Dynamics 365 Fundamentals

MB-901 Exam Prep

about the instructor

A specialist in Dynamics 365, I create solutions using Dynamics, Power Platform and Azure. I have worked in professional services for almost all my career implementing over one hundred solutions. For the past ten years I have split my time between implementing systems and training; creating training courses, labs and delivering courses to thousands of students.

Julian Sharp

Agenda

Start	09:00
Break	10:30
Lunch	12:30
Break	14:30
Break	16:00
End	17:00

Resources

Microsoft Learn – have you been through the learning path?

https://docs.microsoft.com/learn/paths/dynamics-365-fundamentals/

Dynamics 365 Fundamentals

Identify Microsoft Platform Components
for Dynamics 365

Introduction

- Fundamentals Exam Overview
- Digital Transformation
- Business Apps
- Cloud

Fundamentals Exam Overview

MB-901 Dynamics 365 Fundamentals Exam

- Identify Microsoft Platform Components for Dynamics 365 (30-35%)
- Understand AI and Mixed Reality for Dynamics 365 (10-15%)
- Understand Customer Engagement apps (25-30%)
- Understand Dynamics 365 Finance and Operations apps (25-30%)

Exam MB-901: Microsoft Dynamics 365 Fundamentals (beta)
Languages: English
Retirement date: none

This exam measures your ability to identify Microsoft platform components for Dynamics 365; understand AI and mixed reality for Dynamics 365; understand customer engagement apps; and understand Dynamics 365 Finance and Operations apps.

Schedule exam ›

https://docs.microsoft.com/learn/certifications/exams/mb-901

MB-901 Dynamics 365 Fundamentals Exam

- Questions ~ 40-50
- Time – 85 minutes – 60 minutes for questions
- Multiple Types of questions
- No Case Studies ☺
- No Performance Based Labs
- Cost $99

http://bit.ly/mscertquestionformat

Digital Transformation

Digital Transformation

"Dynamics 365 business applications empower organisations to <u>digitally transform</u> their organisations and remove the complexity of dissimilar CRM and ERP systems by creating modern, modular business applications that work together on a single platform, giving organisations the flexibility to adopt technology when they need it to improve business outcomes."

Digital Transformation

Digital Transformation
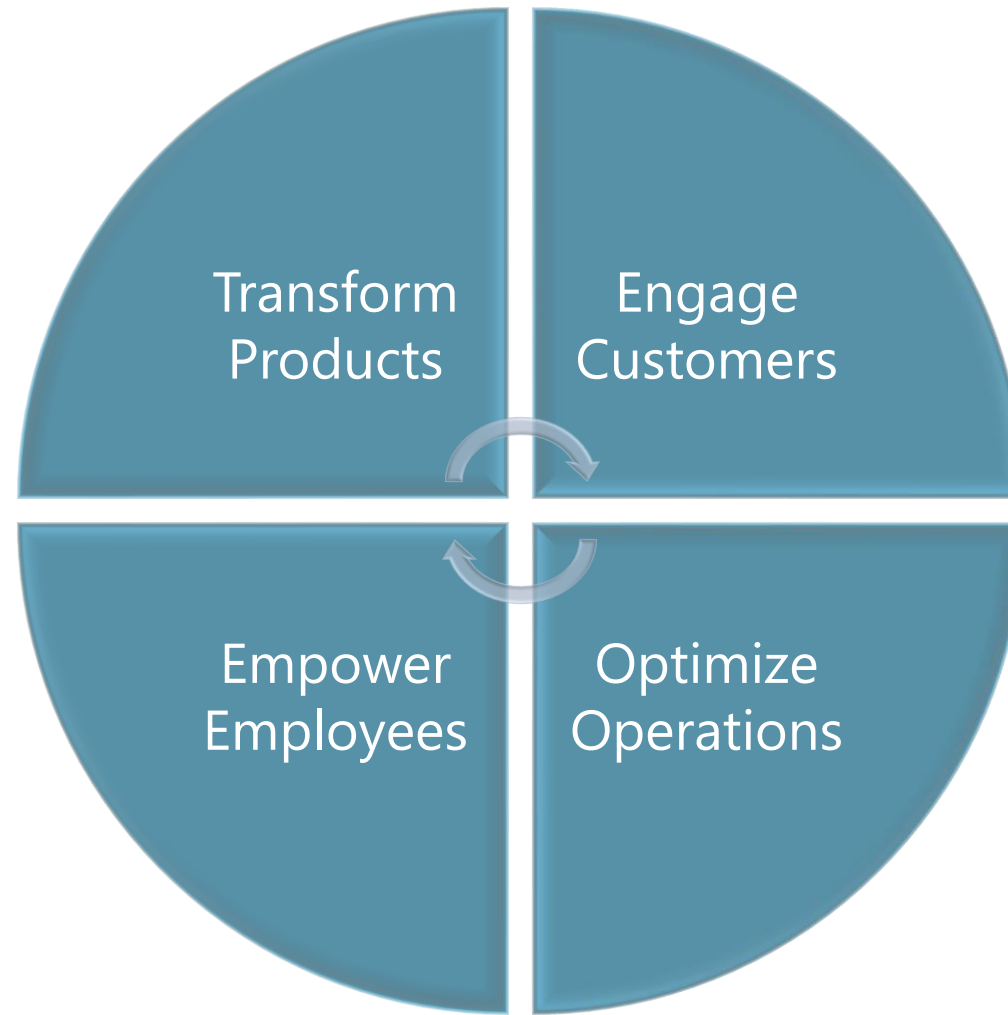
Data → Insights → Action

Business Apps

Business Apps

Model-Driven Apps

Finance and Operations Apps

Add-on Apps

AI Apps

Mixed Reality Apps

Business Apps

Omnichannel applications

Intelligent services

Integrated cloud platform

Flexible solutions

Cloud

What is the Cloud?

"Cloud computing is a model for enabling ubiquitous, convenient, on-demand network access to a shared pool of configurable computing resources (e.g., network, servers, storage, applications and services) that can be rapidly provisioned and released with minimal management effort or service provider interaction."

National Institute of Standards and Technology (NIST)

What is the Cloud?

Characteristics
- On-Demand
- Self Service
- Pay-As-You-Go
- Metered Billing

Cloud Service Types
- IaaS
- PaaS
- SaaS

Cloud Deployment Models
- Public
- Private
- Hybrid

Cloud Characteristics

| Cost effective | Scalable | Elastic | Current | Reliable | Secure | Global |

Cloud Types

IaaS
Infrastructure-as-a-Service

PaaS
Platform-as-a-Service

SaaS
Software-as-a-Service

IaaS

Computing Infrastructure provisioned over the internet

Virtual Machines (Compute), Storage, and Networking

Scale up and down as necessary

You manage the OS and backup/recovery

PaaS

Environment with resources managed over the internet

Combine resources to deliver services

Scale up and down as necessary

You don't touch the OS – managed by Microsoft

SaaS

Complete Cloud Application

You just manage the data

Per User Per Month

Cloud Models

Public
Cloud

Private
Cloud

Hybrid
Cloud

Public Cloud

- Most common
- No local hardware to manage
- Save costs by sharing resources with other cloud users
- Advantages
  - Highly scalable
  - Pay-as-you-go
  - No hardware maintenance
- Considerations
  - Security
  - Compliance
  - Legacy Applications

Private Cloud

- Cloud environment in your data centre
- Advantages
  - Complete control over resources and security
- Disadvantages
  - Must purchase and maintain hardware
  - Requires skilled IT personnel
- Considerations
  - CapEx
  - Agility
  - Maintenance
  - Skills

Hybrid Cloud

- Combines public and private clouds
- Run applications in the most appropriate location
  - Web applications can run on a public cloud
  - Secure databases can be hosted on your private cloud
- Advantages
  - You can keep systems running on out-of-date hardware
  - Flexibility on running locally vs in the cloud
  - Can use Public Cloud for peak load
- Disadvantages
  - May be more expensive
  - More complicated to set up and manage
- Considerations
  - CapEx
  - Cost
  - Skills
  - Management

Knowledge Check

Several web applications have been developed by your organization. The web applications allow users to enter details in a form and those details are emailed to a shared mailbox. The form is accessible from the internet and can be accessed anonymously.

Which cloud service type would best match this situation?

Answer

PaaS (Platform-as-a-Service)

Because the web applications are publicly accessible and do not require authentication, a PaaS service that allows web sites to be hosted without having to manage servers is the best option.

Knowledge Check

A server is needed for a short term project. The server is not required once the project has finished.

Your organization does not have any spare hardware that meets the performance requirements or any available staff to deploy it.

Which cloud deployment model would best match this situation?

Answer

Public Cloud

Because the server is only needed for a short time, the public cloud is the best option.

What is Azure?

- Azure is Microsoft's Cloud Platform
- Global Infrastructure
- Organised by Regions
- Each Region has multiple data centres
- Each Data Centre has multiple fault and update zones
- 100+ Services

Microsoft Trusted Cloud
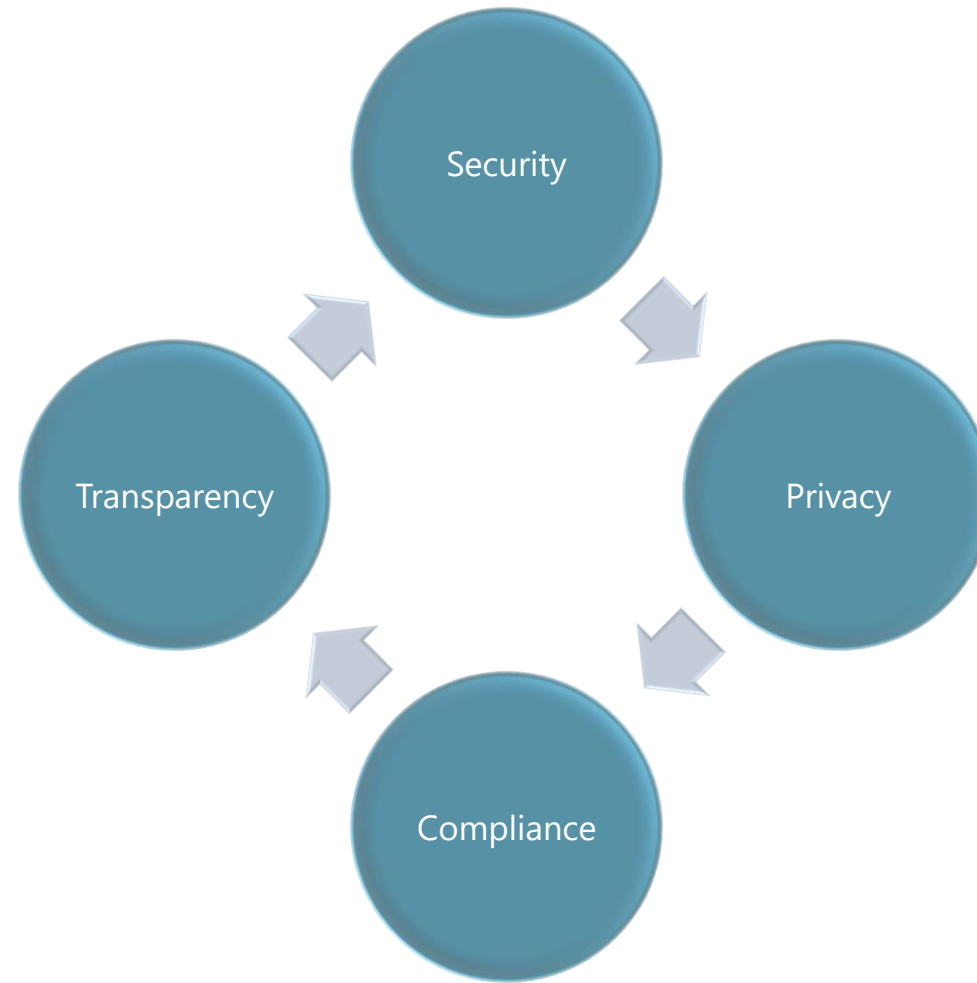
Summary

- Fundamentals Exam Overview
- Digital Transformation
- Business Apps
- Cloud

Dynamics 365 Fundamentals

Understand Customer Engagement apps

Introduction

- Sales
- Relationship Selling
- Marketing
- Customer Service
- Field Service
- Add-on functionality

Sales

Sales Enterprise

Sales force automation (SFA)

Relationships

Actionable insights

Communication

Collaboration using Office 365
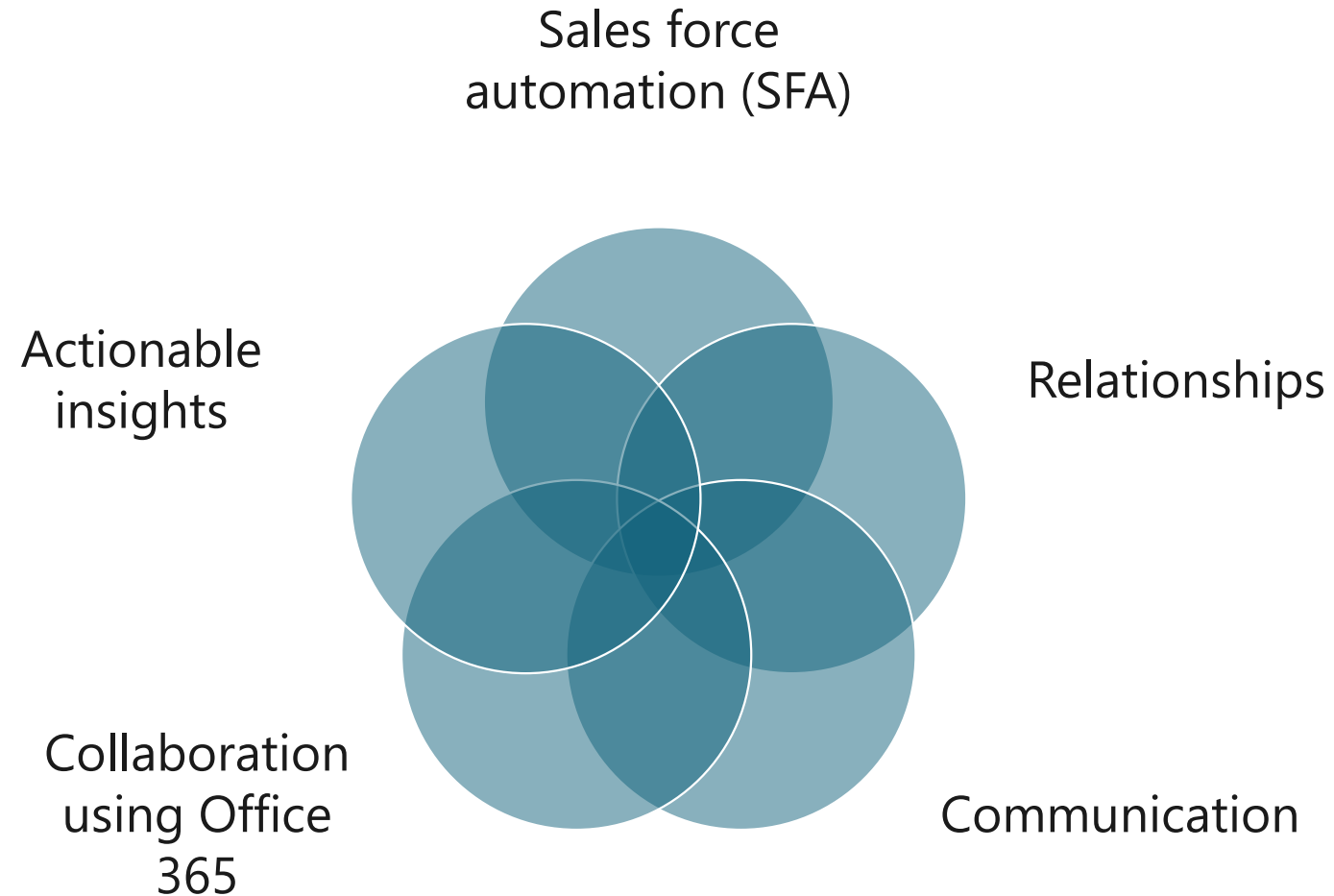
Sales Enterprise Key Functionality

| Accounts and Contacts | Leads | Opportunities | Product Catalog | Quotes, Orders, Invoices | Goals | Playbooks | Embedded Intelligence |

Sales Enterprise

Needs to restock their supply of Product SKU AX305; will purchase at least 25-50 (sample)
Opportunity · Opportunity ⌄

20/01/2020	£25,000.00	In Progress	Julian Sharp	⌄
Est. Close Date	Est. Revenue	Status	Owner	

Opportunity Sales Process
Active for 43 hours ‹

○ Qualify (43 Hrs) ──── ○ Develop ──── ○ Propose ──── ○ Close

Summary   Product line items   Q...

Active for 43 hours   ⤢ ✕

Topic	✓ Identify Contact	🔲 **Sidney Hig...**
Needs to restock their supply of Pro	✓ Identify Account	🔲 **Blue Yonde...**
Contact	Purchase Timeframe	---
🔲 **Sidney Higa (sample)**	✓ Estimated Budget	£16,000.00
Account	✓ Purchase Process	**Committee**
🔲 **Blue Yonder ...**	✓ Identify Decision Maker	☑ completed
Purchase Timeframe	Capture Summary	---

Currency		
💰 **Pound Sterling**	**Next Stage** ›	

+ ▽ ...

📎

restock th   22/10/2019 💬 ⚙
an Sharp for Account Blue...
an Sharp for Account Blue...

Relationship Assistant

ⓘ There are currently no insights.

Stakeholders ...

	✓	Name	↑	Rc 💾
		Sidney Higa (sample)		Stakel

◄ ━━━━━ ►
|◄ ← Page 1 →

Budget Amount
£16,000.00

Purchase Process
Committee

Description

Sales team ...

	✓	Name	↑	Rc 💾

Sales Professional

Small and Medium Business

SMB focus app

Simpler Sales Needs

Simplified First Run Experience

Simplified Administration

Missing / Restrictions

AI/Insights

Competitors

Territories

Goals

Playbooks

Add-on functionality

15 custom entities

Microsoft Dynamics 365

Hello Julian Sharp
Welcome to Sales Professional!

Set up

Explore with sample data

Learn more about Sales Professional
▷ Check out our Youtube channel
▷ Take our guided tour

DEMO

Dynamics 365 Sales Professional

Relationship Selling

Relationship Sales

Dynamics 365 Sales Enterprise

LinkedIn Sales Navigator

LinkedIn data in Sales

Contact

Company

Activity data

Summary   LinkedIn lead info   Details   LinkedIn Member Profile   **LinkedIn Company Profile**   Files   Related

LinkedIn Sales Navigator Controls

LinkedIn Sales Navigator Lead (member profile)

LinkedIn Lead Lookup Control

LinkedIn Sales Navigator Account (company profile)

LinkedIn Account Lookup Control

LinkedIn Lead Gen Forms

Requires LinkedIn Campaign Manager

Install from AppSource

Capture Lead Data

Lead Matching Strategy

Social Selling

Social Engagement

- Social Media
- Search Topics
- Monitor and Analyse
- Engage
- Discontinued

Social Selling Assistant

- Connects to Social Engagement
- Install from AppSource
- Share Content
- Discontinued

Social Selling

Insights from InsideView

- Insights on Accounts, Contacts and Leads
- Install from AppSource
- Discontinued – extended to 2023

Versium Predict

- Analytics on Accounts, Contacts and Leads
- Install from AppSource
- Discontinued – extended to 2023

Marketing

Marketing

- B2B Marketing
- Run Campaigns
- Track Responses
- Generate Leads for Sales

Marketing Key Functionality

| Lead Scoring | Marketing Emails | Marketing Pages | Customer Journeys | Segmentation | Events | LinkedIn integration |

Marketing

- Customise Marketing Emails and Landing Pages
- Segment Customers
- Automate with Customer Journeys
- Generate Leads
- Prioritise with Lead Scoring
  - Sales Ready
- Create and execute Events

DEMO

Dynamics 365 Marketing

Adobe Marketing

- Analytics Cloud
- Experience Cloud
- Marketing Cloud

Customer Service
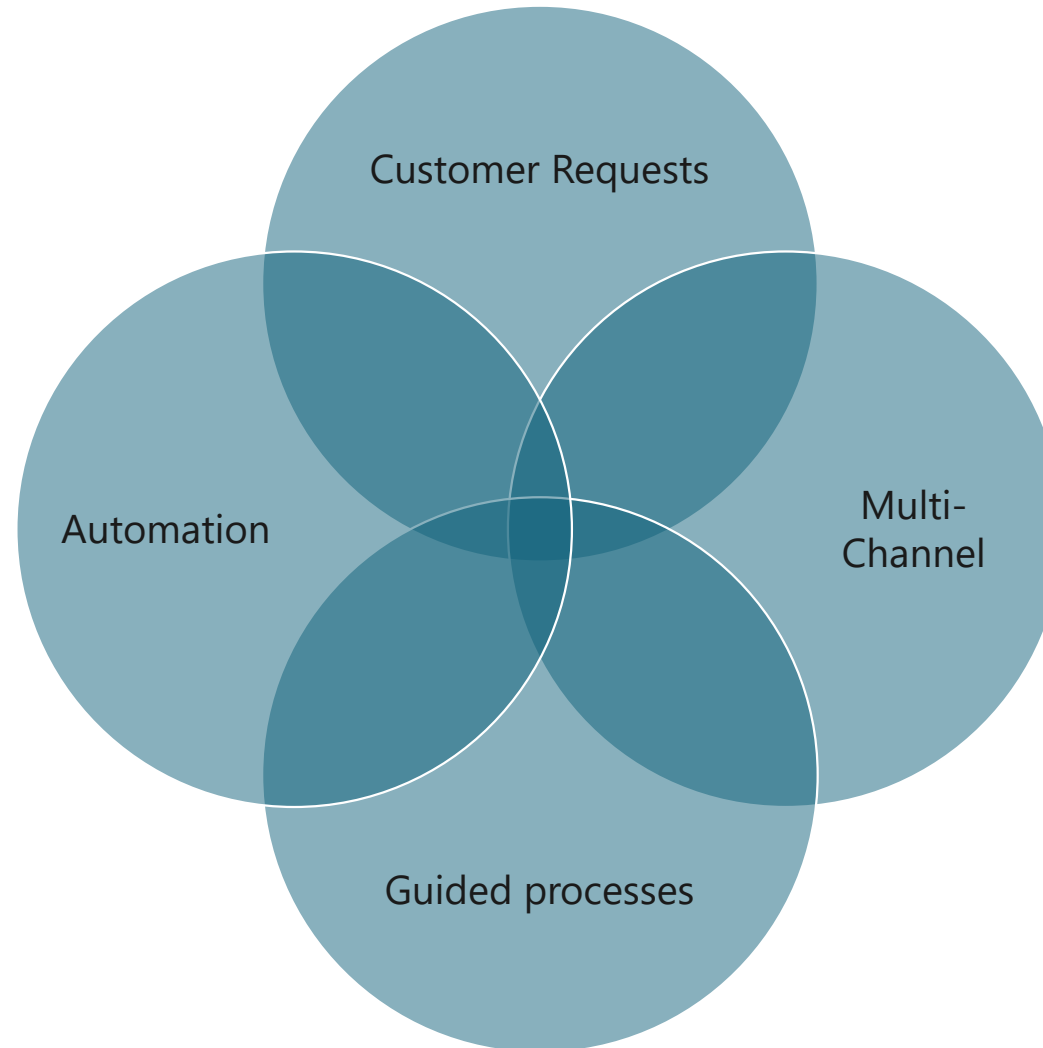
Customer Service

Customer Service Key Functionality

Cases

Queues

SLAs

Entitlements

Knowledge Base

Omni-Channel

Interactive Dashboards
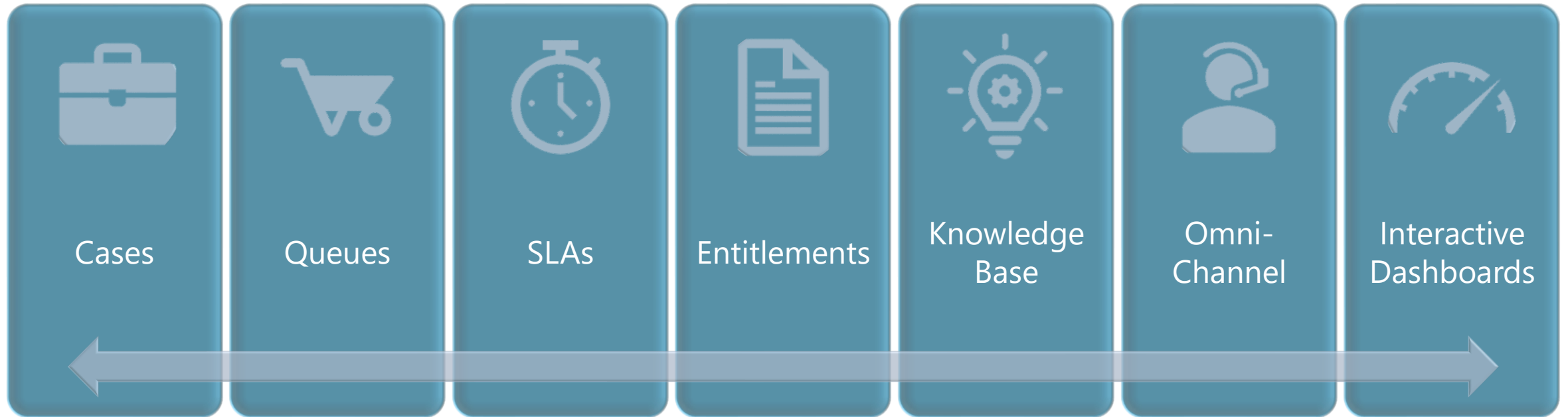
Customer Service

- Case Creation
  - Manual
  - Auto-Creation
- Move to queues
  - Manual
  - Routing Rules
- Utilise Knowledge Base
- Resolve Cases

Customer Service

Show Global Filter   + New ∨   ✓ Set As Default   ⟳ Refresh All

Tier 2 Dashboard ∨

This Quarter 01/10/2019 To 31/12/2019

Cases by Priority

1   14

H   L   Norm

Cases By Product

(blank) (33)

Active Cases

Filtered

🔧 33 ↓   Modified On ∨

| Normal | Problem | Web | Julian Sharp | ⋯ |

FS   Field Service Demo

In Progress ∨

| Normal | Problem | Phone | Julian Sharp | ⋯ |

Other Queues and Views

View   ⋯

33
My Active Cases
Filtered

View   ⋯

0
My Resolved Cases

Navigation sidebar

My Work
- Dashboards
- Activities

Customers
- Accounts
- Contacts
- Social Profiles

Service
- Cases
- Queues
- Knowledge Articles

Home
Recent
Pinned

S Service

Customer Service

- Omni-channel Engagement Hub
- Channel Integration Framework
- Self-Service
- Channels
- Bots
- Chat
- Transcript
- Transfer

DEMO

Dynamics 365 Customer Service

Field Service

Field Service

- Deliver Remote Service
- Resources
- Scheduling
- Right Resource, Right Place, Right Time, Right Skills, Right Parts

Field Service Key Functionality
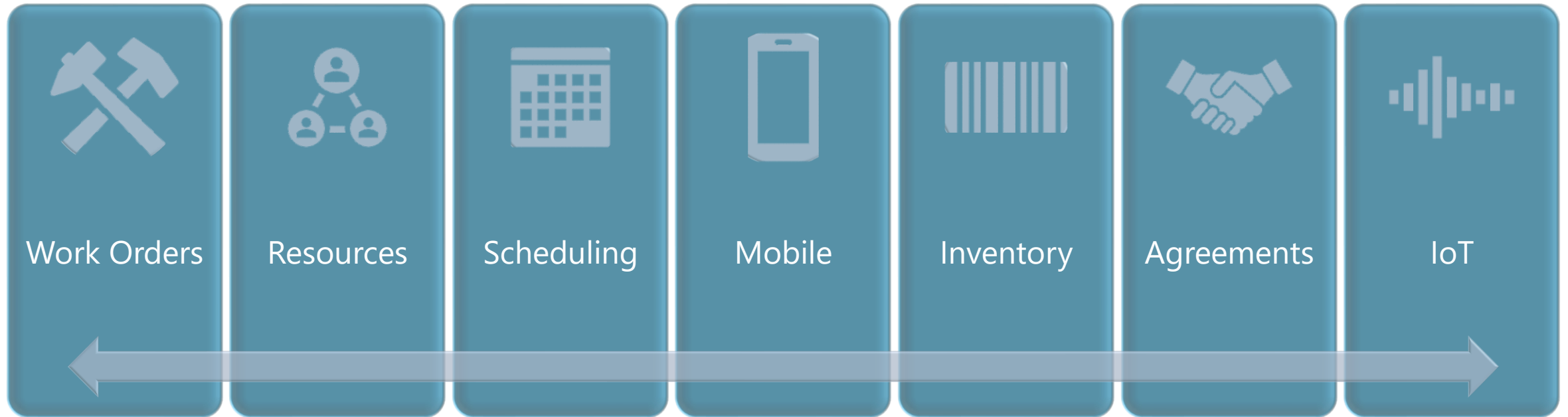
Field Service

- Schedule resources
- Dispatch resources
- Schedule based on role or skill
- Schedule manually or automatically with Resource Schedule Optimization (RSO)
- Enable custom entities for Universal Resource Scheduling (URS)
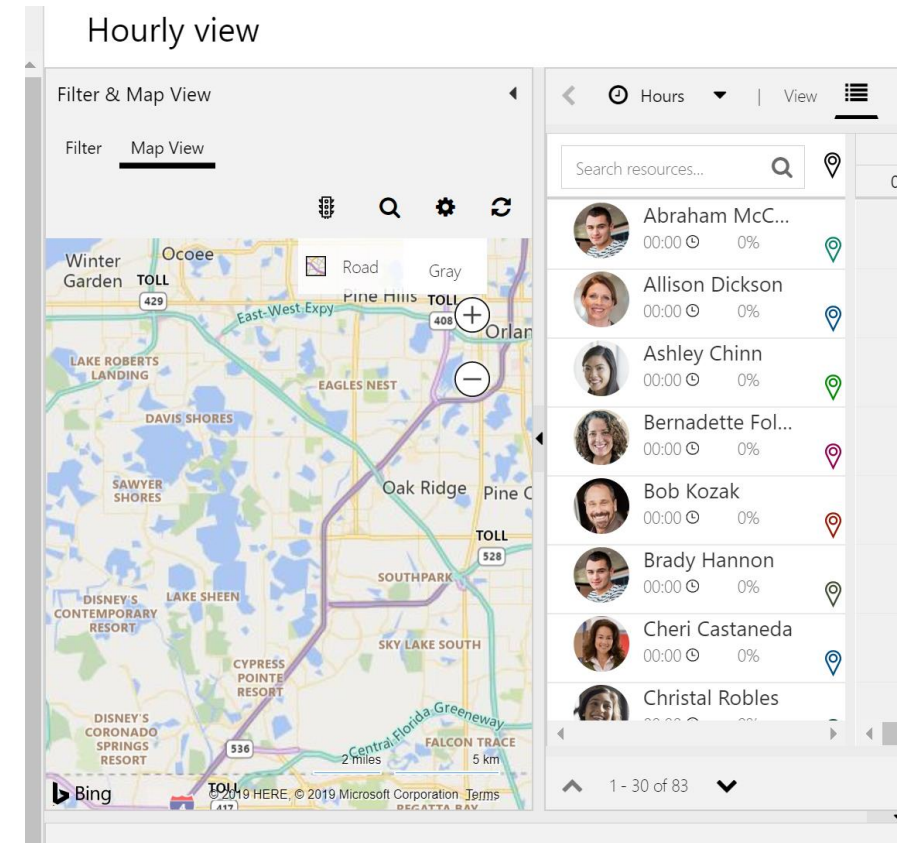
DEMO

Dynamics 365 Field Service

Project Services Automation

- Selling Projects
- Managing Projects
- Resources
- Billing
- Forecasting

Project Services Automation Key Functionality

| Sales Contracts | Projects | Resources | Scheduling | Time | Expenses | Billing |
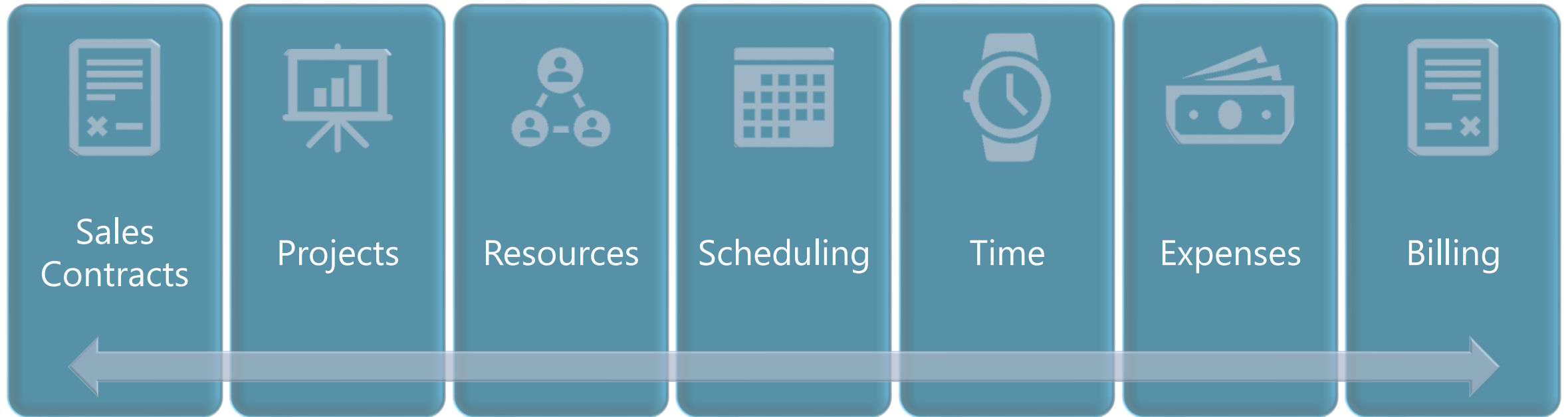
Project Services Automation

- Create and Manage Projects

- Optimize resources across projects

- Manage Time and Expenses

- Forecast

Which Dynamics 365 App enabling users to find the right people to market to, and to build strong relationships with them from the beginning?

Answer

Dynamics 365 Relationship Sales

Add-On Functionality

Voice of the Customer

Surveys

Feedback
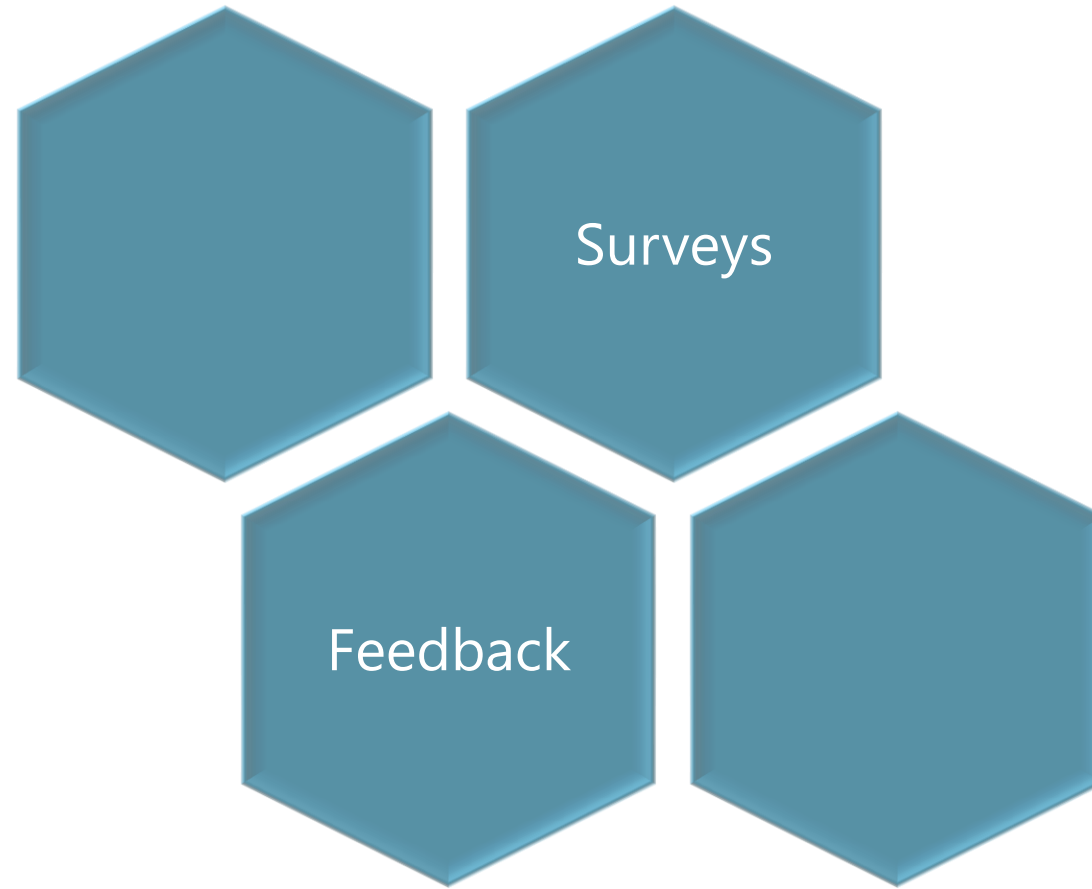
Being replaced by Forms Pro

Forms Pro

- Surveys
- Seamless integration
- Real-time insights

Portal

Web interface for customers and partners

Display data from Common Data Service

Runs in Azure

Gamification

Keep employees engaged

Create KPIs

Setup Games

Import Players

Install from AppSource
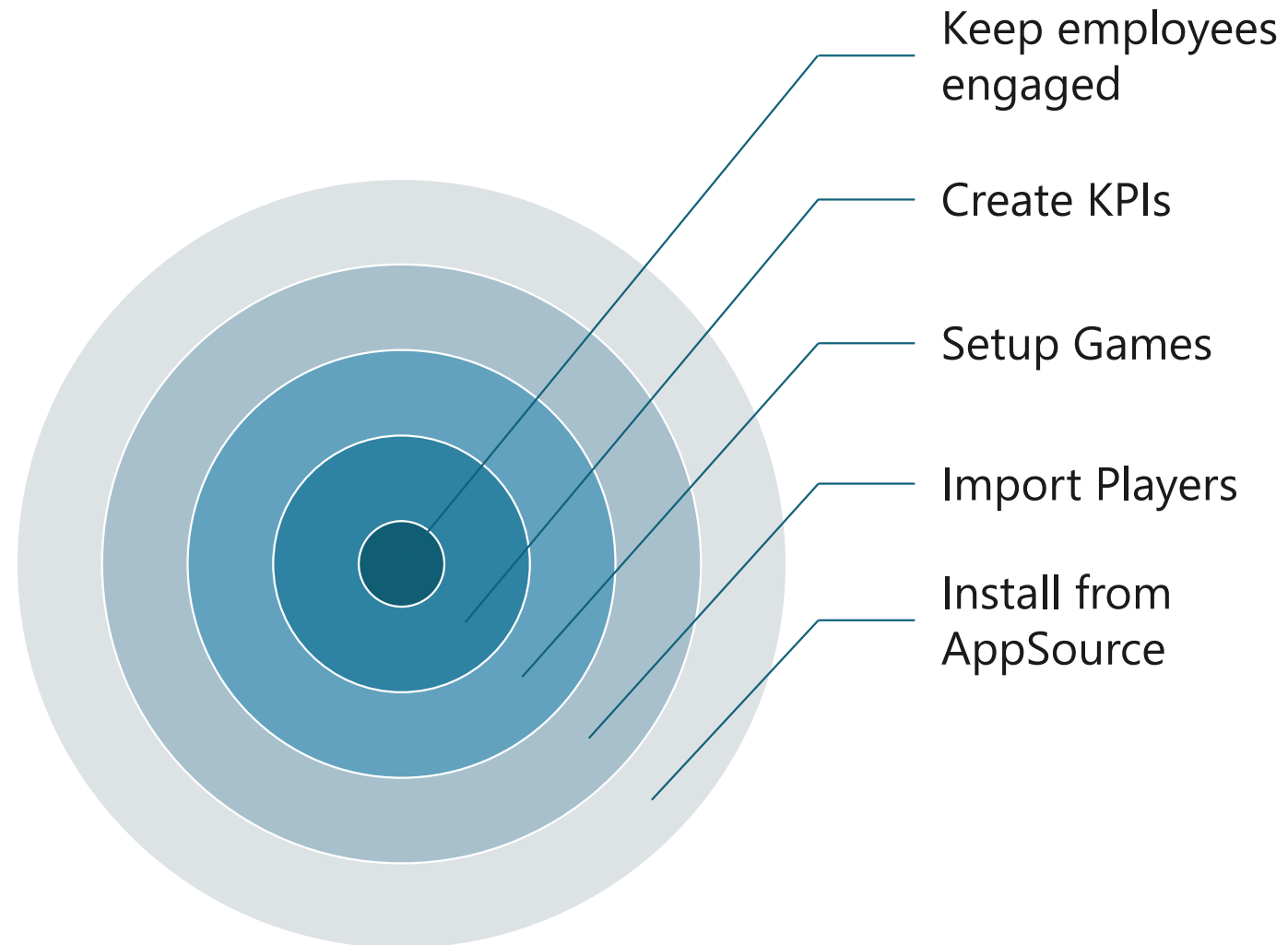
Mobile

Mobile App for Model-Driven Apps

- Android
- iOS
- Windows

Unified Interface

Offline support

Field Service Mobile

Specialised Mobile App for Field Service

- Android
- iOS
- Windows

Optimised for Field Technicians

GPS and other device capabilities

Offline Sync

Push Notifications

Summary

- Sales
- Relationship Selling
- Marketing
- Customer Service
- Field Service
- Add-on functionality

Dynamics 365 Fundamentals

Understand Dynamics 365
Finance and Operations apps

Introduction

- Finance
- Supply Chain Management
- Human Resources
- Retail
- Business Central

Finance and Operations

Finance

Finance

| Budget & Forecast | General Ledger | Invoicing and billing | Accounts Payable | Accounts Receivable | Cash and Bank Management | Cost Accounting | Fixed Assets | Project Accounting | Consolidation and Reporting |
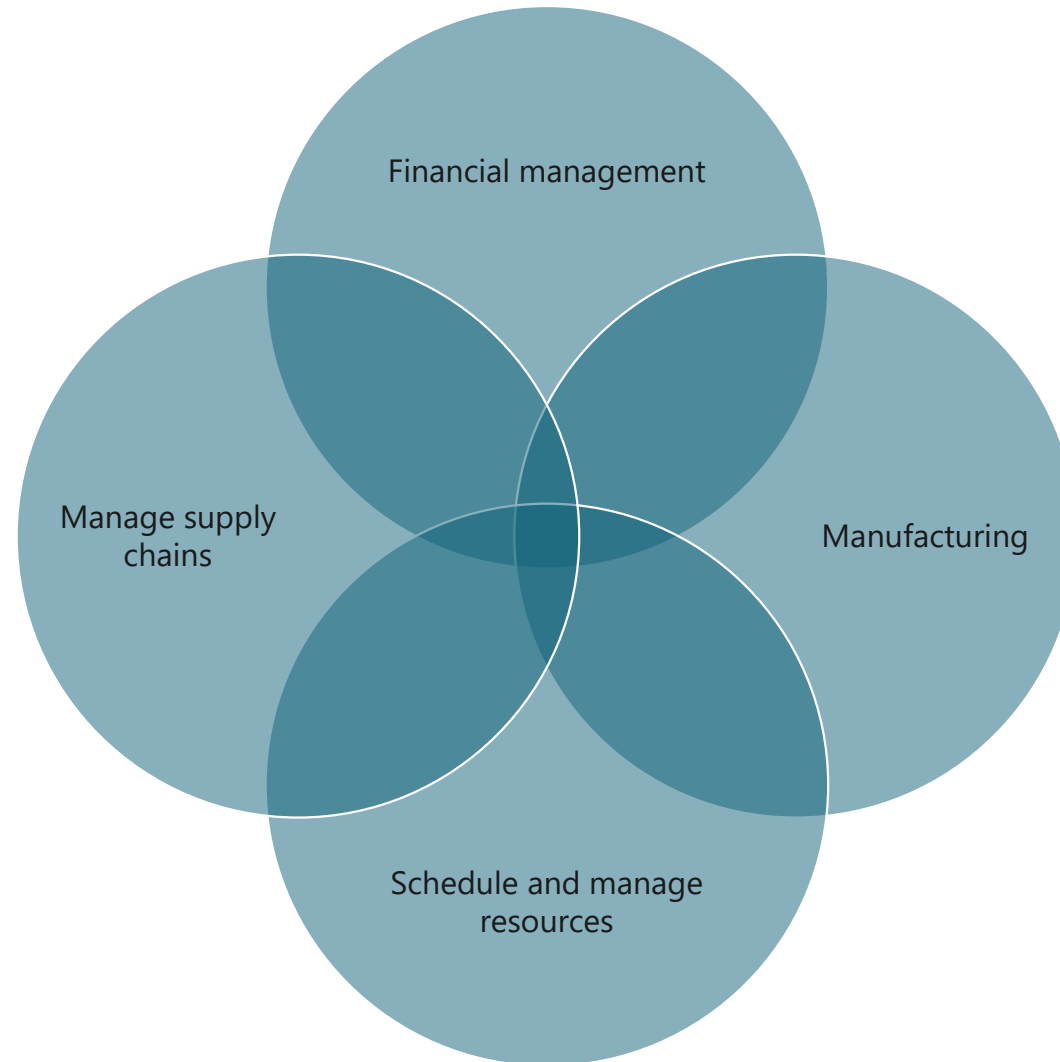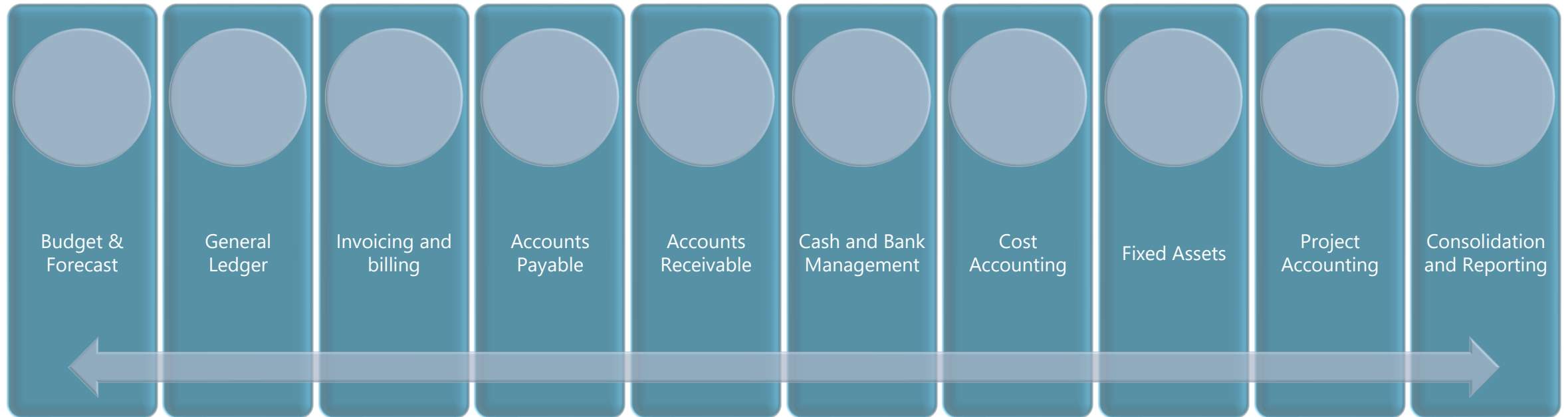
Finance

General Ledger
- Chart of Accounts
- Fiscal Calendars
- Financial Dimensions
- Financial Records
- Fiscal Periods

Accounts Payable
- Vendors
- Purchase Orders
- Pay Suppliers

Accounts Receivable
- Customer Invoices
- Credit Control
- Collections

Asset Management
- Acquisition
- Valuation
- Depreciation
- Disposal

Finance

Project Accounting

- Plan
- Quote
- Manage
- Invoice

Budgeting

- Resource planning
- Budget Models
- Plans and Forecasts
- Quarterly / Annually

Real-time cash flow visibility

- Cash flow
- Insight
- Forecasts

Global attributes

- Languages
- Currencies
- Jurisdictions
- Compliance

Global working

Local regulations	Global regulations (IFRS, SOX)	Exchange rates	Currency Types	Paired Currencies	Currency gender

Currency Types:
- Accounting
- Reporting
- Triangulation
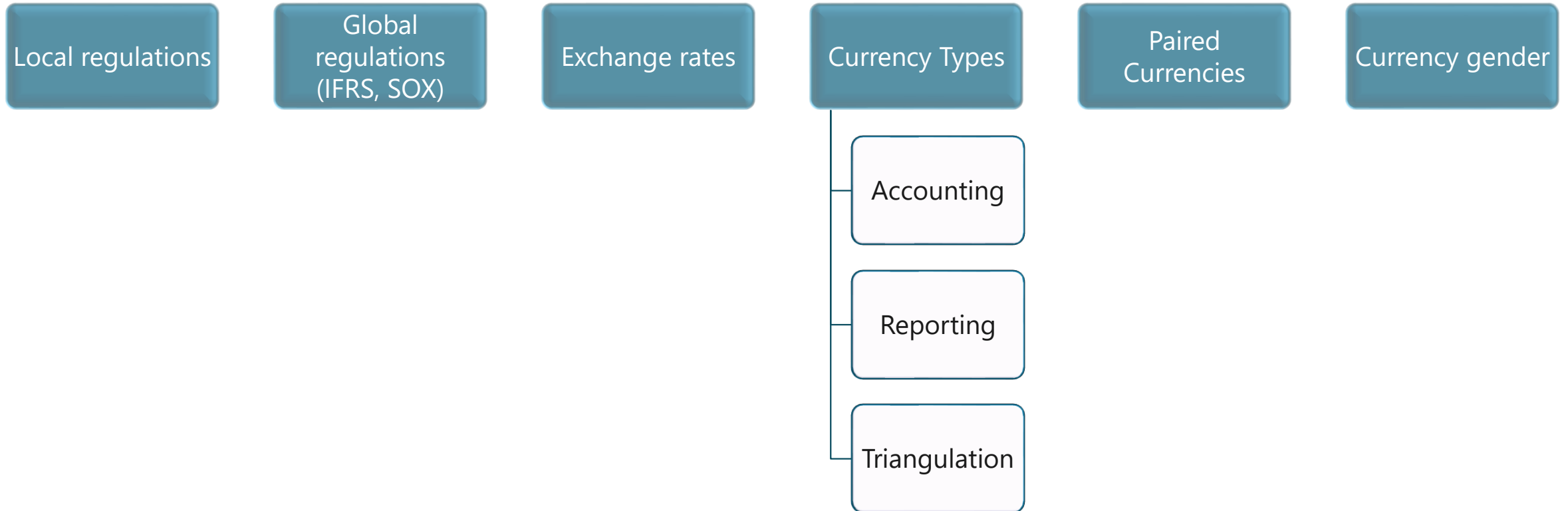
DEMO

Dynamics 365 Finance

Which functionality of Finance is used to monitor vendors and determine discounts?

Answer

Accounts Payable

Supply Chain Management

Supply Chain

| Procurement | Scheduling | Inbound Logistics | Quality Management | Outbound Logistics | Returns |

Manufacturing

| Materials Requirement Planning | Capacity Requirement Planning | Work Order Management | Production Control | Shop Floor Control |

Products

Master planning
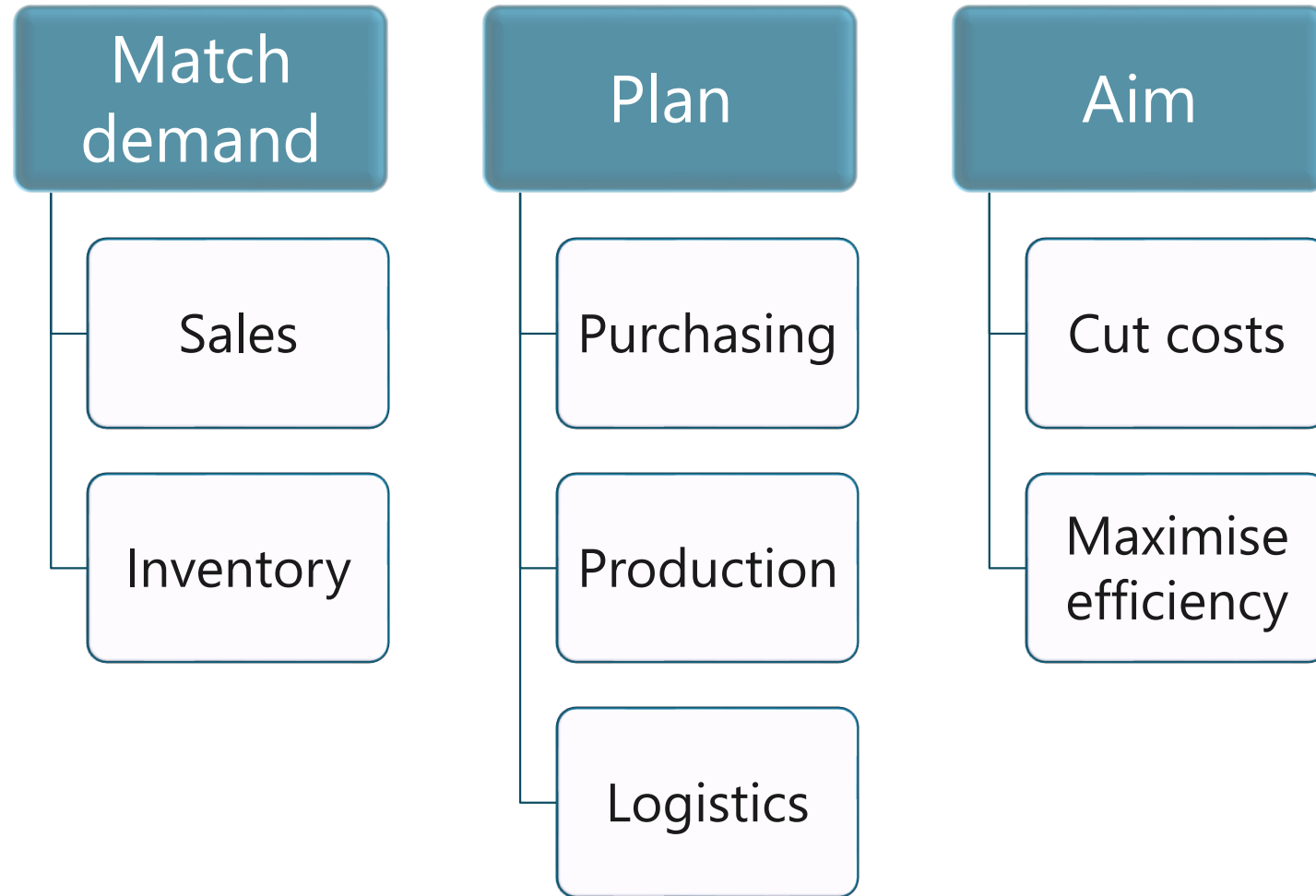
Asset Management

Schedule maintenance

Work Orders

IoT

Mixed Reality

Manufacturing

Discrete

Process

Lean

Unified

DEMO

Dynamics 365 Supply Chain Management

Human Resources

Human Resources

Employee self-service
- Employee profiles
- Self-Service portal

Personnel management
- Skill gap analysis
- Leave and absence

Benefit management
- Benefits
- Compensation

Employee development
- Careers and Goals
- Training Courses

DEMO

Dynamics 365 Human Resources

Commerce

Commerce
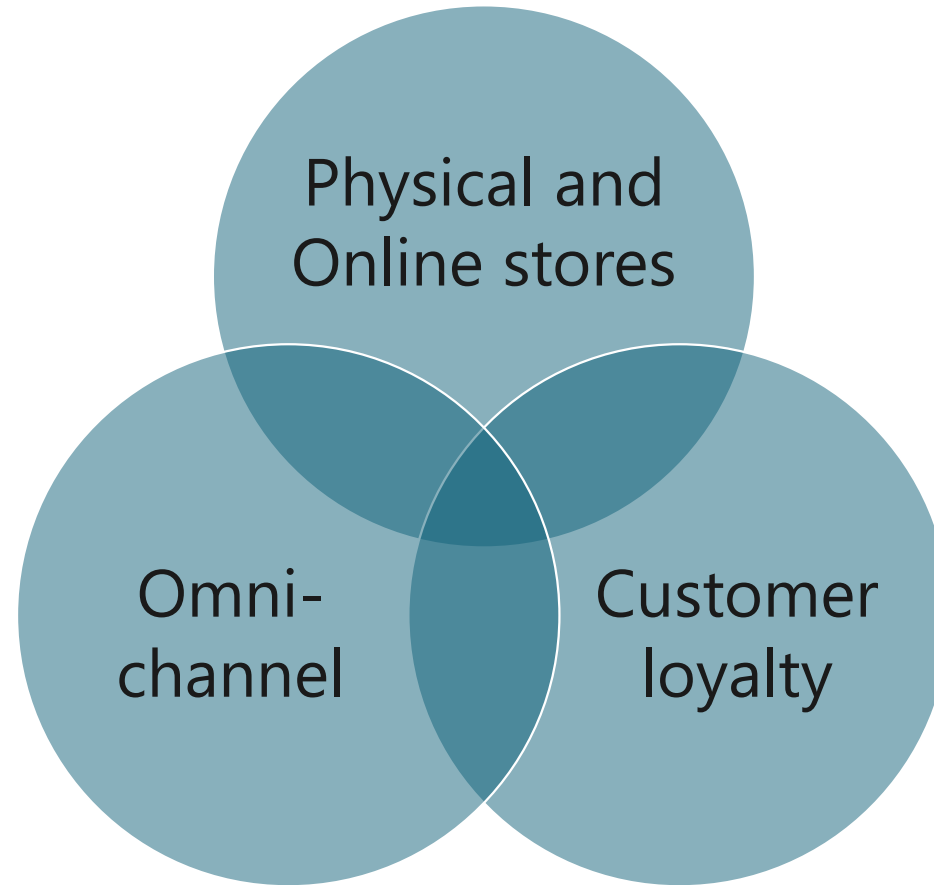
Commerce

- Headquarters Management
- Store Management
- Point-of-Sale
- Omni-Channel Commerce
- Merchandise Management
- Customer Loyalty
- Replenishment Management
- Store Transactions
- Customer Shopping Experiences

Business Central

Business Central

- Solution for small- to mid-size organisations
- All-in-one business management application

Business Central

Financials   Budgets   Projects   Reporting   Compliance   Supply chain   Manufacturing
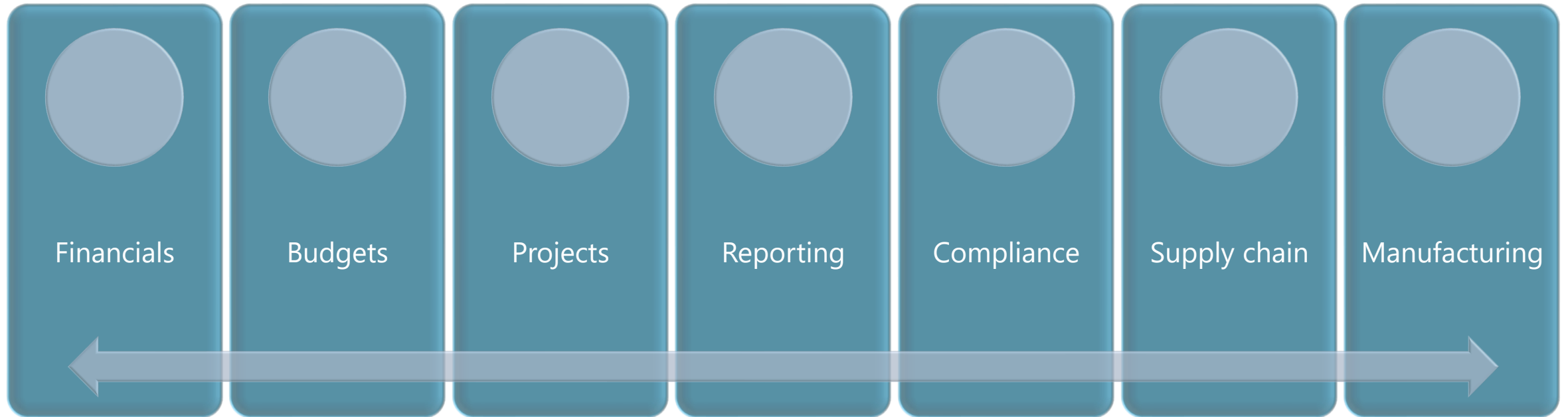
DEMO

Dynamics Business Central

When to choose Finance not Business Central

- More than a few hundred users
- Advanced functional separation and process complexity
- Consolidation of intra-company transactions across geographies
- Sarbanes-Oxley compliance
- Country or Region specific regulatory compliance requirements
- Deal with Microsoft directly and not with a Partner

Which Dynamics 365 App is an all-in-one solution for managing your business operations?

Answer

Business Central

Summary

- Finance
- Supply Chain Management
- Human Resources
- Retail
- Business Central

Dynamics 365 Fundamentals

Understand AI and Mixed Reality
for Dynamics 365

Introduction

- AI Apps
- Mixed Reality Apps

AI Apps

AI Apps

Relationship insights

Sales insights

Customer insights

Customer Service insights

Market insights

Product insights

Fraud protection
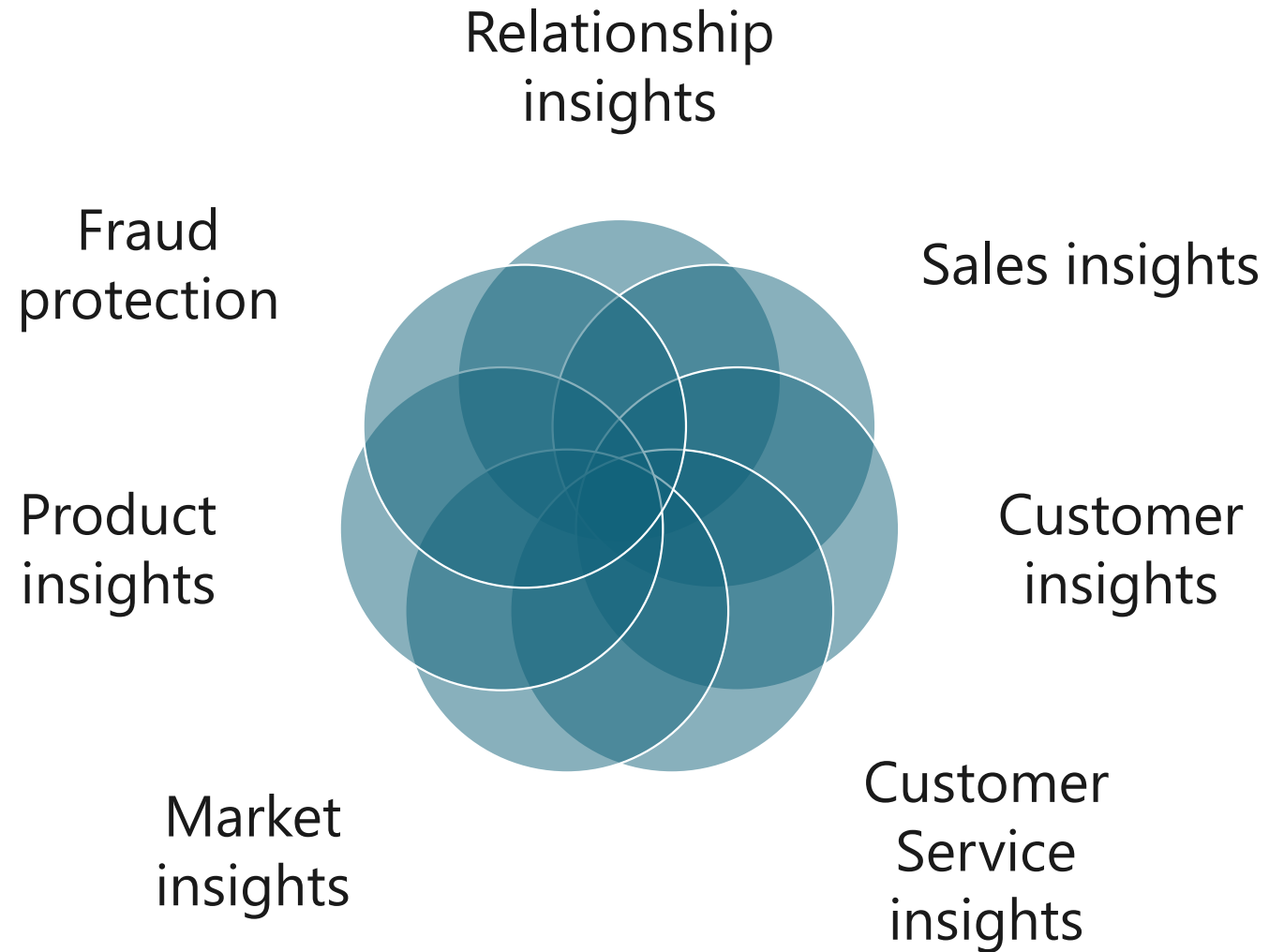
Embedded AI

Sales Enterprise
- Free Sales Insights
- Product recommendations

Supply Chain Management
- Demand forecasting

Business Central
- Cash flow forecasting
- Sales and Inventory forecasting
- Late payment prediction

AI for Sales

Free Sales Insights

- Assistant
- Email engagement
- Auto capture

AI for Sales

Advanced Sales Insights

- Assistant Studio
- Relationship analytics
- Predictive lead scoring
- Predictive opportunity scoring
- Notes analysis
- Talking points
- Who knows whom
- Assistant for Teams

AI for Sales

Sales Insights App

- Business report
- Team report
- Call intelligence

AI for Dynamics 365

Customer Insights

- Customers
- Segmentation
- Measures

AI for Customer Service

Customer Service Insights

- KPIs
- Case volumes
- Case resolutions
- Topic trends
- Customer Satisfaction

AI for Customer Service

Virtual Agent for Customer Service

- Conversational Bots
- WYSIWYG interface
- AI driven dialogs

AI for Dynamics 365

Market Insights

- Web, News and Browse data
- Customers, Products, Competitors
- Sales, Marketing, Service, Finance

Fraud Protection

- Payment fraud
- E-commerce

AI for Commerce

Connected Store

- Real-Time data
- Cameras
- IoT

AI for Supply Chain Management

Product insights

- Devices
- Websites
- Cloud services
- Mobile apps

AI Builder

- AI for CDS
- Model Types
- Pre-Built Models

Enhance your business with AI

Add intelligence to your business. Create tailored AI models to automate processes and find insights. Learn more

Refine a model for your business needs

Form Processing (preview)
Read and save information from standard documents.

Object Detection (preview)
Recognize and count things in images.

Prediction
Predict whether something will happen.

Get straight to productivity

Business Card Reader
Automatically process business card information

Key Phrase Extraction (preview)
Extract the key talking points from text

Language Detection (preview)
Identify the language being used in text

Sentiment Analysis (preview)
Analyze positive/negative sentiment in text

Text Recognizer (preview)
Automatically process text from images

Which app creates a Common Data Platform for use by multiple Dynamics 365 apps?

Answer

Dynamics 365 Customer Insights

Mixed Reality Apps

Mixed Reality

Augmented Reality

Digital content placed in the physical world

Holographic devices e.g., HoloLens

Virtual Reality

Blocks physical world and replaces with a digital experience

Immersive devices

Mixed Reality Apps

Remote Assist	Guides	Product Visualize	Layout
Field Service	Field Service	Sales	SCM
SCM	HR		
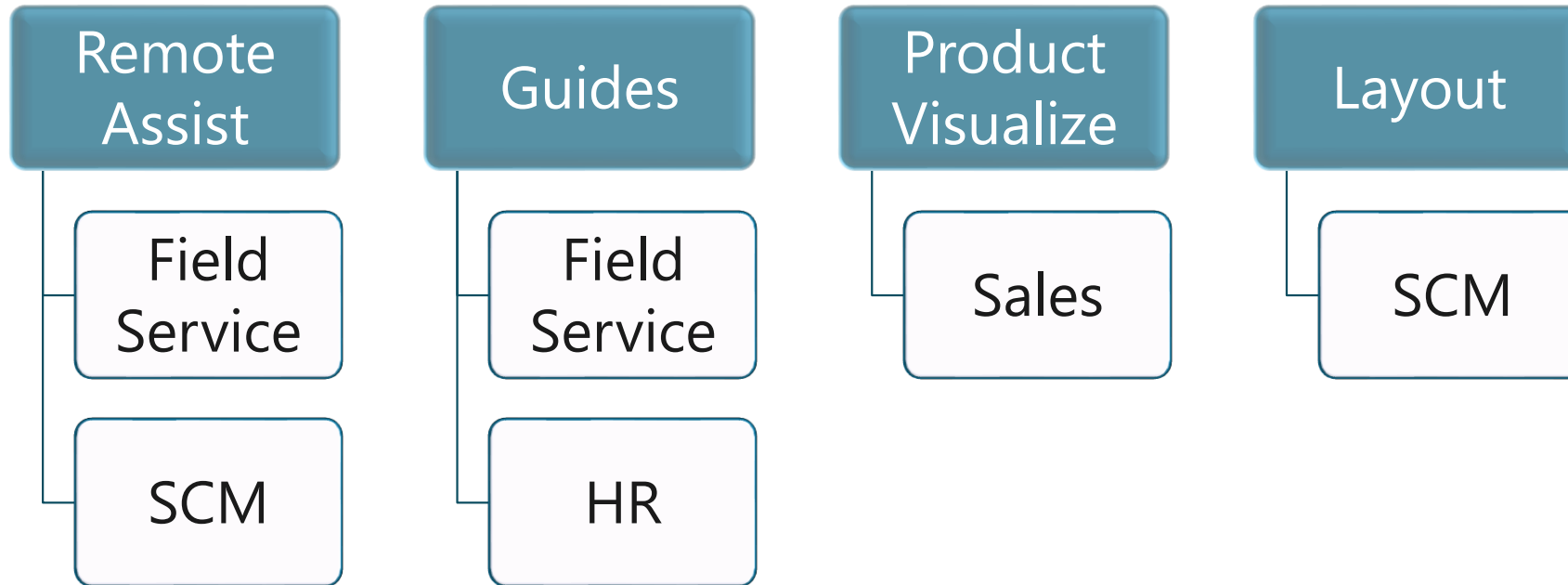
Which mixed reality app reduces the skills needed to complete work?

Answer

Remote Assist

Summary

- AI Apps
- Mixed Reality Apps

Dynamics 365 Fundamentals

Identify Microsoft Platform Components
for Dynamics 365

Introduction

- GDPR
- Cloud Deployment
- Integration
- Security
- Power Platform
- Reporting
- Resources

GDPR

Privacy and Data Protection Requirements

- Requiring the <u>consent</u> of subjects for data processing
- <u>Anonymising</u> collected data to protect privacy
- Providing <u>data breach</u> notifications
- <u>Safely handling</u> the transfer of data across borders
- Appoint a <u>data protection officer</u> to oversee GDPR compliance

GDPR

- White papers on Dynamics 365 and GDPR considerations
  - https://docs.microsoft.com/dynamics365/get-started/gdpr/
- Compliance Manager in the Service Trust Portal
  - https://servicetrust.microsoft.com/ComplianceManager

DEMO

Compliance Manager

Evaluating for GDPR

GDPR and Model-Driven Apps

Discover → Advanced Find → Quick Find → Categorised Search → Relevance Search

Data Classification → Customisation of Fields, Forms and Views → Contact Preferences → GDPR Opt-Out on Contact

Manage → Export using Excel → Portal

Protect → Security → Auditing
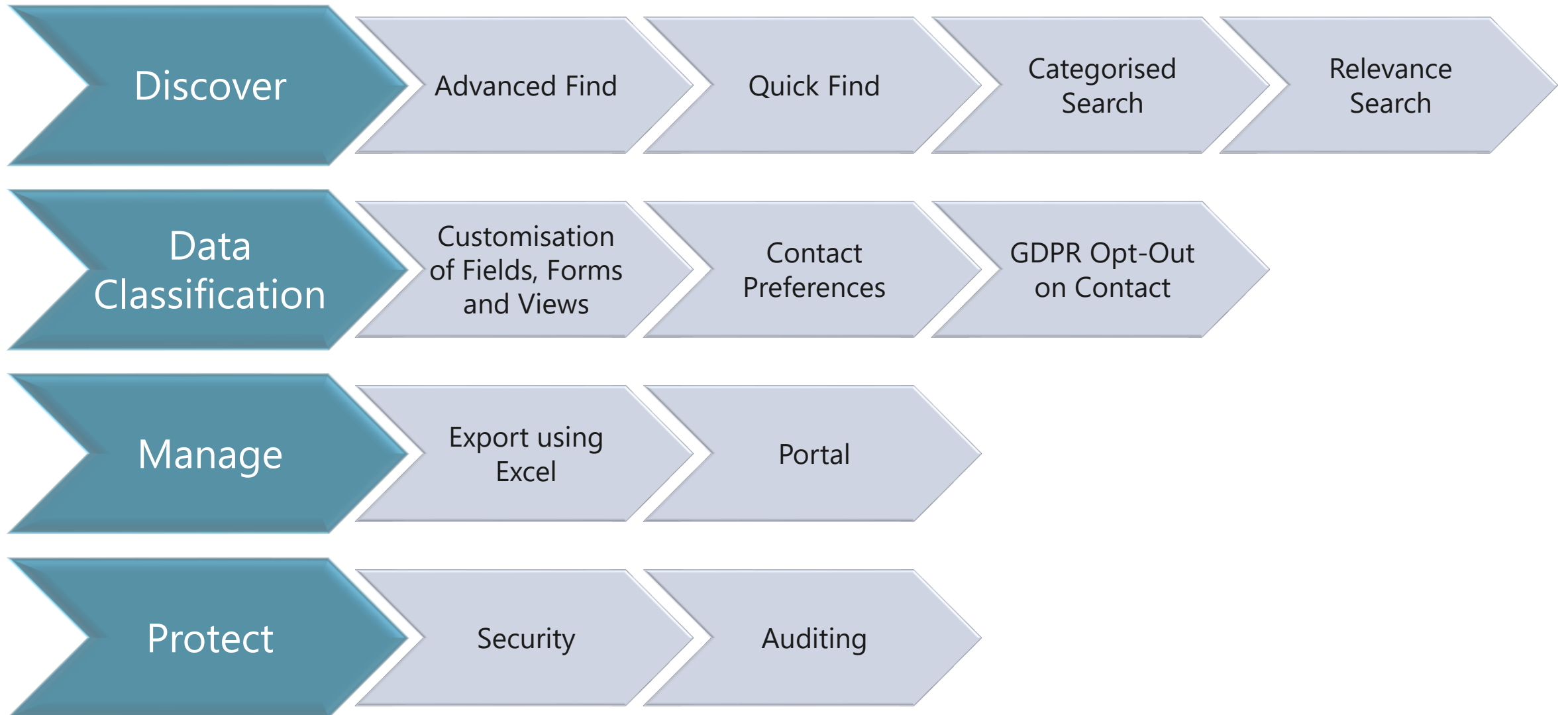
GDPR and Model-Driven Apps

Sales

- Holds Customer Personal Data
- Can edit read-only records for Quote, Order and Invoice

Marketing

- Consent Level

Portal

- Control access by Minors
- Portal Agreement Date
- Last Sign In

GDPR and Finance and Operations Apps

Discover	Advanced Filtering using Advanced Query Syntax	Person Search Report
Data Classification	Customisation of columns	Data Asset and Inventory
Manage	Role based security	Data Export
Protect	Security	Audit
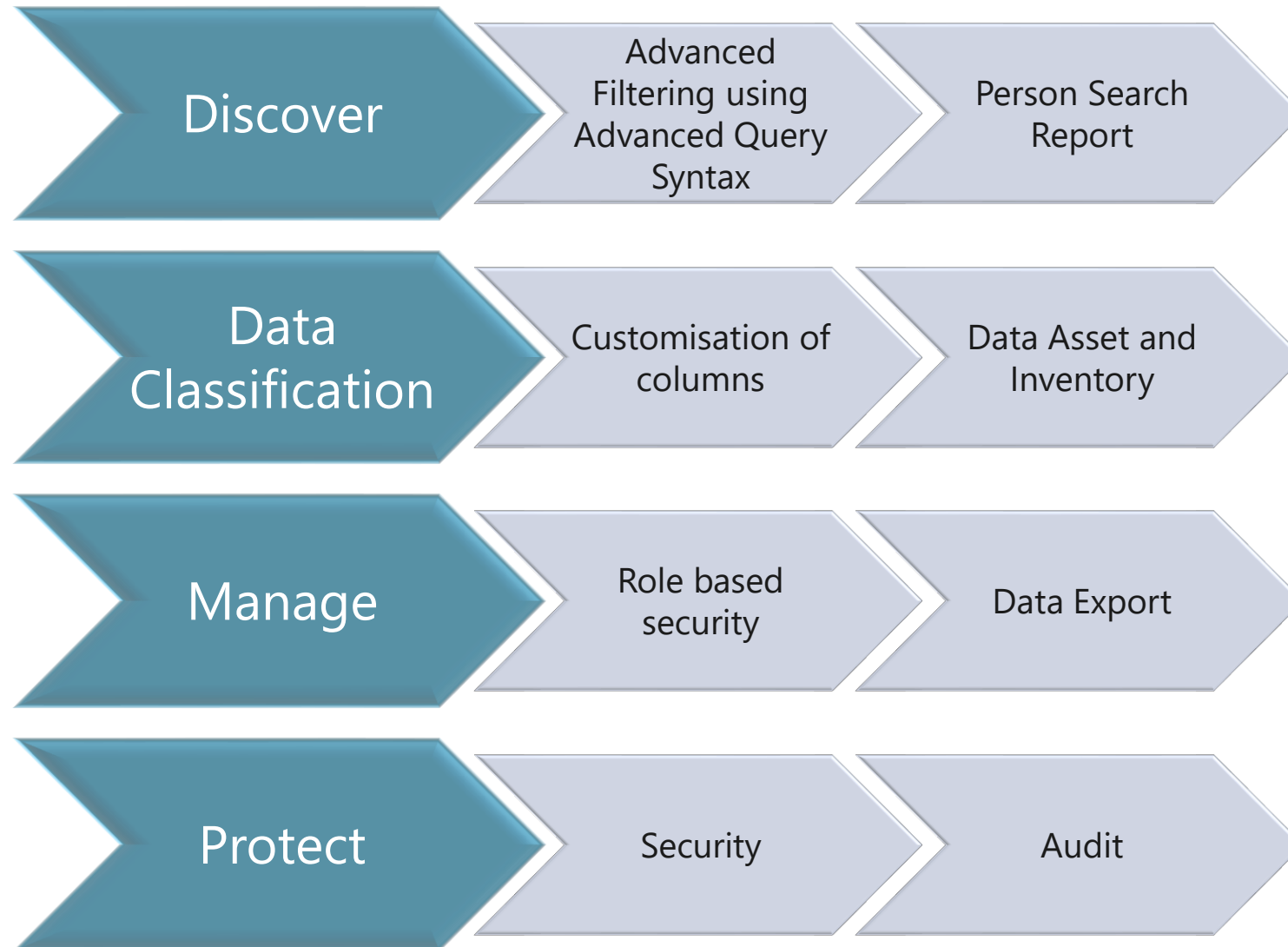
GDPR and Business Central

Discover → Search with filters

Data Classification → Data Classification property → Data Classifications

Manage → Mark people, customers and vendors as blocked due to privacy → Export to Excel

Protect → Security → Audit
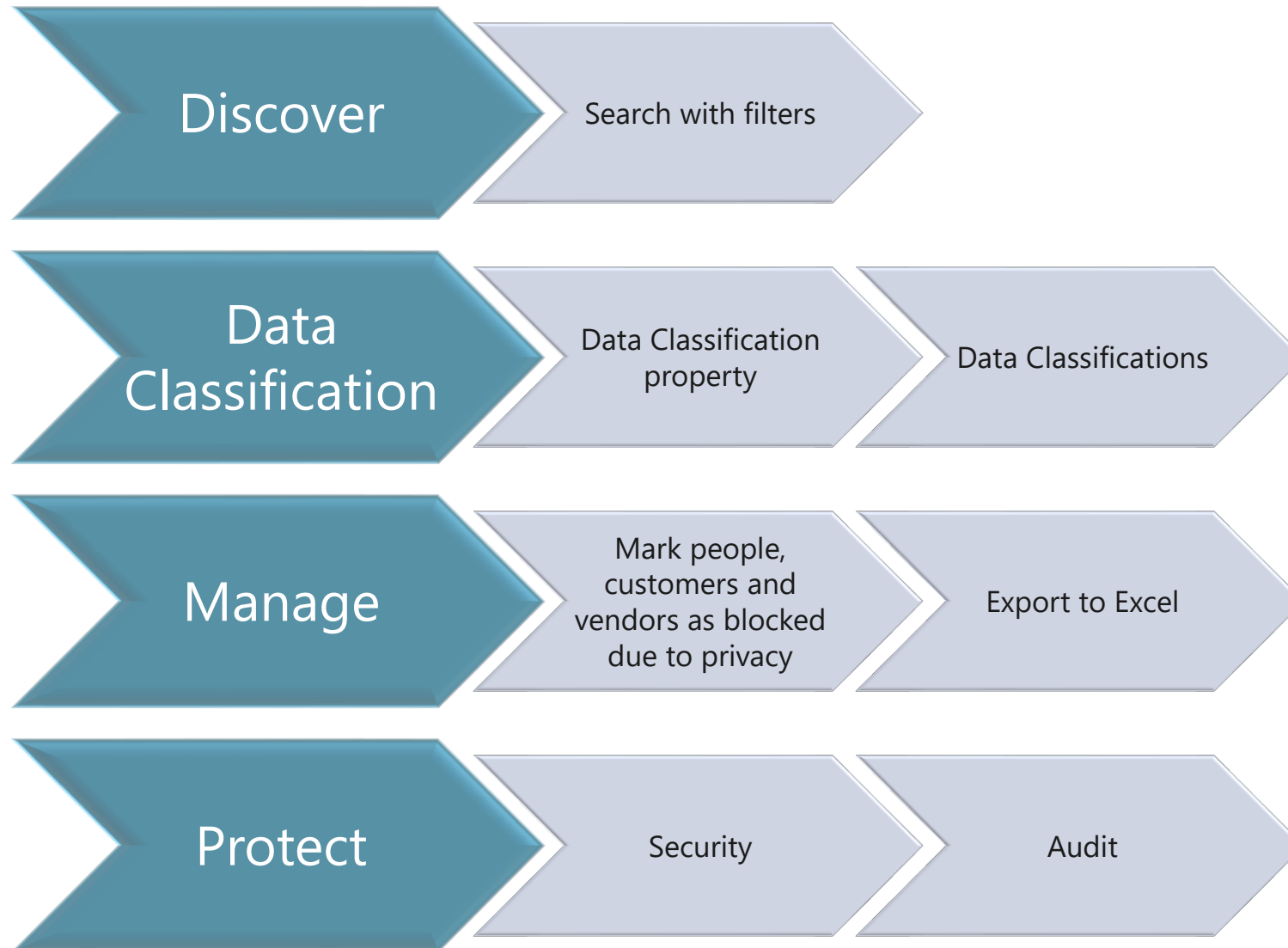
Cloud Deployment

Model-Driven Apps

Cloud

On-Premises

Model-Driven Apps Online Benefits

Start quickly

Pay for what you use

Lower investment

Microsoft backups

Microsoft SLA

Microsoft upgrades
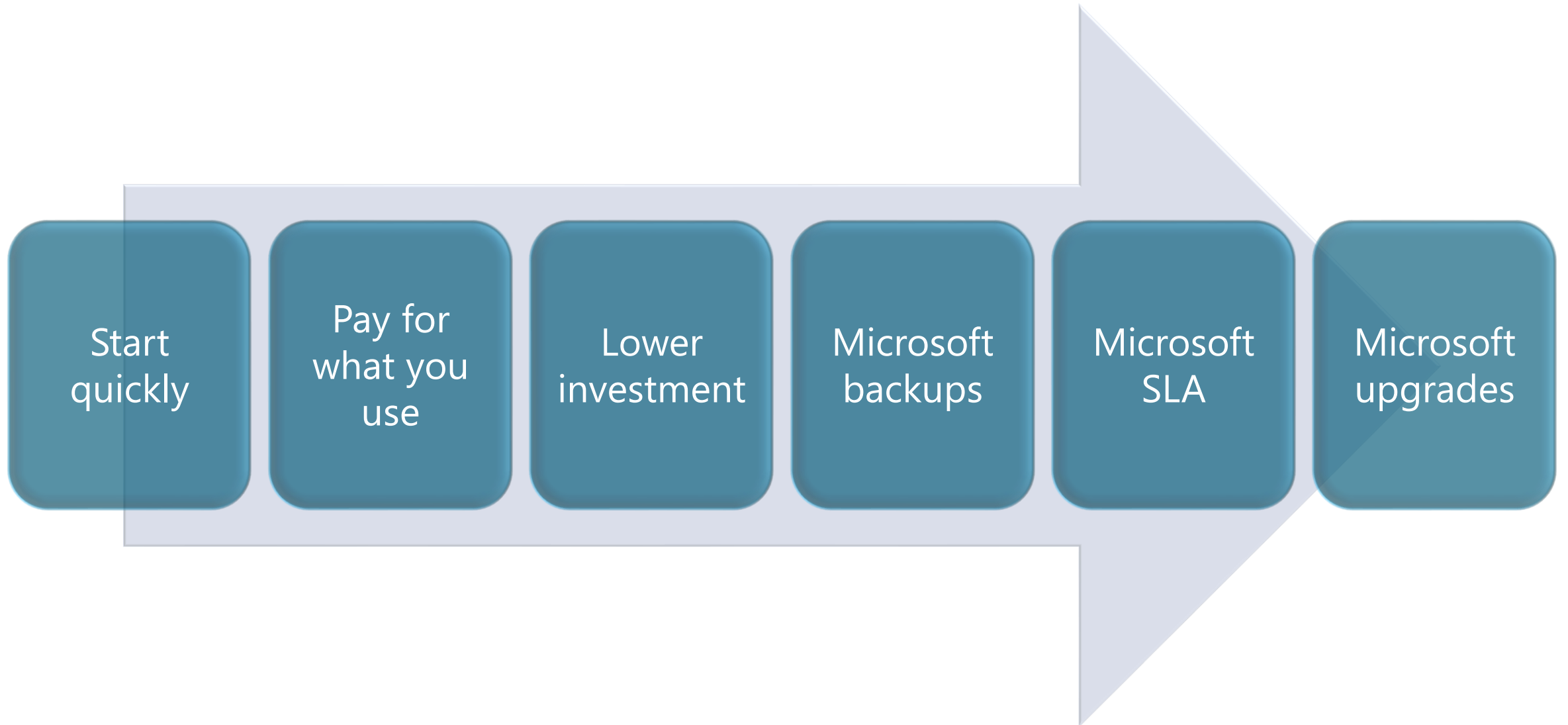
Model-Driven Apps On-Premises Benefits
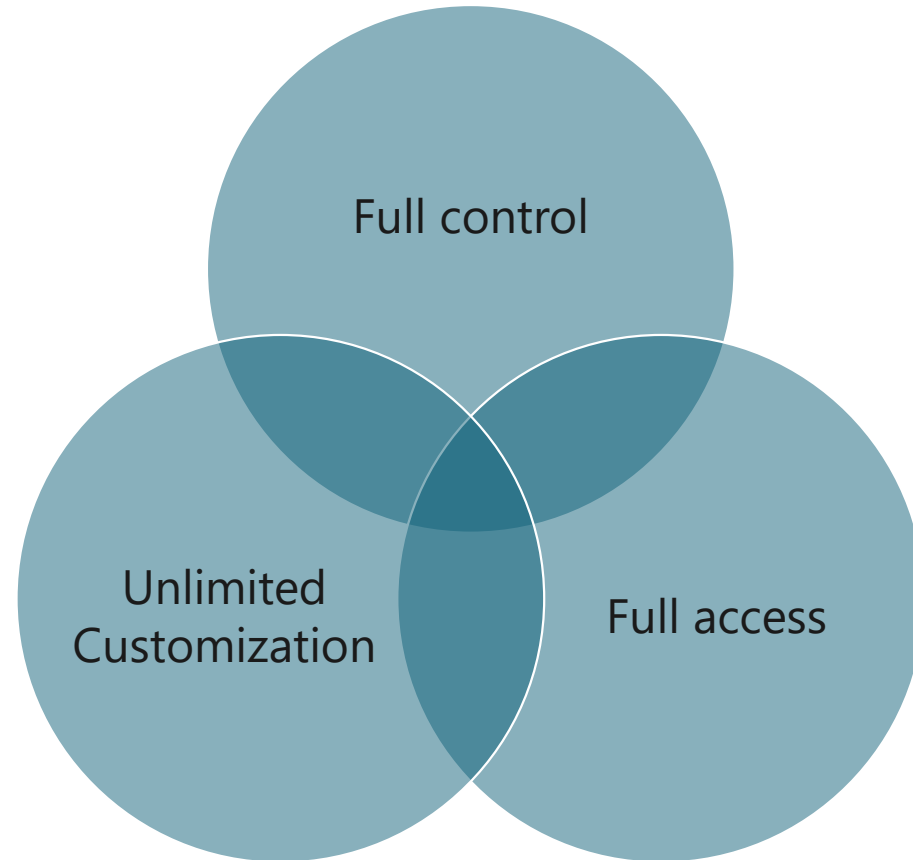
Environments

- Production
- Sandbox
- Default
- Trial
- Support
- Developer
- Preview

Environments

Environment		Type
Dynamics	⋯	Sandbox
Fundamentals	⋯	Trial
Labs	⋯	Production
Sales MB-210	⋯	Production
PPSatSwe	⋯	Production
App In a Day October 2019 (default)	⋯	Default

Azure DevOps

- Work item planning and tracking
- Version Control
- Build
- Release
- Automation
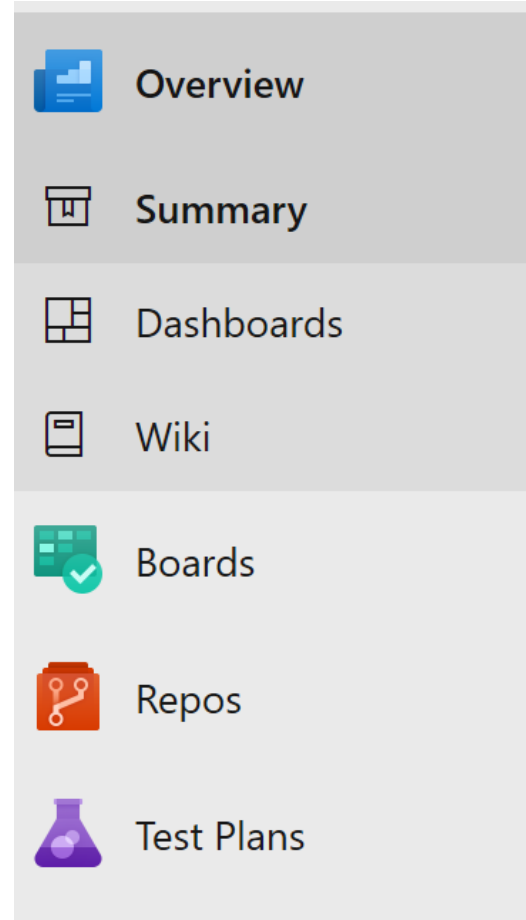
Finance and Operations

Cloud

On-Premises

Hybrid

Finance and Operations Cloud Benefits
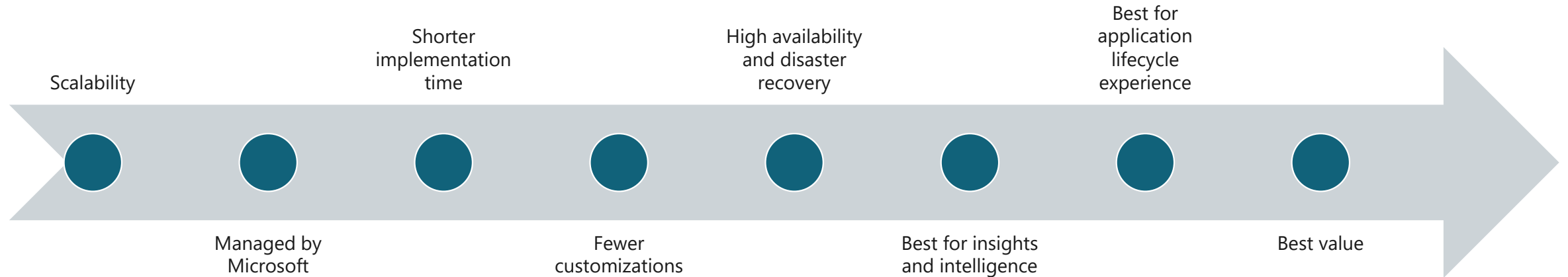
Finance and Operations On-Premises Benefits

Protect investment

Data sovereignty

Regulatory

Compliance

Lifecycle Services (LCS)

- Environments
- Guidance
- Methodology
- Services

DEMO

Lifecycle Services

Business Central

Cloud

On-Premises

Hybrid

Government Cloud Support

- GCC does not support
  - Marketing
  - Finance and Operations
  - Retail
  - Talent
  - Business Central

Knowledge Check

You are planning to implement Dynamics 365 Sales and your existing data warehouse requires direct SQL access to your Sales data. How should you deploy Dynamics 365?

Answer

On-Premises

Integration

Integration between Dynamic 365 apps
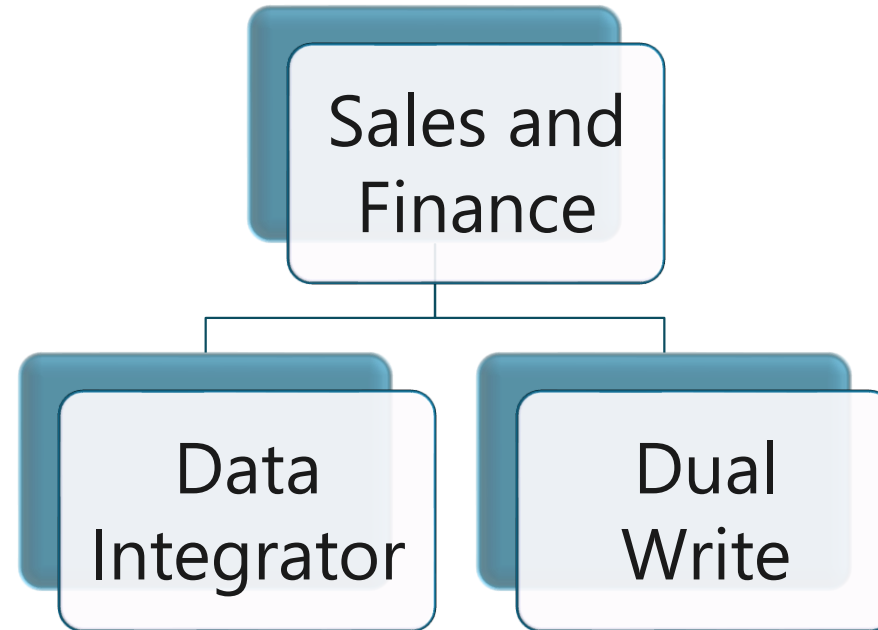
Integration across Dynamic 365 apps
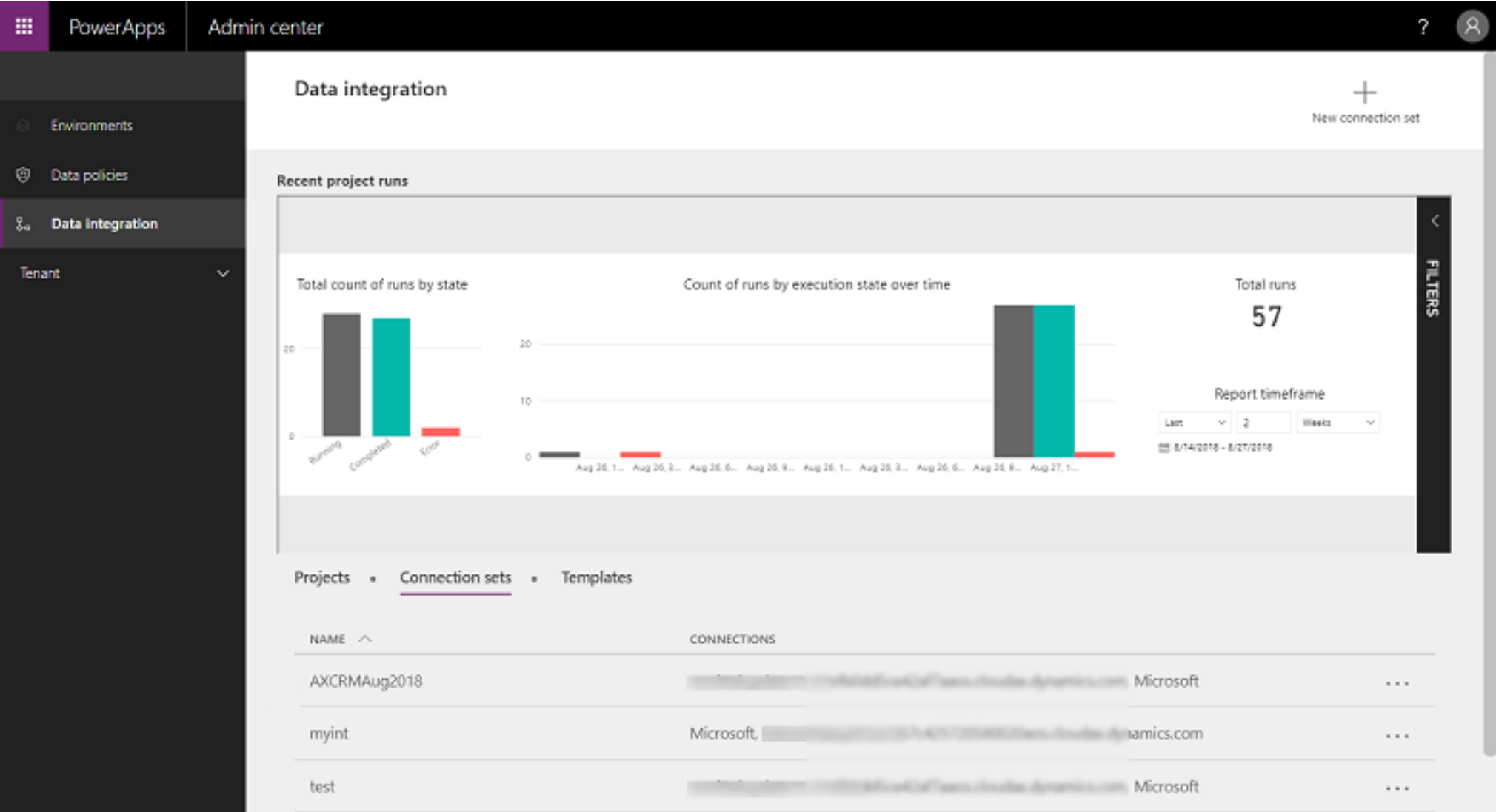
Integrations with Model-Driven Apps

Microsoft Products

- Outlook
- Word
- Excel
- Templates
- SharePoint
- OneDrive for Business
- One Note
- Office 365 Groups
- Teams

Third Party Products

- AppSource

Integrations with Finance and Operations Apps

Data Management Framework

- Parameter
- Reference
- Master
- Document
- Transaction

Integrations with Finance and Operations Apps

Office

- Outlook
- Data Connector add-in
  - Word
  - Excel
  - Templates

Embedded Power BI

- Workspaces

Integrations with Finance and Operations Apps

External integrations

- OData/REST API
  - Custom webservices
  - Data Management
- Business Events
  - Azure Service Bus Queue
  - Azure Service Bus Topic
  - Azure Event Grid
  - Azure Event Hub
  - HTTPS
  - Power Automate

Security

Cloud Security
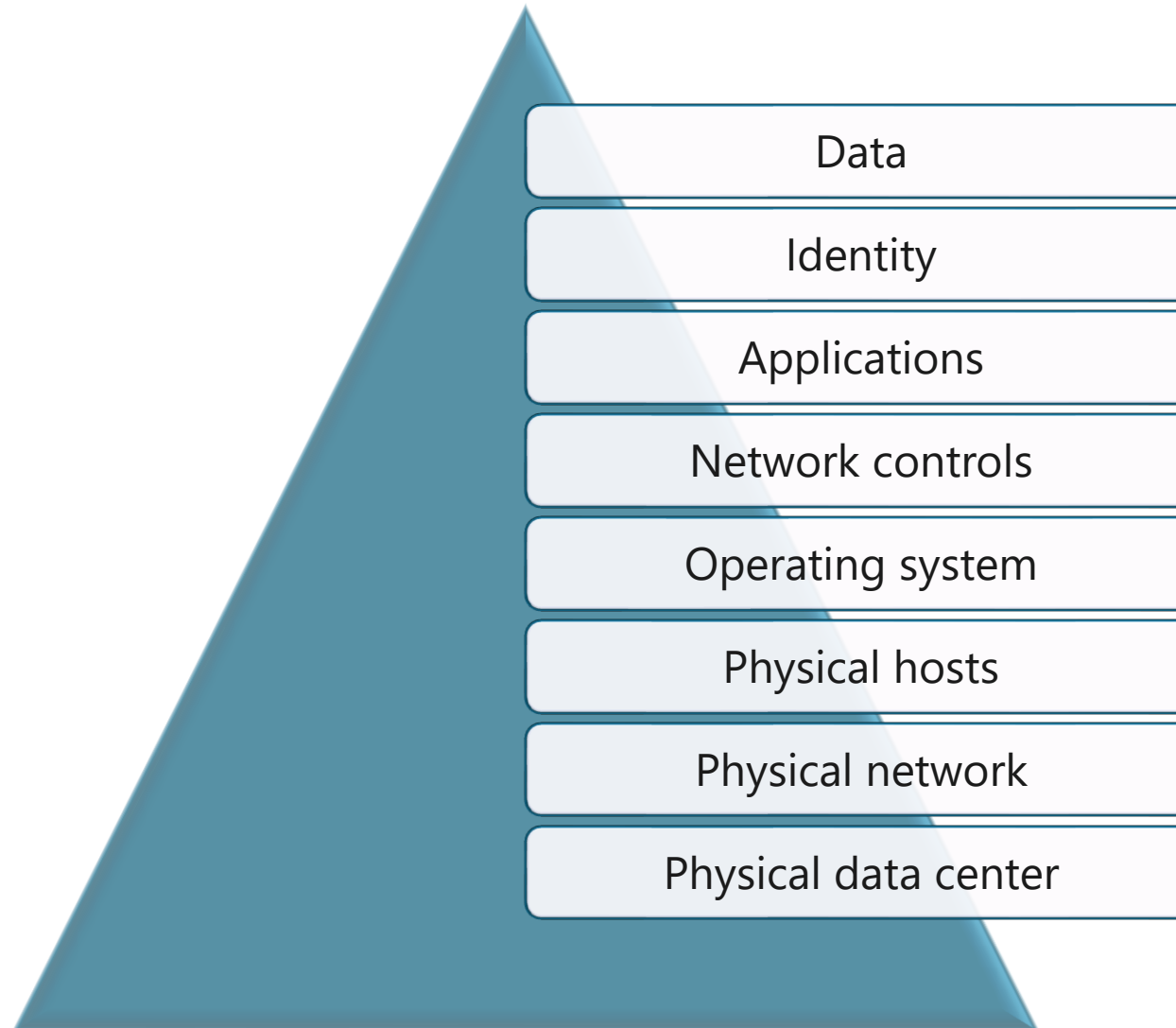
Power Platform Security
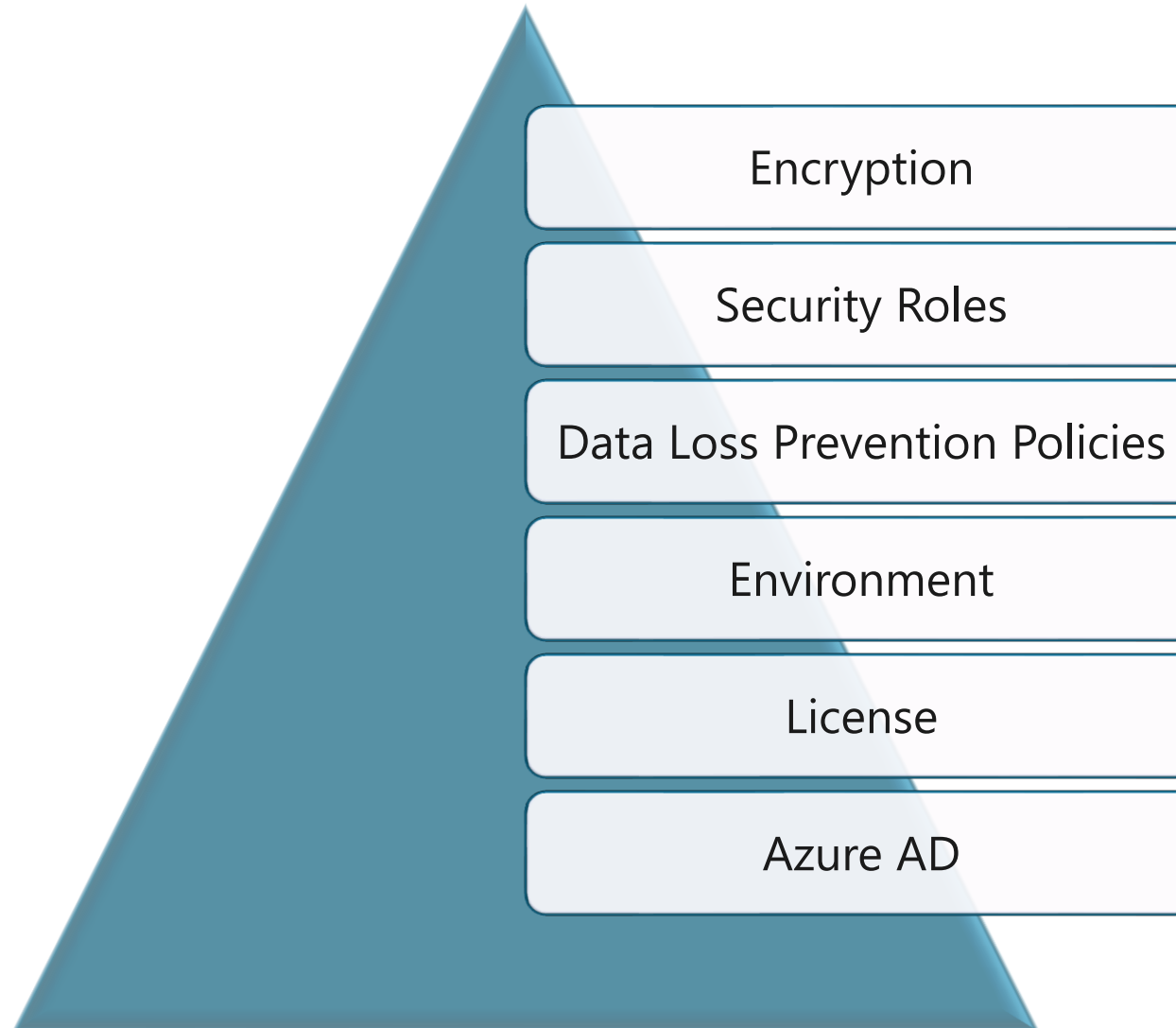
Common Data Service Security Model

Security Roles
- Privileges
- Access levels

Business Units
- Define security boundaries

Record Ownership
- Which user owns a record
- Business unit a user belongs to

Teams
- Owner Teams
- Access Teams

Finance and Operations Security Model

Security Roles

- A user must have at least one security role
- Determine duties
- Level of access to data

Duties

- Map to parts of a business processes

Privileges

Permissions

Business Central Security Model

Power Platform

Common Data Model

- Schema for Business Applications
- Industry Accelerators
- Extensible
- GitHub
- Common Data Service
- Dynamics 365 CE
- Power BI
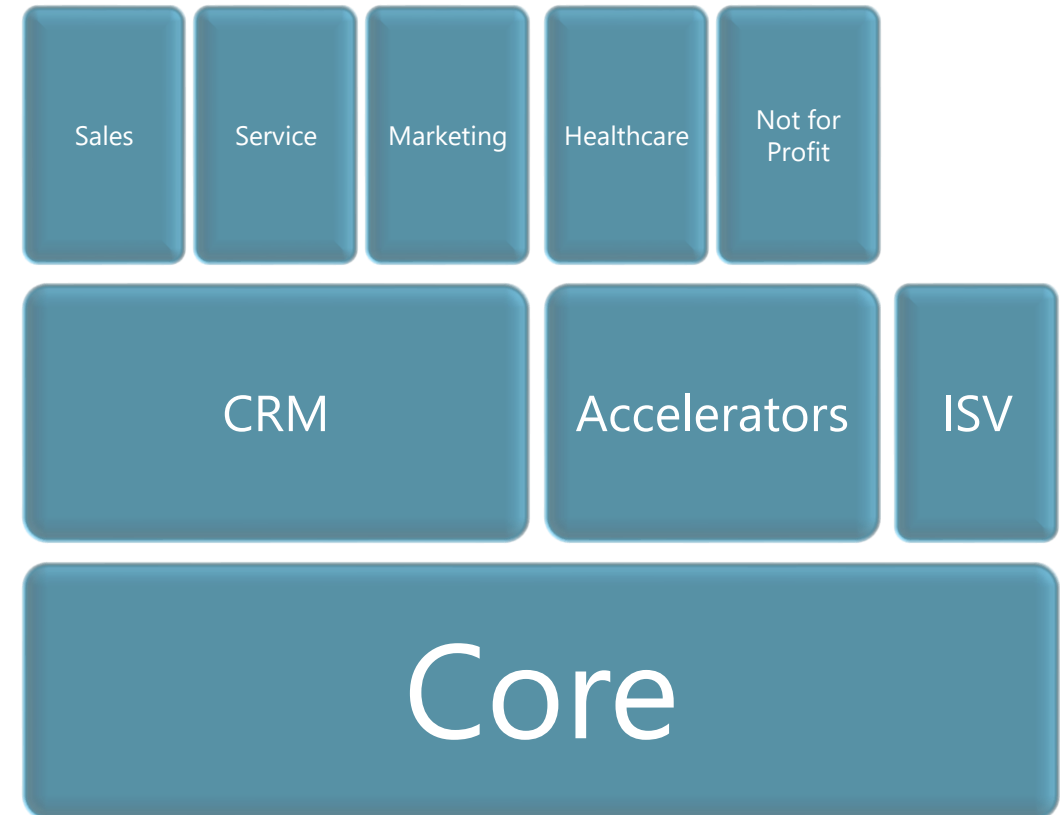
Common Data Service

- CDS: Common Data Service for Apps
- Securely stores and manages data used by Business applications
- Quickly and easily create a data model

Power Platform
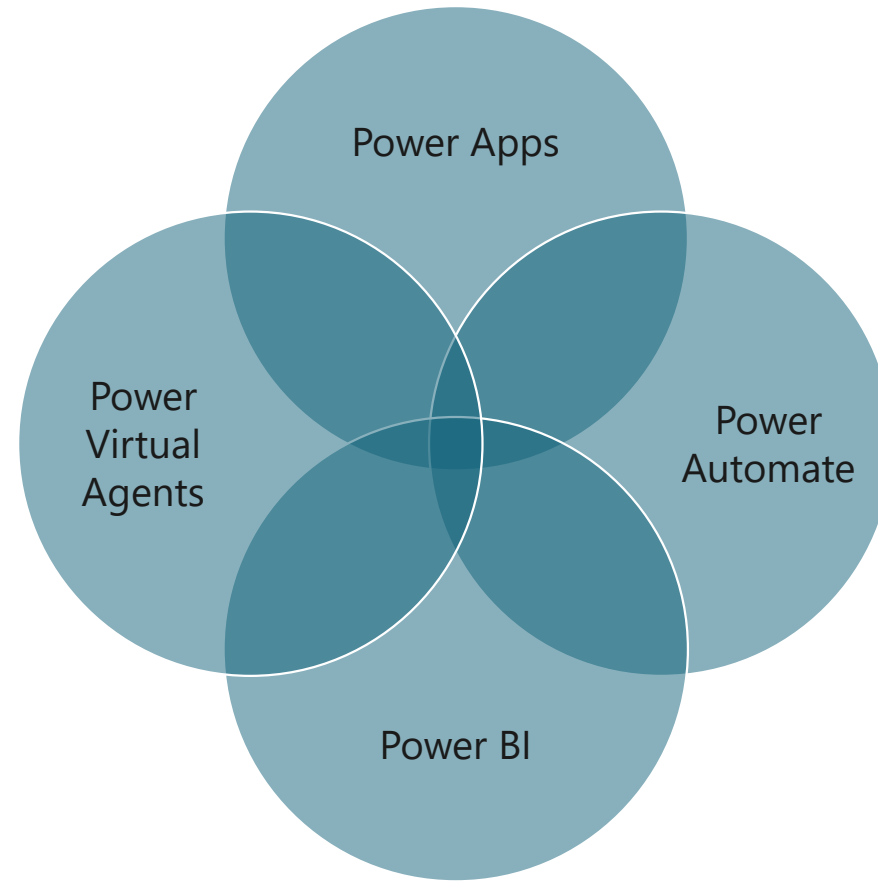
Power Apps

Canvas apps

Model-Driven apps

Portal apps

Power Automate

Automation solution

Automate workflows between applications and services

Approvals

Button Flows

Power BI

| Datasets | Visualizations | Reports | Dashboards | Dataflows | Alerts |
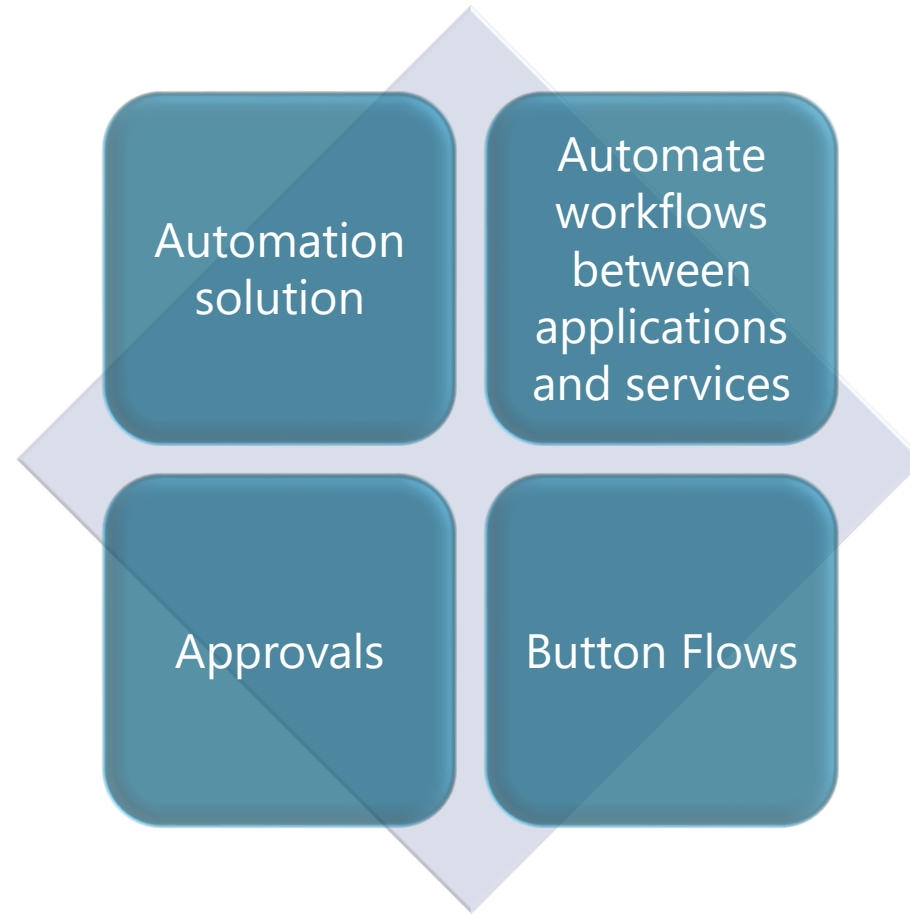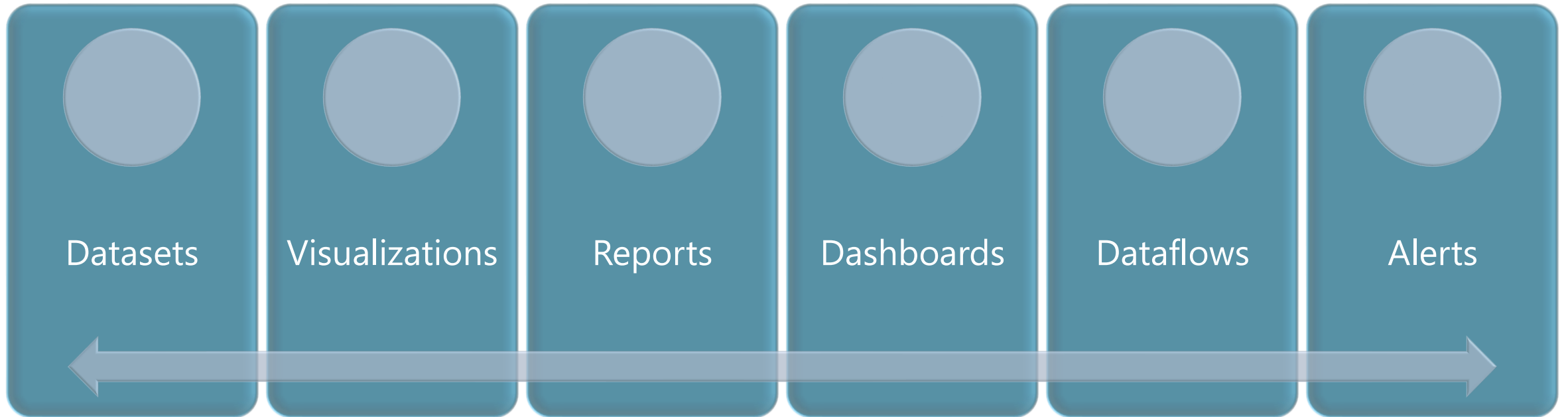
Power BI

- Power BI Desktop
- Power BI Service
- Power BI Mobile

Power Virtual Agents

Conversational Bots

No Code

Use with

- Websites
- Facebook
- Teams

Connectors

Connect to data and services

Triggers

Actions

Hundreds of connectors

Which technology allows you to automate across systems and services both in the cloud and on-premises?

Answer

Microsoft Power Automate (formerly Flow)

Reporting

Reporting in Model-Driven Apps
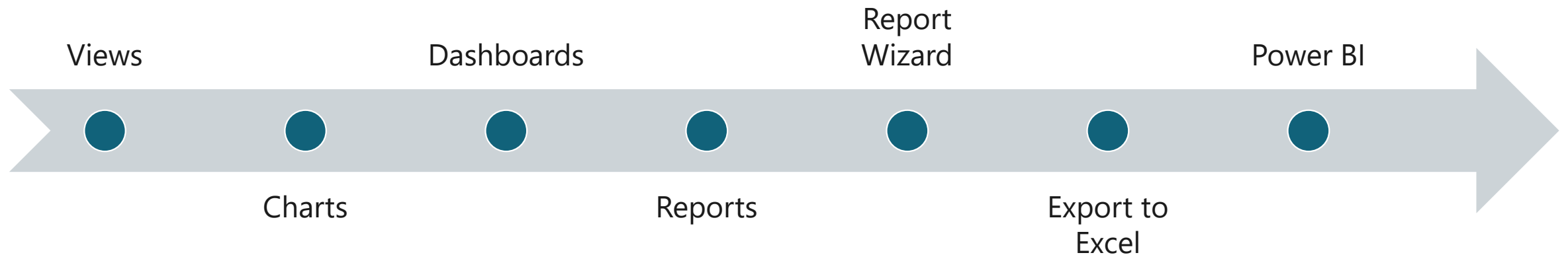
Reporting in Finance and Operations Apps

Income Statement

Balance Sheet

Cash Flow

Trial Balance

Dimensions

Report Designer

Reporting in Business Central

Prebuilt reports

Create new reports using the report designer

Export data to Excel

Resources

Resources

Microsoft Docs

Resources

Microsoft Learn

http://aka.ms/learn

Summary

- GDPR
- Cloud Deployment
- Integration
- Security
- Power Platform
- Reporting
- Resources

Practice Questions

Cloud

What terms from the list below would be viewed as benefits of using cloud services?

A. Elasticity

B. Un-predictable costs

C. Local reach only

Cloud

You're developing an application and want to focus on building, testing, and deploying.

You don't want to worry about managing the underlying hardware or software.

Which cloud service type is best for you?

A. IaaS

B. PaaS

C. SaaS

Cloud

Which cloud model provides the greatest degree of flexibility?

A. Public
B. Private
C. Hybrid

Sales

You are a salesperson in a company that uses Dynamics 365 Sales.

You need to register and control relationships with a new potential customer.

Which three actions can you perform within Dynamics 365 Sales?

A. Qualify or disqualify a lead.

B. Create a new customer from a phone call.

C. Create a new lead from an email.

D. Set up priorities for the leads.

E. Create an opportunity from a qualified lead.

Sales

You are working with Dynamics 365 Sales.

You need to deliver a proposal to your potential customer.

You qualify a lead and convert it to an opportunity.

Which action should you take next?

A. Create a sales order.

B. Create a quote.

C. Close an opportunity.

D. Send an opportunity to a potential customer.

Sales Mobile

What can you do on the Dynamics 365 Sales mobile app?

A. Create Activities
B. Create Alerts
C. Create Business Process Flows
D. Create Orders
E. Create Products

Apps

What would you use to expose service-related data on a customer facing website to provide customers with the ability to view items like open service requests and knowledge base articles?

A. Power Apps

B. Model Driven Apps

C. Portal

D. Voice of the Customer

E. Customer Insights

F. Teams

Customer Service

In Dynamics 365 Customer Service, an entitlement can be used to?

A. Provide field-level access to a certain security role

B. Automate a queue

C. Track the number of cases against a support contract

D. Automatically assign knowledge base articles to a case using keywords

Field Service

The Universal Resource Scheduling solution allows dispatchers to schedule manually using the?

A. Scheduling Vendor

B. Monthly calendar

C. Time-off Request Tool

D. Schedule Board

Field Service

Companies that require a fully automated Field Service scheduling solution should leverage?

A. Dynamics 365 Customer Service

B. Universal Resource Scheduling

C. Resource Scheduling Optimisation

D. Dispatch Solution

E. Woodford

Field Service Mobile

Which of the following are possible with the Field Service Mobile?

A. Work offline
B. Create popup notifications
C. Access SharePoint documents
D. Scan Barcodes

Finance

Which currency type do you use to convert one currency to another by referencing a different currency?

A. Reporting currency
B. Secondary currency
C. Accounting currency
D. Triangulation currency

Supply Chain Management

Your company hires temporary workers during peak periods. The workers must quickly learn to operate the equipment.

You need to streamline training for the workers.

What should you recommend?

A. Remote Assist

B. Layout

C. Guides

D. Power Virtual Agents

Supply Chain Management

A senior technician has been trying to help diagnose a problem with a piece of equipment over the phone with an onsite technician but is not able to resolve the issue.

You need to implement a solution that allows the senior technician to provide visual guidance to the onsite resource.

What should you recommend?

A. Power Virtual Agents

B. Layout

C. Remote Assist

D. Guides

Supply Chain Management

You need to be able to try out various configuration of equipment to maximize the use of space.

What should you recommend?

A. Power Virtual Agents

B. Guides

C. Layout

D. Remote Assist

Human Resources

Which must be created before you can create a course?

A. Course Locations
B. Course Groups
C. Course Types
D. Instructors

Sales Insights

What are two benefits of using Sales Insights with Dynamic 365 Sales?

A. Focus on leads and opportunities at risk.

B. Provide an end-to-end view of each customer journey.

C. Build relationships through personalised engagement.

D. Create unified customer profiles.

Customer Service

You need visibility into the frequency, volume, and types of calls you receive in your customer service centre.

What solution should you recommend?

A. Relationship Analytics

B. Virtual Agent for Customer Service

C. Customer Service Insights

D. Customer Insights

AI

Your customer service agents create cases with titles that are inconsistent.

You want to use AI to spot trends.

What should recommend?

A. Sales Insights

B. Customer Service Insights

C. Customer Service

D. Customer Insights

Mixed Reality

Which technology overlays a machine with images for training purposes?

A. Virtual reality

B. Mixed reality

C. Artificial intelligence

D. Augmented reality

Business Central

Which of the following best describes the functionality of Dynamics 365 for Business Central?

A. Manage mobile workforces via a mobile application

B. Manage IT infrastructure

C. Leverage the Power Platform to create custom operations applications

D. Manage business in an all-in-one solution

Deployment

Which deployment type offers the most extensive customisation capabilities?

A. Online

B. Azure

C. On-Premises

D. Hybrid

E. Public

Deployment

Where do you manage Deployments for Finance & Operations?

A. Power Platform Admin Centre

B. Office 365 Admin Centre

C. Lifecycle Service Centre

D. AX Operations Centre

E. Dynamics 365 Admin Centre

Connectors

Which connector do you use in Power Automate with Dynamics 365 Sales?

A. Azure SQL
B. Common Data Model
C. Common Data Service
D. Dynamics 365 Customer Engagement

Dynamics 365 Fundamentals

MB-901 Exam Prep