parent and Master assets linked to the **Customer Asset** record and use a **business rule, plug-in, or Power Automate flow** that copies the needed fields to the work order **conditionally** (i.e., only when the Customer Asset lookup is populated).

Simply populating fields from the Customer Asset without ensuring the assets stay on the Customer Asset and without conditional visibility does not meet the functional goal, making the solution unsuitable.

Question: 232 **Exam Heist**

Note: This question is part of a series of questions that present the same scenario. Each question in the series contains a unique solution that might meet the stated goals. Some question sets might have more than one correct solution, while others might not have a correct solution.

After you answer a question in this section, you will NOT be able to return to it. As a result, these questions will not appear in the review screen.

You are a 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 create a Requirement Resource Preference record and set the Preference Type to Restricted, and Account to Adventure Works. You also enter an expiration date of four (4) months from today.

Does this meet the goal?

A.Yes
B.No

Answer: A

Explanation:

A is correct because defining a Requirement Resource Preference with a "Restricted" type for a specific account effectively prevents a resource from being scheduled for work orders associated with that account while allowing full availability for other accounts.

The dynamics of Requirement Resource Preferences in Microsoft Dynamics 365 Field Service allow for granular control over resource allocations to ensure compliance with customer expectations. By setting the Preference Type to "Restricted" for the Adventure Works account, the resource will no longer appear in the scheduling options for that account, thus satisfying the customer's request. The inclusion of an expiration date further provides flexibility, allowing the preference to be reviewed and potentially adjusted after the designated period.

Other options are incorrect due to the following reasons:

1. Not using a Requirement Resource Preference: Utilizing an alternative approach, such as general resource availability settings, would not specifically limit the resource for only one account while leaving their overall scheduling intact.
2. Setting the Preference Type to another option (e.g., "Preferred"): "Preferred" does not restrict scheduling but rather promotes it, which would directly contradict the customer's request and lead to potential conflicts.
3. Failing to include an expiration date: Without an expiration date, the restriction could become a long-term issue beyond the customer's stated preferences, potentially leading to dissatisfaction.

References:

https://learn.microsoft.com/en-us/dynamics365/field-service/scheduling-assistant
https://learn.microsoft.com/en-us/dynamics365/field-service/resource-scheduling
https://learn.microsoft.com/en-us/dynamics365/field-service/work-order-management

Question: 233 Exam Heist

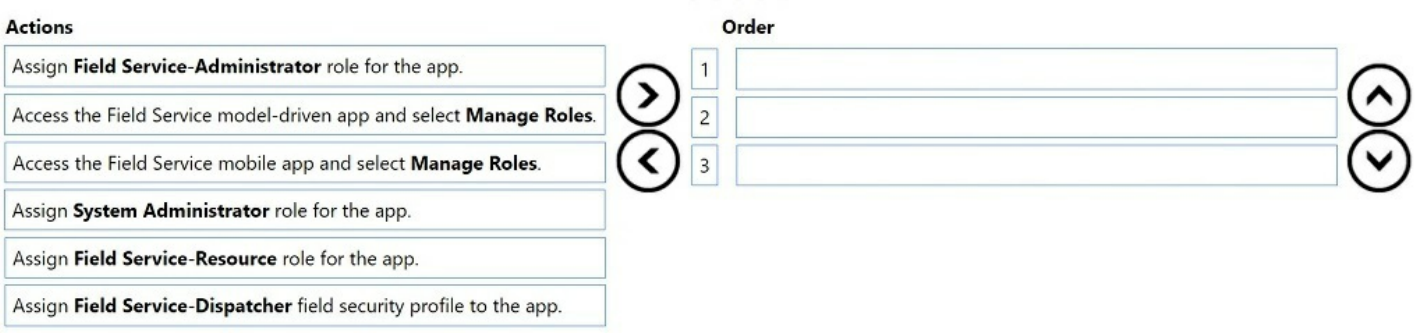
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Your organization wants to use the new Microsoft Dynamics 365 Field Service mobile app.

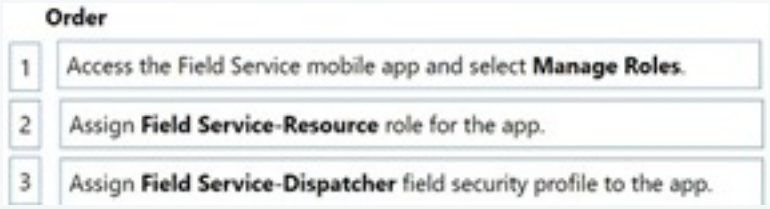
You need to ensure this app works for the technicians.

Which three 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.

NOTE: More than one order of answer choices is correct. You will receive credit for any of the correct orders you select.



Answer:



Question: 234 Exam Heist

A customer experience manager wants to share a technician's phone number with a customer. The customer needs to be able to see the phone number in the customer experience portal and be able to communicate directly with the technician.

The customer reports that they are not able to see the phone number in the portal.

Which two actions should you perform? Each correct answer presents part of the solution.

NOTE: Each correct selection is worth one point.

A. Verify that the customer is not on the exclusion list.
B. Ensure the customer's Communication Type is set to Both.
C. Within the Customer Portal, update Show Resource Phone to Yes.
D. Verify that the Main Phone field is populated.
E. Ensure the customer's communication preference is set to Allowed.

Answer: CD

Explanation:

The correct answers, C and D, ensure the visibility of the technician’s phone number in the customer experience portal.

C, "Within the Customer Portal, update Show Resource Phone to Yes," directly affects the display settings in the portal, allowing the customer's interface to present the technician's information, including the phone number. By default, certain data fields may be hidden to maintain privacy or streamline the user interface. Thus, enabling this setting is crucial for the customer to access the technician's contact information directly.

D, "Verify that the Main Phone field is populated," is fundamental as the absence of populated data renders the display setting irrelevant. If the technician's main phone number is not entered in the system, no amount of adjustment in the portal settings will allow the customer to see it. This step ensures the foundational integrity of the information shared.

Evaluating the incorrect options:

A, "Verify that the customer is not on the exclusion list," does not apply since exclusion lists typically govern overall access to functions rather than specific data visibility. In this case, if the customer could access the portal but not the phone number, exclusion is unlikely to be the cause.

B, "Ensure the customer's Communication Type is set to Both," while important for communication preferences, does not directly impact the visibility of the technician's phone number in the portal. It primarily governs the method of communication rather than the display of contact information.

E, "Ensure the customer's communication preference is set to Allowed," similarly pertains to the customer's generalized communication settings. If the information is present, but the view settings are not adjusted, the customer still wouldn't be able to see the phone number.

References:

https://docs.microsoft.com/en-us/dynamics365/field-service/overview
https://learn.microsoft.com/en-us/dynamics365/customer-service/customer-engagement-portal-overview
https://docs.microsoft.com/en-us/dynamics365/customer-service/portal-customization-configuration

Question: 235 **Exam Heist**

Your organization recently implemented Microsoft Dynamics 365 Field Service. In preparation for user training, you created two new tabs on the schedule board, and configured them based on the line of business.

You need to ensure that users know how to control access to those newly created tabs.

Which three sharing options are available for the tabs? Each correct answer presents a complete solution.

NOTE: Each correct selection is worth one point.

A.Available to all schedule board viewers.
B.Available only to the user who created it.
C.Available only to the users with Field Service dispatcher security role.
D.Available only to the users with Field Service administrator security role.
E.Available only to specified users.

Answer: ABE

Explanation:

A, B, and E are correct because they provide flexible sharing options that align with the user access needs and control in a Microsoft Dynamics 365 Field Service environment.

Reasoning for Correct Answers:

A. Available to all schedule board viewers ensures broad accessibility, facilitating collaboration and

information dissemination across teams, which is crucial in a field service context where multiple stakeholders may need visibility into scheduling information.

B. Available only to the user who created it restricts access, allowing the creator to maintain control over sensitive or specialized configurations, which is an essential feature when certain tabs contain proprietary or critical data relevant only to specific business functions.

E. Available only to specified users allows for targeted sharing, enabling administrators to grant access to selected individuals based on their role or need-to-know basis. This ensures security and relevance in information flow, particularly in large organizations with varying levels of access requirements.

Critique of Incorrect Options:

C. Available only to the users with Field Service dispatcher security role is not valid because it imposes a restrictive access model that might hinder collaboration. This option limits availability only to dispatchers, potentially alienating other necessary roles, such as technicians who may require access to the schedule board.

D. Available only to the users with Field Service administrator security role also presents limitations similar to option C. It unnecessarily restricts the visibility of newly created tabs to a small subset of users, which can disrupt workflows and inhibit real-time decision-making in field operations, where responsiveness is critical.

References:

https://learn.microsoft.com/en-us/dynamics365/field-service/overview
https://learn.microsoft.com/en-us/dynamics365/customer-engagement/admin/configure-scheduling-options
https://learn.microsoft.com/en-us/dynamics365/field-service/field-service-roles

Question: 236 **Exam Heist**

Your organization wants to use Connected Field Service for Azure IoT Hub to remotely monitor IoT devices and address issues faster to reduce downtime.

As part of the implementation, you install the Connected Field Service solution and configure it to use Azure IoT Hub.

You discover that you are unable to register IoT devices. You need to determine why.

What are two reasons that could be causing this issue? Each correct answer presents a complete solution.

NOTE: Each correct selection is worth one point.

A.The Connected Field Service solution was installed incorrectly.
B.Prerequisites for the Azure subscription are incomplete.
C.Dynamics 365 is disconnected from Azure.
D.Azure is offline.

Answer: CD

Explanation:

C.Dynamics 365 is disconnected from Azure.

D.Azure is offline.

Question: 237 Exam Heist

Your manager asks you to provide a report with a summary of work orders. You enable the Field Service historical analytics report.

You need to identify the correct data refresh frequency.

Which frequency applies?

A. 8 hours
B. 12 hours
C. 24 hours
D. 48 hours

Answer: C

Explanation:

Correct option: C – 24hours

The Field Service **Historical Analytics** report is designed to provide near-real-time insight while balancing system load.
Its underlying data refresh cycle is configured to **once every 24hours**, ensuring that the aggregated metrics (e.g., work-order counts, SLA compliance, resource utilization) reflect the previous day's complete activity without over-taxing the production environment.
This interval aligns with the standard refresh cadence documented for the beta version of Dynamics365 Field Service analytics, where a 24-hour window is the default for historical data aggregation.

Why the other options are less suitable

8hours (A) – Too frequent for a historical analytics report; it would require excessive data pulls and could degrade performance of the underlying operational tables.
12hours (B) – Still more frequent than the documented default; while it might appear acceptable, it does not match the officially specified refresh schedule.
48hours (D) – Too long; it would delay the availability of recent trends, causing the report to lag behind operational reality and potentially miss timely corrective actions.

Therefore, **24hours** is the precise, officially-defined refresh frequency for the Field Service Historical Analytics report.

Question: 238 Exam Heist

During User Acceptance Testing, mobile technicians receive the message "Contact your administrator for access to your organization's mobile apps." when logging into the Dynamics 365 Field Service mobile app.

You need to determine which areas to update within the mobile project, so that technicians can see the appropriate information.

What is a possible way to troubleshoot the issue?

A.Ensure you have the correct security role (Field Service - Offline Resource), and that the security role is assigned to the Dynamics 365 Field Service mobile app.
B.Update the mobile offline profile to include the users that require access.
C.Select the menu icon on the top left, and toggle Show non-production apps to Yes.
D.Update the mobile offline profile to include the correct Field Service security roles.

Answer: A

Explanation:

A is correct because ensuring the appropriate security role is assigned is fundamental for access to mobile applications within Dynamics 365 Field Service.

The security role of "Field Service - Offline Resource" is essential as it encompasses all necessary permissions for mobile technicians to interact with the mobile app effectively. If this role is not assigned correctly to the app, technicians will be blocked from accessing critical functionalities, leading to the error message they encountered. Assigning the correct security role ensures that users have the requisite permissions to view and manipulate relevant data within the mobile interface, thereby facilitating their operational tasks seamlessly.

Evaluation of Other Options:

B. Updating the mobile offline profile to include users who require access may seem relevant, but without the correct security role, users may still lack the essential permissions. If the foundational role isn't configured, adjusting the offline profile alone would not resolve the issue, as permission models in Dynamics 365 rely heavily on underlying security roles.

C. Toggling the option to show non-production apps is irrelevant as this setting pertains to the visibility of development or staging applications rather than access control for roles within the mobile app context. Therefore, changing this option does not address the core issue of role permissions.

D. Although updating the mobile offline profile to include correct Field Service security roles seems pertinent, it is ineffective if those roles aren't assigned to users properly in the first instance. Merely having roles in the offline profile does not equate to their correct implementation per user, thus failing to resolve the access issue.

References:

https://docs.microsoft.com/en-us/dynamics365/field-service/manage-security-roles
https://docs.microsoft.com/en-us/dynamics365/field-service/mobile-app-setup
https://docs.microsoft.com/en-us/dynamics365/customer-service/setting-up-mobile-apps

Question: 239 **Exam Heist**

You are configuring settings related to booking status.

You have the following booking status:
1.Arrived On Site, associated with the Field Service status In Progress
2.Repair, associated with the Field Service status In Progress
3.Completed, associated with the Field Service status Completed

You need to anticipate what will happen when a technician updates their booking status on their Microsoft Dynamics 365 Field Service mobile app.

Which two scenarios will happen by default? Each correct answer presents part of the solution.

NOTE: Each correct selection is worth one point.

A.A timestamp is created for Arrived On Site.
It is then overwritten by a new time stamp when the booking status is updated to Repair, as the associated status is still in progress.
This is followed by a new timestamp when the booking status is updated to Completed.

B.By default, a timestamp is created only when a booking status change results in a Field Service status change.

C.A timestamp is created when the booking status is updated to Arrived On Site.
No timestamp is created for Repair, as the associated status is still in progress.
This is followed by a new timestamp when the booking status is updated to Completed.

D.By default, a timestamp is created with every booking status change.

Answer: BC

Explanation:

BC is correct because it accurately reflects the behavior of timestamp creation in relation to booking status updates in Microsoft Dynamics 365 Field Service.

Booking status updates relating to "Arrived On Site" and "Completed" create timestamps that track the timing of service activities. For "Arrived On Site," a new timestamp is recorded. However, since "Repair" retains the Field Service status of "In Progress," no additional timestamp is created for that state, which aligns with option C. Completion, on the other hand, results in a status change to "Completed," warranting a new timestamp, consistent with option B.

Option A is incorrect because it suggests that timestamps for "Arrived On Site" are overwritten when updating to "Repair." In actuality, no new timestamp for "Repair" is created, leaving the "Arrived On Site" timestamp intact.

Option D erroneously implies that every booking status change results in the creation of a timestamp, which only occurs when there is a corresponding change in the Field Service status, as indicated by options B and C.

In sum, options B and C reflect the nuances of status changes and their impact on timestamp creation, fulfilling the requirement for accurate logging of service events within the Dynamics 365 framework.

References:

https://learn.microsoft.com/en-us/dynamics365/field-service/booking-status
https://learn.microsoft.com/en-us/dynamics365/field-service/configure-booking-status
https://learn.microsoft.com/en-us/dynamics365/field-service/field-service-mobile-application

Question: 240 **Exam Heist**

Note: This question is part of a series of questions that present the same scenario. Each question in the series contains a unique solution that might meet the stated goals. Some question sets might have more than one correct solution, while others might not have a correct solution.

After you answer a question in this section, you will NOT be able to return to it. As a result, these questions will not appear in the review screen.

You are implementing Microsoft Dynamics 365 Field Service for a health care institution. Each day, the institution receives a large number of appointment requests for pediatricians.

You have the following requirements:
•create a daily schedule for pediatricians with a frequency of 30 minutes for each slot.
•provide a full-day schedule with start times and end times.

Solution: You create a fulfillment preference with time window details with a duration of 30 minutes for the whole day, create a requirement group, and book it with the schedule assistant.

Does this meet the goal?

A.Yes

B.No

Answer: B

Explanation:

B is correct because the proposed solution does not adequately create a structured and comprehensive schedule that meets the stated requirement for pediatric appointments.

The fulfillment preference with time window details only defines the time per appointment (30 minutes) but fails to establish a precise full-day schedule, including start and end times. A successful scheduling solution must not only segment the day into 30-minute intervals but also effectively allocate slots for each pediatrician, incorporating operational constraints such as breaks and overlapping appointments. The requirement for a daily schedule implies the need for defined time windows spanning a full day, which is not achieved through merely creating a fulfillment preference without a robust scheduling mechanism.

Critically evaluating other options:

1. Other solutions may have involved directly utilizing the schedule assistant to allocate appointments, which is essential for managing real-time demands in a healthcare setting. However, adding fulfillment preferences without defining operational parameters yields ineffective scheduling.
2. Relying solely on requirement groups without incorporating a systematic approach to full-day scheduling can lead to logistical oversights, impacting service delivery and patient satisfaction.

For these reasons, the solution provided does not fulfill the outlined requirements, emphasizing the importance of a comprehensive approach in the context of healthcare service scheduling.

References:

https://docs.microsoft.com/en-us/dynamics365/field-service/scheduling-optimization-overview
https://learn.microsoft.com/en-us/dynamics365/field-service/scheduling-rules
https://learn.microsoft.com/en-us/dynamics365/field-service/field-service-resources

Question: 241 **Exam Heist**

You are the lead consultant on a Dynamics 365 Field Service implementation for a commercial landscaping company.

Some jobs require landscape technicians to be scheduled on a job for multiple days.

What are three ways technicians can be scheduled over multiple days? Each correct answer presents a complete solution.

NOTE: Each correct selection is worth one point.

A.Manually on the schedule board.
B.Using Resource Scheduling Optimization (RSO).
C.Creating a resource group on the incident type.
D.Using the scheduling assistant.
E.Scheduling multiple resources to multiple days.

Answer: ADE

Explanation:

Reference:

https://learn.microsoft.com/en-us/dynamics365/field-service/schedule-multi-day-work

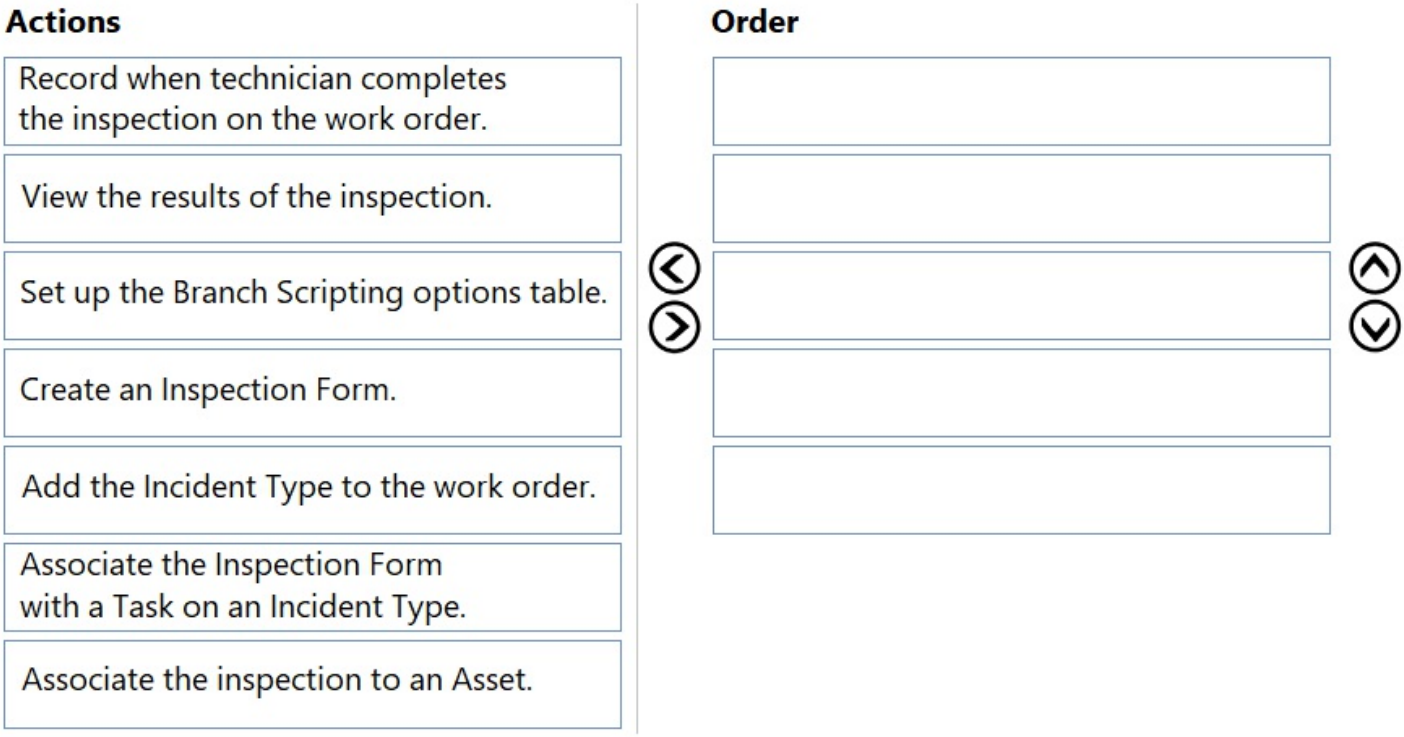
Question: 242 **Exam Heist**

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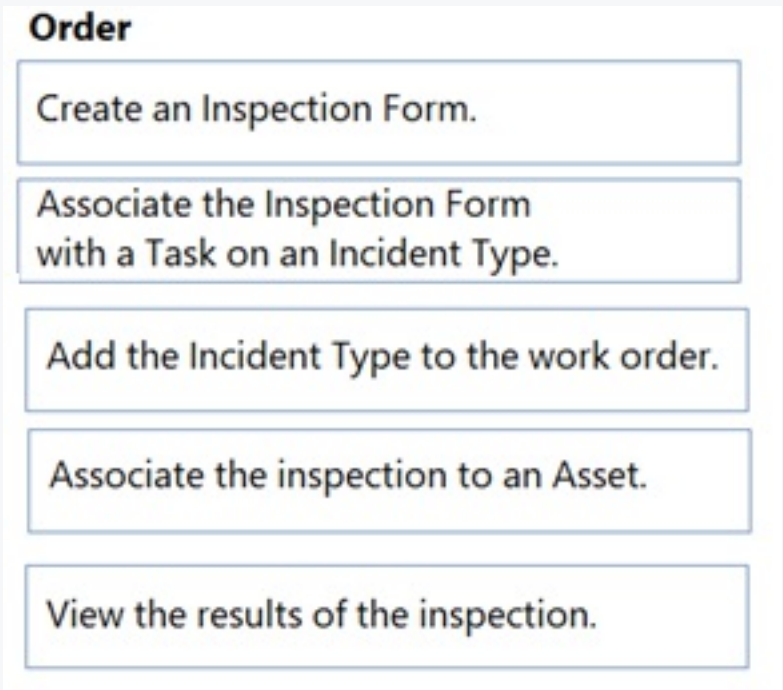
You are the lead consultant on a Dynamics 365 Field Service implementation. Your customer wants the system to be set up for inspections.

You need to implement an inspection lifecycle as it relates to a work order.

In working with your customer, which five actions should you perform in sequence? To answer, move the five appropriate actions from the list of actions to the answer area. Arrange the five actions in the correct order.



Answer:



Question: 243 Exam Heist

You are identifying inconsistencies in recent work order billings.

You find a work order that does not have an Invoice and Actuals posted.

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

NOTE: Each correct selection is worth one point.

A.Actuals are only generated when the invoice is marked as Paid.
B.Actuals are only generated when the invoice is Confirmed.
C.The Work Order Invoice Creation setting is set to Never.
D.The setting for generating invoices for work orders created by an agreement was incorrectly set.

Answer: CD

Explanation:

The correct answers, C and D, highlight specific workflow settings that can prevent invoice and actuals posting in Microsoft Dynamics 365 for Field Service.

C is correct as the "Work Order Invoice Creation" setting being set to "Never" directly prohibits the system from generating invoices, resulting in no actuals being posted. This setting controls whether and how work orders generate invoices, and if set to "Never," it conclusively leads to the absence of invoicing and corresponding actuals.

D is also correct since the incorrect configuration of invoice generation settings for work orders derived from agreements can lead to failures in generating invoices and actuals. If a billing agreement setup does not properly align with business rules or expectations, it can impede the automatic processing of invoices tied to work orders.

In contrast, option A is incorrect as actuals are generated based on completed work and service tasks, independent of the invoice status being marked as "Paid." Option B is similarly flawed; actuals are processed upon completion of service tasks rather than being contingent on an invoice being confirmed. Thus, both A and B misinterpret the mechanics of actual generation in the system.

References:

https://learn.microsoft.com/en-us/dynamics365/field-service/overview
https://learn.microsoft.com/en-us/dynamics365/field-service/invoicing
https://learn.microsoft.com/en-us/dynamics365/field-service/work-order-management

Question: 244 Exam Heist

You are the lead consultant on a Dynamics 365 Field Service implementation for an automotive repair company.

The company wants to be able to create work orders from customer emails using the Field Service app for Microsoft Outlook.

What are two ways to do this? Each correct answer presents a complete solution.

NOTE: Each correct selection is worth one point.

A.After selecting the Field Service app icon on the email, select the Work orders tab and select the plus icon to manually create a work order.
B.From the email, select the Field Service app icon and select Create a work order from email.

C.From the email, select the Field Service app icon to automatically create the work order, then select the Work orders tab to find and schedule the work order that was automatically created.

D.From the email, select the Share to Teams icon where you can generate the work order.

E.Select the Viva Insights app icon on the email and select the Book work order option.

Answer: AB

Explanation:

AB is correct because both options directly leverage the functionalities within the Field Service app for manual and semi-automated work order creation from customer emails.

Option A allows users to manually create work orders through a structured interface after identifying the relevant email, ensuring accurate data entry tailored to specific customer needs. This approach guarantees that personnel can review the content thoroughly before committing it to the work order system, which is crucial in maintaining service quality.

Option B commands the functionality to create work orders form emails directly, enhancing efficiency by streamlining the process into a few clicks. This approach uses the built-in integration of the Field Service app within Microsoft Outlook to automate common tasks, thus reducing manual entry errors and speeding up response times.

Conversely, Option C inaccurately implies that work orders can be automatically created solely by selecting an icon. While it suggests a level of automation, it overlooks the nature of email data handling and the need for human oversight in the work order creation process.

Option D is fundamentally flawed as it suggests using the Teams application to generate work orders, which is not within the direct functionality of Field Service when integrated with Outlook. Such a redirection complicates processes unnecessarily without a direct workflow.

Option E mentions the Viva Insights app, which does not pertain to the Field Service context and therefore is irrelevant to the actual functionalities needed for creating work orders from customer emails in this scenario.

https://docs.microsoft.com/en-us/dynamics365/field-service/
https://learn.microsoft.com/en-us/dynamics365/field-service/field-service-overview
https://learn.microsoft.com/en-us/outlook/add-ins/overview

Question: 245 **Exam Heist**

Note: This question is part of a series of questions that present the same scenario. Each question in the series contains a unique solution that might meet the stated goals. Some question sets might have more than one correct solution, while others might not have a correct solution.

After you answer a question in this section, you will NOT be able to return to it. As a result, these questions will not appear in the review screen.

A dispatcher asked you to customize Fulfillment Preferences in Dynamics 365 Field Service to influence how the schedule assistant displays results for single-day requirements.

You need to create a fulfillment preference.

Solution: Time groups determine the time slots for schedule assistant results *without* affecting the subsequent booking start times.

Does this meet the goal?

A.Yes

B.No

Answer: A

Explanation:

A is correct because time groups effectively influence the schedule assistant's filtering mechanism for presenting available time slots without modifying the initial booking start times.

The fulfillment preferences in Dynamics 365 Field Service allow organizations to optimize how scheduling information is generated and displayed to users. Time groups serve as a critical mechanism to ensure the results offered by the schedule assistant align with operational needs and constraints. By defining specific time slots for bookings, dispatchers can refine the criteria used by the system to prioritize or streamline the scheduling process, therefore enhancing efficiency and responsiveness to customer requirements. This targeted influence on scheduling processes aligns perfectly with the goal of customizing the fulfillment preferences for single-day requirements.

Other potential solutions might include adjusting resource availability or modifying booking rules. These may inadvertently alter initial booking times, leading to disruptions in workflows or misalignment with customer expectations. Such changes can complicate the scheduling landscape rather than simplify it, thus failing to meet the intended goals of the dispatcher who requested a focused and efficient scheduling enhancement.

For further understanding of Dynamics 365 Field Service configurations, the following references provide in-depth insights and best practices:

https://learn.microsoft.com/en-us/dynamics365/field-service/overview
https://learn.microsoft.com/en-us/dynamics365/field-service/prospector-field-service-scheduling
https://learn.microsoft.com/en-us/dynamics365/field-service/scheduling-and-dispatching

Question: 246 **Exam Heist**

Note: This question is part of a series of questions that present the same scenario. Each question in the series contains a unique solution that might meet the stated goals. Some question sets might have more than one correct solution, while others might not have a correct solution.

After you answer a question in this section, you will NOT be able to return to it. As a result, these questions will not appear in the review screen.

A dispatcher asked you to customize Fulfillment Preferences in Dynamics 365 Field Service to influence how the schedule assistant displays results for single-day requirements.

You need to create a fulfillment preference.

Solution: Add intervals and time groups together always resets intervals when time groups overlap, ensuring a consistent booking sequence.

Does this meet the goal?

A.Yes
B.No

Answer: B

Explanation:

B is correct because the proposed solution doesn't effectively customize the fulfillment preferences needed to influence the schedule assistant's results for single-day requirements.

To ensure optimal scheduling in Dynamics 365 Field Service, fulfillment preferences must delineate clear

intervals and criteria rather than a system that resets intervals upon overlap. The proposed method could lead to unpredictable outcomes and hinder the efficiency of the scheduling process. By maintaining consistent booking sequences through well-defined intervals, the system can more effectively prioritize and manage service appointments based on the specific needs of the dispatcher.

Critique of Other Options:

1. **Ignoring Time Groups**: Any approach not considering time groups fails to leverage the full capacity of scheduling intricacies, leading to inefficient allocations of resources.
2. **Overly Complex Rules**: Solutions that introduce complex rules may confuse the scheduler rather than clarifying the fulfillment preferences, resulting in delays and misallocations.
3. **Static Preferences**: Any preference system that remains static and does not allow for flexibility or adaptability in scheduling can ultimately fail to meet the dynamic needs of service operations, causing frustration for dispatchers and field agents alike.

Thus, while the intent may be to enhance performance by combining intervals and time groups, failing to create a robust framework for managing overlaps means that the suggested solution will not successfully meet the operational goals.

References:

https://learn.microsoft.com/en-us/dynamics365/field-service/fulfillment-preferences
https://learn.microsoft.com/en-us/dynamics365/field-service/scheduling-assistant
https://learn.microsoft.com/en-us/dynamics365/field-service/advanced-scheduling-overview

Question: 247 **Exam Heist**

DRAG DROP
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Case study
-

This is a case study. Case studies are not timed separately. You can use as much exam time as you would like to complete each case. However, there may be additional case studies and sections on this exam. You must manage your time to ensure that you are able to complete all questions included on this exam in the time provided.

To answer the questions included in a case study, you will need to reference information that is provided in the case study. Case studies might contain exhibits and other resources that provide more information about the scenario that is described in the case study. Each question is independent of the other questions in this case study.

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To start the case study
-

To display the first question in this case study, click the Next button. Use the buttons in the left pane to explore the content of the case study before you answer the questions. Clicking these buttons displays information such as business requirements, existing environment, and problem statements. When you are ready to answer a question, click the Question button to return to the question.

Overview
-

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.
oDispatchers are assigned to all territories in a region. Dispatchers assign repair and installation work to repair technicians based on their skills.
oRepair technicians are employees and subcontractors.
3.Planned maintenance services perform regular and planned checks for their customers.
oInspectors are assigned to all regions based on skills and expertise.
oInstallers are assigned to multiple territories in a geographic region.
oRepair technicians are employees and subcontractors.
oDispatchers 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.

Existing environment
-

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.

Requirements
-

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.
oCertifications set to expire over the next 90 days should show highlighted in Yellow.
oCertifications 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.
oTemplates 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.

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

Answer:

Order
Enable insurances in the settings.
Create a one-to-many relationship between insurance and account.
Create a cloud flow to validate the insurance and send reminder.

Question: 248 **Exam Heist**

DRAG DROP
-

Case study
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•Enable Microsoft SharePoint Integration.

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•Ability to enter time for the work.

Technical requirements
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•Ability to perform ad-hoc inspections with assets.
•Ability for users to export responses.

Security and access
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•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.

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 correct order.

Actions	Order
Set Analytics Frequency = "Immediately".	
Enable Analytics.	
Set Analytics Frequency = "Custom".	
Set Analytics Frequency = "Daily".	
Update record generation start time.	
Access the **Inspection** tab within Field Service app settings.	

Answer:

Order
Access the **Inspection** tab within Field Service app settings.
Enable Analytics.
Set Analytics Frequency = "Custom".

Question: 249 **Exam Heist**

DRAG DROP
-

You are a dispatcher for a cable installation company that provides installation services in multiple territories. The company is using Dynamics 365 Field Service to manage their work orders. Every time a work order is created, the dispatch team is manually assigning the work order to a territory in order to book the correct resources.

You need to ensure that the system will automatically assign work orders to territories, and that the schedule board will be filtered to the appropriate resources for that territory.

Which four actions must be performed 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.

Actions	Order
Map postal codes to territories.	
Use the territory lookup on each user record to assign territory.	
Add territories to Bookable Resources and Book Work Order.	
Ensure all accounts have a valid postal code and geocode.	
Add postal codes to bookable resources.	
Create postal code records.	
From the view of Active Resources, select the assign territories button in the menu ribbon.	

Answer:

Order

Create postal code records.

Ensure all accounts have a valid postal code and geocode.

Add territories to Bookable Resources and Book Work Order.

From the view of Active Resources, select the assign territories button in the menu ribbon.

Question: 250 **Exam Heist**

You are implementing Dynamics 365 Field Service for a generator maintenance organization.

You need the dispatcher to describe the ways to create a work order from another record associated in Field Service.

In which three record tables can a work order be created? Each correct answer presents a complete solution.

NOTE: Each correct selection is worth one point.

A.Quote
B.Agreement
C.Schedule Board
D.Opportunity
E.Asset
F.Case

Answer: ADF

Explanation:

A work order can be created from a Quote, Opportunity, and Asset within Dynamics 365 Field Service due to their integral functions in the service lifecycle.

Creating work orders from a **Quote** is facilitated by the need to convert a proposed service agreement into actionable tasks, thus allowing the organization to operationalize business opportunities effectively. Quotes often represent potential sales, and converting them into work orders ensures that sales leads can smoothly transition into fulfilled services, enhancing both customer satisfaction and operational efficiency.

Similarly, work orders can be generated from an **Opportunity**, which in Dynamics 365 serves as a crucial touchpoint in tracking potential business engagements. This linkage allows field service organizations to create a seamless workflow from initial customer interest to actual service execution — the conversion supports a structured approach to managing client relationships, allowing for real-time resource allocation based on projected needs.

Creating work orders from an **Asset** extends the utility of the service model by allowing organizations to schedule maintenance or repairs based directly on the condition and service history of the asset itself. This proactive approach not only ensures asset longevity but fosters a preventive maintenance culture, reducing unexpected downtimes and optimizing resource deployment.

Conversely, the **Agreement** option is not applicable for creating work orders directly. While agreements establish service terms, they represent overarching contracts rather than individual service actions. The

Schedule Board, although vital for managing resources and staff allocation, does not serve as a source for creating work orders. The **Case** option is also incorrect, as cases primarily address customer service issues rather than directly producing actionable service tasks.

In summary, within Dynamics 365 Field Service, only Quotes, Opportunities, and Assets meaningfully contribute to generating work orders, underlining their practical application in operational process flows.

https://docs.microsoft.com/en-us/dynamics365/field-service/field-service-overview
https://docs.microsoft.com/en-us/dynamics365/field-service/work-order-overview
https://docs.microsoft.com/en-us/dynamics365/field-service/service-agreements

Question: 251 **Exam Heist**

A customer just signed a contract for a 20% discount on all parts and labor for the next year based on a preset price list.

You need to ensure this customer receives the appropriate discount on all work order parts and labor.

Which two actions should you perform in Dynamics 365 Field Service? Each correct answer presents a complete solution.

NOTE: Each correct selection is worth one point.

A.Create an agreement with the applicable invoice terms.
B.Create an entitlement with the applicable entitlement terms and field service details.
C.Create an agreement and service-level agreement with the applicable invoice terms and escalation point.
D.Create a price list with the appropriate products, services, and pricing discounts.

Answer: BD

Explanation:

BD is correct because creating an entitlement and a price list ensures that the customer's discount is appropriately applied to both parts and labor in Dynamics 365 Field Service.

The choice of **B** is essential as an entitlement defines the terms and conditions of services provided to customers, including discounts. By creating an entitlement with specific details such as the 20% discount, the system can automatically apply these discounts during work order transactions. This ensures consistency and accuracy in billing and service fulfillment.

D is also necessary because a price list outlines the specific prices for products and services, inclusive of any discounts. By setting up a price list that reflects the 20% discount on all applicable parts and labor, you guarantee that the pricing is correctly adjusted in the system. When work orders are created, the prices will pull from this list, automatically applying the discount.

A, while relevant to managing billing, does not directly implement the systematic application of discounts on ongoing transactions or ensure the operational details required for service execution. Thus, it does not sufficiently meet the requirement as standalone action.

C, although it integrates an agreement and service-level agreement, similarly fails to sufficiently address the direct application of discounts on parts and labor. These agreements are more about managing expectations and service delivery than they are about automatically computing discounts at the transaction level.

In conclusion, BD is the most comprehensive approach as it ensures systemic adherence to pricing policies defined by entitlements and price lists, critical functions for managing customer relations in Dynamics 365 Field Service.

References:

https://learn.microsoft.com/en-us/dynamics365/field-service/entitlements-overview
https://learn.microsoft.com/en-us/dynamics365/field-service/pricing-overview
https://learn.microsoft.com/en-us/dynamics365/field-service/service-agreements-overview

Question: 252 **Exam Heist**

Your company's product inventory specialists use the Field Service mobile app to manage inventory, purchasing, and returns.

You need to train the product inventory specialists on the processing actions available with return merchandise authorizations (RMA).

Which three processing actions are available? Each correct answer presents a complete solution.

NOTE: Each correct selection is worth one point.

A.Change Equipment Ownership
B.Return to Vendor (RTV)
C.Return to Warehouse
D.Return for Replacement
E.Return for Repair

Answer: BCD

Explanation:

The correct options B, C, and D represent the available processing actions for return merchandise authorizations (RMA) in the context of Microsoft Dynamics 365 for Field Service.

Explanation of Correct Answers:

1. **Return to Vendor (RTV):** This action allows inventory specialists to send products back to the original supplier, which is essential for managing defective or surplus goods and maintaining accurate inventory levels.
2. **Return to Warehouse:** This option facilitates the return of items to the company's own warehouse. It is a critical process for maintaining stock integrity and ensuring that returned items are re-integrated into inventory management systems promptly.
3. **Return for Replacement:** This processing action is vital when a customer requires a substitution for a defective product. It signals the need for efficient handling of customer service issues while minimizing downtime for operations.

Evaluation of Incorrect Options:

1. **Change Equipment Ownership:** This option pertains to transferring ownership of equipment between customers or within departments but does not address the return process of products through RMAs. Hence, it is not relevant in this context of inventory management.
2. **Return for Repair:** While related to returning items, this action is typically categorized under repair processes rather than straight returns in the inventory management system. RMAs primarily deal with straight returns or replacements rather than returning items specifically for repair.

References:

https://docs.microsoft.com/en-us/dynamics365/field-service/field-service-overview
https://learn.microsoft.com/en-us/dynamics365/field-service/field-service-mobile
https://docs.microsoft.com/en-us/dynamics365/field-service/manage-inventory

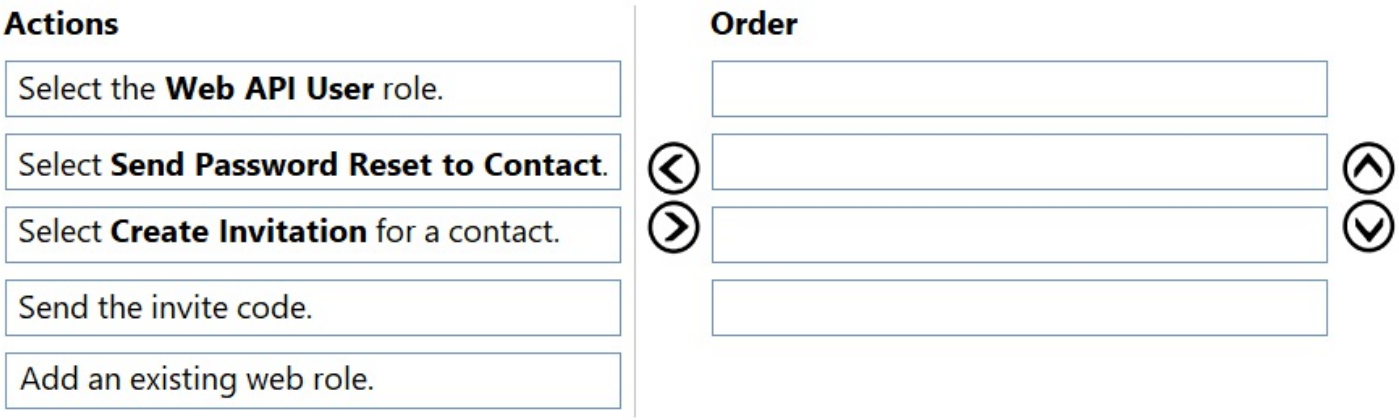
Question: 253 **Exam Heist**

DRAG DROP
-

Your company recently enabled a self-service scheduling portal for your customers to schedule appointments.

You need to explain how a portal access request can be sent manually to your customers to access the portal.

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.



Answer:



Question: 254 **Exam Heist**

You configured Dynamics 365 Field Service for a construction company.

The company needs the ability to create a bookable resource to send a group of individuals with different skillsets, along with building equipment, to the construction site to perform construction work for a period of two months.

When you create a bookable resource record, what should you set as the resource type?

A.Resource Group
B.User
C.Crew

D.Pool

Answer: C

Explanation:

C is correct because a Crew resource type allows for the coordination of a group of individuals with diverse skillsets needed for specific tasks.

The rationale for selecting "Crew" lies in the requirement for multiple technicians and distinct skillsets on-site. A Crew in Dynamics 365 Field Service is explicitly designed to accommodate groups working together, thus facilitating the management of both personnel and necessary equipment effectively over a prolonged duration, such as two months. This approach enhances operational efficiency and response times, optimizing resource allocation for complex projects.

Evaluating the other options:

A. Resource Group: This option is inappropriate as it represents a collection of resources rather than an operational unit on site. While a Resource Group can contain various resources, it does not facilitate direct job assignments and management in the way a Crew does.
B. User: A User refers to an individual resource or technician. This option lacks the group capability necessary for the task requirements. Assigning individual users would complicate the coordination of diverse skills needed at the construction site.
D. Pool: This option typically denotes a group of resources available for designation but does not imply active collaboration on a singular task or project. It lacks the structured coordination integral to managing a team of specialists efficiently for a construction project.

In conclusion, for optimal deployment of a diverse team with multiple skill sets and equipment at a construction site, selecting a Crew as the resource type is the most suitable choice within Dynamics 365 Field Service.

Authoritative References:

https://docs.microsoft.com/en-us/dynamics365/field-service/resource-management
https://docs.microsoft.com/en-us/dynamics365/field-service/crew-resources
https://docs.microsoft.com/en-us/dynamics365/field-service/field-service-overview

Question: 255 **Exam Heist**

Your customer wants their technicians to use Dynamics 365 Remote Assist. The appropriate licenses have been secured.

You need to ensure the technicians can use Remote Assist.

What must the Bookable Resource Type be set to?

A. Crew
B. Account
C. Contact, if it is a contractor
D. User

Answer: D

Explanation:

Why “User” is the correct Bookable Resource Type

Remote Assist is a user-centric, licensed service – it requires an individual user account (Azure AD identity) that is assigned a Dynamics365 Field Service (or Remote Assist) license. The service does not operate on generic "accounts" or "contacts"; it must be tied to a specific user who can sign in, receive assignments, and collaborate in real time.
Bookable Resource Type defines how the resource is scheduled and tracked – setting the type to **User** tells the system that the resource represents a person who can be booked for a job, have a schedule, and receive work orders. This alignment enables proper dispatch, skill-matching, and audit trails for the technician using Remote Assist.
License compliance – the licensing model for Remote Assist is per-named user. Only a **User** resource type can consume that license; other types (Crew, Account, Contact) are not licensed for interactive, per-user services.

Why the other options are unsuitable

Crew – Represents a group of workers treated as a single scheduling unit. Remote Assist is designed for individual technicians who need a personal license and user profile; a crew cannot inherit a per-user license.
Account – An Account is an organizational entity (customer, site, or business) and does not represent a person who can sign in to Remote Assist. Using it as a resource would prevent the required user authentication and license consumption.
Contact, if it is a contractor – Contacts are external individuals linked to an Account; they are not intended for internal scheduling or license assignment. Remote Assist requires an internal user record with a valid license, which a Contact cannot provide.

Conclusion
To enable technicians to use Dynamics365 Remote Assist, the Bookable Resource must be configured as a **User**. This ensures proper licensing, authentication, scheduling, and tracking within Field Service. Options A, B, and C lack the necessary user identity and licensing alignment, making them inappropriate for Remote Assist usage.

Question: 256 **Exam Heist**

HOTSPOT
-

A dispatcher needs help managing work hours calendar for requirements.

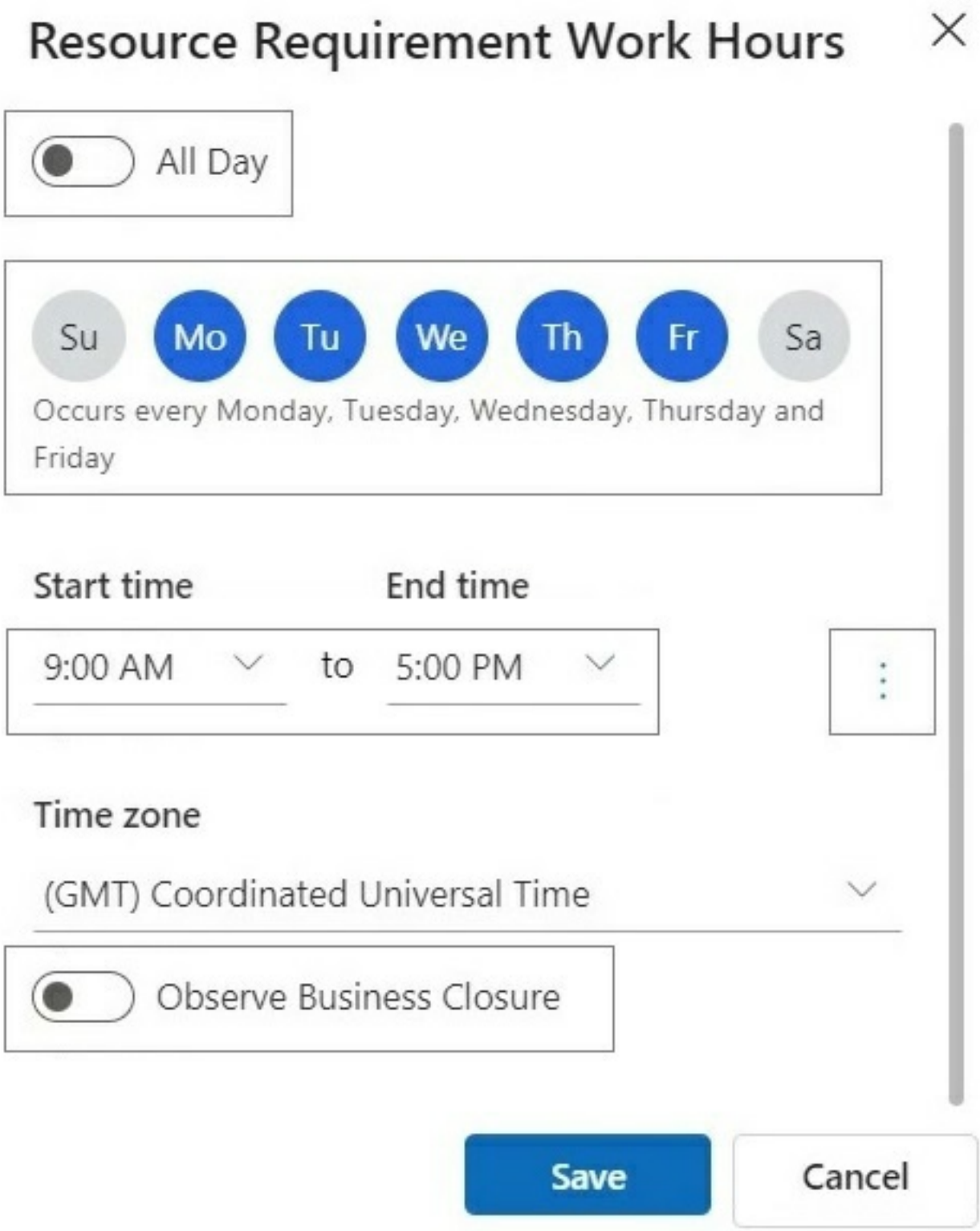
You have the following requirements:

•Add the upcoming holiday calendar for upcoming requirements.
•Add one break time between the shift for 30 mins.

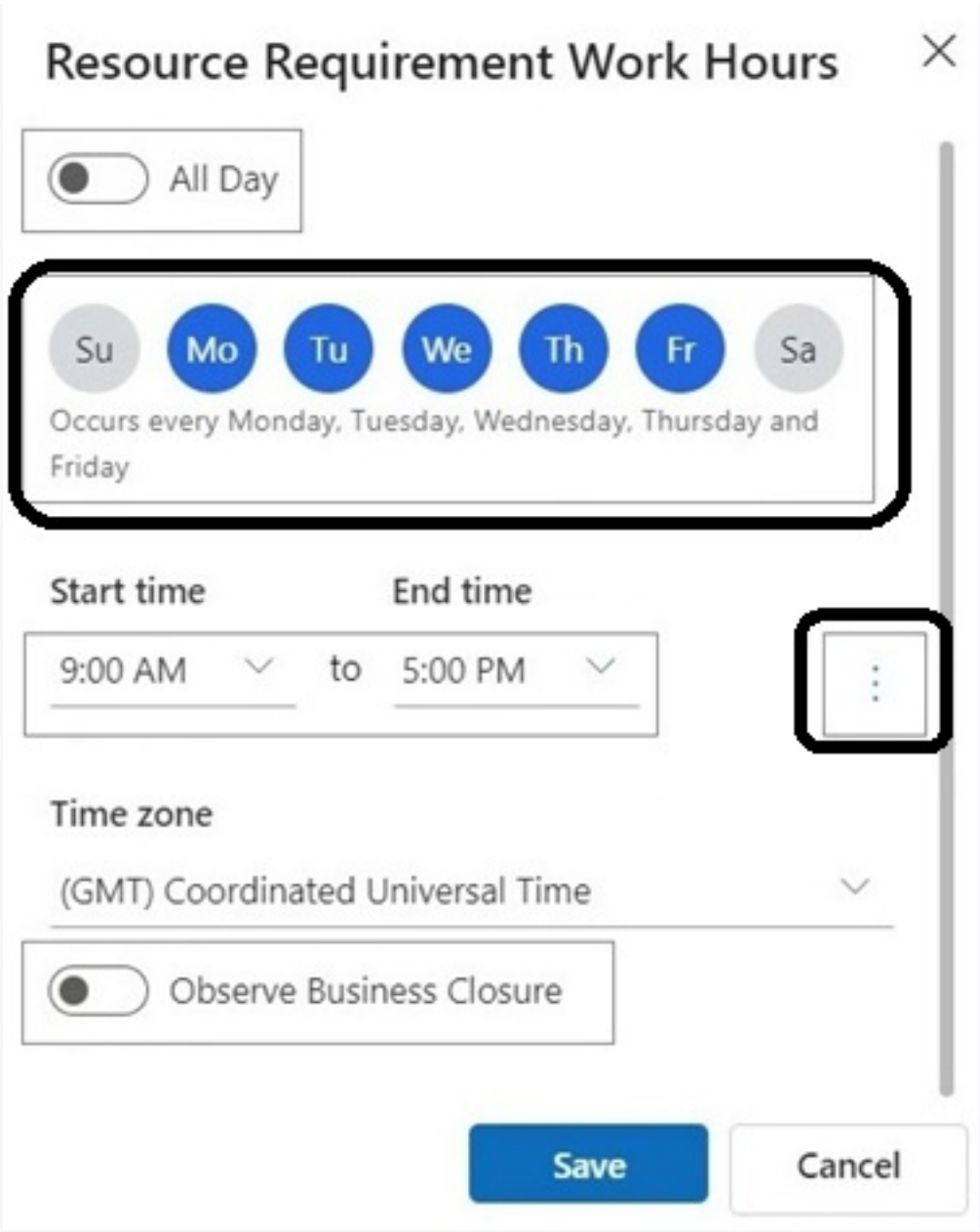
You need to select the correct areas in the image to configure the requirements.

Which two areas should you select? To answer, select the appropriate areas in the answer area.

NOTE: Each correct selection is worth one point.


Resource Requirement Work Hours
All Day
Su
Mo
Tu
We
Th
Fr
Sa
Occurs every Monday, Tuesday, Wednesday, Thursday and Friday
Start time
End time
9:00 AM
to
5:00 PM
Time zone
(GMT) Coordinated Universal Time
Observe Business Closure
Save
Cancel

Answer:



Question: 257 **Exam Heist**

The ability to work offline with a mobile device is key requirement for your customer.

You need to ensure entities and fields are available for offline use.

What should you do?

A.Access the Offline Profile from the Mobile section in Customizations.

B.Unpublish the offline profile, update the security roles, save, and republish the offline profile.

C.Access the Microsoft Power Platform admin center to make changes in the Mobile Configuration section for Offline functionality.

D.Update the mobile offline profile to include the correct Field Service security roles.

Answer: B

Explanation:

B is correct because it ensures that the offline profile is properly managed and aligned with updated security roles for entities and fields to be accessed offline.

To enable offline capabilities effectively in Microsoft Dynamics 365 for Field Service, it is crucial to unpublish the offline profile, modify the security roles as needed, and subsequently publish the profile again. This process guarantees that the modified entities and fields are in sync with user permissions, allowing for proper offline access.

Evaluation of Other Options:

A: Access the Offline Profile from the Mobile section in Customizations. While accessing the offline profile is necessary, merely accessing does not involve any modifications. Without unpublishing, updating, and republishing the profile, changes won't be applied, rendering this option insufficient.

C: Access the Microsoft Power Platform admin center to make changes in the Mobile Configuration section for Offline functionality. This option is relevant for managing mobile configurations but does not address the critical aspect of updating security roles in the offline profile, which is essential for enabling intended offline access per user permissions.

D: Update the mobile offline profile to include the correct Field Service security roles. Although updating the offline profile is important, the step of unpublishing it is crucial to ensure that changes can be effectively made and subsequently published. Simply updating without unpublishing risks inconsistency in expected offline functionality.

Thus, option B not only follows a systematic approach to managing the offline profile but also evaluates and integrates user accessibility requirements effectively.

References:

https://docs.microsoft.com/en-us/dynamics365/field-service/field-service-mobile-configuration
https://learn.microsoft.com/en-us/power-platform/admin/offline-capabilities
https://docs.microsoft.com/en-us/dynamics365/customer-service/mobile-apps-configure-offline

Question: 258 **Exam Heist**

You are a field engineer for a windshield replacement company.

You did not complete all your tasks on your work order. You need to schedule time for the next day.

What should you do?

A.From the bookable resource booking, select Child Work Order and save the new work order.
B.From the work order, change the sub-status to "Not Completed".
C.From the schedule board, select the booking, then select Move to another day.
D.From the work order, select Follow up and save the new work order.

Answer: D

Explanation:

D is correct because it allows the field engineer to effectively manage incomplete tasks by creating a follow-up work order for the uncompleted tasks.

Justification for Option D

Creating a follow-up work order through the work order interface enhances task management and resource allocation. This approach ensures the tasks are not lost and can be easily tracked, effectively communicating the engineer's need for additional time and resources for task completion. By categorizing unfinished tasks under a new work order, the organization maintains a clear workflow and accountability, which is paramount in

field service operations.

Evaluation of Other Options

A. From the bookable resource booking, select Child Work Order and save the new work order.

This option focuses on creating a new child work order, which may fragment task management and lead to confusion about the original work order status, thus complicating tracking and reporting.

B. From the work order, change the sub-status to "Not Completed".

Changing the sub-status to "Not Completed" does not facilitate proactive scheduling or resource allocation for subsequent tasks. It merely indicates the current status without allowing for efficient planning for future work.

C. From the schedule board, select the booking, then select Move to another day.

While moving a booking might appear to reschedule tasks, it lacks the transparency required for effective tracking and documentation of work progress. This action does not create a formal follow-up, which can lead to oversight of uncompleted tasks.

References

https://learn.microsoft.com/en-us/dynamics365/field-service/
https://docs.microsoft.com/en-us/dynamics365/field-service/field-service-overview
https://learn.microsoft.com/en-us/dynamics365/field-service/quick-start-guide

Question: 259 **Exam Heist**

Note: This question is part of a series of questions that present the same scenario. Each question in the series contains a unique solution that might meet the stated goals. Some question sets might have more than one correct solution, while others might not have a correct solution.

After you answer a question in this section, you will NOT be able to return to it. As a result, these questions will not appear in the review screen.

You are working with your customer to define their schedule board.

Your customer needs you to add or create additional views for their scheduling team.

Solution: Create a new view in the Resource Requirements Views, and publish the view. Then, edit or create a new tab on the schedule board, and update the Requirements Panel with the new view.

Does this meet the goal?

A.Yes
B.No

Answer: B

Explanation:

B is correct because simply creating a new view in the Resource Requirements Views and updating the Requirements Panel does not fulfill the requirement for the scheduling team's flexibility and operational efficiency.

Reasoning

1. **Complexity of Scheduling Needs**: The scheduling team requires not only new views but also a

comprehensive understanding of resource allocation, availability, and operational parameters. Merely adding a view might not capture all necessary variables.

2. **Integration with Other Components**: Effective scheduling must include seamless integration within the broader Dynamics 365 ecosystem, such as workflows, service-level agreements, and real-time data insights. The outlined solution lacks engagement with these components.

3. **User Experience**: The implementation of a single additional view may result in a cluttered interface rather than enhancing usability. It is critical for the scheduling board to provide intuitive navigation and access to relevant metrics for decision-making.

Evaluation of Incorrect Options

1. **Simplicity of Changes**: The solution relies heavily on making mechanical adjustments instead of a holistic approach that encompasses user feedback and operational goals. This undermines the overall efficacy of the scheduling system.

2. **Lack of Continuous Improvement**: Focusing solely on a singular view often leads to stagnant processes. An iterative, feedback-driven development cycle is essential to adapt to evolving business needs.

3. **Failure to Address All User Roles**: Scheduling teams often have diverse roles and responsibilities. The proposed solution does not address how varied viewpoints can be represented effectively on the scheduling board.

References

https://learn.microsoft.com/en-us/dynamics365/field-service/overview
https://learn.microsoft.com/en-us/dynamics365/field-service/create-scheduling-board
https://learn.microsoft.com/en-us/dynamics365/field-service/resource-scheduling-options

Question: 260 **Exam Heist**

DRAG DROP
-

Case study
-

This is a case study. Case studies are not timed separately. You can use as much exam time as you would like to complete each case. However, there may be additional case studies and sections on this exam. You must manage your time to ensure that you are able to complete all questions included on this exam in the time provided.

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To start the case study
-

To display the first question in this case study, click the Next button. Use the buttons in the left pane to explore the content of the case study before you answer the questions. Clicking these buttons displays information such as business requirements, existing environment, and problem statements. When you are ready to answer a question, click the Question button to return to the question.

Overview
-

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.
oDispatchers are assigned to all territories in a region. Dispatchers assign repair and installation work to repair technicians based on their skills.
oRepair technicians are employees and subcontractors.
3.Planned maintenance services perform regular and planned checks for their customers.
oInspectors are assigned to all regions based on skills and expertise.
oInstallers are assigned to multiple territories in a geographic region.
oRepair technicians are employees and subcontractors.
oDispatchers 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.

Existing environment
-

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.

Requirements
-

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.
oCertifications set to expire over the next 90 days should show highlighted in Yellow.
oCertifications 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.
oTemplates 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.

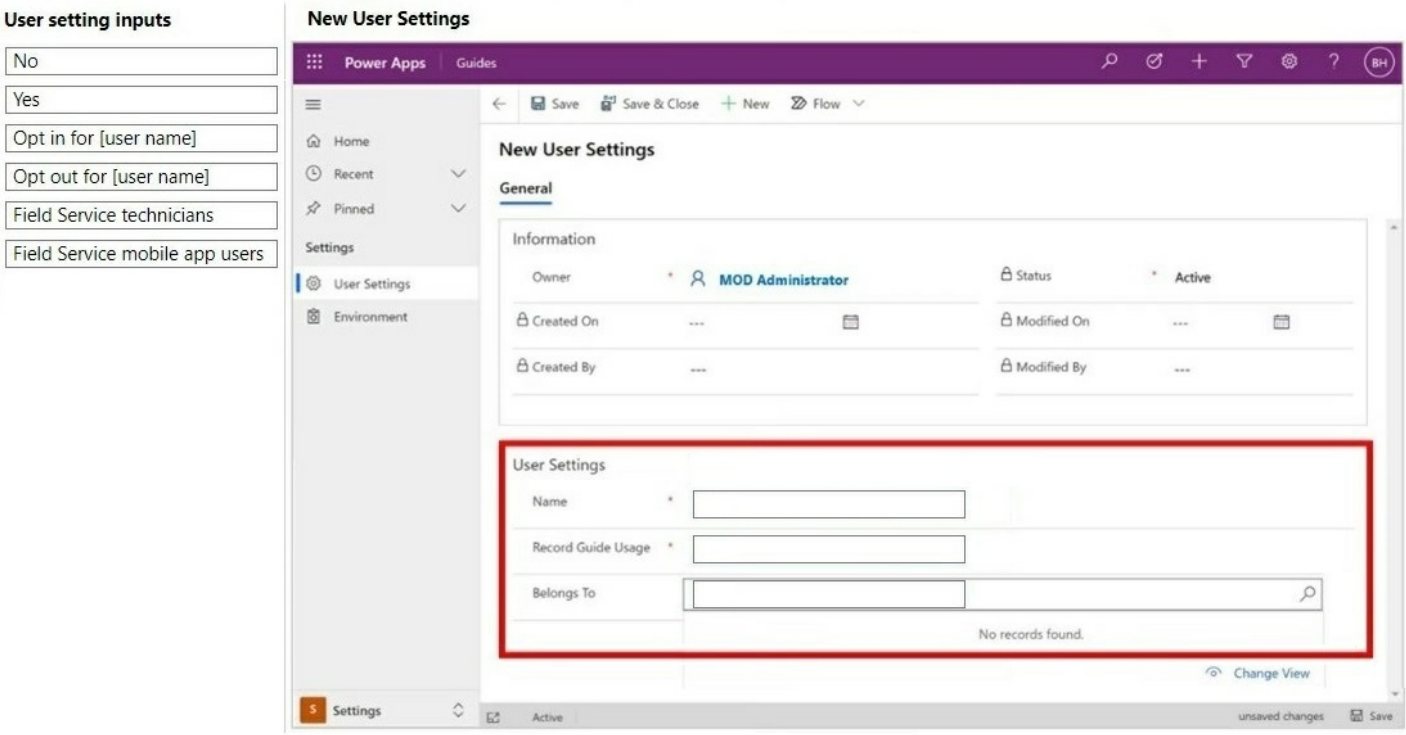
Security and access
-
•Technicians in the field should only see work orders scheduled for today.
•Technicians should have the option to enter manual time.
•Technicians should have the option to complete the inspections.
•Technicians should have the ability to access relevant apps to complete the job.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

LitWare has requirements for configuring the Field Service mobile app, and you are responsible for setting up the system to meet those requirements.

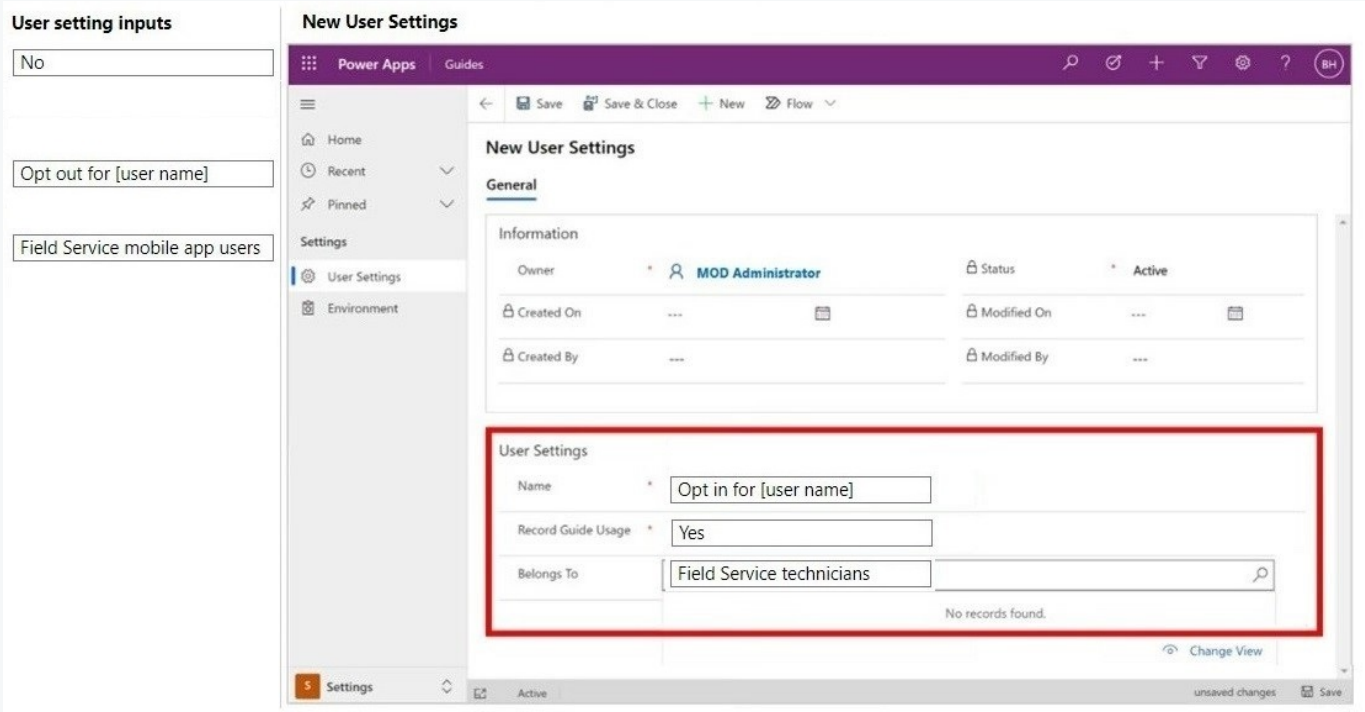
You need to set up help documents related to the requirements as per the case study.

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.



Answer:



Question: 261 **Exam Heist**

Case study -

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•Ability to enter time for the work.

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•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.

You need to advise LitWare administrators on configuring advanced options for inspection requirements.

Which option should you recommend?

A.Download as Word template

B.Export to Excel

C.Export to PDF

D.Download as Report

Answer: C

Question: 262 **Exam Heist**

Case study -

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Overview -

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. oDispatchers are assigned to all territories in a region. Dispatchers assign repair and installation work to repair technicians based on their skills. oRepair technicians are employees and subcontractors.
3.Planned maintenance services perform regular and planned checks for their customers. oInspectors are assigned to all regions based on skills and expertise. oInstallers are assigned to multiple territories in a geographic region. oRepair technicians are employees and subcontractors. oDispatchers 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.

Existing environment -

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.

Requirements -

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. oCertifications set to expire over the next 90 days should show highlighted in Yellow. oCertifications 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.
oTemplates 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.

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.Select the resource, set the calendar, and apply the working hours template.

B.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".

C.Create a work hours template based on the region.

D.Set the resources in the correct time zone.

E.Go to the resource and select the Working hours tab.

Answer: AC

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DRAG DROP
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Case study
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Existing environment
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Service areas
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The service areas are:

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•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.
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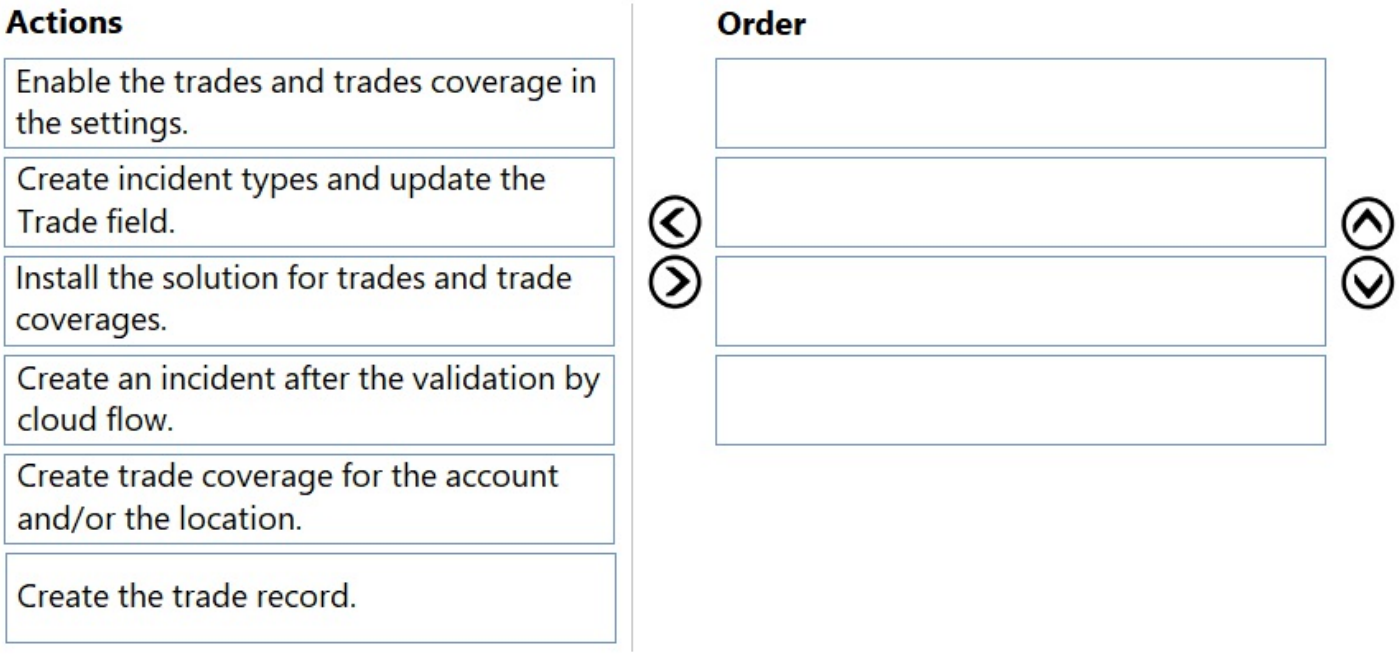
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Security and access
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•Technicians in the field should only see work orders scheduled for today.
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•Technicians should have the option to complete 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.

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.



Answer:

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.

Question: 264 **Exam Heist**

DRAG DROP
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Case study
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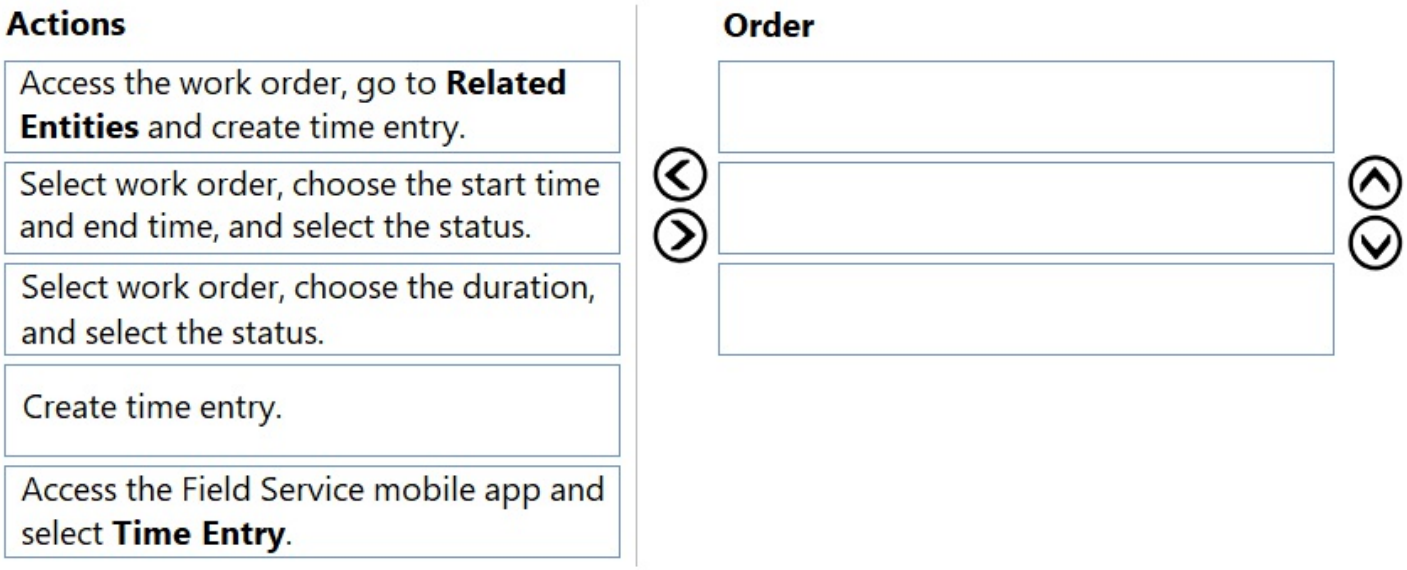
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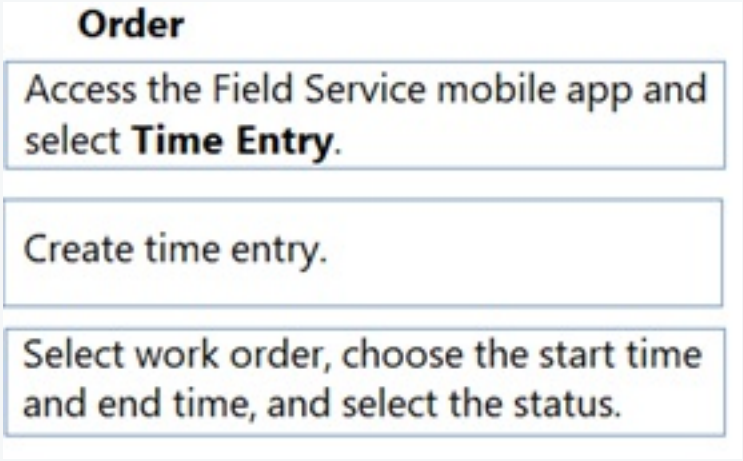
LitWare has requirements for the ability to track technician time.

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



Answer:



Question: 265 **Exam Heist**

You are implementing Dynamics 365 Field Service. Your customer needs to understand how they can schedule the closest possible resource to a work order. The requirement further specifies it could be start of day from the company's site or during the middle of the day from an existing work order.

You need to provide them with the settings they need to properly configure so the closest resource is found when using the schedule assistant.

What should you suggest to the customer?

A. Update the Starting Location to Organization Unit on the Bookable Resource.
B. Update the Resources Synchronization Timeout (in sec) within the Scheduling Parameters.
C. Update the filter on the Scheduler resource tool tips view.
D. Update the Load Default Filters on the Schedule Board.

Answer: C

Explanation:

C is correct because updating the filter on the Scheduler resource tool tips view directly affects how resources are evaluated for proximity to work orders.

The proximity search for scheduling resources relies heavily on the accuracy of the displayed information in

the Scheduler. By enhancing the filter settings on the Scheduler resource tool tips, the user can ensure that the scheduling assistant assesses available resources based on their geographical location in relation to work order locations. This optimization allows for a precise determination of the closest resource based on current and historical context, particularly important when factoring in dynamic work orders throughout the day.

Evaluation of Incorrect Options:

A. Update the Starting Location to Organization Unit on the Bookable Resource.
This option does not explicitly address the proximity aspect critical to finding the closest resource. Changing the starting location only establishes a fixed point for resource availability rather than optimizing the proximity based on real-time data.

B. Update the Resources Synchronization Timeout (in sec) within the Scheduling Parameters.
While important for ensuring data consistency, this setting does not impact the actual proximity calculations or how resources are evaluated for scheduling. It mainly affects how frequently scheduling data is updated, which, without the correct filters, will not improve scheduling accuracy.

D. Update the Load Default Filters on the Schedule Board.
This option applies broadly to how data is presented on the schedule board but does not fine-tune the relevance of resource proximity. Default filters might enhance visibility but fail to directly influence decision-making regarding the closest resource availability.

In summary, option C directly aligns with the need for proximity optimization in real-time scheduling, establishing itself as the most relevant choice for the customer's requirements.

References:

https://docs.microsoft.com/en-us/dynamics365/field-service/scheduling-optimization
https://docs.microsoft.com/en-us/dynamics365/field-service/schedule-board
https://docs.microsoft.com/en-us/dynamics365/field-service/overview

Question: 266 **Exam Heist**

Your organization's field service managers require access to a broader scope of work when they are working offline in the Field Service mobile app.

You need to configure the offline profiles.

Which three actions should you perform? Each correct answer presents part of the solution.

NOTE: Each correct selection is worth one point.

A.Add Field Service Manager users to the offline profile for field service managers.

B.Clone the Field Service mobile offline profile for the field service manager. Then, add additional entities and update sync filters for key entities.

C.Add the mobile offline profile for Field Service to the Field Service mobile model-driven app.

D.Create a new Field Service mobile offline profile record for the field service manager. Then, publish the profile.

E.Add the Field Service Manager role to the offline profile for field service managers.

Answer: ABC

Explanation:

ABC is correct as these steps ensure that field service managers have the necessary data access and functionalities while working offline within the Field Service mobile app.

Justification of Correct Answers:

A. **Adding Field Service Manager users to the offline profile for field service managers** is essential to allow those users to access their tailored configurations when offline. User-specific access is critical to ensuring that the right personnel engage efficiently with the requisite data.

B. **Cloning the Field Service mobile offline profile** and enhancing it with additional entities and modified sync filters is a strategic approach to cater specifically to the needs of managers. This customization enhances offline usability by ensuring relevant data is readily available without impacting system performance with unnecessary information.

C. **Adding the mobile offline profile for Field Service to the Field Service mobile model-driven app** integrates the offline capabilities directly into the application, increasing operational efficiency. This ensures that the app is optimized to use the latest functionalities tailored for offline work scenarios.

Evaluation of Incorrect Options:

D. **Creating a new Field Service mobile offline profile record** might seem plausible but does not effectively leverage existing configurations within the platform. It could lead to redundancy and complicate the management of multiple profiles, which is less efficient than enhancing an existing one.

E. **Adding the Field Service Manager role to the offline profile** is not explicitly necessary because it's already implied in the user access configuration through option A. Roles alone do not modify the offline profile but rather dictate what data can be accessed when the user is online.

Authoritative References:

https://learn.microsoft.com/en-us/dynamics365/field-service/mobile-offline-capabilities
https://learn.microsoft.com/en-us/dynamics365/field-service/field-service-mobile-app
https://learn.microsoft.com/en-us/powerapps/developer/data-platform/offline-data-in-powerapps

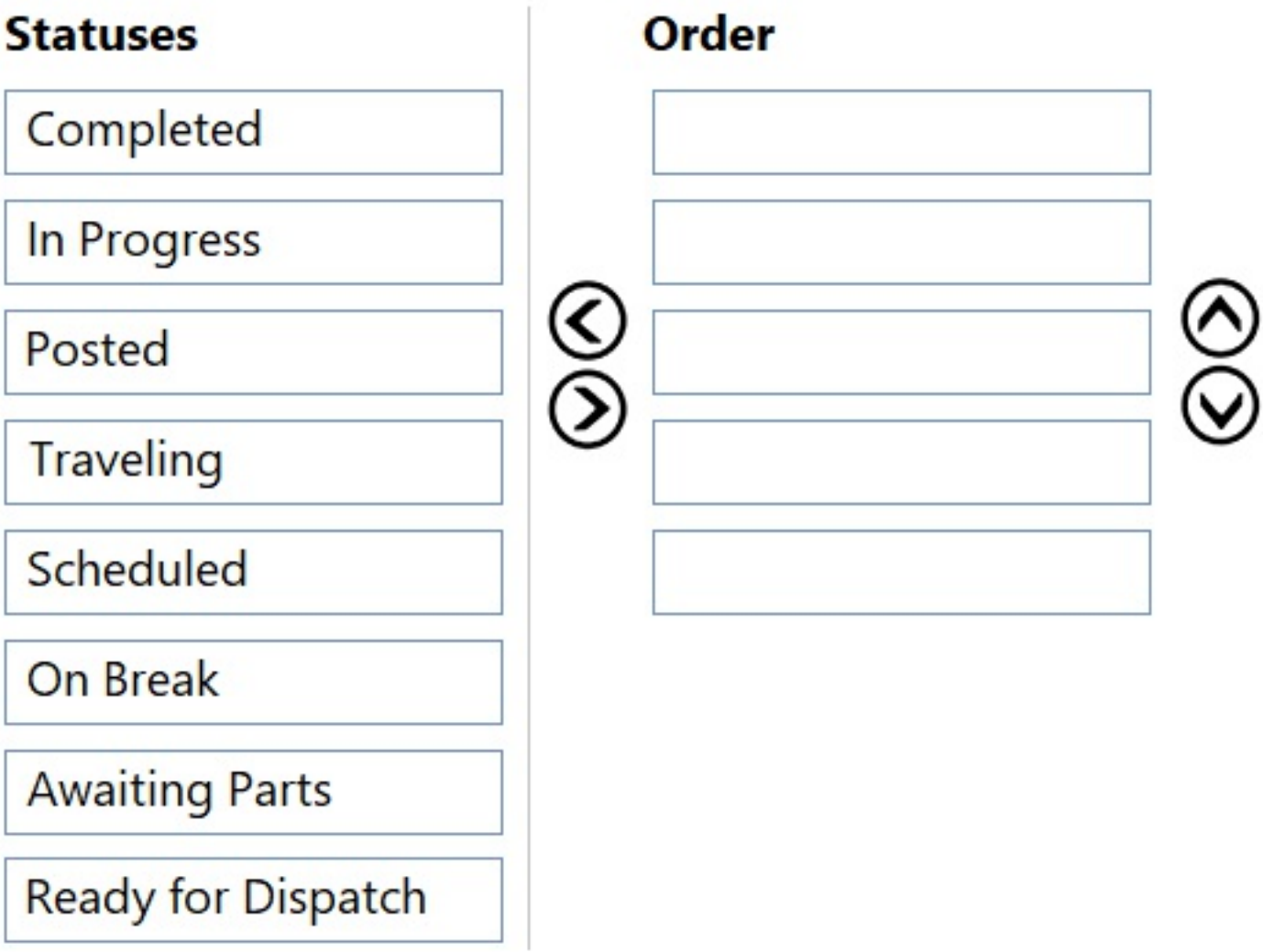
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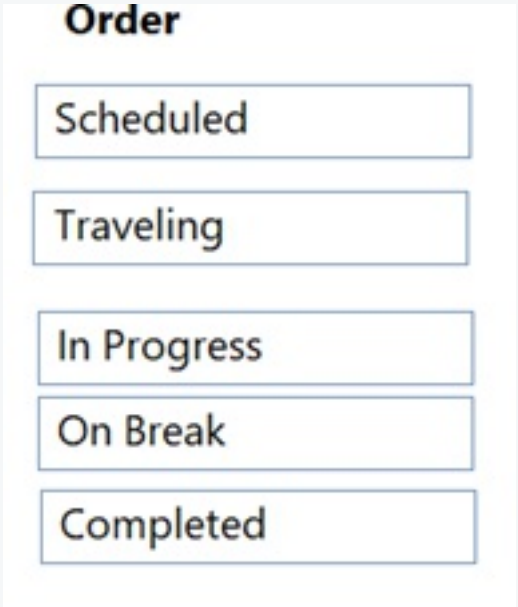
You are implementing Dynamics 365 Field Service at a landscape maintenance company.

You need to select the work order statuses in the correct order, from the creation of a work order to the delivered service at the customer location.

Which five statuses should you select in sequence? To answer, move the five statuses from the list of actions to the answer area. Arrange the five statuses in the correct order.



Answer:



Question: 268 **Exam Heist**

You are configuring work orders for technicians to complete their on-site service.

You need to advise the technicians on locating the whereabouts of the customer assets within the Field Service mobile app.

What is one way a technician can identify the exact location of an asset at a customer site?

A. Use the Functional Locations feature in the app.
B. In the work order, select the customer map and use the GPS app.
C. In the work order, select the map provided in the Customer tab.
D. View the assets from the app menu.

Answer: A

Explanation:

Correct answer: A – Use the Functional Locations feature in the app.

Functional Locations are explicitly designed to represent physical places (e.g., rooms, floors, sites) where assets are stored or serviced. In the Field Service mobile app, technicians can drill down from the work-order to the associated functional location, view its hierarchy, and see the exact GPS-tagged coordinates or address that the location was recorded with. This provides a reliable, searchable, and auditable way to pinpoint an asset's whereabouts on-site.

Why the other options are less suitable

B – "In the work order, select the customer map and use the GPS app." The work-order map only shows the customer's site boundary; it does not expose individual functional locations or asset-level details, and relying on a generic GPS app adds an extra step that is not integrated with the service data model.
C – "In the work order, select the map provided in the Customer tab." The customer-tab map is a high-level view of the customer's premises and lacks the granularity to display specific functional locations or asset tags, making it unsuitable for locating a particular asset.
D – "View the assets from the app menu." The generic asset list does not include location context; without linking to functional locations or a map, technicians cannot determine where an asset is physically situated within the site.

Conclusion: Leveraging the **Functional Locations** feature directly ties an asset to its precise, configured location record, delivering accurate, app-native navigation to the technician and ensuring compliance with the Dynamics365 Field Service data model. This is the only option that guarantees an exact, searchable location within the mobile experience.

Question: 269 **Exam Heist**

Dispatchers and technicians in Dynamics 365 Field Service want to be able to automatically update work order statuses.

You need to enable the feature to allow the update of a work order based on resource location.

Which feature should you enable?

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

Answer: D

Explanation:

The correct answer is D. Connection to Microsoft Bing Maps.

Enabling the connection to Microsoft Bing Maps allows for real-time tracking of resource locations, which is critical in updating work order statuses automatically as technicians move to job sites. This feature provides dynamic geospatial data that is essential for the application to assess the proximity of resources to specific work orders, thus facilitating timely status updates based on their current locations. By integrating Bing Maps, the Field Service application becomes able to calculate travel times and distances efficiently, allowing for improved dispatching and resource management.

Critical Evaluation of Incorrect Options:

A. Geo location: While geolocation provides location data, it does not inherently facilitate the automatic status update of work orders. It serves as a prerequisite technology rather than a feature that directly influences work order management within the application.

B. Booking maps: This feature is primarily utilized for visualizing booking information in a graphical format, which does not support dynamic updates to work order statuses based on actual resource locations. Its capabilities are limited to displaying pre-determined data rather than real-time updates.

C. Auto-geocoding for addresses: Although this feature simplifies the mapping of addresses to geographical coordinates, it does not provide the necessary real-time location tracking of resources required for automatic status updates in status management workflows.

In summary, the integration with Microsoft Bing Maps (D) is indispensable for achieving real-time resource location tracking that empowers efficient status updates for work orders in Dynamics 365 Field Service.

References:

https://docs.microsoft.com/en-us/dynamics365/field-service/overview
https://learn.microsoft.com/en-us/dynamics365/field-service/dispatchers-guide
https://learn.microsoft.com/en-us/dynamics365/field-service/map-server-setup

Question: 270 **Exam Heist**

Your organization recently implemented the Dynamics 365 Field Service application. You have configured the schedule board as per your organization's requirements, and provided training to the dispatching team.

The dispatching team reported that the utilization of certain resources is showing as "0%" even though they can see bookings against those resources on the schedule board. You need to explain why this is happening.

Bookings with which booking status are ignored for utilization?

A.Proposed
B.Traveling
C.In progress
D.On break

Answer: A

Explanation:

A is correct because bookings with the status of "Proposed" are not factored into the utilization metrics within Dynamics 365 Field Service.

Utilization metrics are critical for assessing resource efficiency, allowing management to evaluate and optimize workforce productivity. In Dynamics 365 Field Service, only confirmed bookings influence these metrics, specifically pertaining to actual workload and service engagement. Proposed bookings are suggestions and do not represent actual commitments; thus, they are excluded from utilization calculations to

prevent misleading representations of a resource's availability. This ensures that utilization statistics reflect genuine engagement levels, enabling accurate performance analysis.

Evaluation of other options:

B. Traveling: This status indicates that a resource is currently en route to a service location. Utilization is calculated during this period, as it reflects actively engaged time leading to service delivery.

C. In progress: Bookings that are ongoing are counted in utilization metrics. This reflects the resource's active involvement in service tasks, directly impacting productivity assessments.

D. On break: Resources marked as "On break" are also considered in utilization calculations. However, this status serves to measure downtime, which can inform decisions on scheduling and optimizing field service operations.

For comprehensive insights into utilization and status definitions within Dynamics 365, refer to the following resources:

https://learn.microsoft.com/en-us/dynamics365/field-service/field-service-scheduling
https://learn.microsoft.com/en-us/dynamics365/field-service/utilization
https://learn.microsoft.com/en-us/dynamics365/field-service/overview-field-service

Question: 271 **Exam Heist**

Case study -

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Company Overview. Company Structure

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• Siebel for Sales and Customer Service
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Sales and Service Overview -

Sales and Service Overview. B2B Sales and Service Overview

Sales -
• 70% of total Sales & Service Revenue
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Installations -
• Variety of large compressors
• Scheduled with Dispatch when equipment has been shipped
• Take a crew of 2-3 technicians

Service -
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• Break Fix
• Planned/Preventive Maintenance
• Both Break Fix and Planned/Preventive Maintenance Work Orders require 1 technician
• Planned/Preventive Maintenance
○ Requires a detailed Inspection prior to restart of equipment

Sales and Service Overview. B2C Sales and Service Overview

Sales -
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No Installation -

Service -
• 95% of all service issues handled by partners/distributors
• Service calls to Contoso Call Center are routed to a partner/distributor for service
• Only 1% of all Service Revenue

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1. New Acquisitions
2. Partner/Distribution network expansion for B2B and B2C
3. New B2B Service Offerings
4. Increase Customer Satisfaction/NPS

Current Challenges -

Current Challenges. Call Center -

• Siloed systems
• Disconnected from other regions
• Poor Return tracking
• Poor partner visibility

Current Challenges. Work Order Management

• No visibility to truck stock
• No task breakdown on Work Orders
• Poor reconciliation to partners/distributors

Current Challenges. Resource Management

• No crew capability for installs
• No visibility across regions

Current Challenges. Contract/Agreement Management

• Service is often given away due to poor entitlement tracking
• No tickler system for renewals

Current Challenges. Asset Management

• No sub-asset tracking
• No work Order history
• No visibility to detailed location tracking
• No ability to connect to IoT

Current Challenges. Mobile Technician Capability

• No offline mode
• Inspections are done manually
• No quoting, signature, or job summary/print capability

Current Challenges. Scheduling -

• Lack of status updates from technicians
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• Customer 360 capability with Knowledge Base
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• Inventory tracking
• Digital Inspections with Branch Logic and Reporting
• Integration to ERP for proper pricing and invoicing

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• Conditional logic for Gas Compressor pressure reading failure
○ By looking at the reading, a technician can see if it's in the red, indicating failure. If fail, must shut down, clean or replace pressure valve
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• Inspection results are critical to review with the customer after the inspection is performed

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• Flexible Work Hours
• Crews, equipment tracking as resources for scheduling
• Skills with proficiency levels
• Drip Scheduling for planned maintenance jobs

Desired Functionality. Asset Management

• Track Asset sub-components
• Connected Service for new equipment
• Azure Machine Learning to offer a new chargeable service for machine uptime
• Capture defined asset readings to feed the Azure Machine Learning model
• Many internal assets are used on jobs. We need to be able to schedule those assets with a technician on a job.
○ We also perform our own maintenance on internal assets
○ These would not be needed for RS

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• Generate Planned Maintenance jobs 3 months in advance for capacity planning
• Tickler system to notify customers of expirations
• Track covered equipment and related entitlements

Desired Functionality. Mobile Technician Capability

• Offline
• Digitized Inspections
• Geo-fencing for no-touch arrival and departure
• "Uber-like" functionality, notifying customers when a technician will be arriving
• Remote Assist functionality to quickly get junior technicians in the field and increasing first time fix rate

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• Schedule Boards visible to each region
• Assign resources based on skills and proficiency
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• RMA's
○ Tied to Customer Service
○ Track open Returns to reduce part/asset leakage & charge for not returned items
○ The biggest issue we face today is that we can't track an item that a customer has returned

• RTV
○ Ability to send in-warranty parts back to vendor for credit or exchange

Desired Functionality. IoT -

• IoT devices will be place on all new and existing equipment.
• Devices will measure compressor temperature and motor pressure of the equipment.
• Azure Machine Learning is desired to predict failure based on trends of compressor temperature and pressure readings.
• Currently, there is no way to capture backflow pressure because it can only be measured during the onsite inspection by a technician.
• Contoso Compressor would like to capture that value and feed it back to the machine-learning algorithm to better measure performance and predict failure.

You are the lead consultant on a Dynamics 365 Field Service implementation for Contoso Compressor.

You need to set up the system to manage Installation work orders so all dispatchers have visibility to installations jobs and resources in their respective regions in Brazil.

Which three steps must you take? Each correct answer presents part of the solution.

NOTE: Each correct selection is worth one point.

A.Create Resource Crews that consist of two (2) technicians.
B.Create two (2) Schedule Boards that consist of resources that belong to the Brazil and Chile territories.
C.Create a Work Order Type called Installations.
D.Create two (2) Schedule Boards that consist of resources that belong to the Brazil and Argentina territories.
E.Create an Incident Type with a Requirement Group of two (2) technicians.
F.Create a Resource Requirement Group that consist of two (2) technicians.

Answer: CDF

Explanation:

The correct choices C, D, and F provide a comprehensive setup for managing installation work orders in Brazil by ensuring resource and task organization are optimized.

Justification for Correct Answers:

C. Create a Work Order Type called Installations.
Establishing a distinct Work Order Type for installations ensures that all installation-related jobs are categorized in a way that optimizes the tracking and management process. This classification allows dispatchers to prioritize and manage these specific types of work orders effectively, thus enhancing operational efficiency.

D. Create two (2) Schedule Boards that consist of resources that belong to the Brazil and Argentina territories.
Creating dedicated Schedule Boards for the Brazil and Argentina territories facilitates localized dispatching, allowing dispatchers to allocate resources more effectively. This setup enhances visibility for the dispatchers and makes the scheduling of installation jobs more efficient across the given regions.

F. Create a Resource Requirement Group that consists of two (2) technicians.

By establishing a Resource Requirement Group with two technicians, it supports the organizational need for team-based installations, ensuring that the appropriate number of skilled technicians are assigned to each installation job. This increases the likelihood of successful job completion within optimal time frames.

Critical Evaluation of Incorrect Options:

A. Create Resource Crews that consist of two (2) technicians.
While Resource Crews may seem beneficial, they are not a direct setup step for managing work orders; the emphasis should be on Work Order Types and visibility through Schedule Boards.

B. Create two (2) Schedule Boards that consist of resources that belong to the Brazil and Chile territories.
Including Chile introduces unnecessary complexity since the question specifically focuses on Brazil. The emphasis should remain on the defined regional scope.

E. Create an Incident Type with a Requirement Group of two (2) technicians.
An Incident Type focuses on service calls rather than installations. This choice diverges from the goal of managing installation work orders specifically.

Authoritative References:

https://docs.microsoft.com/en-us/dynamics365/field-service/field-service-overview
https://docs.microsoft.com/en-us/dynamics365/field-service/create-work-order
https://docs.microsoft.com/en-us/dynamics365/field-service/scheduling-overview

Question: 272 **Exam Heist**

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• Currently, there is no way to capture backflow pressure because it can only be measured during the onsite inspection by a technician.
• Contoso Compressor would like to capture that value and feed it back to the machine-learning algorithm to better measure performance and predict failure.

You are the lead consultant on a Dynamics 365 Field Service implementation for Contoso Compressor.

One of your assignments is to create an Inspection template for their compressors during a routine PM work order.

What must you do to set up this inspection form?

A. Create a branch script that requires the technician to clean or replace the pressure valve, and retest to get a ‘pass’ on the inspection.

B. Create a branch script that creates another work order for another technician to come out and service the gas compressor.

C. Create a field on the form to enter the gas pressure reading. Create a branch script that analyzes the reading and then instructs the technician what to do next.

D. Create a field on the form to enter the gas pressure reading. If it falls outside a defined range, shut down the compressor and schedule a follow-up work order.

Answer: D

Explanation:

Why optionD is the correct choice

The requirement calls for an **inspection template that evaluates a gas-pressure reading and reacts appropriately**.
OptionD creates a **field to capture the pressure value** and then uses a **branch script that checks the value against a predefined range**.
When the reading is out of range, the script **shuts down the compressor** (preventing unsafe operation) and **automatically schedules a follow-up work order**, fulfilling both the safety and scheduling aspects of the desired functionality.
This aligns directly with the “Conditional logic for Gas Compressor pressure reading failure” and the need to **schedule a follow-up work order** described in the case study.

Why the other options are less suitable

OptionA only adds a branch script that forces a valve-clean/re-test action; it does not capture the pressure

reading, nor does it enforce a shutdown or schedule a new work order, so it cannot enforce safety or proper follow-up.
OptionB creates a separate work order for a second technician but ignores the pressure-reading evaluation altogether, missing the core conditional-logic requirement and the ability to shut down the equipment when unsafe.
OptionC adds the pressure-reading field and a script that instructs the technician, but it stops at "instructs" without enforcing a shutdown or automatically generating a follow-up work order, leaving the safety and scheduling steps incomplete.

Therefore, **OptionD** best satisfies the technical requirement to set up an inspection form that safely evaluates pressure readings, takes corrective action, and schedules subsequent work, making it the optimal solution for the Dynamics365 Field Service implementation.

Question: 273 **Exam Heist**

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• Capture defined asset readings to feed the Azure Machine Learning model
• Many internal assets are used on jobs. We need to be able to schedule those assets with a technician on a job.
○ We also perform our own maintenance on internal assets
○ These would not be needed for RS

Desired Functionality. Contract/Agreement Management

• Generate Planned Maintenance jobs 3 months in advance for capacity planning
• Tickler system to notify customers of expirations
• Track covered equipment and related entitlements

Desired Functionality. Mobile Technician Capability

• Offline
• Digitized Inspections
• Geo-fencing for no-touch arrival and departure
• "Uber-like" functionality, notifying customers when a technician will be arriving
• Remote Assist functionality to quickly get junior technicians in the field and increasing first time fix rate

Desired Functionality. Scheduling

• Schedule Boards visible to each region
• Assign resources based on skills and proficiency
• Visibility to access resources from other regions
• Drip Scheduling for inspection jobs
• Scheduling optimization for small jobs
• Automated crew assignment for installation jobs

Desired Functionality. Returns Management

• RMA's
○ Tied to Customer Service
○ Track open Returns to reduce part/asset leakage & charge for not returned items
○ The biggest issue we face today is that we can't track an item that a customer has returned

• RTV
○ Ability to send in-warranty parts back to vendor for credit or exchange

Desired Functionality. IoT -

• IoT devices will be place on all new and existing equipment.
• Devices will measure compressor temperature and motor pressure of the equipment.
• Azure Machine Learning is desired to predict failure based on trends of compressor temperature and pressure readings.
• Currently, there is no way to capture backflow pressure because it can only be measured during the onsite inspection by a technician.
• Contoso Compressor would like to capture that value and feed it back to the machine-learning algorithm to better measure performance and predict failure.

You are the lead consultant on a Dynamics 365 Field Service implementation for Contoso Compressor. You are designing the RMA and RTV process with the customer.

While there are many benefits associated with this process, you need to advise the customer on where they might be able to find the biggest cost savings based on their requirements.

What should you recommend?

A.Receiving the RTV back from the manufacturer
B.Tracking the products returned
C.Tracking the warranty on the products returned
D.Linking the RMA to a Depot Repair work order

Answer: C

Explanation:

C is correct because tracking the warranty on returned products optimizes costs by ensuring that only valid returns are processed, minimizing losses incurred from unauthorized returns.

Tracking warranties provides clear insights into which items are still under warranty, facilitating timely refunds or replacements without generating excess costs. It enhances strategic decision-making about warranty services and can reduce expenses associated with items that should not be returned, thus directly impacting the bottom line positively. Implementing an effective warranty tracking mechanism also fosters better relationships with customers and distributors, aligning with Contoso's business goal to enhance partner visibility and satisfaction.

Option A: Receiving the RTV back from the manufacturer is less impactful because this process is typically standard in logistics and does not specifically address cost containment or operational efficiencies within Contoso’s context.

Option B: Tracking the products returned fails to provide a focused financial advantage as it does not differentiate between warranty and non-warranty returns. While beneficial, it does not directly relate to saving costs — comprehensive evaluation in warranty tracking provides a more strategic advantage.

Option D: Linking the RMA to a Depot Repair work order may streamline operations but does not address financial optimization as directly as warranty tracking. Depot repairs introduce costs associated with handling, storaging, and managing repairs, whereas warranty tracking can preempt those expenses by identifying eligible returns efficiently.

References:

https://www.microsoft.com/en-us/microsoft-365/blog/2020/03/26/improving-customer-service-and-reduce-costs-with-dynamics-365/
https://www.forbes.com/sites/forbeshumanresourcescouncil/2020/07/06/optimizing-warranty-claims-a-

better-way-to-track-returns-and-saves-costs/
https://www.accenture.com/us-en/insights/technology/data-driven-warranty-claims-success

Question: 274 **Exam Heist**

DRAG DROP
-

Case study
-

This is a case study. Case studies are not timed separately. You can use as much exam time as you would like to complete each case. However, there may be additional case studies and sections on this exam. You must manage your time to ensure that you are able to complete all questions included on this exam in the time provided.

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To start the case study
-

To display the first question in this case study, click the Next button. Use the buttons in the left pane to explore the content of the case study before you answer the questions. Clicking these buttons displays information such as business requirements, existing environment, and problem statements. When you are ready to answer a question, click the Question button to return to the question.

Company Overview
-

Company Overview. Company Structure

Contoso Compressor Ltd. is a large global manufacturer with 12,000 employees. Contoso Compressor produces, installs, and services large B2B and small B2C gas and air compressors.

They have manufacturing plants and service centers in:

North America (Canada, US, Mexico) Territories
• US – 600 Service Technicians, 60 Call Center Agents, 30 Dispatchers
• Canada – 300 Service Technicians, 30 Call Center Agents, 15 Dispatchers
• Mexico – 200 Service Technicians, 20 Call Center Agents, 10 Dispatchers

Europe Territories
-
• Germany – 200 Service Technicians, 20 Call Center Agents, 10 Dispatchers
• France – 150 Service Technicians, 15 Call Center Agents, 7 Dispatchers
• Italy – 100 Service Technicians, 10 Call Center Agents, 5 Dispatchers

South America Territories
-
• Brazil – 200 Service Technicians, 20 Call Center Agents, 10 Dispatchers
• Argentina – 100 Service Technicians, 10 Call Center Agents, 5 Dispatchers

India Territories
-
• Mumbai – 100 Service Technicians, 10 Call Center Agents, 5 Dispatchers
• Chennai – 150 Service Technicians, 15 Call Center Agents, 7 Dispatchers Contoso

Contoso Compressor sales channels include direct and via distributors.

Contoso Compressor service and installation channels include direct and via service partners.

Company Overview. Existing Systems

Existing systems:
• SAP for ERP
• Siebel for Sales and Customer Service
• Home grown for Field Service and Installations

Dynamics 365 has been selected for Sales, Customer Service, and Field Service.

Azure IoT and Azure Machine Learning have been selected for Connected Field Service.

Sales and Service Overview
-

Sales and Service Overview. B2B Sales and Service Overview

Sales
-
• 70% of total Sales & Service Revenue
• 20% new sales revenue is through distributors

Installations
-
• Variety of large compressors
• Scheduled with Dispatch when equipment has been shipped
• Take a crew of 2-3 technicians

Service
-
• 95% of service calls handled by Contoso Call Center
• All calls come to a regional service center
• Break Fix
• Planned/Preventive Maintenance
• Both Break Fix and Planned/Preventive Maintenance Work Orders require 1 technician
• Planned/Preventive Maintenance
○ Requires a detailed Inspection prior to restart of equipment

Sales and Service Overview. B2C Sales and Service Overview

Sales
-
• 30% of total Sales & Service Revenue
• 100% of new Sales revenue from distributors

No Installation
-

Service
-
• 95% of all service issues handled by partners/distributors

• Service calls to Contoso Call Center are routed to a partner/distributor for service
• Only 1% of all Service Revenue

Sales and Service Overview. Business Goals

Contoso Compressor desires to double both their Sales and Service Revenue over the next 5 years.

To achieve this, they have developed the following goals as part of implementing a new CRM Sales, Service, and Field Service application:
1. New Acquisitions
2. Partner/Distribution network expansion for B2B and B2C
3. New B2B Service Offerings
4. Increase Customer Satisfaction/NPS

Current Challenges
-

Current Challenges. Call Center

• Siloed systems
• Disconnected from other regions
• Poor Return tracking
• Poor partner visibility

Current Challenges. Work Order Management

• No visibility to truck stock
• No task breakdown on Work Orders
• Poor reconciliation to partners/distributors

Current Challenges. Resource Management

• No crew capability for installs
• No visibility across regions

Current Challenges. Contract/Agreement Management

• Service is often given away due to poor entitlement tracking
• No tickler system for renewals

Current Challenges. Asset Management

• No sub-asset tracking
• No work Order history
• No visibility to detailed location tracking
• No ability to connect to IoT

Current Challenges. Mobile Technician Capability

• No offline mode
• Inspections are done manually
• No quoting, signature, or job summary/print capability

Current Challenges. Scheduling
-

• Lack of status updates from technicians
• Manual crew scheduling for installs
• No ability to estimate travel time
• No filter capability to search for the best technician

Desired Functionality
-

Desired Functionality. Call Center

• Customer 360 capability with Knowledge Base
• Visibility to Partner/Distributor information
• Portal capability for customer visibility to Knowledge, equipment owned, open work orders and cases

Desired Functionality. Work Order management

• Defined Work Order Tasks
• Inventory tracking
• Digital Inspections with Branch Logic and Reporting
• Integration to ERP for proper pricing and invoicing

Desired Functionality. Inspections

• Conditional logic for Gas Compressor pressure reading failure
○ By looking at the reading, a technician can see if it's in the red, indicating failure. If fail, must shut down, clean or replace pressure valve
• Impromptu Inspections – the ability to create inspections at a customer site on assets without a work order while working on another work order at the customer site.
• Inspection results are critical to review with the customer after the inspection is performed

Desired Functionality. Resource Management

• Flexible Work Hours
• Crews, equipment tracking as resources for scheduling
• Skills with proficiency levels
• Drip Scheduling for planned maintenance jobs

Desired Functionality. Asset Management

• Track Asset sub-components
• Connected Service for new equipment
• Azure Machine Learning to offer a new chargeable service for machine uptime
• Capture defined asset readings to feed the Azure Machine Learning model
• Many internal assets are used on jobs. We need to be able to schedule those assets with a technician on a job.
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Desired Functionality. IoT
-

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• Currently, there is no way to capture backflow pressure because it can only be measured during the onsite inspection by a technician.
• Contoso Compressor would like to capture that value and feed it back to the machine-learning algorithm to better measure performance and predict failure.

You are the lead consultant on a Dynamics 365 Field Service implementation for Contoso Compressor.

One of your assignments is to set up the system for a technician to create inspections on assets, while working on another job at a customer site.

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

Answer Area

Actions		Order
Assign the incident type to a work order.		1.
Create an inspection form to capture Gas Compressor Temperature.		2.
Enable the Customer to Asset Inspection capability in the Customize the System section.		3.
Create an inspection form to add logic for Gas Compressor failure.		4.
Select the asset for inspection.		5.
Assign the inspection form to an Incident Type.		

Answer:

Order

1. Enable the Customer to Asset Inspection capability in the Customize the System section.
2. Select the asset for inspection.
3. Create an inspection form to add logic for Gas Compressor failure.
4. Assign the inspection form to an Incident Type.
5. Assign the incident type to a work order.

Question: 275 **Exam Heist**

DRAG DROP
-

A new dispatcher is using the schedule assistant to help select the best option for the booking and to assign the requirement.

You need to advise how they can use the scheduling assistant to schedule an unscheduled requirement for a work order.

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

Answer Area

Actions	Order
Select the unscheduled requirement from the list.	1.
Select **Find availability** to search for a resource.	2.
Drag and drop the unscheduled requirement to schedule it.	3.
Enable Resource Scheduling Optimization (RSC) goals and constraints.	
Select the schedule board.	

Answer:

Order

1. Select the schedule board.
2. Select the unscheduled requirement from the list.
3. Select **Find availability** to search for a resource.

Question: 276

Exam Heist

DRAG DROP
-

Your customer is a medical equipment and technology company. The schedulers of the company want to create and schedule work orders from Microsoft Outlook.

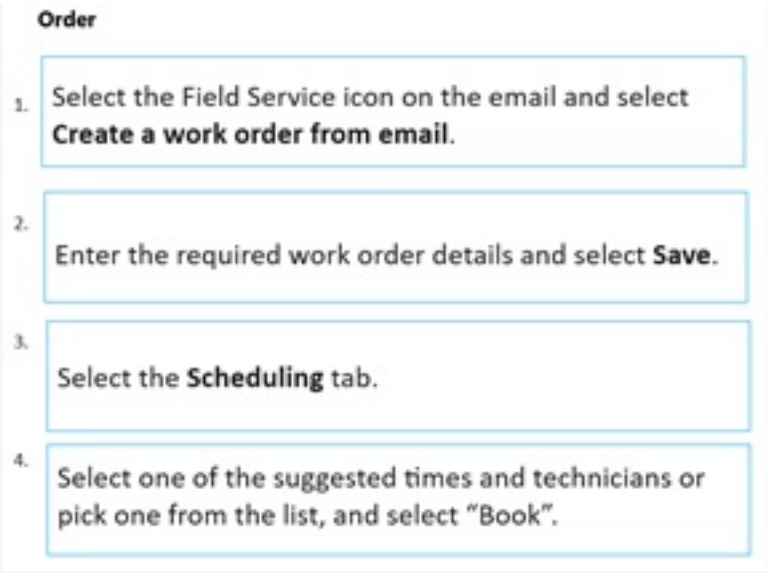
You need to recommend the mandatory actions the schedulers must perform.

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

Answer Area

Actions	Order
Select the Field Service icon on the email and select **Create a work order from email**.	1.
Select one of the suggested times and technicians or pick one from the list, and select "Book".	2.
Enter the required work order details and select **Save**.	3.
Select the **Scheduling** tab.	4.
Navigate to the schedule board to schedule the appropriate resource.	
Open the work order by selecting the expansion icon of the **General** tab.	

Answer:



Question: 277 **Exam Heist**

You are in the process of setting up calendars and working hours in Dynamics 365 Field Service.

You are setting up working hours templates.

What are three capabilities of using working hours and calendars in Dynamics 365 Field Service? Each correct answer presents a complete solution.

NOTE: Each correct selection is worth one point.

A.A template resource can be assigned to the bookable resource so that the working hours will match.
B.Working hours can either be set on a bookable resource view or on the resource record.
C.The same set of working hours can be assigned to multiple resources.
D.Asset resource types lack the ability to track working hours.
E.A template resource is available to be assigned to a working hours template.

Answer: ACE

Explanation:

The correct answers A, C, and E reflect the core functionalities of working hours and calendars in Dynamics 365 Field Service due to their roles in enhancing resource scheduling and management.

Justification of Correct Answers:

A. A template resource can be assigned to the bookable resource, ensuring consistent working hours across resources. This facilitates efficient management of schedules and eliminates discrepancies in resource availability.

C. The ability to assign the same set of working hours to multiple resources streamlines the scheduling process, enhancing operational efficiency and ensuring uniformity in service delivery across similar resource categories.

E. The availability of a template resource for assignment to a working hours template allows organizations to simplify the configuration of working hours, enabling better management and adherence to service level agreements.

Critique of Incorrect Options:

B. While working hours can be set on a bookable resource view, the option implies a limitation on where working hours can be configured. In actuality, working hours can be managed through various interfaces in Dynamics 365, not restricted solely to a resource view.

D. The assertion that asset resource types lack the ability to track working hours directly contradicts the functionality inherent in Dynamics 365. Asset resources can indeed have working hours assigned for maintenance and service scheduling, making this option fundamentally misleading.

References:

https://docs.microsoft.com/en-us/dynamics365/field-service/overview
https://docs.microsoft.com/en-us/dynamics365/field-service/scheduling-and-bookable-resources
https://docs.microsoft.com/en-us/dynamics365/field-service/work-hours-templates

Question: 278 **Exam Heist**

You are implementing Dynamics 365 Field Service for an electronics service company.

As part of the implementation, you need to create prefixes for transaction numbering and the beginning numbers of Field Service tables in the Field Service settings.

In which three entities can you do this? Each correct answer presents a complete solution.

NOTE: Each correct selection is worth one point.

A.Customer asset
B.Return merchandise authorization (RMA)
C.Agreement
D.Work order
E.Time entry

Answer: BCD

Explanation:

BCD (Return Merchandise Authorization, Agreement, and Work Order) are correct selections for prefix customization in Dynamics 365 Field Service, as these entities directly support transactional processes central to field service operations.

Return Merchandise Authorization (RMA) facilitates the management of returned goods, necessitating a systematic numbering convention for efficient tracking and reconciliation. The Agreement entity governs service contracts, where unique prefixes play a critical role in differentiating multiple agreements and enhancing auditability. Work Orders are essential operational documents that require distinct prefixes to streamline workflow, facilitate service delivery, and improve service reporting accuracy.

In contrast, Customer Asset, while important for tracking individual pieces of equipment or service history, does not require unique transactional number prefixes since it primarily serves as a reference rather than a standalone transaction entity. Additionally, Time Entry records service activities performed by technicians but is typically more concerned with logging hours rather than requiring a unique identification system. Thus, while both Customer Asset and Time Entry are integral to field service operations, they do not align with the need for transactional prefixing as BCD do.

For further referencing:

https://docs.microsoft.com/en-us/dynamics365/field-service/field-service-setup
https://docs.microsoft.com/en-us/dynamics365/field-service/work-orders

https://docs.microsoft.com/en-us/dynamics365/field-service/service-agreements

Question: 279 **Exam Heist**

You have configured the required resource pay types in the Dynamics 365 Field Service settings.

You need to train the users on how the calculations are done on the work order when it is completed.

Which two actions are executed during calculations? Each correct answer presents a complete solution.

NOTE: Each correct selection is worth one point.

A.The application calculates the resource booking costs based on the cost per hour entered by the field technician on the work order.

B.The application creates one booking journal record to calculate the cost of a resource booking for each of the resource pay types.

C.Hourly Markup will be applied to the hourly rate amount specified on the resource record when determining the costs associated with the resource booking.

D.The price list on the work order will be considered while calculating the resource booking costs.

Answer: BC

Explanation:

BC is correct because the application operationalizes the resource booking calculations through defined processes that accurately generate cost assessments based on configured parameters.

B is correct as the application indeed generates one booking journal record for each resource pay type involved. This structured record-keeping is essential for transparency and accuracy in cost calculations, ensuring that each pay type is examined independently within the overall financial accounting framework.

C is accurate because the Hourly Markup directly influences cost determination by augmenting the base hourly rate recorded on the resource profile. This markup strategy facilitates the inclusion of overhead and profit margins, thereby aligning service costs with organizational financial objectives.

A is incorrect because the field technician does not manually input the cost per hour in the work order; rather, the application utilizes pre-configured pay rates as defined in the resource records. This centralized mechanism mitigates discrepancies and ensures consistency across various service engagements.

D is also incorrect; while the price list on the work order is considered for billing purposes, the actual calculation of resource booking costs primarily hinges on resource-specific pay types and their respective configurations rather than solely relying on the work order's price list.

https://learn.microsoft.com/en-us/dynamics365/field-service/field-service-setup-resource-management
https://learn.microsoft.com/en-us/dynamics365/field-service/resource-booking
https://learn.microsoft.com/en-us/dynamics365/field-service/field-service-overview

Question: 280 **Exam Heist**

You are working on a Dynamics 365 Field Service project at Contoso Manufacturing.

The VP of Services is interested in setting up Connected Field Service to monitor key sensors to help extend asset life.

You need to ensure the asset correctly reads IoT information from Azure.

What needs to be set up on the asset?

A.Azure IoT Hub Asset ID
B.Asset Properties defined for Connected Field Service
C.Asset Functional Location
D.Device ID

Answer: B

Explanation:

B is correct because Asset Properties configured for Connected Field Service directly enable the integration and management of IoT data within Dynamics 365.

In Dynamics 365 Connected Field Service, Asset Properties play a critical role as they define the attributes and functional parameters of the asset being monitored. Setting up these properties allows the system to interpret and manage the incoming IoT data effectively, ensuring accurate alerts and predictive maintenance actions are triggered based on the sensor readings. This foundational layer of configuration influences how the data from sensors is processed, ensuring that service teams have the necessary insights to extend asset life effectively.

Evaluation of Other Options:

A. Azure IoT Hub Asset ID: While the Azure IoT Hub is essential for connecting devices and managing IoT communications, the Asset ID alone does not configure the properties necessary for meaningful data interpretation or action within Dynamics 365. Thus, this option lacks completeness.

C. Asset Functional Location: Defining an asset's functional location is useful for organizational purposes but is insufficient for directly handling IoT data integration and real-time analytics critical for Connected Field Service. It does not inherently manage the specifics of IoT data interpretation.

D. Device ID: The Device ID identifies a specific device within IoT infrastructure but does not encapsulate the comprehensive attributes or parameters that Asset Properties involve. A Device ID lacks the context required for effective data management and service delivery.

Thus, selecting Asset Properties ensures the system can leverage the IoT data effectively for predictive maintenance and lifecycle extension strategies.

References:

https://learn.microsoft.com/en-us/dynamics365/field-service/iot-connected-field-service
https://learn.microsoft.com/en-us/azure/iot-hub/overview-iot-hub
https://learn.microsoft.com/en-us/dynamics365/field-service/asset-management

Question: 281 **Exam Heist**

Case study -

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To start the case study -

To display the first question in this case study, click the Next button. Use the buttons in the left pane to explore the content of the case study before you answer the questions. Clicking these buttons displays information such as business requirements, existing environment, and problem statements. When you are ready to answer a question, click the Question button to return to the question.

Overview -

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. oDispatchers are assigned to all territories in a region. Dispatchers assign repair and installation work to repair technicians based on their skills. oRepair technicians are employees and subcontractors.
3.Planned maintenance services perform regular and planned checks for their customers. oInspectors are assigned to all regions based on skills and expertise. oInstallers are assigned to multiple territories in a geographic region. oRepair technicians are employees and subcontractors. oDispatchers 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.

Existing environment -

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.

Requirements -

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. oCertifications set to expire over the next 90 days should show highlighted in Yellow. oCertifications 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.
oTemplates 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.

You need to set up the system to manage the time-off requests.

Which three actions should you perform? Each correct answer presents part of the solution.

NOTE: Each correct selection is worth one point.

A.Enable the time-off approval of the resources with plumbing skills.

B.Enable the time-off approval of the resources with electrical skills.

C. Assign Field Service-Administrator field security profile to the managers and line-managers.

D.Enable the time-off approval in the settings.

E.Assign Field Service-Dispatcher field security profile to the managers and line-managers.

Answer: BDE

Question: 282 **Exam Heist**

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At the end of this case study, a review screen will appear. This screen allows you to review your answers and to make changes before you move to the next section of the exam. After you begin a new section, you cannot return to this section.

To start the case study -

To display the first question in this case study, click the Next button. Use the buttons in the left pane to explore the content of the case study before you answer the questions. Clicking these buttons displays information such as business requirements, existing environment, and problem statements. When you are ready to answer a question, click the Question button to return to the question.

Overview -

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. oDispatchers are assigned to all territories in a region. Dispatchers assign repair and installation work to repair technicians based on their skills. oRepair technicians are employees and subcontractors.
3.Planned maintenance services perform regular and planned checks for their customers. oInspectors are assigned to all regions based on skills and expertise. oInstallers are assigned to multiple territories in a geographic region. oRepair technicians are employees and subcontractors. oDispatchers 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.

Existing environment -

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.

Requirements -

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. oCertifications set to expire over the next 90 days should show highlighted in Yellow. oCertifications 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.
oTemplates 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.

LitWare has requirements for configuring the mobile app.

You need to set up ad hoc inspections for technicians.

What should you do?

A.Enable the ad hoc inspection in the Field Service settings.

B.Enable the ad hoc inspection in the asset table.

C.Go to Assets > Related and create inspections.

D.Update the customer asset relationship to enable the ad hoc inspections.

Answer: D

Question: 283 **Exam Heist**

DRAG DROP
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You are implementing Dynamics 365 Field Service. Your customer wants to start adding Field Service users.

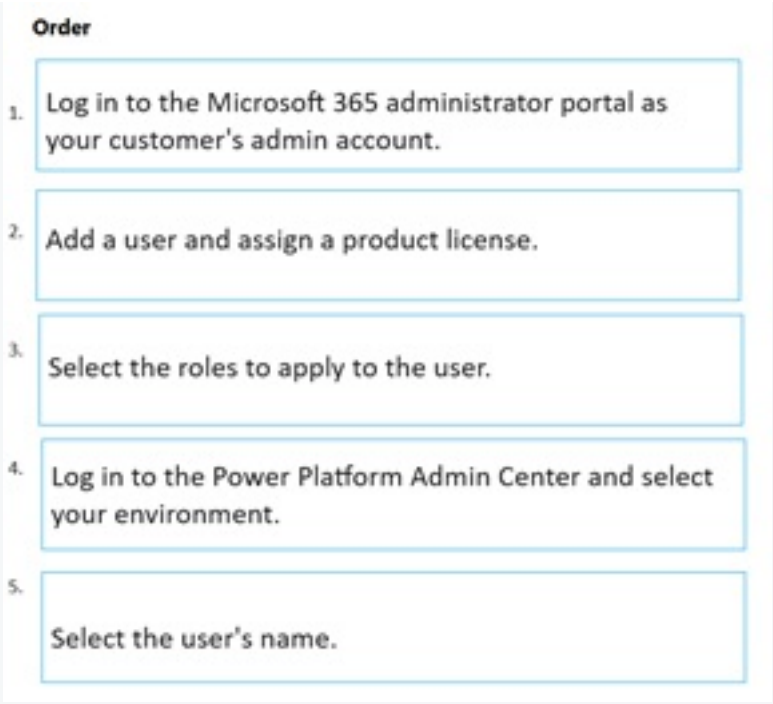
You need to add a user and assign a Field Service role.

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

Answer Area

Actions	Order
Add a user and assign a product license.	1.
Log in to the Microsoft 365 administrator portal as your customer's admin account.	2.
Access **Advanced Settings** from **Settings**.	3.
Select the user's name.	4.
Log in to the Power Platform Admin Center and select your environment.	5.
Select the roles to apply to the user.	

Answer:



Question: 284 **Exam Heist**

You need to enable Internet of Things (IoT) access for both resources and dispatchers.

Which two actions should you take? Each answer presents a complete solution.

NOTE: Each correct selection is worth one point.

A. Assign access to IoT entities in the Field Service - Resources role.
B. Assign access to IoT entities in the Field Service - Inventory Purchase.
C. Assign access to IoT entities in the Field Service - Dispatcher role.
D. Add dispatchers to the Connected Field Service - Resources role.
E. Add resources to the Connected Field Service - Resources role.

Answer: CD

Explanation:

Justification – WhyCandD are the correct selections

C.Assign access to IoT entities in the Field Service – Dispatcher role

The Dispatcher role is the security principal that grants permission to view and manage IoT device data, alerts, and status for field-service operations.
By assigning IoT entities to this role, dispatchers can receive real-time telemetry, trigger work orders, and update device status within the Dynamics 365 Field Service application.
This mapping aligns with the platform's security model, where IoT device permissions are granted through the Dispatcher security role.

D.Add dispatchers to the Connected Field Service – Resources role

The Connected Field Service – Resources role aggregates permissions for all entities that interact with IoT resources (including devices, assets, and service tasks).
Adding dispatchers to this role ensures they inherit the necessary IoT-related privileges (read/write on device records, ability to create service tasks from IoT triggers, etc.) without needing separate custom role configurations.

This role is the recommended “catch-all” container for any user who must work with connected devices, making it the proper way to grant IoT access to dispatchers.

Why the other options are not suitable

A.Assign access to IoT entities in the Field Service – Resources role

The Resources role is focused on managing resource scheduling, skills, and availability, not on IoT device interaction.
Granting IoT permissions here would not provide dispatchers with the specific telemetry or device-management rights required for connected service scenarios.

B.Assign access to IoT entities in the Field Service – Inventory Purchase role

This role pertains to procurement and inventory management processes; it does not contain the permissions needed for IoT device monitoring or dispatch actions.
Using it for IoT access would leave dispatchers without the ability to act on device data.

E.Add resources to the Connected Field Service – Resources role

While adding resources to this role does give them IoT-related permissions, the question specifically asks for actions that enable IoT access **for both resources and dispatchers**.
OptionE addresses only resources, leaving dispatchers uncovered, and therefore does not satisfy the “both resources and dispatchers” requirement.

Conclusion
The only combination that directly grants IoT access to dispatchers (via the Dispatcher role) and ensures they have the broader connected-service permissions (via the Connected Field Service – Resources role) is **CandD**.
These selections align with Microsoft’s recommended security role mappings for IoT-enabled Field Service scenarios.

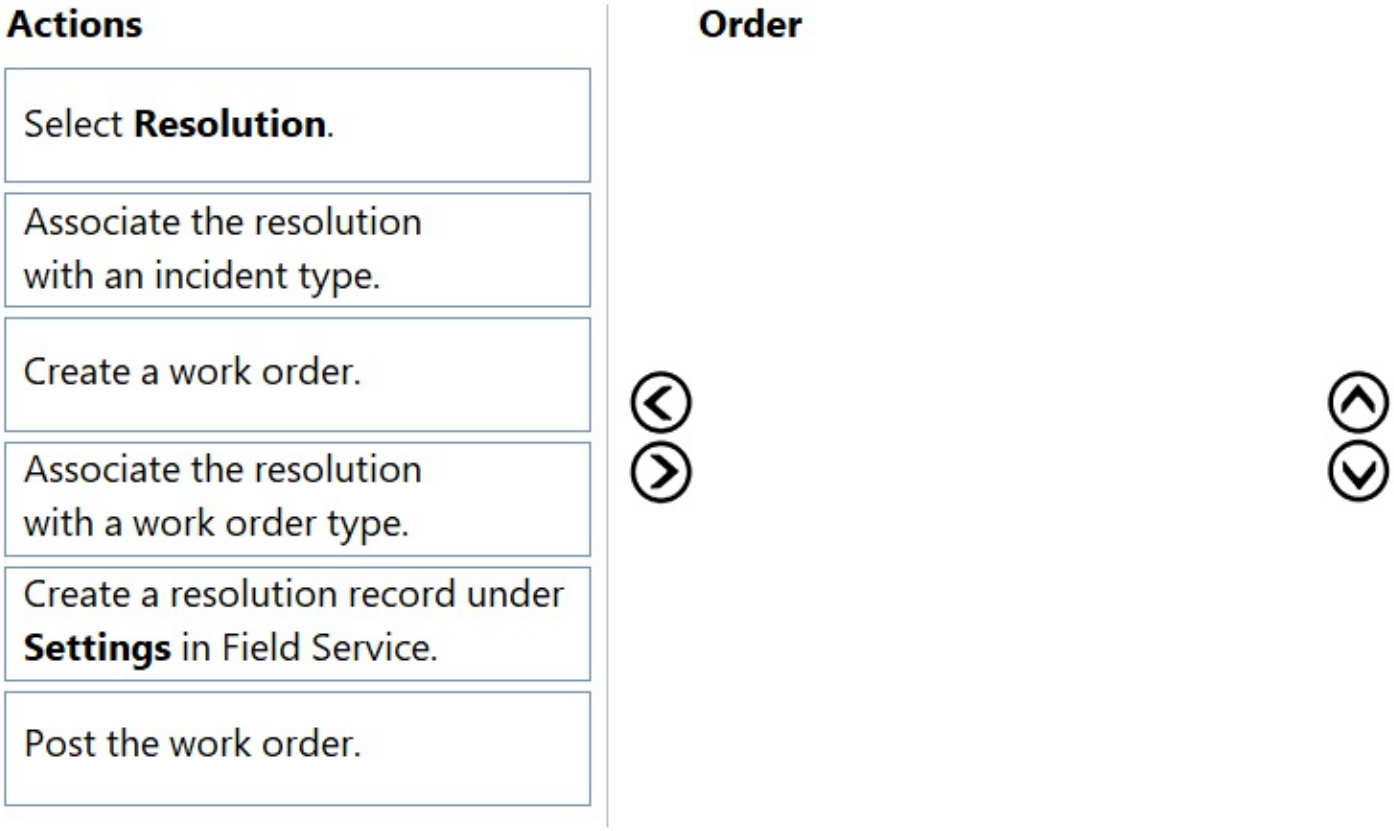
Question: 285 **Exam Heist**

DRAG DROP
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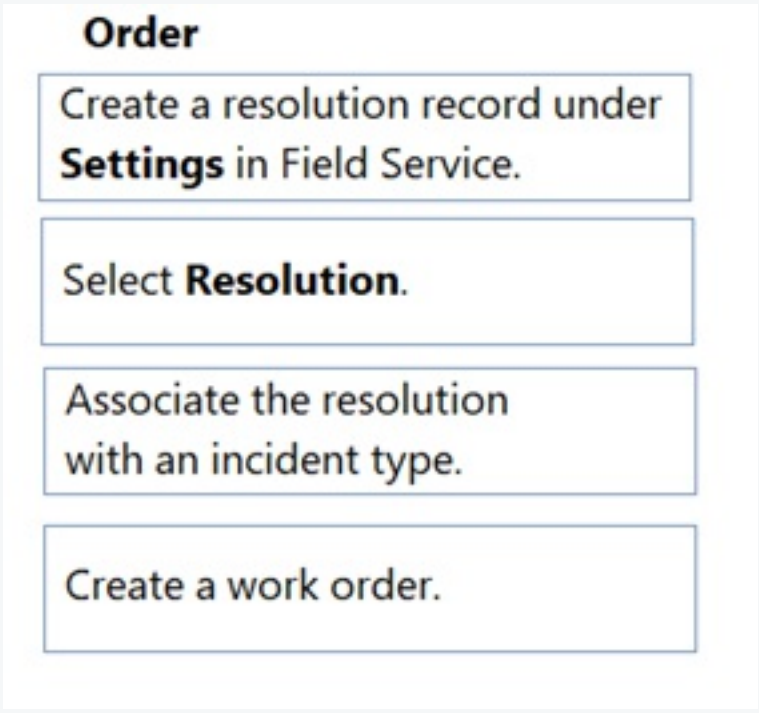
Your Heating, Venting, and Air Conditioning (HVAC) customer wants to help technicians in the future by making resolutions available for use on work orders.

You need to set up templated resolutions to be attached to a work order.

Which four actions must 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.



Answer:



Question: 286 **Exam Heist**

The ability to work offline with a mobile device is key requirement for your customer.

You need to ensure entities and fields are available for offline use.

What should you do?

A. Access the Microsoft Power Platform admin center to make changes in the Mobile Configuration section for Offline functionality.

B. Create a new mobile offline profile for initial use.

C. Access the Offline Profile from the Mobile section in Customizations.

D. Once the system configuration is correctly set up, add the Offline Security role to the user who needs offline access.

Answer: A

Explanation:

Why optionA is the correct choice

The offline capability for mobile apps is controlled at the **environment level** through the **Mobile Configuration** section of the **Microsoft Power Platform admin center**.
Here you can **enable offline sync**, **select the entities and fields** that should be available offline, and **publish the configuration** to all mobile clients.
This step is required before any offline profile or security role can be used, because the underlying data-access settings must be defined first.

Why the other options are less suitable

B – Create a new mobile offline profile for initial use – An offline profile is only a container for the previously configured offline settings; it cannot be created or functional without first enabling offline sync in the admin center.
C – Access the Offline Profile from the Mobile section in Customizations – The Mobile Customizations area does not expose the full offline-profile configuration; the proper location for setting up offline entities and fields is the Power Platform admin center, not the classic Customizations UI.
D – Add the Offline Security role to the user – Assigning a security role grants permissions but does **not** configure the offline data set. Without the environment-level offline settings, the role has no effect on mobile offline behavior.

Conclusion
To make entities and fields available for offline use on a mobile device, you must first **configure offline functionality in the Power Platform admin center's Mobile Configuration section** (OptionA). This foundational step enables subsequent actions such as creating offline profiles or assigning roles.

Question: 287 **Exam Heist**

Note: This question is part of a series of questions that present the same scenario. Each question in the series contains a unique solution that might meet the stated goals. Some question sets might have more than one correct solution, while others might not have a correct solution.

After you answer a question in this section, you will NOT be able to return to it. As a result, these questions will not appear in the review screen.

A dispatcher asked you to customize Fulfillment Preferences in Dynamics 365 Field Service to influence how the schedule assistant displays results for single-day requirements.

You need to create a fulfillment preference.

Solution: Reset intervals per time group detail impacts the appointment sequence, ensuring even distribution within time group limits.

Does this meet the goal?

A. Yes

B. No

Answer: A

Explanation:

The **Reset intervals per time group** fulfillment preference directly controls how the Schedule Assistant orders appointments inside a given time-group, forcing an even distribution of single-day requirements.
This behavior is exactly what the dispatcher needs to influence the way results are displayed for a day-long schedule.
Other fulfillment preferences (e.g., “Prefer earlier start times,” “Prioritize by skill”) affect selection criteria or priority but do **not** modify the sequencing of appointments within a time group, so they cannot achieve the stated goal.
Consequently, applying “Reset intervals per time group” satisfies the requirement, making the correct answer **A – Yes**.

Question: 288 **Exam Heist**

Note: This question is part of a series of questions that present the same scenario. Each question in the series contains a unique solution that might meet the stated goals. Some question sets might have more than one correct solution, while others might not have a correct solution.

After you answer a question in this section, you will NOT be able to return to it. As a result, these questions will not appear in the review screen.

A dispatcher asked you to customize Fulfillment Preferences in Dynamics 365 Field Service to influence how the schedule assistant displays results for single-day requirements.

You need to create a fulfillment preference.

Solution: Intervals define the time slots for displaying schedule assistant results and influence the start time for subsequent bookings.

Does this meet the goal?

A. Yes
B. No

Answer: B

Explanation:

Justification

The requirement is to **customize a fulfillment preference** so that the **Schedule Assistant shows results differently for single-day requirements**.
Intervals are a scheduling parameter that define fixed time-slot windows (e.g., 08:00-10:00, 10:00-12:00) and affect how the engine calculates start times for subsequent bookings; they do **not** control the visual presentation or filtering of schedule-assistant results.
To influence what the dispatcher sees in the Schedule Assistant, the appropriate fulfillment preference would be something that directly affects **display options**, such as **“Preferred time windows”** or **“Show only same-day jobs”** settings.
Using **Intervals** therefore does **not** meet the goal of shaping the Schedule Assistant’s output for single-day requirements; it merely adjusts internal scheduling calculations and could even cause overlapping or mis-aligned slots.
Consequently, the statement “Intervals define the time slots for displaying schedule assistant results and influence the start time for subsequent bookings” is **incorrect** for the asked customization, making the correct answer **B – No**.

Why the other option is unsuitable

Selecting **A – Yes** would imply that configuring Intervals satisfies the dispatcher's need to tailor the Schedule Assistant's display, which it does not; the feature addresses scheduling logic, not UI filtering or preference customization. Hence it does not fulfill the stated objective.

Question: 289 **Exam Heist**

DRAG DROP
-

Your client is interested in performing health and safety training at their customer's locations. Those data points, tables and columns do not exist in the out-of-the-box solution.

You need to use the latest features in Microsoft Power Apps to help the trainer, facilitate the inspections, and generate the certificate.

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.

Actions
Create HTML content and integrate with Microsoft Dataverse using iFrame.
Use a model-driven app to view the evaluation results.
Use a physical form to capture the health and safety evaluation results.
Use Microsoft Forms to capture data and then integrate with Microsoft Power Apps.
Create custom tables and columns within Microsoft Dataverse.
Use form recognition in Microsoft Power Apps to read the forms and store the data in Microsoft Dataverse.
Use a Microsoft Power Automate cloud flow to generate certificates.
Use a canvas app to capture the health and safety evaluation results.

Order	
1	
2	
3	
4	

Answer:

Order	
1	Create custom tables and columns within Microsoft Dataverse.
2	Use a canvas app to capture the health and safety evaluation results.
3	Use a Microsoft Power Automate cloud flow to generate certificates.
4	Create HTML content and integrate with Microsoft Dataverse using iFrame.

Question: 290 Exam Heist

You are a Dynamics 365 Field Service administrator.

You need to maintain pricing for products and services for customers.

On which three records can price lists be stored? Each correct answer presents part of the solution.

NOTE: Each correct selection is worth one point.

A. Bookable resource bookings
B. Customer assets
C. Accounts
D. Agreements
E. Work orders

Answer: CDE

Explanation:

Technical justification

Accounts (C) – Price lists are primarily attached to **Account** records because they represent the customer-facing entities for which pricing is defined. The price list's "Customer" field points to an Account, making it the natural container for customer-specific pricing.

Agreements (D) – **Agreement** records define contractual terms (including pricing) that can span multiple accounts or sites. A price list can be linked to an Agreement to enforce the agreed-upon rates across the related contracts, enabling centralized control of pricing terms.

Work Orders (E) – While price lists are not stored directly on a work-order record, the **pricing context** for a work order is derived from the associated **Account** (or Agreement) that the work order belongs to. When a work order is created, the system resolves the applicable price list based on the work order's customer (Account) relationship, ensuring the correct rates are applied at execution time.

Why the other options are not correct

Bookable resource bookings (A) – These are operational scheduling records; they do not store pricing data. Pricing is resolved from the underlying customer context, not from the booking itself.

Customer assets (B) – Asset records represent physical items owned by a customer and are used for inventory and maintenance tracking. They are not a repository for price-list definitions.

Thus, the three records that can hold price-list definitions are **Accounts, Agreements, and Work Orders (CDE)**, each providing a distinct level of pricing governance — customer-level, contract-level, and execution-level respectively.

Question: 291 Exam Heist

The ability to work offline with a mobile device is key requirement for your customer.

You need to ensure tables and columns are available for offline use.

What should you do?

A. Update the mobile offline profile to include the correct Field Service security roles.

B. Create a new mobile offline profile for initial use.

C. In Microsoft Power Apps, select the table you want to enable for offline. Then, update the settings to enable for mobile offline.

D. Unpublish the offline profile, update the security roles, save, and republish the offline profile.

Answer: C

Explanation:

Why optionC is the correct choice

Direct enablement of offline capability – In Power Apps, a table must be explicitly marked as available for offline before it can be cached on a mobile device. Selecting the table and toggling the offline setting does exactly that, ensuring that the required tables and columns are materialized in the device's local store.
Preserves existing offline profiles – The action works within the current mobile offline profile, so no need to create a new profile (optionB) or modify security roles (optionA). It simply adds the selected table to the profile's data set.
Minimal disruption – The operation is performed in the Power Apps portal, requires only a few clicks, and does not involve republishing or unpublishing profiles (optionsD andA), which could affect other users or introduce unnecessary complexity.

Why the other options are less suitable

OptionA – Updating the mobile offline profile to include security roles only controls who can access the data offline; it does not add the tables themselves to the offline cache.
OptionB – Creating a new offline profile is unnecessary when an existing profile can be extended; it adds extra maintenance overhead and does not address the core requirement of enabling the specific tables.
OptionD – Unpublishing and republishing a profile is a heavyweight step that can interrupt service and is only needed when structural changes (e.g., schema updates) are made, not merely to enable a table for offline use.

Therefore, the most precise and efficient method is to **enable the desired table for offline use directly in Power Apps**, which is exactly what optionC describes.

Question: 292 **Exam Heist**

A dispatcher for a restaurant equipment repair company has a requirement for a multi-day, multi-resource booking.

They need to schedule specific resources for individual days within the resource's working hours.

What should you recommend?

A. Use the schedule assistant to specify resource availability and days for each resource separately.

B. Access the resource pool to manually assign days to individual resources for the multi-day requirement using the schedule assistant.

C. Go to Requirement Details > Specify Pattern, select days for each resource, and then individually select Book for each resource on their specific days.

D. Utilize the auto-schedule feature to automatically allocate specific days to each resource.

Answer: C

Explanation:

Justification

OptionC directly addresses the need to schedule a multi-day, multi-resource job by allowing the dispatcher to define a pattern of days for each resource and then book each resource on its specific days. This workflow is built into the **Requirement Details→Specify Pattern** flow and the subsequent **Book** action, which is the standard method for handling complex, non-contiguous scheduling in Dynamics365 Field Service.

OptionA only uses the Schedule Assistant to set availability; it does not provide a mechanism to lock a resource to particular days across multiple dates, so the dispatcher cannot guarantee that each day is reserved for the intended resource.

OptionB suggests manually assigning days via the Resource Pool with the Schedule Assistant. While the Resource Pool can view resources, the manual assignment process does not enforce a repeatable pattern and is error-prone for multi-day bookings; it also bypasses the built-in pattern-specification capability.

OptionD relies on the Auto-Schedule feature, which automatically allocates resources based on availability and skill but does not let the dispatcher pre-define specific days for each resource. Consequently, it cannot guarantee the exact day-by-day allocation required for a multi-day, multi-resource scenario.

Conclusion: OptionC is the only choice that provides a controlled, repeatable method to set a day pattern per resource and then book each resource on those exact days, matching the dispatcher's requirement precisely.

Question: 293 **Exam Heist**

You create an incident type with an estimated duration of 1 hour. After adding products, services, and service tasks to the incident type, you notice the estimated duration is now 4 hours.

You need to set the estimated duration to 1 hour.

Which two actions should you perform? Each correct answer presents a complete solution.

NOTE: Each correct selection is worth one point.

A. Update both the service tasks and services records to ensure each one equals 1 hour.
B. Update the Estimated Duration of the service tasks to equal a total of 1 hour.
C. Update the services records to equal a total of 1 hour.
D. Remove the Estimated Duration of the service tasks and set the incident type Estimated Duration to 1 hour.

Answer: BD

Explanation:

Technical justification

Correct actions –B and D

B – Update the Estimated Duration of the service tasks to equal a total of 1hour.
The incident type's estimated duration is calculated from the sum of the durations of its associated service tasks. By editing each service-task record so that the combined total equals 1hour, the incident type automatically reflects the intended duration.
D – Remove the Estimated Duration of the service tasks and set the incident type Estimated Duration to 1hour.
Service-task records can inherit an estimated duration, but that value can be overridden at the incident-type level. Clearing the task-level duration eliminates any unintended contribution, and then explicitly setting the incident-type's Estimated Duration to 1hour ensures the correct value is used for all future incidents.

Why the other options are not appropriate

A – Update both the service tasks and services records to ensure each one equals 1hour.
Modifying every service record to 1hour would inflate the total duration (e.g., if three services are linked, the incident type would sum to 3hours). The goal is a combined total of 1hour, not a per-record value of 1hour.
C – Update the services records to equal a total of 1hour.
Service records are shared across multiple incident types; changing their duration globally could affect unrelated incidents. Moreover, the incident-type's duration is derived from the service tasks, not directly from the service records, so adjusting services alone does not correct the incident-type calculation.

Conclusion
Only actions **B** and **D** directly address the source of the inflated duration — service-task estimates — and then set the incident-type's duration to the desired 1hour, providing a precise and safe solution for the certification scenario.

Question: 294 **Exam Heist**

DRAG DROP
-

You are the lead consultant on a Dynamics 365 Field Service implementation. Your customer wants the system to be set up for inspections.

You need to implement an inspection lifecycle as it relates to a work order.

In working with your customer, which five actions should you perform in sequence? To answer, move the five appropriate actions from the list of actions to the answer area. Arrange the five actions in the correct order.

Actions	Order	
Add the incident type to the work order.	1	
Create and publish an inspection template.	2	
Associate the inspection template with a service task on an incident type.	3	
Set up the Branch Scripting options table.	4	
Mark the inspection service task as Complete.	5	
Associate the inspection to an asset.		
View the results of the inspection.		

Answer:

Order	
1	Create and publish an inspection template.
2	Associate the inspection template with a service task on an incident type.
3	Add the incident type to the work order.
4	Mark the inspection service task as Complete.
5	View the results of the inspection.

Question: 295 **Exam Heist**

Case Study -

This is a case study. Case studies are not timed separately from other exam sections. You can use as much exam time as you would like to complete each case study. However, there might be additional case studies or other exam sections. Manage your time to ensure that you can complete all the exam sections in the time provided. Pay attention to the Exam Progress at the top of the screen so you have sufficient time to complete any exam sections that follow this case study.

To answer the case study questions, you will need to reference information that is provided in the case. Case studies and associated questions might contain exhibits or other resources that provide more information about the scenario described in the case. Information provided in an individual question does not apply to the other questions in the case study.

A Review Screen will appear at the end of this case study. From the Review Screen, you can review and change your answers before you move to the next exam section. After you leave this case study, you will NOT be able to return to it.

To start the case study -

To display the first question in this case study, select the "Next" button. To the left of the question, a menu provides links to information such as business requirements, the existing environment, and problem statements. Please read through all this information before answering any questions. When you are ready to answer a question, select the "Question" button to return to the question.

Background information -

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:

•The Chief Executive Officer (CEO)
•The prop master
•The robotics engineer
•The robotics intern
•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.

Cosmetic work orders -

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.

Dental check-up -

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.

Technical work orders -

Overview -

Technical work can be performed by either the robotics engineer or by the robotics intern, depending on the

complexity level.

When a new work order is created manually, it must be triaged by the robotics engineer before it can be scheduled. Maintenance work orders created by agreements can be scheduled without triage.

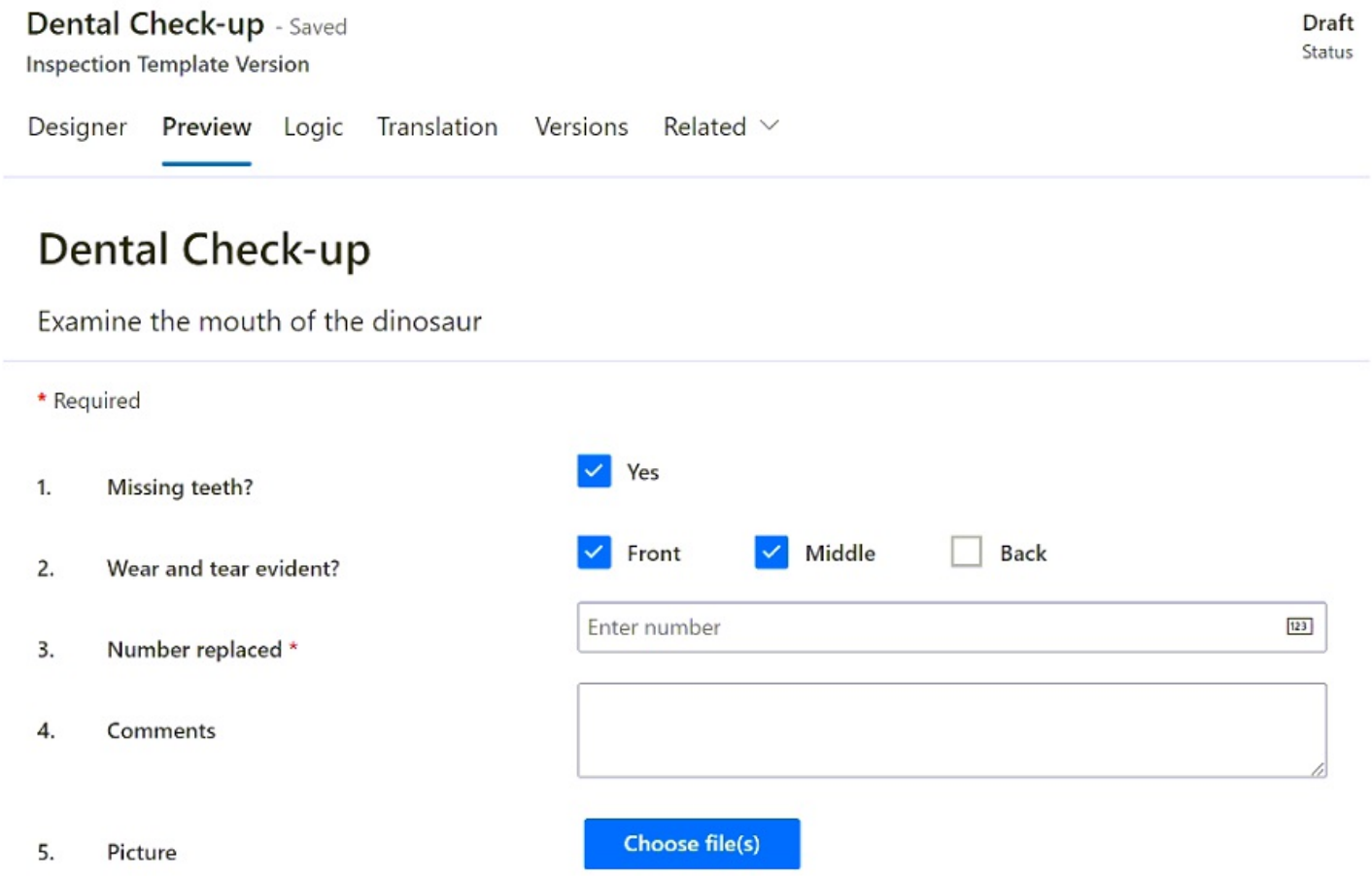
The robotics intern only uses the Field Service mobile app to view upcoming jobs, whereas the robotics engineer uses the mobile app and the model-driven app.

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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 following image is a draft of the "Dental Check-up" inspection:



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.

Additional requirements -

Natural History Museum -

The prop master has a cosmetic maintenance job scheduled for tomorrow at the Natural History Museum. This is their first maintenance job for two dinosaurs on lease – a diplodocus and a carnosaur. The CEO asks you to ensure

that the prop master completes the new dental check-up for both dinosaurs during the visit.

Large parts of the museum do NOT have mobile data reception, nor Wi-Fi.

Offline requirements -

The engineer uses offline first to monitor both work order assigned to themselves and to their intern. No custom offline profiles have been created.

Neither the prop master nor the intern have used the Field Service app offline before. The CEO requires that they only see their own work orders.

Configuration -

The CEO wants the Species value to appear as the sub-title when selecting a primary asset on the work order main form.

You need to configure a push notification for the engineer to indicate that the intern is waiting for their feedback.

Automation -

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.

New programming: dance firmware update

The robotics engineer has been working on a passion project - developing a program to allow a dinosaur to perform a high-energy dance routine.

When the engineer demonstrated the results on a newly finished Baryonyx sculpture during a staff meeting, the CEO was certain that some of their existing customers would want to commission a firmware update to their dinosaurs to allow the dance program to be installed as a special service.

New sales package -

The CEO names the new programming the "Dino dance" package, a new category of work which requires a new price list.

The CEO will call customers and explain the new package to them. If customers are interested, the CEO wants to create an opportunity which can be converted into a work order.

A customer needs the new "Dino dance" package.

What does the robotic engineer need to create in order to capture the information to generate a work order?

A. Work order type
B. Opportunity
C. Incident type
D. Service task type

Answer: D

Question: 296 **Exam Heist**

DRAG DROP
-

Case Study
-

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Background information
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Company overview
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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:

•The Chief Executive Officer (CEO)
•The prop master
•The robotics engineer
•The robotics intern
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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
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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.

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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.

Cosmetic work orders
-

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.

Dental check-up
-

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.

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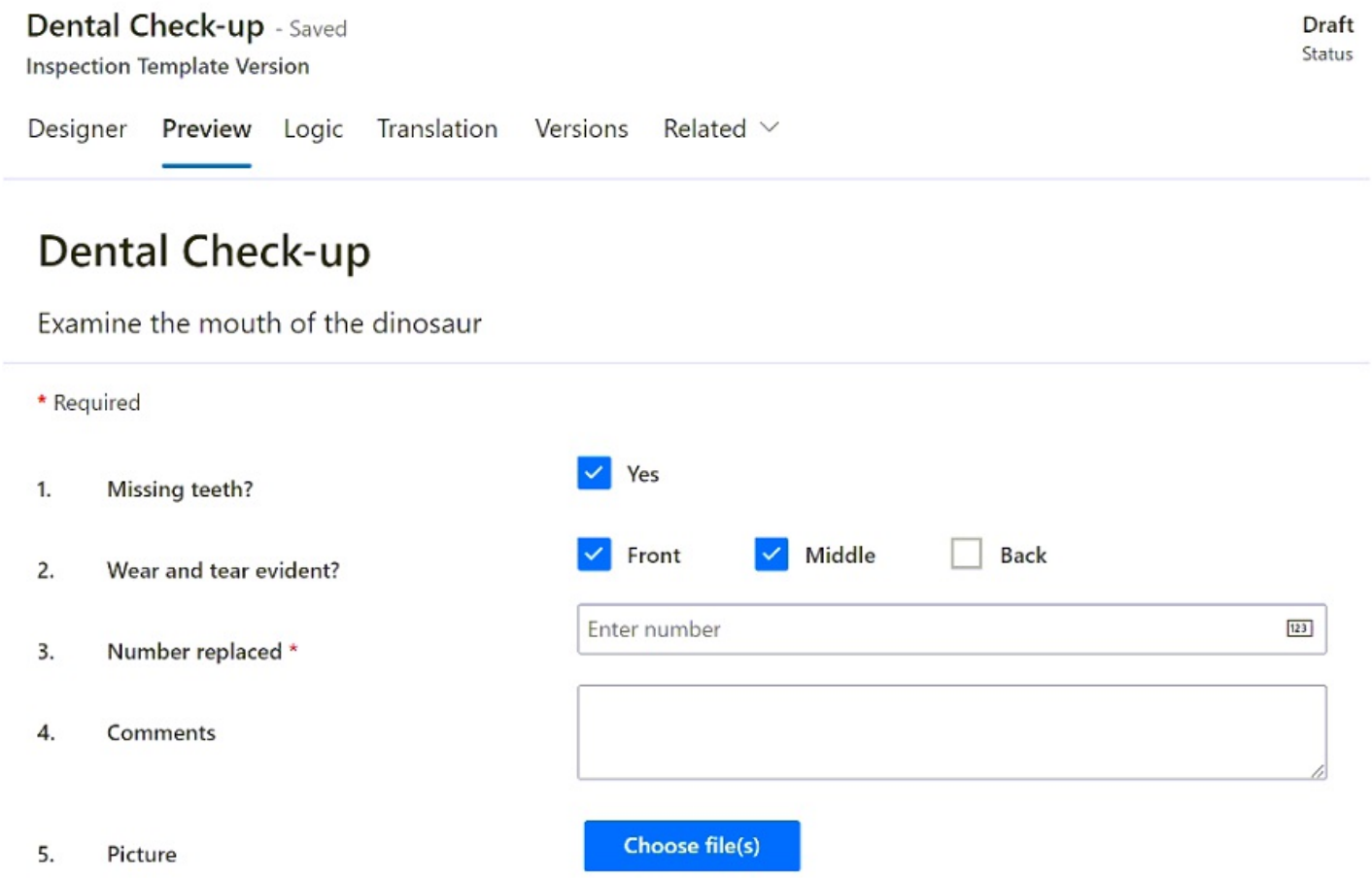
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Additional requirements
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Natural History Museum
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Configuration
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Automation
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When the engineer demonstrated the results on a newly finished Baryonyx sculpture during a staff meeting, the CEO was certain that some of their existing customers would want to commission a firmware update to their dinosaurs to allow the dance program to be installed as a special service.

New sales package
-

The CEO names the new programming the "Dino dance" package, a new category of work which requires a new price list.

The CEO will call customers and explain the new package to them. If customers are interested, the CEO wants to create an opportunity which can be converted into a work order.

You need to list the booking statuses required for a job assigned to the robotics intern.

Which five booking statuses will the intern use, in sequence? To answer, move the five appropriate statuses from the list of actions to the answer area. Arrange the five appropriate statuses in the correct order.

Statuses	Order
Waiting for Review	1
In Progress	2
Triage Completed	3
Unscheduled	4
Approved by Engineer	5
Scheduled	
Posted	
Completed	

Answer:

Order	
1	Scheduled
2	In Progress
3	Waiting for Review
4	Approved by Engineer
5	Completed

Question: 297 **Exam Heist**

Case Study -

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Background information -

Company overview -

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Staff members -

Wingtip Toys has five staff members:

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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.

Cosmetic work orders -

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.

Dental check-up -

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.

Technical work orders -

Overview -

Technical work can be performed by either the robotics engineer or by the robotics intern, depending on the complexity level.

When a new work order is created manually, it must be triaged by the robotics engineer before it can be scheduled. Maintenance work orders created by agreements can be scheduled without triage.

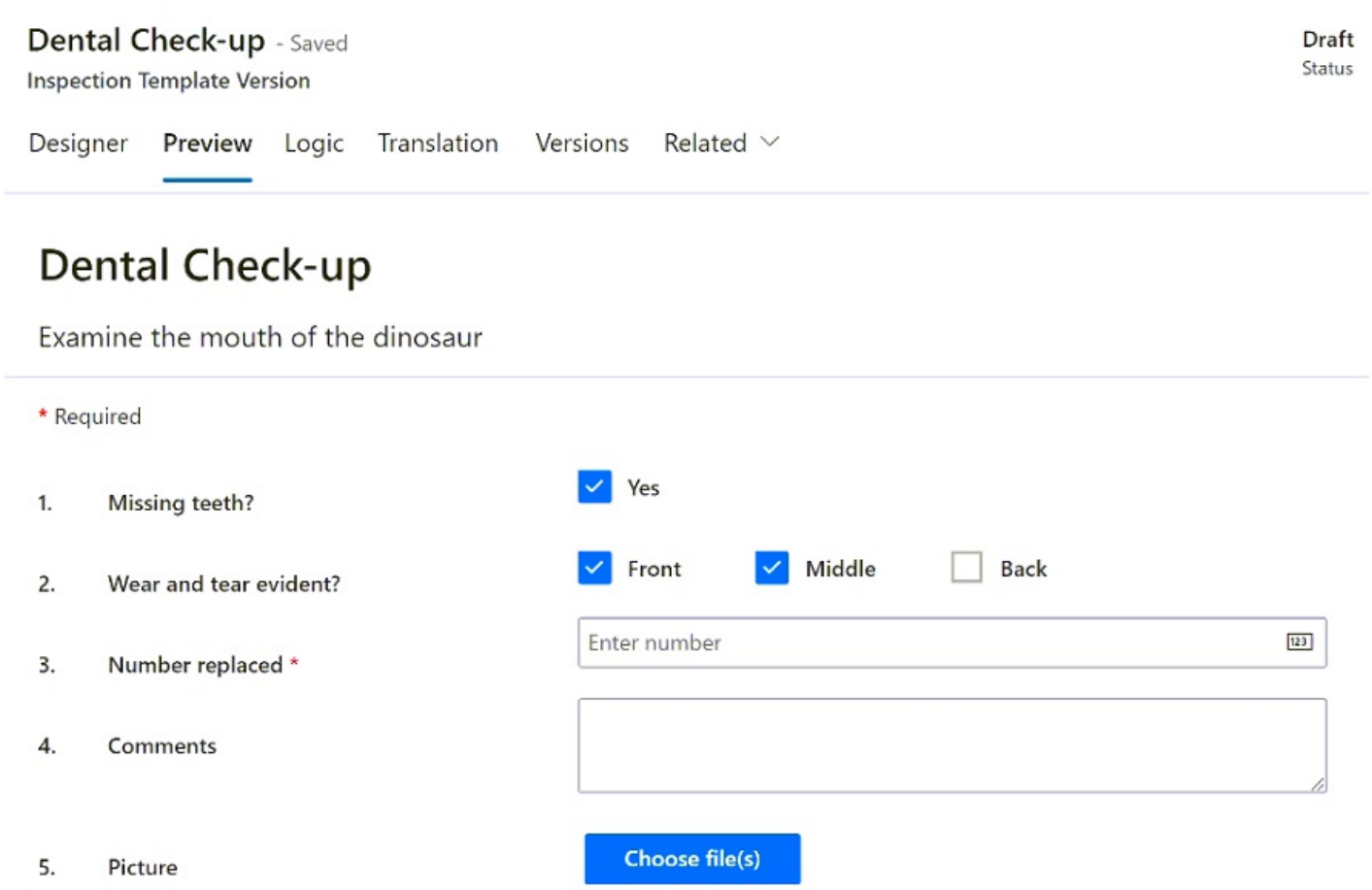
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Inspections -

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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.

Additional requirements -

Natural History Museum -

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Offline requirements -

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Configuration -

The CEO wants the Species value to appear as the sub-title when selecting a primary asset on the work order main form.

You need to configure a push notification for the engineer to indicate that the intern is waiting for their feedback.

Automation -

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New programming: dance firmware update

The robotics engineer has been working on a passion project - developing a program to allow a dinosaur to perform a high-energy dance routine.

When the engineer demonstrated the results on a newly finished Baryonyx sculpture during a staff meeting, the CEO was certain that some of their existing customers would want to commission a firmware update to their dinosaurs to allow the dance program to be installed as a special service.

New sales package -

The CEO names the new programming the "Dino dance" package, a new category of work which requires a new price list.

The CEO will call customers and explain the new package to them. If customers are interested, the CEO wants to create an opportunity which can be converted into a work order.

You need to add the Species sub-title.

Which type of view should you update?

A. Lookup
B. Advanced Find
C. Quick Find
D. Associated

Answer: A

Question: 298 **Exam Heist**

Case Study -

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Company overview -

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Dinosaur sculptures -

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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.

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Cosmetic work orders -

Overview -

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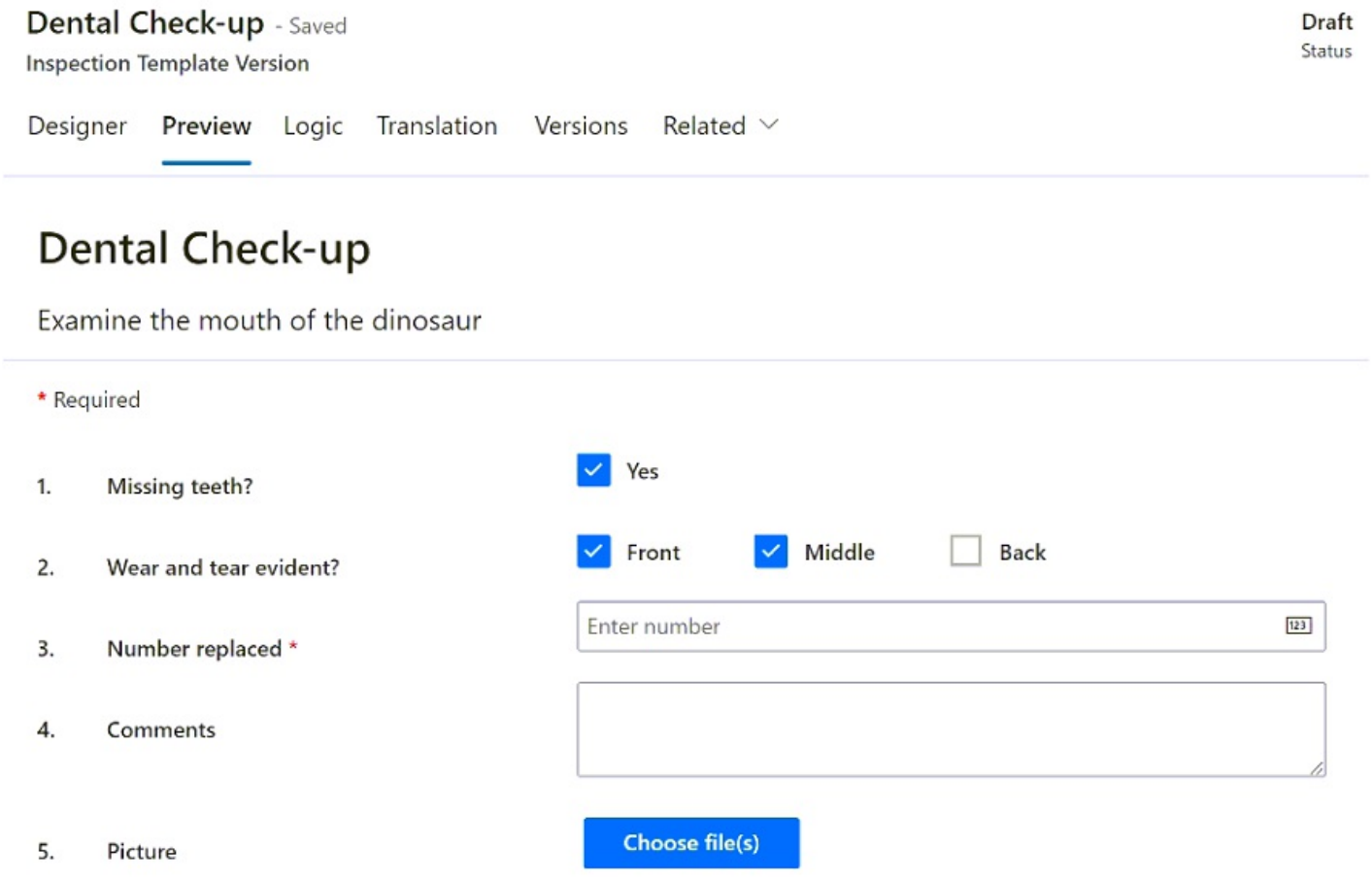
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Additional requirements -

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New sales package -

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The CEO will call customers and explain the new package to them. If customers are interested, the CEO wants to create an opportunity which can be converted into a work order.

You need to configure the dental check-up, before relating it to the existing incident type.

What should you create?

A. Product, Field Service type: Inventory

B. Characteristic

C. Product, Field Service type: Non-inventory

D. Service task type

Answer: D

Question: 299 **Exam Heist**

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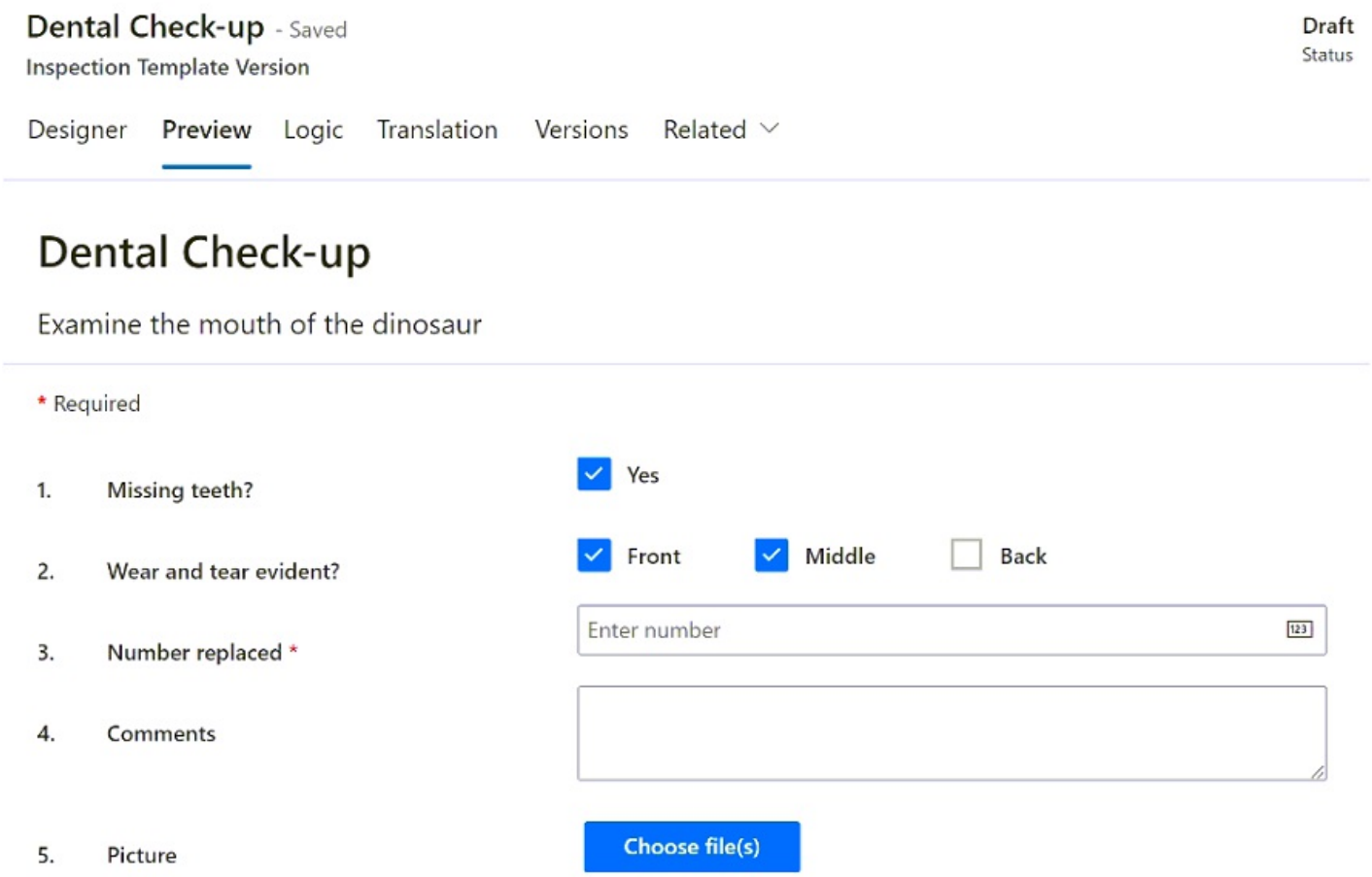
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You need to configure a push notification for the engineer to indicate that the intern is waiting for their feedback.

Automation -

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.

New programming: dance firmware update

The robotics engineer has been working on a passion project - developing a program to allow a dinosaur to perform a high-energy dance routine.

When the engineer demonstrated the results on a newly finished Baryonyx sculpture during a staff meeting, the CEO was certain that some of their existing customers would want to commission a firmware update to their dinosaurs to allow the dance program to be installed as a special service.

New sales package -

The CEO names the new programming the "Dino dance" package, a new category of work which requires a new price list.

The CEO will call customers and explain the new package to them. If customers are interested, the CEO wants to create an opportunity which can be converted into a work order.

You need to add a control to display the required information for all assets to the custom page.

Which control should you use?

A. Editable Grid
B. Gallery
C. List box
D. Combo Box

Answer: B

Question: 300 **Exam Heist**

Case Study -

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Background information -

Company overview -

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Staff members -

Wingtip Toys has five staff members:

•The Chief Executive Officer (CEO)
•The prop master
•The robotics engineer
•The robotics intern
•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.

Cosmetic work orders -

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.

Dental check-up -

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.

Technical work orders -

Overview -

Technical work can be performed by either the robotics engineer or by the robotics intern, depending on the complexity level.

When a new work order is created manually, it must be triaged by the robotics engineer before it can be scheduled. Maintenance work orders created by agreements can be scheduled without triage.

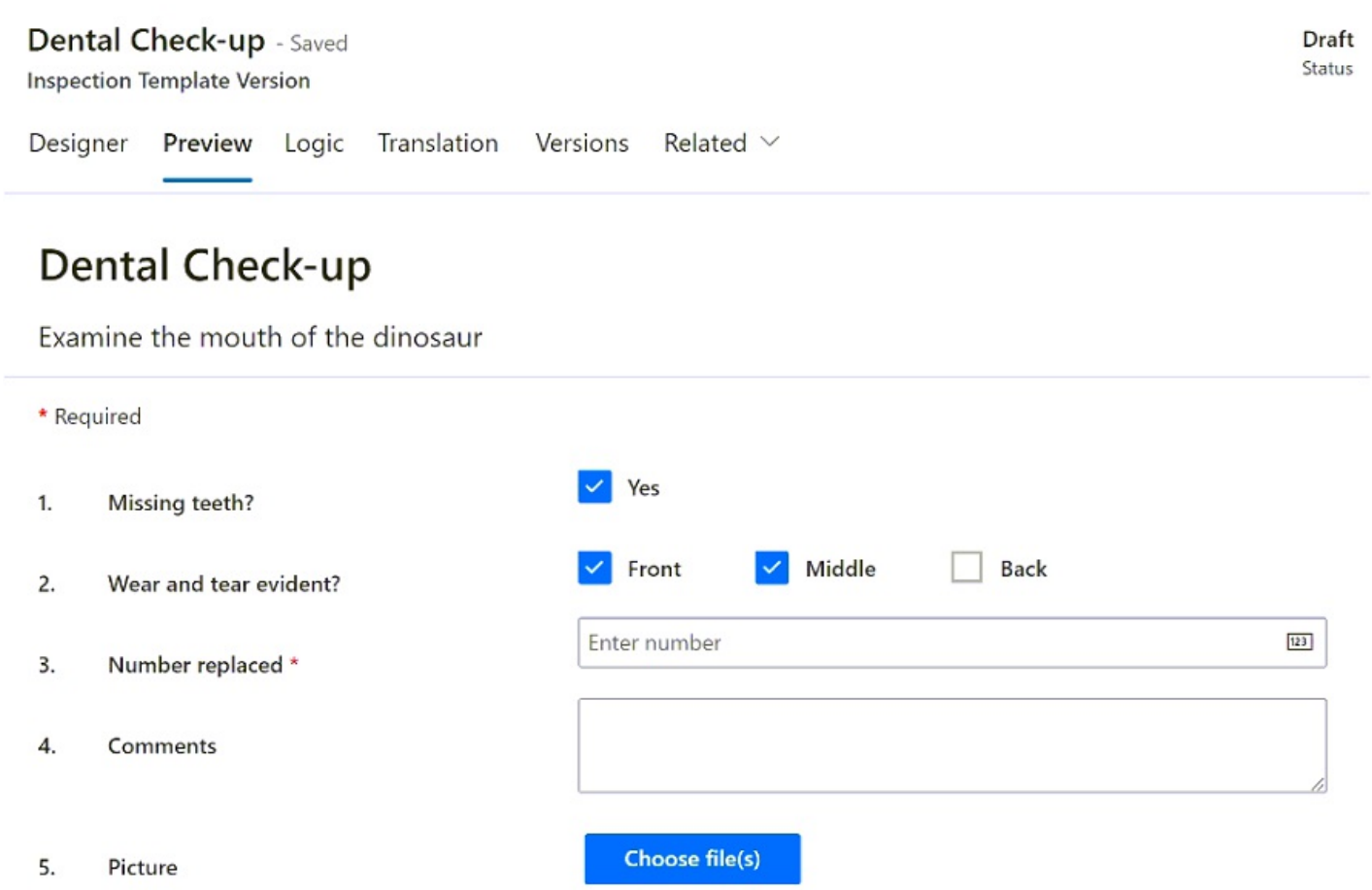
The robotics intern only uses the Field Service mobile app to view upcoming jobs, whereas the robotics engineer uses the mobile app and the model-driven app.

If the intern is performing a work order, they must wait for the engineer to review and approve the notes before they can finish their work. The CEO requires that the intern records the time they spend waiting for the engineer using the Field Service mobile app. This will help the CEO monitor whether the duration required for work orders needs to be increased.

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 following image is a draft of the "Dental Check-up" inspection:



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.

Additional requirements -

Natural History Museum -

The prop master has a cosmetic maintenance job scheduled for tomorrow at the Natural History Museum. This is their first maintenance job for two dinosaurs on lease – a diplodocus and a carnosaur. The CEO asks you to ensure that the prop master completes the new dental check-up for both dinosaurs during the visit.

Large parts of the museum do NOT have mobile data reception, nor Wi-Fi.

Offline requirements -

The engineer uses offline first to monitor both work order assigned to themselves and to their intern. No custom offline profiles have been created.

Neither the prop master nor the intern have used the Field Service app offline before. The CEO requires that they only see their own work orders.

Configuration -

The CEO wants the Species value to appear as the sub-title when selecting a primary asset on the work order main form.

You need to configure a push notification for the engineer to indicate that the intern is waiting for their feedback.

Automation -

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.

New programming: dance firmware update

The robotics engineer has been working on a passion project - developing a program to allow a dinosaur to perform a high-energy dance routine.

When the engineer demonstrated the results on a newly finished Baryonyx sculpture during a staff meeting, the CEO was certain that some of their existing customers would want to commission a firmware update to their dinosaurs to allow the dance program to be installed as a special service.

New sales package -

The CEO names the new programming the "Dino dance" package, a new category of work which requires a new price list.

The CEO will call customers and explain the new package to them. If customers are interested, the CEO wants to create an opportunity which can be converted into a work order.

You need to update the Natural History Museum work order for the current job.

Which two actions should you perform? Each correct answer presents part of the solution.

NOTE: Each correct selection is worth one point.

A. Select the asset on the work order service task.
B. Select the asset on the work order service.
C. Create two work order incidents.
D. Create two work order service tasks.
E. Create two work order services.

Answer: AD

Question: 301 **Exam Heist**

DRAG DROP
-

Case Study
-

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Background information
-

Company overview
-

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Staff members
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Wingtip Toys has five staff members:

•The Chief Executive Officer (CEO)
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-

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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.

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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.

Cosmetic work orders

-

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.

Dental check-up

-

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.

Technical work orders

-

Overview

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Technical work can be performed by either the robotics engineer or by the robotics intern, depending on the complexity level.

When a new work order is created manually, it must be triaged by the robotics engineer before it can be scheduled. Maintenance work orders created by agreements can be scheduled without triage.

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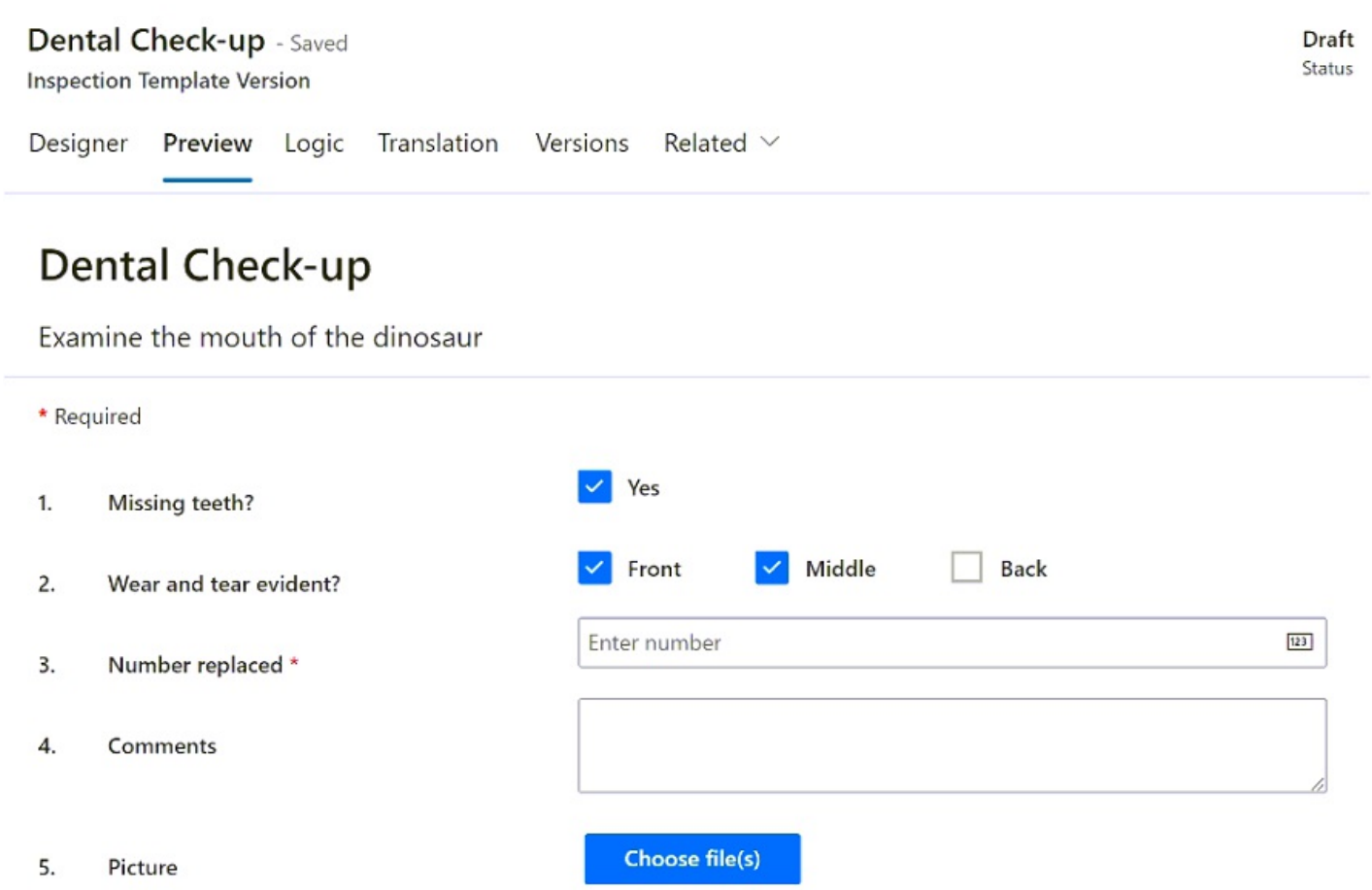
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Inspections

-

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.

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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.

Additional requirements
-

Natural History Museum
-

The prop master has a cosmetic maintenance job scheduled for tomorrow at the Natural History Museum. This is their first maintenance job for two dinosaurs on lease – a diplodocus and a carnosaur. The CEO asks you to ensure that the prop master completes the new dental check-up for both dinosaurs during the visit.

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-

The engineer uses offline first to monitor both work order assigned to themselves and to their intern. No custom offline profiles have been created.

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Configuration
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You need to configure a push notification for the engineer to indicate that the intern is waiting for their feedback.

Automation
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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.

New programming: dance firmware update

The robotics engineer has been working on a passion project - developing a program to allow a dinosaur to perform a high-energy dance routine.

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New sales package
-

The CEO names the new programming the "Dino dance" package, a new category of work which requires a new price list.

The CEO will call customers and explain the new package to them. If customers are interested, the CEO wants to create an opportunity which can be converted into a work order.

You need to ensure the prop master can use their mobile app when visiting the Natural History Museum.

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

Actions
Add the offline profile to the Field Service app.
Add the Offline profile to the Field Service Mobile app.
Navigate to the settings area of the Field Service Mobile app.
Add the prop master to the offline profile and publish.
Update the bookable resource booking filter.
Navigate to the Power Platform admin center.
Clone the **Field Service Mobile - Offline Profile**.
Edit the **Field Service Mobile - Offline Profile**.

Order

Answer:

Order

Navigate to the Power Platform admin center.

Navigate to the settings area of the Field Service Mobile app.

Edit the **Field Service Mobile - Offline Profile**.

Update the bookable resource booking filter.

Add the Offline profile to the Field Service Mobile app.

Question: 302 **Exam Heist**

HOTSPOT
-

Case Study
-

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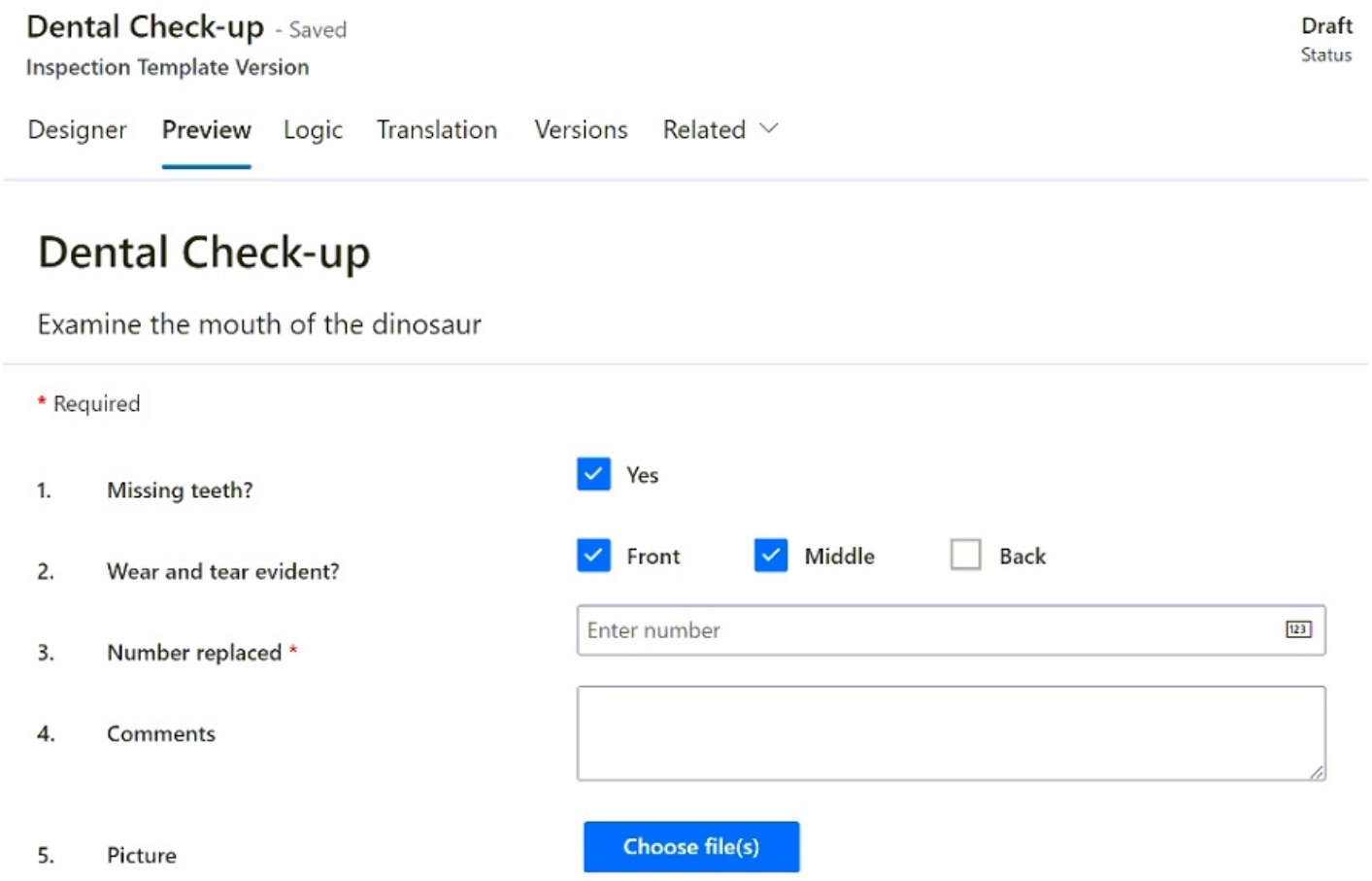
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Additional requirements
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New sales package
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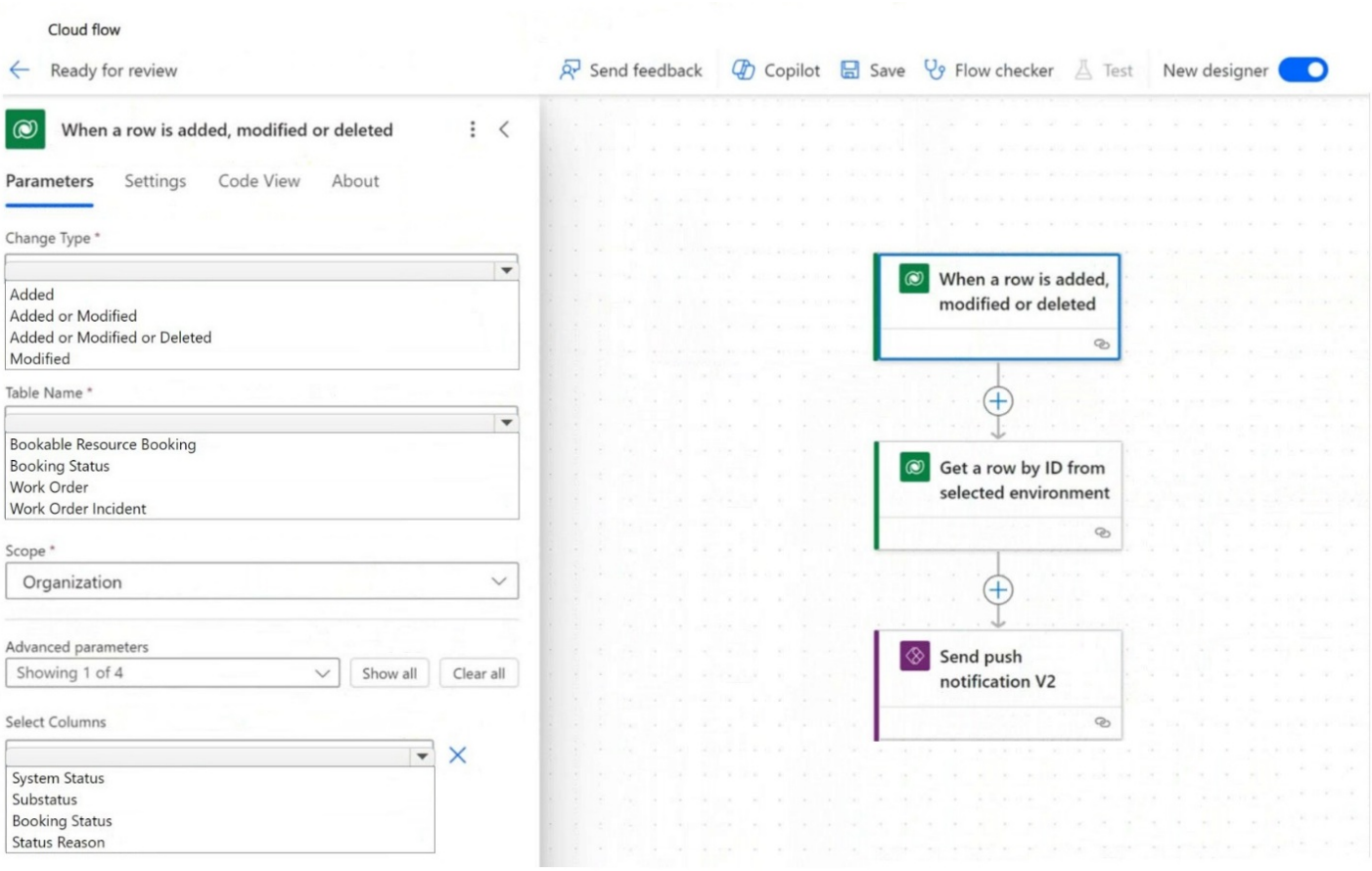
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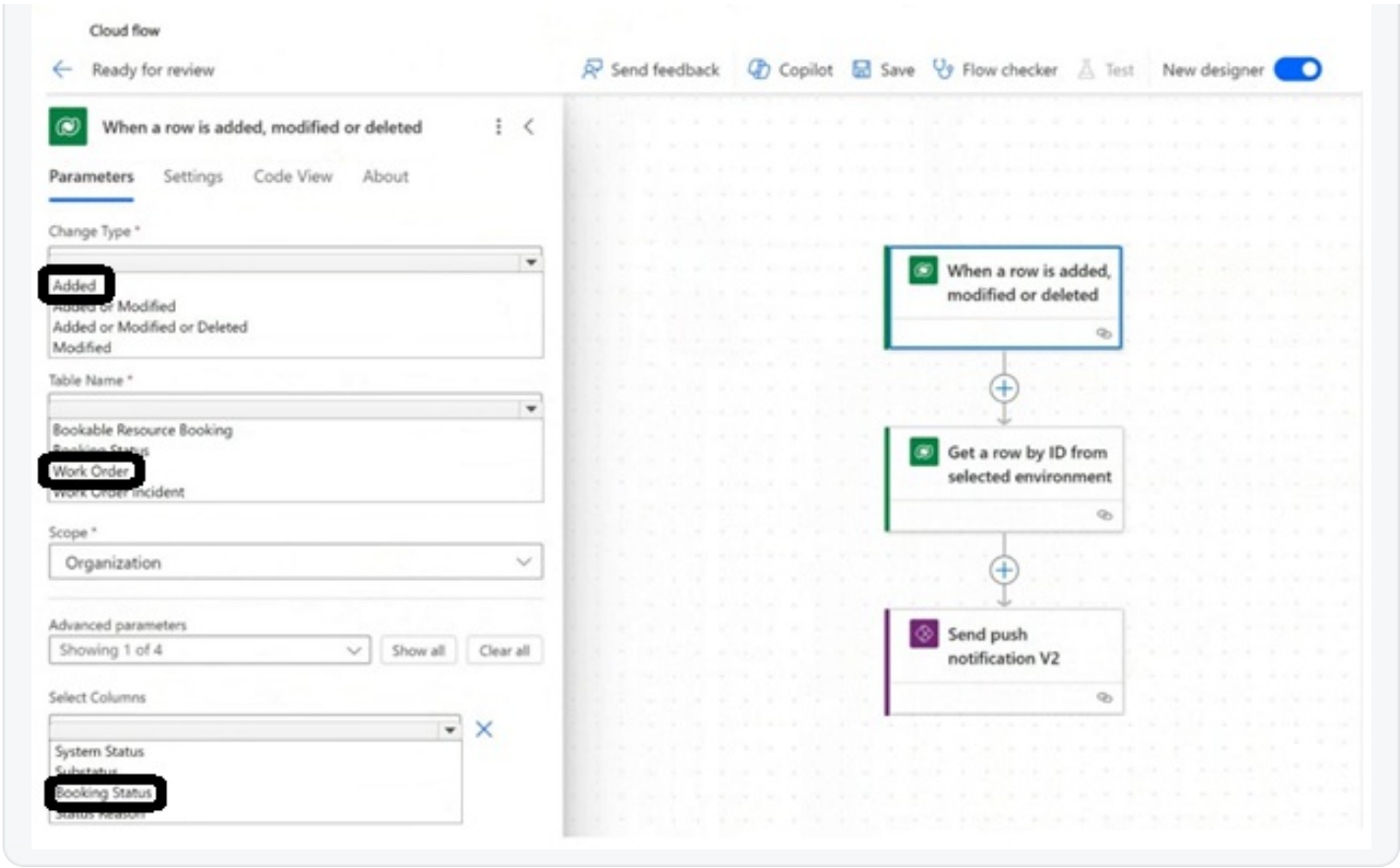
You need to complete the cloud flow to send the push notification to the robotics engineer.

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

NOTE: Each correct selection is worth one point.



Answer:



Question: 303 **Exam Heist**

You are implementing Dynamics 365 Field Service for Contoso Manufacturing.

You need to set up preventive maintenance schedules for the assets they service.

In addition to creating an Agreement Booking, what else must you set up in order to associate the asset to the agreement?

A. Asset Functional Location
B. Auto Generate Work Order set to Yes
C. Agreement Booking Incident
D. Booking Recurrence

Answer: D

Explanation:

Justification

Correct option – D.Booking Recurrence
In Dynamics365 Field Service, an Agreement Booking defines the service contract (e.g., frequency, duration, and start/end dates). To link a specific **Asset** to that agreement, you must enable **Booking Recurrence** on the agreement line. This setting tells the system to automatically generate the related bookings (and consequently work orders) on the schedule defined by the agreement. Without recurrence enabled, the agreement cannot be tied to an asset's preventive-maintenance calendar.

Why the other options are not appropriate

A. Asset Functional Location – This is used to organize assets within a hierarchy for reporting and navigation, but it does not drive the automatic creation of bookings tied to an agreement.
B. Auto Generate Work Order set to Yes – While auto-generation creates work orders from bookings, it is a

property of the Work Order record, not a prerequisite for associating an asset with an agreement.
C. Agreement Booking Incident – This is a type of record used to capture incidents within an agreement; it does not serve the purpose of linking an asset to the agreement schedule.

Therefore, enabling **Booking Recurrence** is the essential step that connects an asset to its preventive-maintenance agreement and allows the system to generate the corresponding bookings and work orders on the defined schedule.

Question: 304 **Exam Heist**

HOTSPOT
-

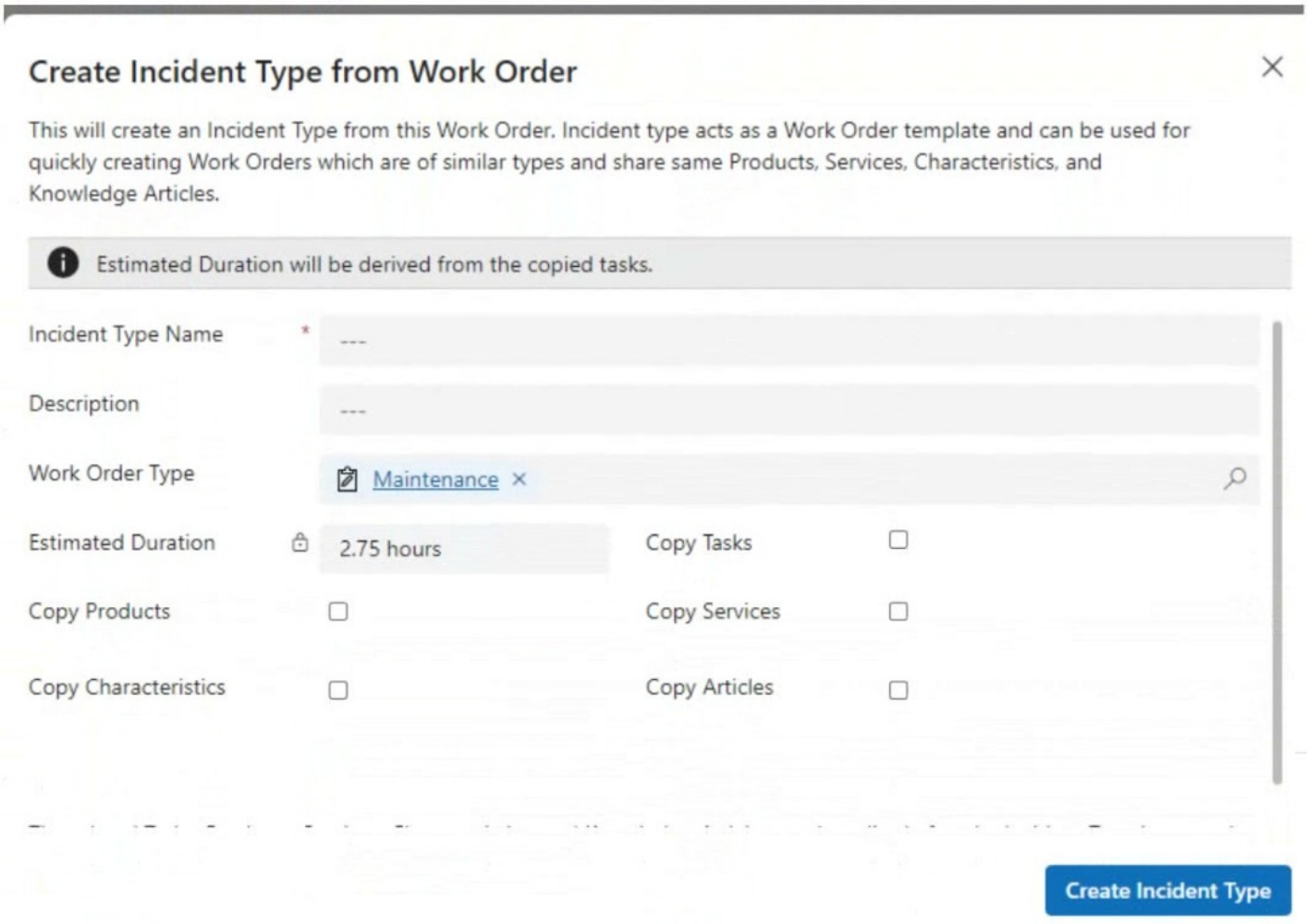
You are a field service manager who reviews completed work orders before they are posted. You noticed that there are many maintenance jobs that use the same exact parts and labor, and require the same skills.

You want to create an incident type from one of the recently completed work orders, but you need to ensure that each job has a unique duration and inspection associated.

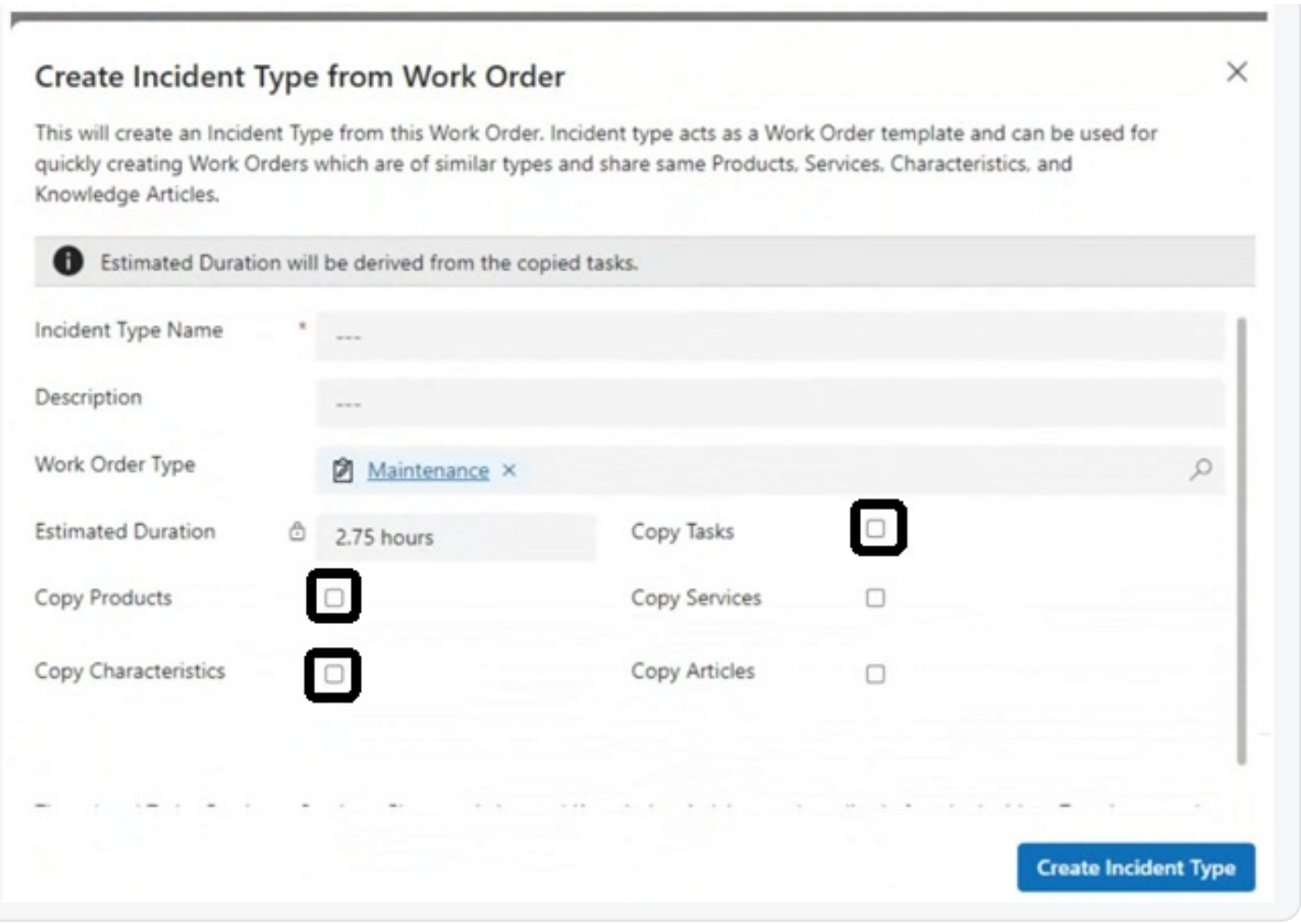
You need to update the configuration in the Create Incident Type from Work Order dialog.

Which settings should be updated in order to create your desired template? To answer, select the appropriate settings in the answer area.

NOTE: Each correct selection is worth one point.



Answer:



Question: 305 **Exam Heist**

DRAG DROP
-

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

Answer:

Order
Identify the user who owns the booking.
Identify the user who is using the Field Service Mobile app.
Use the **Send Push Notification V2** action to configure the notification.

Question: 306 **Exam Heist**

DRAG DROP
-

You are a dispatcher at an organization that uses Dynamics 365 Field Service. Your work orders need to have multiple resources assigned to the job, so you started using requirement groups to define the resource needs.

You need to schedule those requirement groups from the schedule board.

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

Actions
Add a new requirement panel.
Use drag and drop scheduling to book the requirement group.
Configure the schedule type for the requirement group.
Create a new schedule board tab.
Configure the panel as a requirement group view.
Use Schedule Assistant for requirement group scheduling.

Order

Answer:

Order

Configure the schedule type for the requirement group.

Use Schedule Assistant for requirement group scheduling.

Add a new requirement panel.

Configure the panel as a requirement group view.

Question: 307 **Exam Heist**

HOTSPOT
-

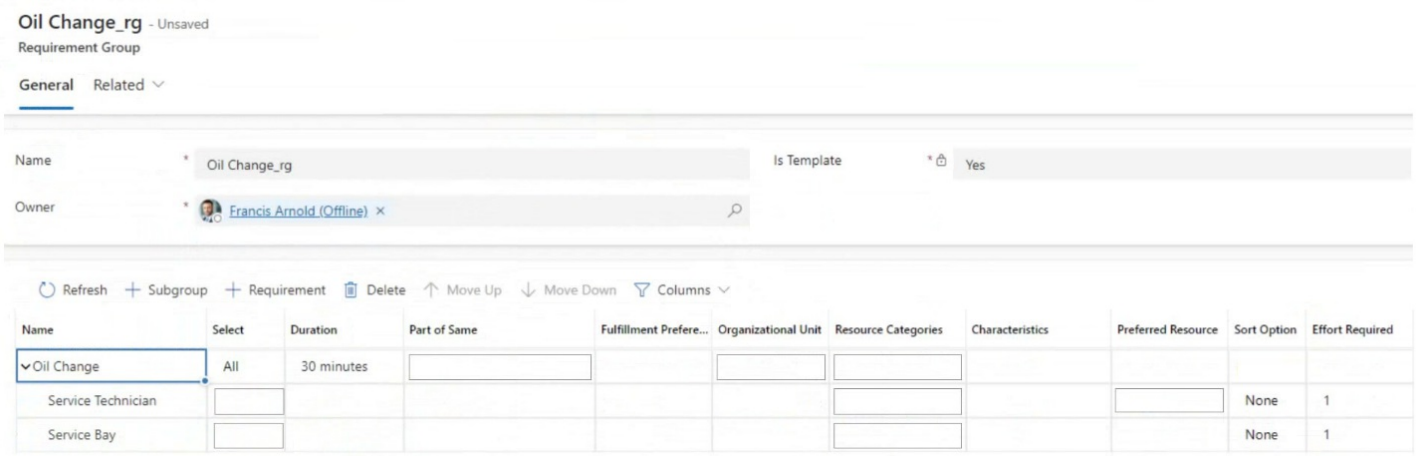
Your customer is a national auto repair center that provides services for vehicles. They are currently using Dynamics 365 Field Service for scheduling all of their services in each of their shops.

Each shop is set up as an Organizational Unit and resources are aligned to those shops accordingly.

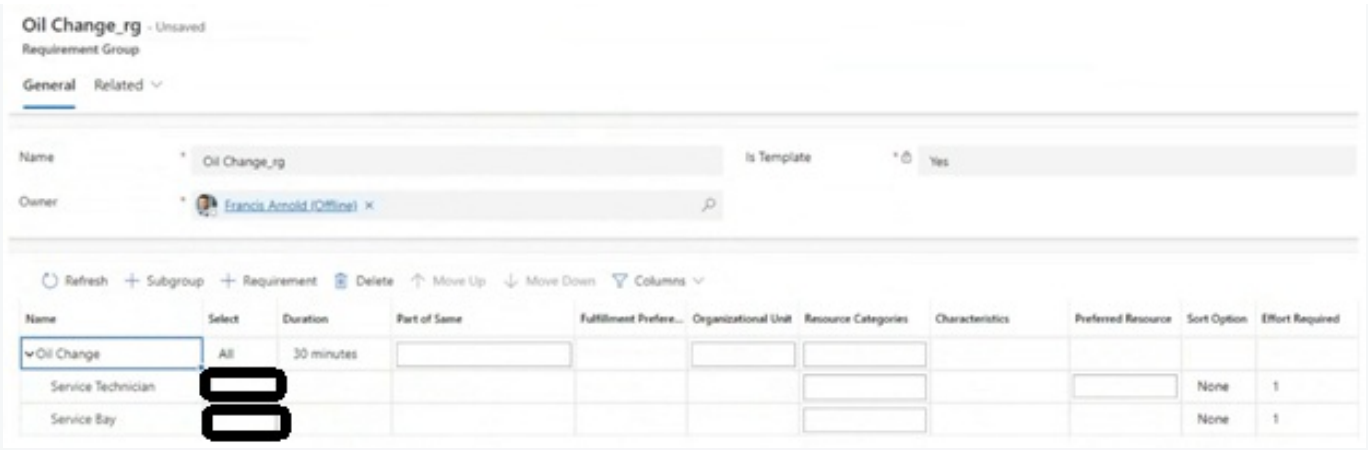
You need to set up a universal Requirement Group Template for scheduling oil changes that will require both a service technician and a bay in the shop.

Which settings do you need to configure in the Requirement Group Template to ensure that this can be used by each shop respectively? To answer, select the appropriate fields in the answer area.

NOTE: Each correct selection is worth one point.



Answer:



Question: 308 **Exam Heist**

Your company has hired a new service technician. They are still learning about the job and the units the company sells and services.

The service technician was 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 to do next.

The service technician calls the internal help team for assistance, but they CANNOT provide the proper guidance as they are unable see what exactly the service technician is looking at and the service technician CANNOT describe it.

You need to recommend the appropriate tools or applications that can assist in resolving these types of issues in the future.

Which two tools or applications should the company implement? Each correct statement presents a complete solution.

NOTE: Each correct selection is worth one point.

A. Microsoft Dynamics 365 Remote Assist
B. Microsoft Dynamics 365 Guides
C. Resource Scheduling Optimization
D. Microsoft 365 Copilot for Sales

Answer: AB

Explanation:

Why options A and B are the correct choices

Microsoft Dynamics365 Remote Assist (A) – Enables a field technician to start a live, shared video session with a remote expert. The expert can see exactly what the technician is viewing, annotate the screen, and guide the technician step-by-step in real time. This solves the problem of “cannot describe what I’m looking at” because the remote party has a live visual feed.

Microsoft Dynamics365 Guides (B) – Provides contextual, mixed-reality (AR) instructions that can be overlaid on the actual equipment. The technician can launch a guided workflow that shows the next actions, part numbers, safety warnings, etc., eliminating the need for a verbal description and reducing reliance on external help.

Why the other options are not appropriate

Resource Scheduling Optimization (C) – This module optimizes the assignment of resources (technicians, equipment, time slots) but does not provide any on-site visual or instructional support. It cannot help a

technician who is unsure of the next technical step.

Microsoft365 Copilot for Sales (D) – Designed for sales-related activities such as opportunity insights and customer interaction summarization. It has no relevance to field-service troubleshooting or real-time technical assistance.

Thus, the combination of **Remote Assist** for live remote collaboration and **Guides** for on-site, step-by-step AR instructions directly addresses the technician's need for visual guidance when they cannot articulate the problem.

Question: 309 **Exam Heist**

You are a Dynamics 365 Field Service system administrator.

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

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

NOTE: Each correct selection is worth one point.

A. Sitemap
B. Filters
C. Relationships
D. Forms
E. Tables
F. Views

Answer: BCE

Explanation:

WhyBCE are the correct selections

Filters (B) – Define the criteria that determine which records are eligible for offline caching (e.g., status, date range, custom query). Only records that satisfy the filter are considered for download to the mobile device.
Relationships (C) – Specify the parent-child links that must be followed when building the offline data set. The mobile app traverses these relationships to pull related child records (e.g., work orders linked to assets).
Tables (E) – Identify the entity types (tables) whose data will be cached. Selecting a table tells the system to include all its rows that meet the filter and relationship criteria in the offline payload.

Why the other options are not part of the definition

Sitemap (A) – Used only for navigation and navigation-related security; it does not influence which data rows are cached.
Forms (D) – Describe the UI layout for data entry; they are irrelevant to the data-selection logic for offline sync.
Views (F) – Although views can encapsulate filters, the offline engine works directly with the underlying **Tables** and the explicit **Relationships** defined in the mobile app configuration; Views themselves are not a distinct selection parameter.

Thus, the three items that explicitly govern what data is taken offline are **Filters, Relationships, and Tables (BCE)**.

Question: 310 **Exam Heist**

Note: This question is part of a series of questions that present the same scenario. Each question in the series contains a unique solution that might meet the stated goals. Some question sets might have more than one correct solution, while others might not have a correct solution.

After you answer a question in this section, you will NOT be able to return to it. As a result, these questions will not appear in the review screen.

You are configuring Dynamics 365 Field Service to create an option to see only a specific set of resources on the schedule board. As part of the system setup, all Resources have been assigned to a territory.

You want to create the option to see only resources that are in Washington territory.

Solution: You filter the Resource Type in the Resources options.

Does this meet the goal?

A. Yes
B. No

Answer: B

Explanation:

Answer: B – No

Why this does not meet the goal

The requirement is to display only resources that belong to the **Washington territory**.
Filtering the **Resource Type** merely limits the view by the type of resource (e.g., “Technician”, “Vehicle”), which does not relate to geographic territory.
Resources are already assigned to a territory; to restrict the schedule board to a specific territory you must filter on **Territory** (or on a location field that maps to the territory), not on the resource type.

Why other options would be more appropriate

Using a **Territory filter** (or a view that shows resources only for the Washington territory) directly addresses the goal of showing a specific set of resources based on their territory assignment.
This can be achieved by configuring the schedule board’s **Filters** or by creating a **View** on the Resource entity that includes only resources where Territory = Washington.

Thus, simply filtering by Resource Type does not achieve the desired outcome, making the correct response **No**.

Question: 311 **Exam Heist**

Note: This question is part of a series of questions that present the same scenario. Each question in the series contains a unique solution that might meet the stated goals. Some question sets might have more than one correct solution, while others might not have a correct solution.

After you answer a question in this section, you will NOT be able to return to it. As a result, these questions will not appear in the review screen.

You are configuring Dynamics 365 Field Service to create an option to see only a specific set of resources on the schedule board. As part of the system setup, all Resources have been assigned to a territory.

You want to create the option to see only resources that are in Washington territory.

Solution: You filter by Washington territory in the resource list.

Does this meet the goal?

A. Yes
B. No

Answer: A

Explanation:

Justification

The requirement is to display **only** resources that belong to the **Washington** territory on the schedule board.
In Dynamics365 Field Service, resources are organized by **Territory**; assigning a resource to a territory automatically scopes it within that territory's hierarchy.
The schedule board's **Resource List** includes a built-in filter pane that allows users to narrow the view by **Territory**. Selecting "Washington" filters the list to show exclusively resources assigned to that territory, which directly satisfies the goal of "seeing only resources that are in Washington territory."
This approach leverages native security and data-partitioning mechanisms, ensuring that only the intended subset of resources is rendered without additional custom code or complex query logic.
Alternative options (e.g., creating separate views, custom plugins, or modifying the schedule board layout) would either introduce unnecessary complexity, affect performance, or require maintenance beyond the standard configuration. Hence, filtering by Washington territory in the resource list is the most efficient, supported, and straightforward solution.

Conclusion: The proposed solution **does meet the goal → Answer: A**.

Question: 312 **Exam Heist**

You have started work at a surgical center which users Dynamics 365 Field Service to Schedule miner out-patient procedures.

A teammate created a requirement group template for a skin-tag removal procedure, configured as follows:

Name	Select	Duration	Part of Same	Resource Categories	Characteristics
Skin-tag removal	Any	1hr	Location		
Op room	All				
Consult room					Gurney
Sterile kit				Surgical kit	
Doctor				Resident	MD
Temp room	All				
Consult room					Gurney
Sterile kit				Surgical kit	
Practice nurse				Nurse 1	Minor surgery

You create a requirement group using this template.

You need to evaluate what will occur when you attempt to book the requirement group.

Which scenario is valid?

A. If all "Op room" requirements have resources available, NO "Temp room" resources will be displayed.
B. The requirement group can be fulfilled if resources for all "Op room" requirements are available, other than the surgical kit.
C. The requirement group can be fulfilled if resources for all "Op room" requirements are available, but at separate starting locations.

D. The requirement group can be booked if "Consult room" and "Sterile kit" resources are available, but neither a "Nurse" NOR a "Doctor" are available.

Answer: A

Question: 313 **Exam Heist**

You are implementing Dynamics 365 Field Service for Contoso Manufacturing.

You need to set preventive maintenance schedules for multiple sub-components that have a different maintenance routine than the top-level or parent asset. The goal is to increase asset useful life and provide increased customer satisfaction.

Which two actions should you perform? Each correct answer presents a complete solution.

NOTE: Each correct selection is worth one point.

A. Create Asset Categories for each preventive maintenance schedule, and assign to the appropriate sub-component.

B. Associate Agreement Booking Incidents to separate booking setups for each of the sub-component assets based on their required maintenance schedule.

C. Create Asset Properties, and associate the appropriate new Asset Property schedule to each sub-component.

D. Create an Agreement for each asset sub-component to ensure the proper preventive maintenance schedule is set.

Answer: C

Explanation:

Why optionC is the correct choice

Asset Properties+Property Schedules are the native mechanism in Dynamics365 Field Service for defining maintenance-specific data on individual assets.
By creating a distinct **Asset Property** (e.g., “PM Frequency”, “Inspection Interval”) and linking a **Property Schedule** to that property, you can assign a unique preventive-maintenance cadence to each sub-component while still inheriting the parent-asset hierarchy.
The schedule drives the **Preventive Maintenance Work Order** generation automatically, ensuring the correct tasks are created on the right frequency for each sub-component, which directly supports longer asset life and higher customer satisfaction.

Why the other options are less suitable

A – Asset Categories are used only for grouping assets (e.g., “Electrical”, “Mechanical”) and do not carry any scheduling or maintenance-task information; they cannot enforce a specific PM routine per sub-component.
B – Agreement Booking Incidents relate to service-agreement bookings and billing; they do not control the generation of preventive-maintenance work orders or define maintenance frequencies on assets.
D – Separate Agreements are intended for contractual service terms with customers, not for configuring the technical maintenance schedule of an asset’s sub-components; they have no impact on PM work-order creation.

Bottom line: Only **C** leverages the built-in Asset Property+Property Schedule feature to assign a tailored preventive-maintenance schedule to each sub-component, fulfilling the requirement to extend asset life and improve customer satisfaction.

Question: 314 Exam Heist

You are working with your customer to set up their Dynamics 365 Field Service environment.

You need to explain the options around Booking Timestamps and when they are created.

Which two options are available in the Timestamp Frequency setting? Each correct answer presents a complete solution.

NOTE: Each correct selection is worth one point.

A. Per Booking Status Change
B. Per Field Service Status Change
C. Per Booking Status Reason Change
D. Per Work Order Status Change

Answer: AB

Explanation:

Correct selections:

A. Per Booking Status Change
B. Per Field Service Status Change

Why these are the only valid options

The **Timestamp Frequency** setting controls when a booking timestamp is recorded. It can be triggered only by events that directly affect the **booking** itself or the **field-service** work that the booking represents.
Per Booking Status Change fires a timestamp each time the booking's own status (e.g.,Created → Scheduled → In-Progress → Completed) is updated, ensuring an audit trail of the booking lifecycle.
Per Field Service Status Change fires a timestamp each time the underlying field-service status (e.g.,Work Order status transitions) changes, allowing the system to capture timestamps that reflect the actual service execution flow.

Why the other options are not valid

C. Per Booking Status Reason Change – Status reasons are sub-states that do not trigger a separate timestamp; they are merely descriptive values attached to a status and are not supported as independent frequency events.
D. Per Work Order Status Change – While a work order is related to a booking, the Timestamp Frequency setting is scoped to the **booking** or **field-service** level, not to the work-order object; using a work-order status would fall outside the supported configuration options.

Thus, only **A** and **B** correctly represent the two supported timestamp-frequency triggers in Dynamics365 Field Service.

Question: 315 Exam Heist

DRAG DROP
-

Your client is a solar energy company who performs consultations and installations of solar panels. On-site visits to customer homes are necessary before a solar panel installation can take place.

The client wants to use the schedule board and scheduling tools to complete the following tasks:

•assign leads to appropriate sales resources.
•perform the consultation and qualification process with potential customers.

You need to provide a solution for this request.

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	Order
Create a lead with a resource requirement.	
Enable the **Lead** table for scheduling.	
Add the required service tasks.	
Create the work order with the appropriate work order type.	
Book the work order to the resources.	
Book the lead to a sales resource.	

Answer:

Order
Create a lead with a resource requirement.
Enable the **Lead** table for scheduling.
Book the lead to a sales resource.

Question: 316 **Exam Heist**

During normal daily operations, dispatchers at your organization 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. Add a Requirement Panel.
B. In the Scheduler Settings, select one Territory.
C. On the Resource filter panel, select a Territory and save it as the default.
D. On the Resource filter panel, select a Resource Type and save it as the default.

Answer: C

Explanation:

Correct option: C – On the Resource filter panel, select a Territory and save it as the default.

The dispatcher's goal is to view **only resources that belong to their own territory** on the schedule board.
In Dynamics365 Field Service, the **Resource filter panel** allows users to narrow the resource list by any attribute, including **Territory**.
By selecting the specific territory and then **saving the filter as the default**, the board will automatically open with that filtered view each time, eliminating the need to re-apply the filter manually.
This approach directly satisfies the "see resources in their territory" requirement while keeping the UI simple and persistent.

Why the other options are less suitable

A – Add a Requirement Panel – A requirement panel is used to define skill or certification requirements for a work order; it does not filter the resource list by territory and therefore does not provide the needed view.
B – In the Scheduler Settings, select one Territory – Scheduler settings control global scheduling parameters (e.g., default working hours), but they do not provide a per-user, per-board filter for resources; the change would affect all users, not just the dispatcher's view.
D – On the Resource filter panel, select a Resource Type and save it as the default – Filtering by **Resource Type** (e.g., "Technician", "Vehicle") would show all resources of that type across territories, not limited to the dispatcher's own territory, thus failing to meet the territory-specific requirement.

Therefore, option **C** is the precise, supported method to configure a persistent, territory-specific resource view on the schedule board.

Question: 317 **Exam Heist**

You are deploying the Field Service mobile app at your organization.

You are in the process of creating push notifications for the mobile app, and you have the following requirement:

•When a field service technician is assigned an emergency priority work order, the technician should be immediately notified on their mobile phone.

What should you do?

A. Create an instant cloud flow. The condition within the flow should look at the Resource Requirement entity where the out-of-the-box priority field has a value of Emergency priority.

B. Create an automated cloud flow. The condition within the flow should look at the Resource Requirement entity where the out-of-the-box priority field has a value of Emergency priority.

C. Create an automated cloud flow. The condition within the flow should look at Bookable Resource Bookings where the out-of-the-box priority field has a value of Emergency priority.

D. Create a scheduled cloud flow. The condition within the flow should look at Bookable Resource Bookings where the out-of-the-box priority field has a value of Emergency priority.

Answer: C

Explanation:

Technical justification

OptionC – Create an automated cloud flow that evaluates Bookable Resource Bookings where the out-of-the-box Priority field equals "Emergency".

The Field Service mobile app relies on **Bookable Resource Scheduling** to drive work-order dispatch. When a

work order is created with an **Emergency** priority, the corresponding **Bookable Resource Booking** record is automatically generated (or updated) and contains the priority value.
An **automated** cloud flow can be triggered **in real-time** on the **Create/Update** of a Bookable Resource Booking record, allowing immediate push-notification generation without manual intervention.
Using the Bookable Resource Booking entity ensures the flow works on the exact data that the mobile app consumes, guaranteeing that the technician receives the notification as soon as the scheduling engine assigns the emergency work order.

Why the other options are less suitable

OptionA – Instant cloud flow on the Resource Requirement entity – Resource Requirement is a higher-level abstraction that may not be updated instantaneously when a booking is created, and it does not directly map to the scheduling engine's priority field used by the mobile app. This can introduce latency and miss the real-time trigger needed for emergency alerts.
OptionB – Automated cloud flow on the Resource Requirement entity – Although automated, it suffers from the same limitation as OptionA: the Resource Requirement entity is not the primary source for the priority flag that the mobile app monitors, leading to potential missed or delayed notifications.
OptionD – Scheduled cloud flow on Bookable Resource Bookings – A **scheduled** flow runs on a timer (e.g., every few minutes). This introduces unnecessary delay; an emergency technician must be notified **immediately**, and a schedule-based approach could cause minutes-long latency, violating the "immediately notified" requirement.

Conclusion
OptionC is the only solution that aligns with the real-time, entity-specific nature of emergency work-order dispatch in Dynamics365 Field Service, ensuring an instant push notification to the technician's mobile device.

Question: 318 **Exam Heist**

You are configuring work orders for technicians to complete the onsite service.

When a work order is completed, the customer needs to receive an invoice for the labor charge time spent by the technician to complete the service.

Which option should the technician use to enter their time spent?

A. Work Order Service Task
B. Work Order Service
C. Bookable Resource Booking
D. Work Order Product

Answer: B

Explanation:

Correct option: B –Work Order Service

Why it's the right choice

In Dynamics365 Field Service, labor time is recorded on the **Work Order Service** record.
This service line is the source used by the invoicing engine to generate a **labor charge** on the customer invoice once the work order is closed.
The technician can directly enter the actual time spent (hours, minutes, or a custom time-entry method) on the service line, ensuring the amount is posted to the correct cost center and billed to the customer.

Why the other options are not appropriate

A. Work Order Service Task – Used to track individual tasks or sub-activities within a work order, but it does not automatically flow into the labor-charge invoice; it is more for internal task management.
C. Bookable Resource Booking – Represents a scheduled resource allocation (e.g., a technician's calendar entry). It is useful for planning and dispatching, but it does not capture the actual time logged for billing purposes.
D. Work Order Product – Represents parts or consumables that are sold or consumed. Labor is not a product; using this record would incorrectly associate labor with a product line and would not be recognized by the invoice generation logic.

Bottom line: To have the technician's elapsed time recognized as a billable labor charge on the final invoice, the time must be entered on the **Work Order Service** record. This is the only field that the platform's invoicing engine maps to labor revenue.

Question: 319 **Exam Heist**

DRAG DROP
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Case study
-

This is a case study. Case studies are not timed separately. You can use as much exam time as you would like to complete each case. However, there may be additional case studies and sections on this exam. You must manage your time to ensure that you are able to complete all questions included on this exam in the time provided.

To answer the questions included in a case study, you will need to reference information that is provided in the case study. Case studies might contain exhibits and other resources that provide more information about the scenario that is described in the case study. Each question is independent of the other questions in this case study.

At the end of this case study, a review screen will appear. This screen allows you to review your answers and to make changes before you move to the next section of the exam. After you begin a new section, you cannot return to this section.

To start the case study
-

To display the first question in this case study, click the Next button. Use the buttons in the left pane to explore the content of the case study before you answer the questions. Clicking these buttons displays information such as business requirements, existing environment, and problem statements. When you are ready to answer a question, click the Question button to return to the question.

Overview. 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.

Overview. 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.

Existing environment. 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	• Global HQ • North America HQ	• Executive Management • Sales Executives
Chicago, IL	North America Midwest Regional Office	• Sales Reps • Sales Managers • Regional Sales Manager
Los Angeles, CA	North America West Coast Regional Office	• Sales Reps • Sales Managers • Regional Sales Manager
New York, NY	North America East Coast Regional Office	• Sales Reps • Sales Managers • Regional Sales Manager
Montreal, QC	North America Canada Regional Office	• Sales Reps • Sales Managers • Regional Sales Manager
City of Manila, Philippines	• APAC HQ • Philippines Regional Office	• Sales Reps • Sales Managers • Sales Director • Regional Sales Manager • Executive Management
Kolkata, India	• APAC India Regional Office	• Sales Reps • Sales Managers • Regional Sales Manager

Existing environment. Data management structure

Contoso's sales teams currently can only see data within their region. HQ locations for each region have visibility to data for all locations in their regions only. All of the data rolls-up to Contoso Global HQ for executive management reporting. Sales Reps who work with global accounts struggle to obtain the data they need to support their clients.

The current data access structure appears as follows:



Existing environment. Field Service structure

Contoso's 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.

Existing environment. 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.

Requirements. 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.

Requirements. 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.
oAutomated and suggestion-based scheduling.
oScheduling based on required technician skills and number of technicians needed.
oSchedule resources based on location, minimizing travel time when possible.
oTechnicians must be onsite within 3 hours of an emergency Work Order being assigned to them.
oThe travel time should automatically update upon changing a booking.
2. Agreements
oSetup and create work orders, bookings and invoices for preventative maintenance with work orders automatically created 14 days before PM is due.
oEscalation of Work Orders based upon agreed customer commitment
oAbility to designate clients as Preferred, with special pricing.
3. Products and Services
oWarehousing and inventory management processes will be implemented, including tracking products moved onto trucks for installation at customer sites.
oImplement a parts return process that includes having a technician uninstall the part to be returned.
oMultiple price lists will be used, divided into Gold, Silver and Bronze levels, based on the spending level of each customer.
oInternal teams need the capability to associate a 3D image to a Customer Asset record.

oProducts added to a work order should be set to Allocated.
4. Resources
oImplement Company Holidays for North American regions,
oImplement Paid Time Off for all regions,
oSpecialty equipment will be scheduled on work orders as needed,
oTraining and skill levels will be noted as appropriate for resources.
5. System
oGeocoding will be activated throughout the system.

Requirements. Technical requirements

Contoso identified the following technical requirements:

1. Invoicing
oAuto creation of invoices upon work completion.
oThe 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.
oTravel time is billable for all field service technicians, pay type Travel, which should be noted on all Service Accounts.
2. Resources
oContractor technicians require access to work order and customer details once assigned to a booking.
oDispatchers need a schedule board for their region(s).
3. Products and Services
oAll parts that are removed from a customer s equipment must be returned to the Main warehouse.
oProducts to be marked as Assets will be configured accordingly.
oAll products that will become Assets require installation by a technician.
oAll products are received into the Main warehouse.
4. Work Orders
oThe ability to have templates for work orders: The templates will provide guidance for technicians along with recommended products and default services.
oOnce a work order is posted it should no longer show on views.
oContoso 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
oOnce a work order is scheduled, do not change the time.
oWork Orders scheduled to technician(s) who do not have the desired skill set and level should show a warning.
6. Security and access
oSafeguards must be in place for the data on the Field Service Mobile App if a technician loses his mobile phone or tablet device.
oThe Field Service Administrator needs the ability to update the defaults for the schedule assistant.
7. Accounts
oAny Service Accounts that do not have a Billing Account noted should show a warning.
oAny Billing Accounts that do not have a Price List noted should show a warning.

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

Actions	Order
Activate the agreement.	
Create an agreement invoice setup with a monthly recurrent every three (3) months.	
Add two (2) agreement booking setups, one monthly and one every three (3) months.	
Add agreement booking incidents with the relevant incident type template.	
Create an agreement with the correctly price list.	
Add one (1) agreement schedule for both monthly and quarterly visits.	
Create an agreement with no incident.	





Answer:

Order
Create an agreement with no incident.
Add agreement booking incidents with the relevant incident type template.
Add two (2) agreement booking setups, one monthly and one every three (3) months.
Activate the agreement.
Create an agreement invoice setup with a monthly recurrent every three (3) months.

Question: 320 **Exam Heist**

Case study -

This is a case study. Case studies are not timed separately. You can use as much exam time as you would like to complete each case. However, there may be additional case studies and sections on this exam. You must manage your time to ensure that you are able to complete all questions included on this exam in the time provided.

To answer the questions included in a case study, you will need to reference information that is provided in the case study. Case studies might contain exhibits and other resources that provide more information about the scenario that is described in the case study. Each question is independent of the other questions in this case study.

At the end of this case study, a review screen will appear. This screen allows you to review your answers and to make changes before you move to the next section of the exam. After you begin a new section, you cannot return to this section.

To start the case study -

To display the first question in this case study, click the Next button. Use the buttons in the left pane to explore the content of the case study before you answer the questions. Clicking these buttons displays information such as business requirements, existing environment, and problem statements. When you are ready to answer a question, click the Question button to return to the question.

Company background -

Company background. General overview

Contoso Ltd. is a leading provider of technology services, with clients all around the world.

Contoso Ltd. has over 1,000 offices globally and over 10,000 employees servicing those buildings, from janitorial service people, repair technicians and new project (office setup, painting, furniture) setup resources. Each day, they dispatch these resources to work on and/or repair items in the cluster of buildings within their geographical area.

The major offices are located in North America, Asia Pacific, Europe, and Latin America.



Company background. Concerns -

Contoso Ltd. has several key challenges and issues in managing their day-to-day operations and facilities.

Many of their facilities have issues spanning five-to-ten days, before the proper personnel begins to work on the request. In some cases, issues within their facilities cause significant issues for the employees in the building or cause disruptions to customers. For example: An air conditioning issue causes servers to reach a critical temperature. It forces servers to shut down, and Contoso Ltd. must employ their emergency disruption plans.

Additional concerns:
1. Many different and siloed systems to manage requests, and track history and progress.
2. No concise and definitive processes to log, manage and complete requests throughout the organization.
3. No tools and technology to make technicians more effective.
4. Lack of ease for internal customers to log a request for work, provide updates and track progress.
5. The inability to monitor equipment performance and check for anomalies, and then interpret and act upon the data.
6. Lack of insight of historical details for the technicians and building management.
7. Field technicians experience issues trying to work in areas that do not have internet connectivity. Most of the

requests are details within an email. As a result, they always carry paper copies of all the requests.
8. The current system lacks the ability to capture real-time data for system critical components, such as air conditioning and heating units, and energy consumption details.
9. Technicians in the field do not have standard devices. Some have iPhones and Android devices, while some use Windows-based laptops, such as the Surface Pro 7.

Field Service background and pain points

Field Service background and pain points. Scheduling and work orders challenges

During several discovery sessions, key users (subject matter experts) mentioned the following areas of operation pain points.

Scheduling and work orders -
• Outlook and Excel is used to schedule technicians.
• Technicians receive email appointments with the applicable details, and self-schedule work based on their availability.
• Technicians and contractors work primarily in email, and print out the work order details from the email. This has turned into a large amount of paper work orders with cryptic email notes.
• There is zero reporting or insight, and in-house technicians cannot monitor critical equipment to ensure it is working as expected.
• Since the equipment is not monitored, often the breakdown of equipment is what leads to recognition of a potential issue and the scheduling of a work request.

The implementation team recognized, during the initial implementation, that technicians need access to several custom entities. Without that visibility, the technicians will not be able to complete their work.

Field Service background and pain points. Visibility challenges

Technicians and dispatchers have either limited or zero visibility to:
• Install-base history.
• Real-time readings of equipment.
• Customer Information including detailed request information.
• Customer updates.
• Correct equipment they should be working on. Cannot search or see serial number or barcode of equipment.

There is also no ability to work offline with the data.

Field Service background and pain points. Challenges associated with the team

IT staff:
• Are inexperienced when it comes to implementing and managing software implementations, and the ongoing maintenance. They quickly find themselves experiencing issues implementing changes required by the users.
• Struggle with the concept of connected field service. They do not understand the different options, benefits, or the security model.
• Need a solution that can store device data for longer time periods to perform data analysis to better predict device failures.

Technicians:
• Have issues gaining access to the mobile app and receive error messages when trying to connect.
• Cannot access the data offline.

Managers:
• Need mobile access.
• Need access to historical data.
• Need access to a broader and larger amount of data than the technicians.

Field Service background and pain points. Asset management data challenges

As a large global company, Contoso Ltd.'s lack of consolidated systems, and systems that track and maintain asset history, has become a significant issue for technicians.

In addition, technicians are constantly being forced to leave in-progress low priority jobs to handle emergency issues. If Contoso Ltd. had the ability to determine when a system would experience a failure, and alert them ahead of time, many of the emergency issues could have been avoided. This capability needs to be in the new system.

Desired solution and requirements

Desired solution and requirements. Overall Field Service requirements

During requirement gathering workshops, the following high-level Field Service requirements were captured:
• Standardize systems onto a single platform.
• Provide an effective tool for employees and third-party contractors to digitally manage work.
• Streamline the service request process; automating processes where possible.
• Implement Dynamics 365 Field Service Mobile app, along with Connected Field Service capabilities.
○ Connected Field Service solution needs to allow for development capabilities, such as sending remote commands.
• Implement scheduling to ensure successful adoption.
• Provide insight and analytics to key personnel.
• Receive automated prescriptive guidance.

Further, there is a need to secure data and access for technicians and management to see only the data they need to see.

Technicians need access to:	• location data, including key contact • asset Data • equipment Readings, current and historical • work Requests • custom entities, in online mode only, as outlined above to be more effective at their jobs
Additional technician and IT requirements:	• offline capabilities • ability to enter time and perform key inspections within one system • IT needs device management capabilities for mobile implementation • ability to set up filters to only allow technicians access to data they need to see • different alerts to technicians for work order assignments, based on severity and priority • receive notifications for assigned work • receive a different notification for emergency or priority work
Tech managers need:	• mobile and mobile offline capabilities • the same access levels as technicians, but less restrictions with offline data • access to more data and areas than technicians

Desired solution and requirements. Install-base requirements

1. Access to all service history and historical readings.
2. Access to warranty and service contract details.
3. Proactive monitoring of the install base health, including alerts to the internal call center team.
4. Details of the customer asset, including BOM (bill of material) and various key properties that are maintained over time.

Desired solution and requirements. Connected Field Service requirements

1. Configure and setup Connected Field Service.
2. Implement a solution that will capture large amounts of data to accurately predict failures.
3. The solution should allow for additional developer capabilities.
4. Allow Field Administrators and administrators access to Connected Field Service data.
5. Anomaly detection and auto work order creation.

You are scheduling a customer for preventative maintenance performed on a predictable schedule.

The customer wants the work performed within two (2) days of the 15th of each month, and an Agreement has already been created.

Which three elements of the booking setup are valid? Each correct answer presents part of the solution.

NOTE: Each correct selection is worth one point.

A. Preferred Resource contains data
B. Auto Generate Work Order = No
C. Pre-Booking Flexibility = 2 and Post Booking Flexibility = 2
D. Auto Generate Work Order = Yes
E. Booking recurrence is set to Monthly on the 15th of each month

Answer: CDE

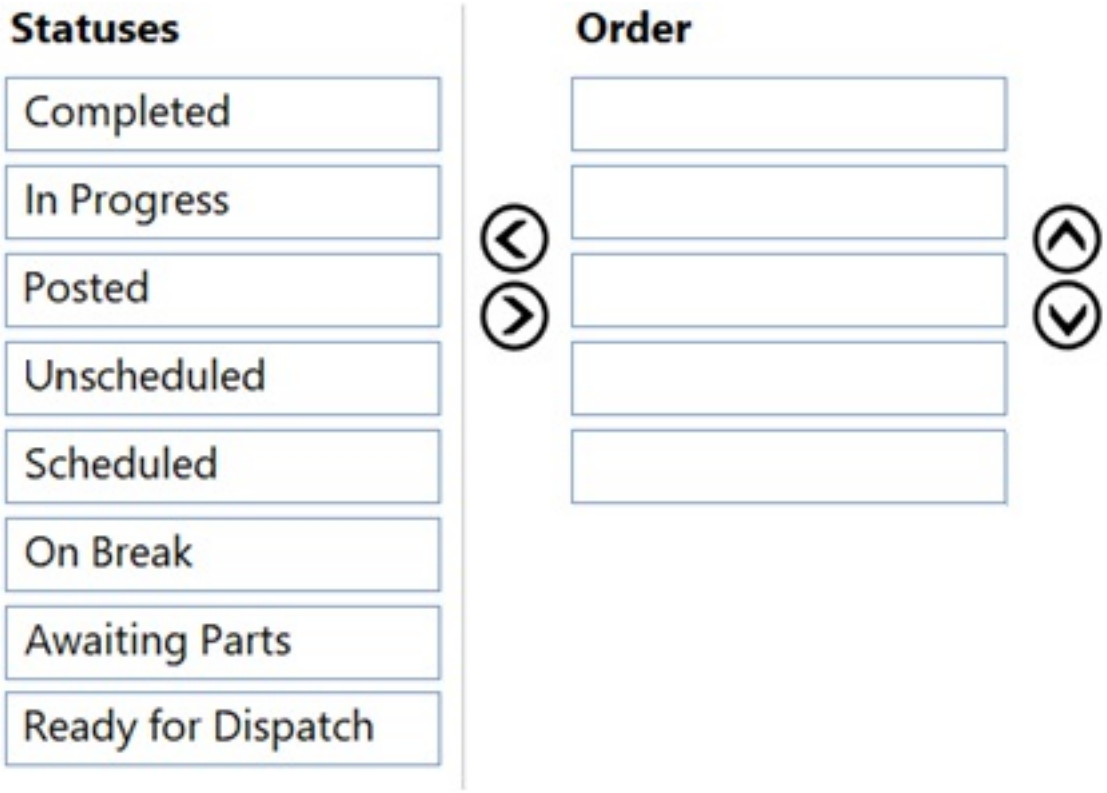
Question: 321 **Exam Heist**

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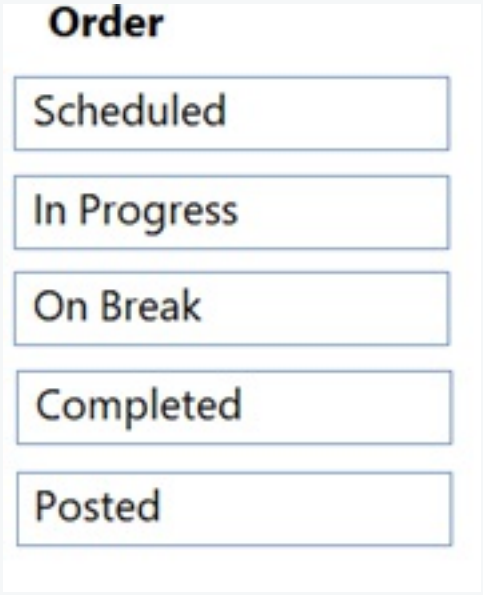
You are implementing Dynamics 365 Field Service at a landscape maintenance company.

You need to select the work order statuses in the correct order, from the creation of a work order to the delivered service at the customer location.

Which five statuses should you select in sequence? To answer, move the five statuses from the list of actions to the answer area. Arrange the five statuses in the correct order.



Answer:



Question: 322 **Exam Heist**

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

Answer: A

Explanation:

Correct option: A –Geofencing

Why it fits the requirement

Geofencing defines virtual boundaries around a resource's current location. When a technician (or dispatcher) enters or exits that boundary, the platform can trigger business rules that automatically change the work-order status (e.g., In-Progress → Completed).
This capability is built-in to Dynamics365 Field Service and directly ties status updates to **resource location**, which is exactly what the question asks for.

Why the other options are not appropriate

Booking maps – Provides a visual map for scheduling and dispatching but does not automatically modify work-order status based on location.
Auto-geocoding for addresses – Converts textual addresses into geographic coordinates; it is a data-preparation step, not a status-automation mechanism.
Connection to Microsoft Bing Maps – Supplies the underlying mapping engine used by other features, but by itself it does not enforce any rule that updates a work order when a resource moves.

Bottom line: Geofencing is the only feature that leverages a resource's real-time location to automatically drive work-order status changes, making it the optimal configuration for the described scenario.

Question: 323 **Exam Heist**

Note: This question is part of a series of questions that present the same scenario. Each question in the series contains a unique solution that might meet the stated goals. Some question sets might have more than one correct solution, while others might not have a correct solution.

After you answer a question in this section, you will NOT be able to return to it. As a result, these questions will not appear in the review screen.

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

One of your jobs does NOT want one of your resources to be scheduled to perform the work. The resource must be available to be scheduled for other jobs.

Solution: You select the resource in the Restricted Resources field within the Schedule Assistant filter.

Does this meet the goal?

A. Yes
B. No

Answer: B

Explanation:

Answer: B – No

The Restricted Resources filter in the Schedule Assistant is a **global exclusion** that removes the selected resource from **all** scheduling considerations in the current schedule view.
Because it blocks the resource for every job, the resource cannot be used on any other work order, which violates the requirement that the resource must remain **available for other jobs**.

To prevent a resource from being scheduled **only on this specific job** while still allowing it to be scheduled elsewhere, you should use a **job-level exclusion** (e.g., a "Must Not Use" constraint or a resource-capability filter) rather than the global Restricted Resources filter.
Therefore, selecting the resource in Restricted Resources does **not** meet the stated goal; the correct approach is to apply a targeted exclusion that affects only the current job.

References

Schedule Assistant

Question: 324 **Exam Heist**

Note: This question is part of a series of questions that present the same scenario. Each question in the series contains a unique solution that might meet the stated goals. Some question sets might have more than one correct solution, while others might not have a correct solution.

After you answer a question in this section, you will NOT be able to return to it. As a result, these questions will not appear in the review screen.

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

One of your jobs does NOT want one of your resources to be scheduled to perform the work. The resource must be available to be scheduled for other jobs.

Solution: You create a Requirement Resource Preference record and set the Preference Type to Restricted.

Does this meet the goal?

A. Yes
B. No

Answer: A

Explanation:

RequirementResourcePreference with PreferenceType=Restricted explicitly tells the Scheduling Assistant to exclude that resource from the current requirement while still keeping the resource in the resource pool. As a result, the job will never be scheduled to that resource, yet the resource remains eligible for other assignments, fulfilling the stated goal.
Other approaches — such as removing the resource from the requirement, changing its skill level, or using a non-restricted preference — either still allow the resource to be considered for the job or would make the resource unavailable altogether, which does not meet the requirement of keeping the resource available for future work.

Therefore, the solution does meet the goal; the correct answer isA(Yes).

Question: 325 **Exam Heist**

Note: This question is part of a series of questions that present the same scenario. Each question in the series contains a unique solution that might meet the stated goals. Some question sets might have more than one correct solution, while others might not have a correct solution.

After you answer a question in this section, you will NOT be able to return to it. As a result, these questions will not appear in the review screen.

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

One of your jobs does NOT want one of your resources to be scheduled to perform the work. The resource must be available to be scheduled for other jobs.

Solution: You select Load the Default Filters on the Schedule Board.

Does this meet the goal?

A. Yes
B. No

Answer: B

Explanation:

Why the correct answer is "No" (B)

Load the Default Filters on the Schedule Board only applies the board's standard view settings (e.g., showing all resources, default time-frames, and visibility of certain columns). It does **not** create an exclusion rule for a specific resource.
The scenario requires that a particular resource **must not be scheduled** for this job, while still being visible for other assignments. Simply loading default filters leaves the resource in the pool and therefore it can still be auto-scheduled, which does not satisfy the requirement.
To truly prevent the resource from being considered for this job, you must adjust the **resource constraints** (e.g., set the resource's availability to "Unavailable" for that time slot, add a "Do Not Schedule" flag, or remove the resource from the resource group for that work order). These actions actively filter the resource out of the scheduling engine.

Why the other option ("Yes") is unsuitable

Selecting "Yes" would imply that loading default filters accomplishes the goal, but it does not. Default filters are neutral; they do not enforce any exclusion logic. Consequently, the resource remains eligible for scheduling, which contradicts the explicit need to keep that resource free for other jobs.

Technical takeaway for the exam

When a job must **exclude** a specific resource, you must modify the scheduling parameters that influence resource selection (availability, constraints, or resource-level filters), not merely change the board's visual filters. This ensures the scheduling engine respects the exclusion during auto-scheduling.

Question: 326 **Exam Heist**

You are working with your customer to set up their Dynamics 365 Field Service environment.

You need to configure the settings for booking timestamps.

What are two valid configurations for when a timestamp is created? Each correct answer presents a complete solution.

NOTE: Each correct selection is worth one point.

A. When a booking is marked as "Complete."
B. At fixed time intervals.
C. When a booking is assigned to a resource.
D. When a field service status changes.
E. When a booking status changes.

Answer: BD

Explanation:

WhyB andD are the correct selections

B – At fixed time intervals – The system can be configured to generate a timestamp record on a regular cadence (e.g., every5minutes) regardless of any event. This is useful for monitoring SLA adherence and for periodic health-checks of work orders.

D – When a field service status changes – A timestamp is automatically logged at the moment the **Field Service Status** field transitions (for example, from Scheduled to En-Route or from En-Route to On-Site). This captures the exact moment the service state is altered, which is essential for audit trails and performance reporting.

Why the other options are not valid

A – When a booking is marked as "Complete." – Completion triggers a status change to Completed, but the platform does not create a dedicated timestamp specifically at that moment; the completion date is stored as a separate field, not as a timestamp event.

C – When a booking is assigned to a resource. – Assignment updates the Resource lookup but does not generate a timestamp event; the assignment is recorded in the resource-booking relationship, not via the timestamp mechanism.

E – When a booking status changes. – While status changes can fire business rules, the platform only creates a timestamp when the **Field Service Status** changes, not for every generic booking status transition. Hence this option is too broad and not a configured timestamp trigger.

Thus, the only configurations that explicitly cause a timestamp to be recorded are **(B) at fixed intervals** and **(D) on a field service status change**.

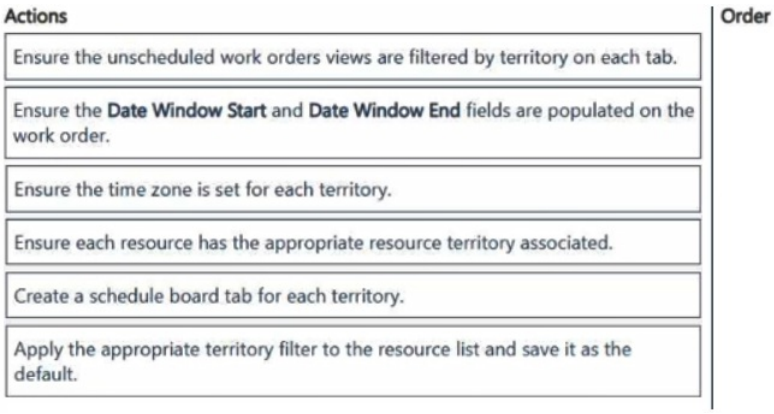
Question: 327 **Exam Heist**

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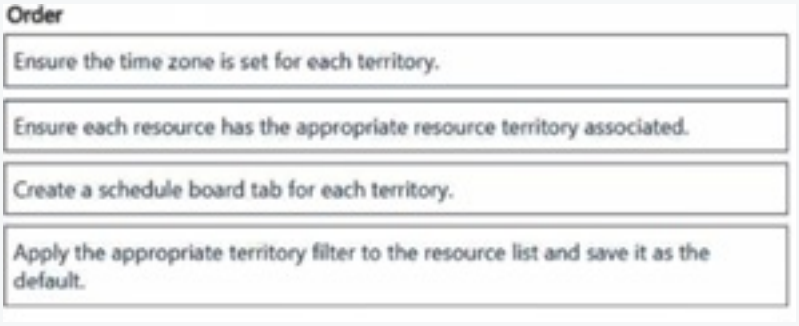
You are implementing the schedule board for a HVAC (heating, ventilation, and air conditioning) company. The company has two dispatchers in their own territories who only schedule resources within their territory.

You need to configure the schedule board so that each dispatcher only sees resources who belong in their territory, as well as work orders to be scheduled in their territory.

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.



Answer:



Question: 328 **Exam Heist**

You are entering products and services into Dynamics 365 CE Field Service.

You need to ensure that your field technicians can use the products when completing work orders.

Which two field service product types should you configure? Each correct answer presents a complete solution.

NOTE: Each correct selection is worth one point.

A. Service
B. Non-inventory
C. Asset
D. Inventory

Answer: AD

Explanation:

Why AD is the correct choice

Service product type – Represents billable, non-physical work (e.g., labor, consulting, diagnostics). When a technician performs the work on a work order, the Service product is consumed to record the time and skill used, enabling proper charging and reporting.

Inventory product type – Represents stocked, physical items that are tracked in the inventory. Technicians can allocate these items from the inventory to a work order, decrementing stock levels and ensuring the correct parts are used during the service.

Why the other options are not suitable

Non-inventory – Used for sellable items that are not tracked in inventory. Since the scenario requires technicians to use the products on the job (i.e., consume or account for them), a non-inventory product does not provide the necessary stock-control and usage tracking.

Asset – Designed for long-term, high-value equipment that is managed as an asset (e.g., vehicles, machinery). Assets are tracked for depreciation and lifecycle, not for the day-to-day consumption of parts or services on a work order.

Thus, configuring **Service** and **Inventory** product types gives field technicians the ability to both perform the service work and consume the required physical items, which is exactly what the question asks for.

Question: 329 Exam Heist

You are advising your customer on how to configure their territories.

You need to identify the options that are related to territories during the configuration.

Which three relationships are available out-of-the-box? Each correct answer presents a complete solution.

NOTE: Each correct selection is worth one point.

A. Resource Territories
B. Contacts
C. Accounts
D. Incident type
E. Postal Codes

Answer: ACE

Explanation:

Correct selections: A–Resource Territories, C–Accounts, E–Postal Codes

Resource Territories (A) – Territories are defined at the resource level to group the resources (field technicians, dispatchers, etc.) that will service a geographic or functional area. This relationship is built-in and is the primary way to associate a resource with a territory during configuration.

Accounts (C) – An Account can be linked to one or more territories. This linkage determines which territory's service schedule, pricing, and SLA apply to the customer represented by the Account. The out-of-the-box data model includes a direct lookup from Account to Territory.

Postal Codes (E) – Postal (ZIP) codes are used as a key attribute for territory assignment. When a resource, account, or work order is created, the system can automatically map the postal code to a predefined territory, enabling rule-based routing without manual territory assignment.

Why the other options are not part of the out-of-the-box territory relationships

Contacts (B) – While contacts are often associated with accounts, they are not a native territory-related entity. Territory configuration does not directly reference contacts; any such linkage would require custom development or a roll-up from the parent Account.

Incident Type (D) – Incident types are part of the service-order or work-order taxonomy and govern the nature of the service request. They are unrelated to the territorial model; territories are defined by geography or resource grouping, not by the type of incident being handled.

Thus, the three out-of-the-box relationships that can be configured when setting up territories are **Resource Territories, Accounts, and Postal Codes**. These provide the foundational mapping needed for routing, scheduling, and reporting within Dynamics 365 Field Service.

Question: 330 Exam Heist

You are implementing Dynamics 365 Field Service for a manufacturing company.

You need to set up preventive maintenance schedules for the assets they service.

In addition to creating an agreement booking setup, what else must you set up in order to associate the asset to the agreement?

A. Asset functional location
B. Booking recurrence
C. Agreement booking incident
D. Agreement invoice setup

Answer: B

Explanation:

Correct option: B – Booking recurrence

Why B is required:
In Dynamics365 Field Service, an **Agreement** defines the terms (price, duration, service level) for a set of services. To actually deliver those services on a schedule, you must create **Agreement Bookings**. The recurrence property of a booking determines how often the service is performed (e.g., weekly, monthly, quarterly). By configuring the recurrence, you link the agreement to a repeating work order that can be automatically generated, ensuring the preventive-maintenance tasks are executed on the intended cadence. This is the essential step that ties the agreement to the asset's maintenance schedule.

Why the other options are not appropriate:

A. Asset functional location – While functional locations are useful for organizing assets and can be referenced in agreements, they are not a prerequisite for associating an agreement with an asset. An agreement can be linked directly to an asset record without first establishing a functional location.
C. Agreement booking incident – Booking incidents are used to capture individual service events after a booking has been created; they are a downstream record, not a setup step needed to associate the agreement with the asset.
D. Agreement invoice setup – Invoice configuration governs how charges are posted to customers, but it does not affect the linkage between an agreement and an asset. It is unrelated to the scheduling of preventive maintenance.

Bottom line: To associate an asset with a preventive-maintenance agreement, you must define a **booking recurrence** that schedules the service repetitions. This step enables the system to generate the appropriate work orders tied to the agreement, fulfilling the preventive-maintenance requirement.

Question: 331 **Exam Heist**

Your organization uses Dynamics 365 Field Service.

The organization wants you to set up the steps for technicians to follow when completing specific types of work orders in the field.

What should you do?

A. Create service tasks and associate them with incident types.
B. Create service activities for work orders, based on work order type.
C. Create a resolution and associate it with incident types.
D. Create a business process flow, based on work order type.

Answer: A

Explanation:

Justification

Correct option – A. Create service tasks and associate them with incident types.

Service tasks are the granular work items that technicians execute in the field.
By linking each service task to a specific incident type, the system automatically surfaces the appropriate checklist, required skills, and parts when a work order of that incident type is created.
This direct association ensures that technicians receive the exact procedural steps required for the particular service scenario, supporting compliance and consistency across the organization.

Why the other options are less suitable

B. Create service activities for work orders, based on work order type.

Service activities are higher-level groupings (e.g., “Installation” or “Repair”) and do not provide the detailed, step-by-step guidance needed for specific incident types. They are useful for scheduling but not for enforcing precise field procedures.
C. Create a resolution and associate it with incident types.

A resolution defines how an incident is closed, not how the work is performed. It does not drive the execution steps a technician must follow during the service visit.
D. Create a business process flow, based on work order type.

Business process flows are primarily used for guiding users through approvals or multi-step approvals within the CRM UI. They are not designed to deliver the technical task details required on the field-service mobile app.

Conclusion
Associating service tasks with incident types directly ties the procedural content to the work order context, delivering the precise, technician-focused guidance the organization requires. The alternative approaches either lack the necessary granularity (B, D) or address a different lifecycle stage (C), making optionA the most appropriate solution.

Question: 332 **Exam Heist**

Your company hires a consultant to help them determine the best way to efficiently dispatch the best technicians to customer sites.

The consultant suggests that for phase one, your company should use a proficiency model that includes four ratings:

•In Training, rating 1
•Familiar, rating 3
•Proficient, rating 5
•Expert, rating 7

You need to evaluate this proficient model.

Which two statements apply to this proficiency model? Each correct answer presents a complete solution.

NOTE: Each correct selection is worth one point.

A. This information above is all that is needed to create a proficiency model.
B. There are multiple proficiency models available “out of the box” and you must choose one of them.
C. This proficiency model can be created even though the ratings numbers have gaps.
D. This proficiency model cannot be created because the ratings numbers have gaps.

Answer: AC

Explanation:

Why the correct selections (A&C) are appropriate

A – The model can be built from the information given.
The description supplies the four rating levels (InTraining=1, Familiar=3, Proficient=5, Expert=7) and the associated numeric values. Those elements are sufficient to define a proficiency model; no additional data are required to instantiate it in the system.

C – Gaps in the numeric scale do not prevent model creation.
Proficiency models in Dynamics365 Field Service do not mandate a continuous integer sequence. The presence of gaps (e.g., missing 2,4,6) is permissible; the model simply uses the defined rating numbers as discrete identifiers. Therefore, a model with the given set of ratings can be created without issue.

Why the other options are not correct

B – "There are multiple proficiency models available 'out of the box' and you must choose one of them."
While standard models exist, the platform allows you to design a custom model that matches your business terminology and rating scheme. The question asks which statements apply to the described model, not whether a pre-built option must be used. Hence, this statement does not describe the situation accurately.

D – "This proficiency model cannot be created because the ratings numbers have gaps."
As noted in C, gaps are allowed. The platform does not enforce a contiguous numeric series; it only requires that each rating be uniquely identified. Consequently, the model can indeed be created despite the gaps, making this statement false.

Question: 333 **Exam Heist**

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

Answer: C

Explanation:

Technical justification

Geofencing (OptionC) is the feature that enables automatic work-order status updates based on the real-time location of a resource.

Geofencing defines virtual boundaries around a work-order location or a set of predefined coordinates. When a technician's device reports a position that crosses into or out of the geofence, the platform can trigger business rules (e.g., change the work-order status from In-Progress to Completed).
This capability is built-in to Dynamics365 Field Service and integrates directly with the mobile client, allowing

dispatchers to see status changes instantly without manual intervention.

Why the other options are not appropriate

Booking maps (OptionA) – Primarily used for visualizing scheduled appointments and resource assignments; they do not provide automatic status updates based on proximity.
Connection to Microsoft Bing Maps (OptionB) – Supplies map tiles and location search services but does not itself enforce location-based triggers; it is a data source rather than a rule engine.
Auto-geocoding for addresses (OptionD) – Converts textual addresses into latitude/longitude coordinates for routing or display, but it does not create the boundary logic needed to fire status changes.

Conclusion – To meet the requirement of automatically updating a work order when a resource enters or leaves a defined area, the **Geofencing** feature must be configured, as it directly provides the location-aware trigger mechanism required for the scenario.

Question: 334 **Exam Heist**

Your company enabled automatic time entries for all technicians.

You need to explain to the dispatchers when the time entry actuals will be created in the work order process.

In which work order status will this occur?

A. On Break
B. Completed
C. Posted
D. In Progress

Answer: B

Explanation:

Technical Justification

Automatic time entry logic is triggered only after the work is fully completed, because only then is the actual effort spent on the task known and can be recorded as a concrete value.
When the work order status changes to **Completed**, the platform automatically creates the Time Entry Actual records for all technicians that logged time on that order.
In Progress – time is still being accumulated; the system does not finalize actuals until the work ends.
On Break – this is simply a scheduling state and does not indicate work-order closure, so no final time entry is generated.
Posted – posting is an accounting action that occurs after the time entry has already been created; it is not the point at which the system creates the actuals.

Why B (Completed) is the best answer

The status “Completed” explicitly marks the point at which the work order lifecycle is finished and the system finalizes all associated time data.
This aligns with the design of the automatic-time-entry feature, which waits for the work order to transition to Completed before persisting the actual duration values.
Consequently, dispatchers can rely on Completed status as the definitive cue that time-entry actuals are now available for reporting and billing.

References

Automatic Time Entry in Dynamics 365 Field Service –learn.microsoft.com/.../automatic-time-entry
Work Order Status Overview –learn.microsoft.com/.../work-order-statuses

Question: 335 **Exam Heist**

DRAG DROP
-

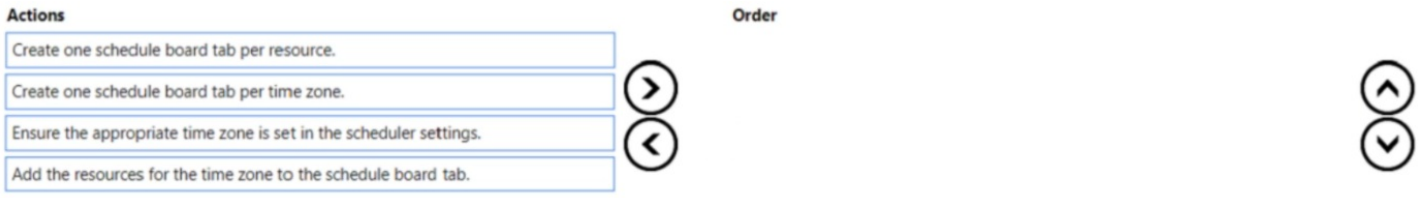
You are implementing Microsoft Dynamics 365 Field Service for an organization.

The organization has a dispatcher who schedules resources across multiple time zones. The dispatcher requests for the resources categorized by time zone, so they could quickly schedule the appropriate resources and visualize multiple resources per time zone on the schedule.

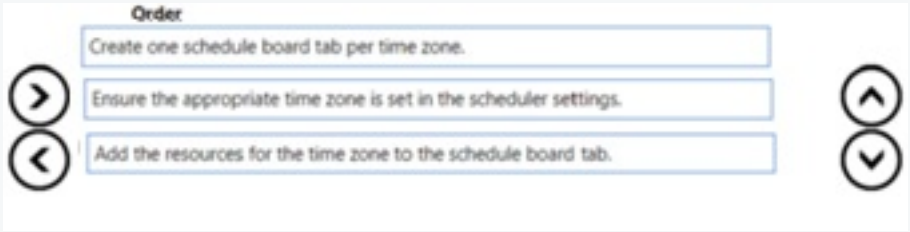
You need to configure the schedule board to accommodate this request.

Which three actions should you recommend be performed 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.

NOTE: More than one order of answer choices is correct. You will receive credit for any of the correct orders you select.



Answer:



Question: 336 **Exam Heist**

Your organization wants to use the new Field Service mobile app.

You need to ensure this app works for the technicians.

Which two actions should you perform? Each correct answer presents part of the solution.

NOTE: Each correct selection is worth one point.

A. Access the Field Service mobile app and select Manage Roles.
B. Assign Field Service-Resource role for the app.
C. Access the Field Service model-driven app and select Manage Roles.
D. Assign System Administrator role for the app.
E. Assign Field Service-Dispatcher field security profile to the app.

Answer: AB

Explanation:

Technical Justification

A – Access the Field Service mobile app and select Manage Roles
The mobile app is a separate client that requires explicit role configuration within the app context. Only by opening the app and navigating to **Manage Roles** can the intended permissions be applied to the technician's user record. This step is mandatory before any role can be assigned.

B – Assign Field Service-Resource role for the app
The **Field Service-Resource** role is the out-of-the-box security role that grants the permissions needed for field technicians to view appointments, update work orders, and access mobile-specific features. Assigning this role directly to the technician's user (or to a security group that includes them) fulfills the functional requirement of the mobile app.

Why C, D, and E are not suitable

C – Access the Field Service model-driven app and select Manage Roles – The model-driven app is the administration interface, not the mobile client. Managing roles there does not affect the mobile app's permission set.
D – Assign System Administrator role for the app – System Administrator is a broad, organization-wide role that bypasses the principle of least privilege; it is unnecessary and insecure for targeted mobile access.
E – Assign Field Service-Dispatcher field security profile to the app – The Dispatcher profile is designed for scheduling and dispatching users, not for field technicians who need resource-level access. Using it would grant irrelevant permissions and could expose data that the technician should not see.

Therefore, the combination of **A** and **B** directly configures the mobile app's role model for technicians, ensuring the correct permissions are applied in the proper context.

References

Configure roles and permissions in Field Service mobile app –Microsoft Docs
Manage security roles for Power Apps and mobile apps –Microsoft Docs

Question: 337 **Exam Heist**

DRAG DROP
-

Case Study
-

This is a case study. Case studies are not timed separately from other exam sections. You can use as much exam time as you would like to complete each case study. However, there might be additional case studies or other exam sections. Manage your time to ensure that you can complete all the exam sections in the time provided. Pay attention to the Exam Progress at the top of the screen so you have sufficient time to complete any exam sections that follow this case study.

To answer the case study questions, you will need to reference information that is provided in the case. Case studies and associated questions might contain exhibits or other resources that provide more information about the scenario described in the case. Information provided in an individual question does not apply to the other questions in the case study.

A Review Screen will appear at the end of this case study. From the Review Screen, you can review and change your answers before you move to the next exam section. After you leave this case study, you will NOT be able to return to it.

To start the case study
-

To display the first question in this case study, select the "Next" button. To the left of the question, a menu provides links to information such as business requirements, the existing environment, and problem statements. Please read through all this information before answering any questions. When you are ready to answer a question, select the "Question" button to return to the question.

Background information
-

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.

Cosmetic work orders
-

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.

Dental check-up
-

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.

Technical work orders
-

Overview
-

Technical work can be performed by either the robotics engineer or by the robotics intern, depending on the complexity level.

When a new work order is created manually, it must be triaged by the robotics engineer before it can be scheduled. Maintenance work orders created by agreements can be scheduled without triage.

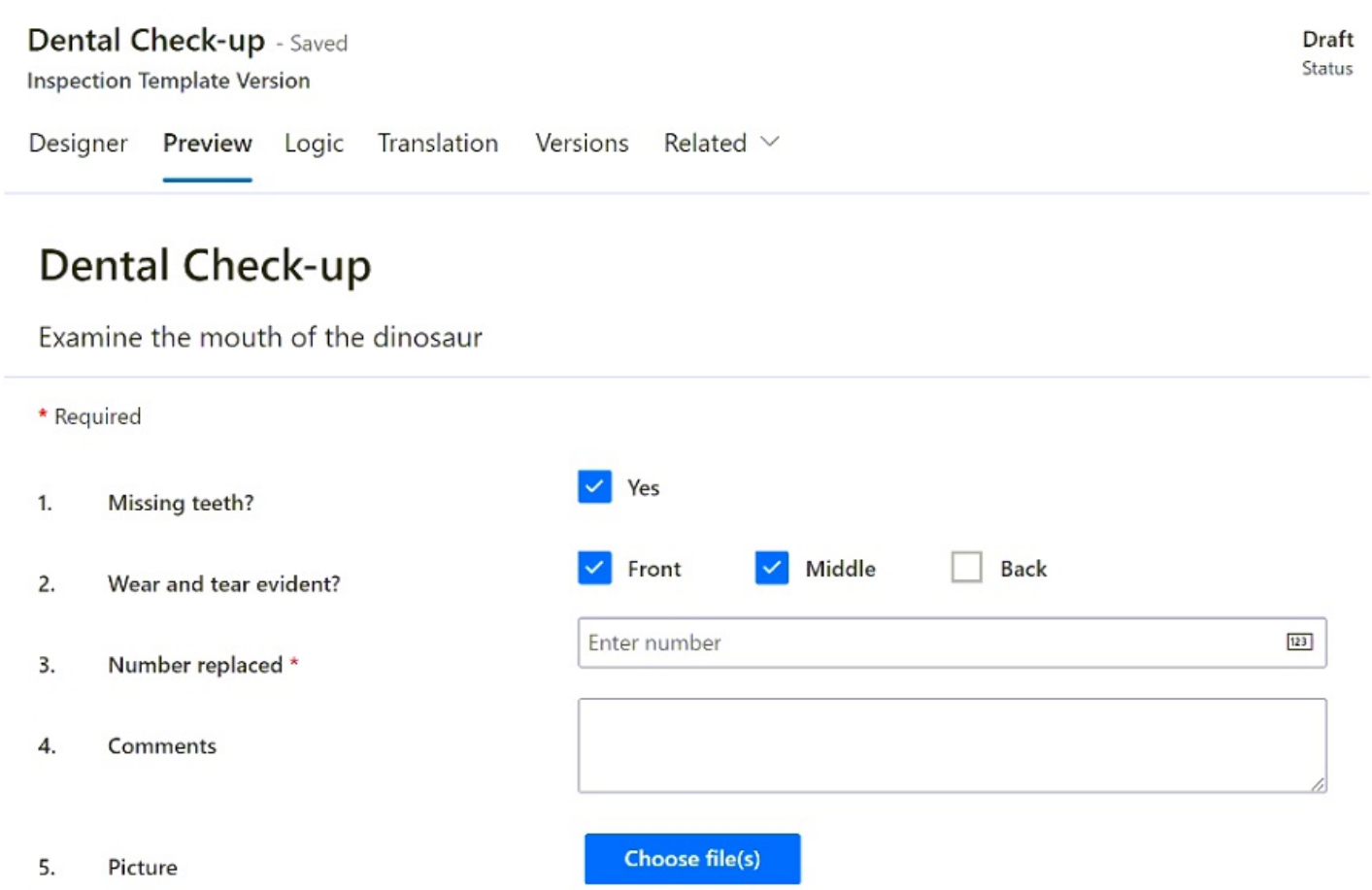
The robotics intern only uses the Field Service mobile app to view upcoming jobs, whereas the robotics engineer uses the mobile app and the model-driven app.

If the intern is performing a work order, they must wait for the engineer to review and approve the notes before they can finish their work. The CEO requires that the intern records the time they spend waiting for the engineer using the Field Service mobile app. This will help the CEO monitor whether the duration required for work orders needs to be increased.

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 following image is a draft of the "Dental Check-up" inspection:



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.

Additional requirements
-

Natural History Museum
-

The prop master has a cosmetic maintenance job scheduled for tomorrow at the Natural History Museum. This is their first maintenance job for two dinosaurs on lease – a diplodocus and a carnosaur. The CEO asks you to ensure that the prop master completes the new dental check-up for both dinosaurs during the visit.

Large parts of the museum do NOT have mobile data reception, nor Wi-Fi.

Offline requirements
-

The engineer uses offline first to monitor both work order assigned to themselves and to their intern. No custom offline profiles have been created.

Neither the prop master nor the intern have used the Field Service app offline before. The CEO requires that they only see their own work orders.

Configuration
-

The CEO wants the Species value to appear as the sub-title when selecting a primary asset on the work order main form.

You need to configure a push notification for the engineer to indicate that the intern is waiting for their feedback.

Automation
-

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.

New programming: dance firmware update

The robotics engineer has been working on a passion project - developing a program to allow a dinosaur to perform a high-energy dance routine.

When the engineer demonstrated the results on a newly finished Baryonyx sculpture during a staff meeting, the CEO was certain that some of their existing customers would want to commission a firmware update to their dinosaurs to allow the dance program to be installed as a special service.

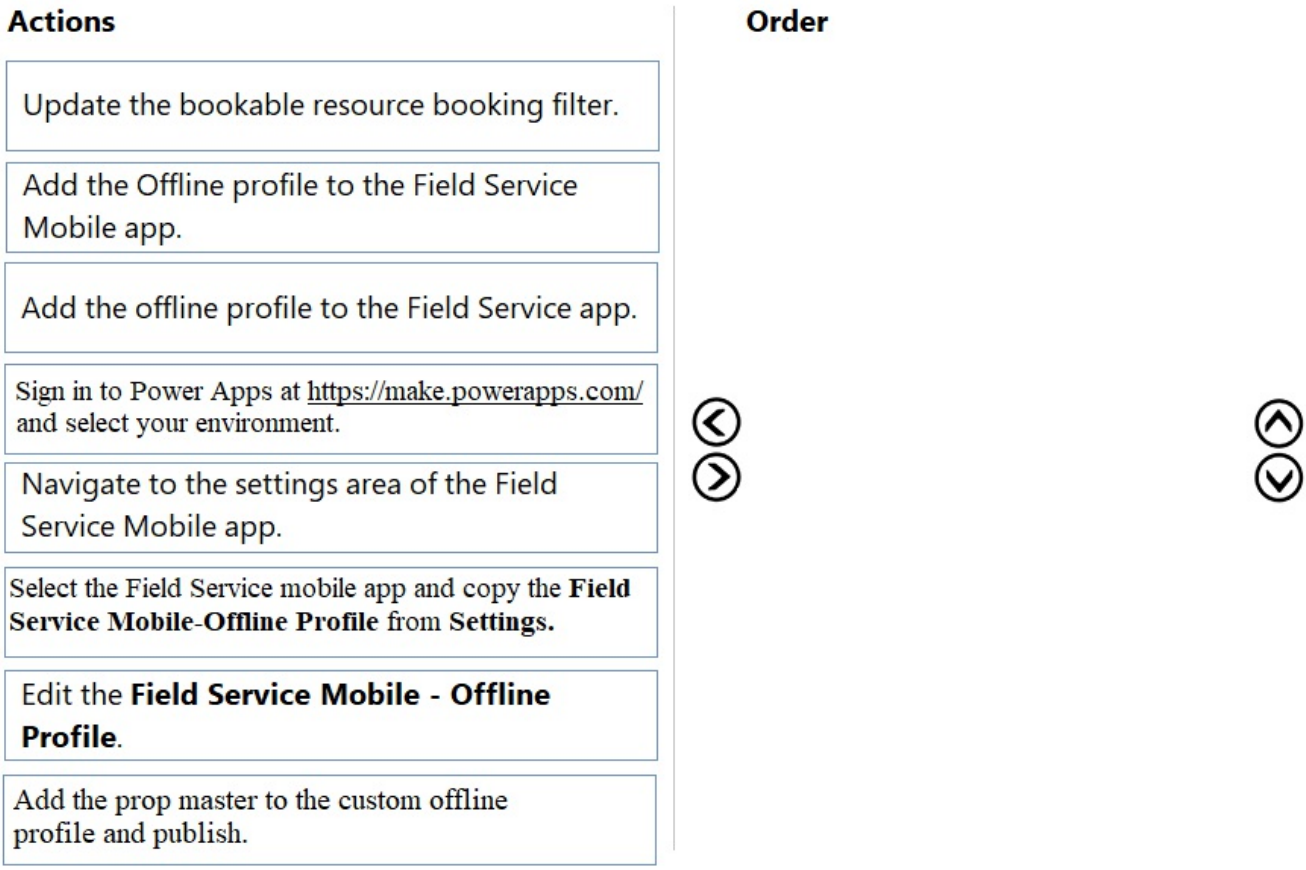
New sales package
-

The CEO names the new programming the "Dino dance" package, a new category of work which requires a new price list.

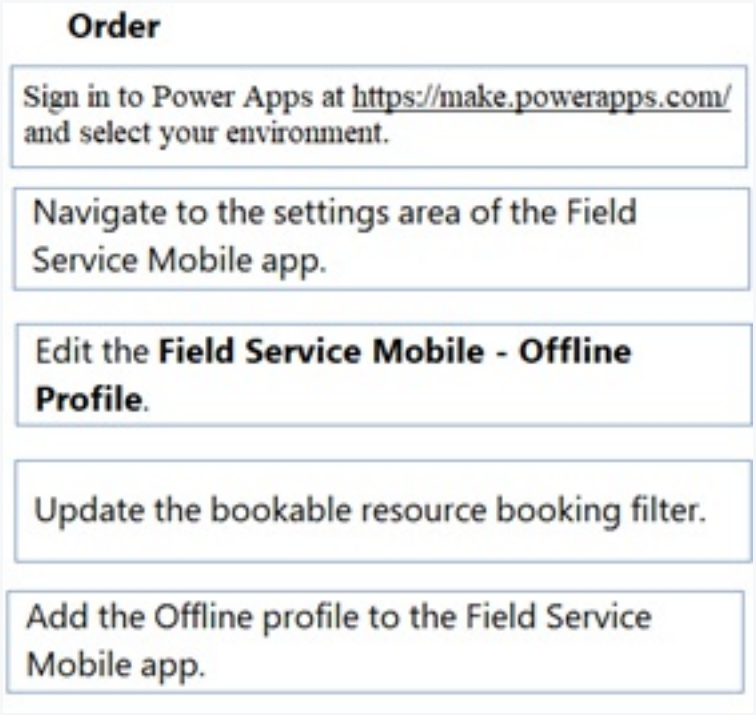
The CEO will call customers and explain the new package to them. If customers are interested, the CEO wants to create an opportunity which can be converted into a work order.

You need to ensure the prop master can use their mobile app when visiting the Natural History Museum.

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



Answer:



Question: 338 **Exam Heist**

Note: This question is part of a series of questions that present the same scenario. Each question in the series contains a unique solution that might meet the stated goals. Some question sets might have more than one correct solution, while others might not have a correct solution.

After you answer a question in this section, you will NOT be able to return to it. As a result, these questions will not appear in the review screen.

Your organization wants to roll out a preventive maintenance offer to select existing customers to help improve customer satisfaction and service revenue.

As part of this initiative, your organization wants to provide some specific customers with a one (1) year 10% discount on all work order products and services based on a preset price list.

You need to ensure that this discount is applied dynamically upon creation of a relevant work order.

Solution: Create an agreement for each customer where you add the discounted prices on all products and services to the agreement price list. The discounted prices will be reflected on all work orders generated.

Does this meet the goal?

A. Yes
B. No

Answer: B

Explanation:

Why the selected answer is the correct outcome

The question asks whether “creating an agreement with discounted prices on the agreement price list” satisfies the requirement to dynamically apply a 10% discount to all work-order products and services for a selected set of customers.
The correct response is **No** because the proposed approach does **not** guarantee that the discount will be applied automatically every time a relevant work order is created.

Agreements are contract-level records; they store pricing terms for a customer but are not linked by default to every work-order line item.
When a work order is generated, the system looks first at the **product's price list** (or the site-level price list) and then at any **price group** or **price list line** attached to the product. An agreement's price list is only consulted if it is explicitly assigned to the service product, which is not guaranteed for all work orders.
The requirement stresses dynamic application, meaning the discount should be enforced **without manual intervention each time a work order is generated**. Relying on an agreement alone does not enforce the discount automatically; users could still select a different price list or omit the product linked to the agreement, causing the discount to be missed.
To achieve true dynamic discounting, the proper method is to **configure a site-level or product-specific price list with a discounted price line (-10%)**, assign that price list to the relevant products, and optionally use a **price group** to tie the list to the customer segment. This ensures the discount is evaluated at the moment the work order line is priced, independent of any agreement record.

Therefore, the solution described does **not** meet the goal; the correct answer is **B – No**.

Why the other option is unsuitable

Yes suggests that merely adding discounted prices to an agreement price list will automatically propagate the discount to all work orders. This overlooks the pricing evaluation chain in Dynamics365 Field Service, where work-order pricing relies on product price lists and price groups, not solely on agreements. Without explicitly configuring a discounted price list line, the discount cannot be guaranteed to apply automatically.

References

Create and manage price lists in Dynamics 365 Field Service
Work with agreements and contract terms in Dynamics 365 Field Service

Question: 339 **Exam Heist**

Note: This question is part of a series of questions that present the same scenario. Each question in the series contains a unique solution that might meet the stated goals. Some question sets might have more than one correct solution, while others might not have a correct solution.

After you answer a question in this section, you will NOT be able to return to it. As a result, these questions will not appear in the review screen.

Your organization wants to roll out a preventive maintenance offer to select existing customers to help improve customer satisfaction and service revenue.

As part of this initiative, your organization wants to provide some specific customers with a one (1) year 10% discount on all work order products and services based on a preset price list.

You need to ensure that this discount is applied dynamically upon creation of a relevant work order.

Solution: Create a price list with the associated products and services, and use this price list while creating an entitlement. Then, specify the discount percentage in the entitlement for each customer.

Does this meet the goal?

A. Yes
B. No

Answer: A

Explanation:

Why this solution meets the goal

Creating a price list that contains the preset products and services and then linking that price list to an entitlement allows the discount to be applied automatically whenever a work order is generated from that entitlement. The entitlement can store a10% discount field that is evaluated at creation time, so every relevant work order inherits the discount without manual price adjustments. This approach is fully supported by the Dynamics365 Field Service pricing engine and ensures the discount is consistently enforced for the targeted customers.

Why other options fall short

Relying only on a price list without attaching it to an entitlement would require the technician to select the price list each time a work order is entered, which introduces human error and does not guarantee the discount is applied dynamically.
Manually editing the product price on the price list for each customer would affect all customers using that list, not just the designated ones, and would not be tied to an entitlement-driven workflow.
Using a discount rule on the work-order form itself does not integrate with the price-list engine and would not be triggered automatically when the work order is created from an entitlement.

Therefore, the described method — price list + entitlement with a discount percentage — provides a scalable, automated, and auditable way to apply a customer-specific discount to all qualifying work orders.

References

Price Lists in Dynamics365 Field Service
Entitlements and Discounts in Dynamics365 Field Service

Question: 340 **Exam Heist**

Note: This question is part of a series of questions that present the same scenario. Each question in the series contains a unique solution that might meet the stated goals. Some question sets might have more than one correct solution, while others might not have a correct solution.

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Your organization wants to roll out a preventive maintenance offer to select existing customers to help improve customer satisfaction and service revenue.

As part of this initiative, your organization wants to provide some specific customers with a one (1) year 10% discount on all work order products and services based on a preset price list.

You need to ensure that this discount is applied dynamically upon creation of a relevant work order.

Solution: Create a warranty for each customer where you add the discounted prices on all products and services to the price list mentioned on the billing account and then specify the discount percentage.

Does this meet the goal?

A. Yes
B. No

Answer: B

Explanation:

Why the proposed solution does NOT meet the goal

The requirement is to apply a **10% discount dynamically** when a work order is created for a selected customer, using the preset price list.
Creating a **warranty** and populating it with discounted prices only stores those prices in the **billing account**; it does **not** automatically adjust the price of **new work orders** at the moment they are generated.
Work orders reference the **price list** that is attached to the billing account, but a warranty does not influence the **price calculation engine** that evaluates discount rules. Consequently, the discount will not be enforced unless a manual price change is performed after the work order is created.
To achieve the desired behavior, the discount must be defined as a **price list condition** (e.g., a discount line item) that is evaluated during work-order creation, or a **business rule/workflow** that sets the discount percentage on the fly. Simply adding discounted prices to a warranty does not guarantee that the discount will be applied to every relevant work order.

Why options that rely only on storing discounted prices in a warranty are insufficient

Warranties are primarily used to track **service contracts** and related terms; they are not designed to enforce pricing rules on operational records such as work orders.
Storing a discounted price in a warranty creates a **static snapshot**; if the price list is later updated or if multiple discount levels are required, the warranty entry will not reflect those changes automatically.
The system's **price calculation** for work orders expects discount information to be part of the **price list items** or **discount groups** that are evaluated at transaction time. Adding discounts solely to a warranty bypasses this evaluation path and therefore fails to meet the "dynamic upon creation" requirement.

Correct approach summary

Configure a **price list** that includes the standard prices.
Add a **price list item** with the **10% discount** for the relevant products/services, targeting the specific customers.
Ensure that the **billing account** (or the customer record) is linked to this price list, so the discount is automatically applied when a work order is generated for that customer.

References

Price Lists in Dynamics365 Field Service: https://learn.microsoft.com/en-us/dynamics365/field-service/price-lists
Discount Pricing Overview: https://learn.microsoft.com/en-us/dynamics365/field-service/discount-pricing-overview

Question: 341 **Exam Heist**

Note: This question is part of a series of questions that present the same scenario. Each question in the series contains a unique solution that might meet the stated goals. Some question sets might have more than one correct solution, while others might not have a correct solution.

After you answer a question in this section, you will NOT be able to return to it. As a result, these questions will not appear in the review screen.

You are a systems administrator for a company implementing Dynamics 365 Field Service and planning to enable Dynamics 365 Remote Assist for frontline technicians. You previously installed the Field Service app.

You need to confirm that all prerequisites are in place so that both technicians and remote collaborators can use Remote Assist integrated with Field Service.

Solution: You create two bookable resources of type User, one for the technician and one for the remote collaborator. You assign Field Service licenses to both users and install the Field Service mobile app on the technician's device.

Does this meet the goal?

A. Yes
B. No

Answer: B

Explanation:

Why the proposed solution does NOT meet the goal

The goal requires that **both** the frontline technician **and** the remote collaborator can use **Dynamics365 Remote Assist** within a Field Service environment.
Assigning only a **Field Service license** to a user who will act as a remote collaborator does **not** provide the necessary RemoteAssist licensing; Remote Access requires a separate RemoteAssist (or Dynamics365 Field Service) license that specifically includes RemoteAssist capabilities.
Bookable resources of type **User** are intended for scheduling service appointments, not for enabling RemoteAssist collaboration. RemoteAssist collaboration is configured through **RemoteAssist users** (or "RemoteAssist agents") which have distinct permission sets and licensing.
Installing only the **Field Service mobile app** on the technician's device satisfies part of the technician prerequisite, but the remote collaborator also needs the RemoteAssist client (or web client) installed and proper environment settings (e.g., RemoteAssist enabled in the tenant, correct security groups).
Consequently, the described steps leave critical prerequisites unaddressed — specifically, RemoteAssist licensing and configuration for the collaborator — so the solution does **not** guarantee that both parties can use RemoteAssist integrated with Field Service.

Correct answer: B – No

References

Dynamics365 Remote Assist licensing requirements
Enable Remote Assist in Dynamics365 Field Service

Question: 342 **Exam Heist**

Note: This question is part of a series of questions that present the same scenario. Each question in the series contains a unique solution that might meet the stated goals. Some question sets might have more than one correct solution, while others might not have a correct solution.

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You need to confirm that all prerequisites are in place so that both technicians and remote collaborators can use Remote Assist integrated with Field Service.

Solution: You assign Dynamics 365 Field Service licenses to the technician and remote collaborator users. You create one bookable resource of type User for the technician and install the Field Service mobile app on the technician's device.

Does this meet the goal?

A. Yes
B. No

Answer: B

Explanation:

Answer: No – the described actions do not satisfy all the prerequisites for using RemoteAssist with Field Service.

Why the solution is insufficient

Licensing alone is not enough.

Technicians must have a **Field Service license** and a **RemoteAssist license** (or be included in a Dynamics365Enterprise/Professional license that includes RemoteAssist). Remote collaborators also need a **RemoteAssist license** in addition to a Field Service license. Simply assigning a Field Service license to the collaborator does not grant the RemoteAssist capability required for the integration.

RemoteAssist feature must be enabled in the environment.

The RemoteAssist add-in must be turned on for the tenant (via the **RemoteAssist settings** in the Field Service administration). Without this activation, the mobile app cannot open a RemoteAssist session, even if the users are licensed.

Correct resource type and scheduling configuration.

A **bookable resource of type User** is only a placeholder. RemoteAssist expects a **Field Service Resource** (resource schedule) that is linked to the **RemoteAssist collaborator role**. The resource must be created as a **Field Service Resource** (type Resource → Field Service Resource), assigned to the appropriate schedule, and published. A plain "bookable resource of type User" does not provide the required scheduling metadata or the RemoteAssist collaborator role.

Mobile app setup must include the RemoteAssist persona.

Installing the Field Service mobile app is necessary, but the app must be configured with the **RemoteAssist off-line persona** and the user must be added to the **RemoteAssist security group** (or the appropriate security role). Without this configuration, the technician cannot launch a RemoteAssist session from the device.

Security and permission model.

The technician's user must belong to the **Field Service Mobile** security role (or a custom role that grants RemoteAssist permissions). The remote collaborator must be assigned the **RemoteAssist Collaborator** role. Simply granting a Field Service license does not automatically grant these specific permissions.

Integration settings.

The **RemoteAssist integration** (e.g., enabling "RemoteAssist on Mobile" in the Field Service settings) must be turned on, and the **mobile device's offline sync** must be configured. Without these settings, the app cannot establish a RemoteAssist session with the collaborator.

Why other options would be more suitable

Assigning **both Field Service and RemoteAssist licenses** to the technician and collaborator, **creating a proper Field Service Resource** (not just a bookable resource), **enabling RemoteAssist in the tenant**, and **configuring the mobile app with the RemoteAssist persona** would satisfy all prerequisite requirements. Those steps ensure licensing, feature activation, resource scheduling, security, and mobile offline capabilities are all in place.

Conclusion

Because the solution only assigns licenses and creates a generic bookable resource without enabling RemoteAssist, provisioning the correct resource type, or configuring the necessary mobile settings, it **does**

not meet the goal. Hence, the correct answer is **B – No**.

References

Dynamics365 Field Service – Remote Assist licensing requirements
Enable Remote Assist in Field Service
Create and configure Remote Assist collaborators
Configure mobile offline for Remote Assist

Question: 343 **Exam Heist**

Note: This question is part of a series of questions that present the same scenario. Each question in the series contains a unique solution that might meet the stated goals. Some question sets might have more than one correct solution, while others might not have a correct solution.

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You are a systems administrator for a company implementing Dynamics 365 Field Service and planning to enable Dynamics 365 Remote Assist for frontline technicians. You previously installed the Field Service app.

You need to confirm that all prerequisites are in place so that both technicians and remote collaborators can use Remote Assist integrated with Field Service.

Solution: You assign the remote collaborator a license to access Microsoft Teams. You assign both the technician and the remote collaborator Field Service licenses, and set them up as bookable resources of type User.

Does this meet the goal?

A. Yes
B. No

Answer: B

Explanation:

Justification

The objective is to have both frontline technicians and their remote collaborators use **Dynamics365 RemoteAssist** integrated with the Field Service app.
Remote collaborators require a **RemoteAssist** user license (or a Dynamics365 Field Service license that includes RemoteAssist) **and** the proper **RemoteAssist-specific setup** (e.g., assignment to the “Remote Collaborator” security role, Teams channel provisioning, and meeting policies).
Simply assigning a **Microsoft Teams** license and marking the collaborator as a **bookable resource of typeUser** does **not** grant the collaborator the RemoteAssist capabilities needed to join a session, share annotations, or receive work orders via RemoteAssist.
Moreover, Remote collaborators are **not** intended to be managed as bookable resources; they should be added through the **Remote Collaboration** feature set, which is separate from the bookable-resource model used for technicians.
Therefore, the proposed solution omits the essential RemoteAssist license and role configuration, so it **does not meet the goal**.

Answer: B – No

References

Dynamics365 Remote Assist licensing: https://learn.microsoft.com/dynamics365/remote-assist/license-remote-assist
Configure Remote Collaboration in Field Service: https://learn.microsoft.com/dynamics365/field-service/remote-collaboration-setup

Thank you

Thank you for being so interested in the premium exam material.
I'm glad to hear that you found it informative and helpful.

If you have any feedback or thoughts on the bumps, I would love to hear them.
Your insights can help me improve our writing and better understand our readers.

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Keep your head up, stay positive, and go show that exam what you're made of!

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