



## Microsoft

### Exam Questions mb-240

Microsoft Dynamics 365 for Field Service

#### NEW QUESTION 1

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**

#### NEW QUESTION 2

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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- 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**

#### NEW QUESTION 3

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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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 Business Closures.
- 5) Create Bookable Resources with Hourly Rates and Work Hours.

Does this meet the goal?

- A. Yes
- B. No

**Answer: A**

#### NEW QUESTION 4

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 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**

#### NEW QUESTION 5

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.

### Answer Area

Purchase Order

Agreement

Booking Status

Draft

Billed

Estimate

Expired

Traveling

In progress

- A. Mastered
- B. Not Mastered

**Answer:** A

**Explanation:**

### Answer Area

|                |
|----------------|
| Purchase Order |
| Agreement      |
| Booking Status |

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

#### NEW QUESTION 6

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

#### NEW QUESTION 7

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 field 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:

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

#### NEW QUESTION 8

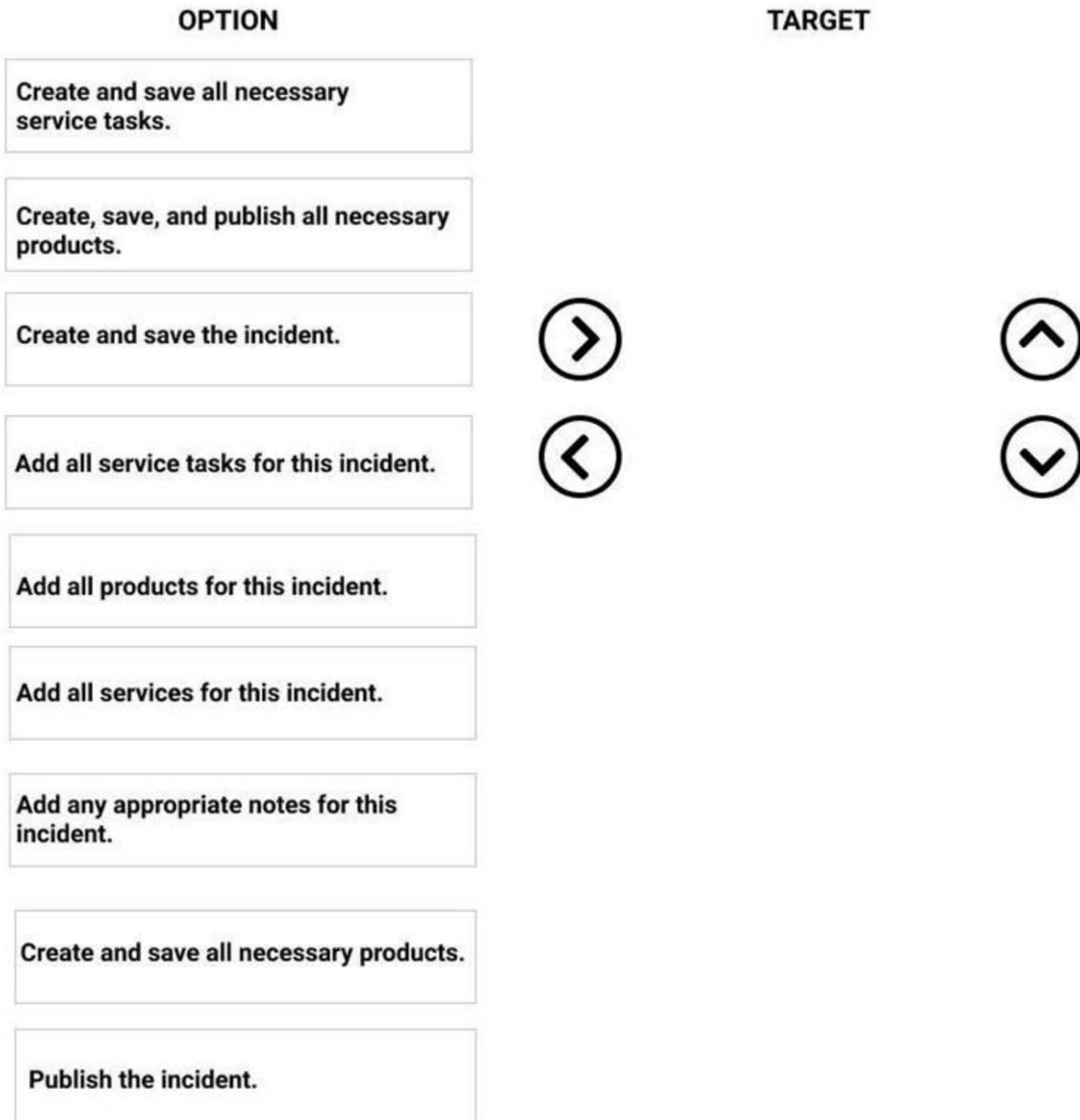
DRAG DROP

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.



- A. Mastered
- B. Not Mastered

**Answer:** A

**Explanation:**

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

**NEW QUESTION 9**

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:**

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

**NEW QUESTION 10**

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:** BDE

**Explanation:**

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

**NEW QUESTION 10**

**DRAG DROP**

You are a new Dynamics 365 for Field Service Administrator for a manufacturing firm.

Your manager has asked you to configure the system to enable scheduling for maintenance of equipment at customer sites. It is against company policy to dispatch resources to sites with known issues such as credit or safety holds. Many site visits may require more than one technician to be sent for the repair. Which resource scheduling component should be used for each task? To answer, drag the appropriate resource scheduling component to the appropriate task. Each resource scheduling component may be used once, more than once, or not at all. You may need to drag the split bar between panes or scroll to view the content.

NOTE: Each correct selection is worth one point.

Select and Place:

**Answer Area**

|                                 |  |  |
|---------------------------------|--|--|
| <b>Resource Crew</b>            | Heavy machinery repair requires three technicians as well as a safety inspector to be sent to the site. Additionally, power testing equipment must be sent to complete the inspection. |  |
| <b>Requirement Group</b>        | Dispatchers must be able to locate the resources needed for the heavy machinery repair within a single search to allow for efficient scheduling.                                       |  |
| <b>Schedule Board</b>           | Dispatchers and scheduling administrators must have a way to easily review all resource availability and be able to schedule the work order.   |  |
| <b>Booking Rule</b>             | When customers on credit hold request service, no technician can be sent and dispatchers must be alerted of the credit hold status.  |  |
| <b>Incident type</b>            |  |  |
| <b>Booking Resource Booking</b> |  |  |

- A. Mastered
- B. Not Mastered

**Answer:** A

**Explanation:**

**Answer Area**

|                          |  |                |
|--------------------------|--|----------------|
| Resource Crew            | <p>Heavy machinery repair requires three technicians as well as a safety inspector to be sent to the site. Additionally, power testing equipment must be sent to complete the inspection.</p> <p>Dispatchers must be able to locate the resources needed for the heavy machinery repair within a single search to allow for efficient scheduling.</p> <p>Dispatchers and scheduling administrators must have a way to easily review all resource availability and be able to schedule the work order.</p> <p>When customers on credit hold request service, no technician can be sent and dispatchers must be alerted of the credit hold status.</p> | Resource Crew  |
| Requirement Group        |  |                |
| Schedule Board           |  | Schedule Board |
| Booking Rule             |  | Schedule Board |
| Incident type            |  |                |
| Booking Resource Booking |  | Booking Rule   |

**NEW QUESTION 11**

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 Work
- C. Select Load the Default Filters on the Schedule Board.
- D. Create a Requirement Resource Preference record for the resource.

**Answer:** B

**NEW QUESTION 15**

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 Area**

- Schedule Board**
- Schedule Assistant**
- Booking Rules**
- Resource Scheduling Optimization**
- Facility Scheduling**

View map of resource, organizational units, bookings, or requirements.

Filter resources to see select resources' actively scheduled work orders.

Filter resources based on requirements of the work order.

Schedule requirements that are part of a group.

- A. Mastered
- B. Not Mastered

**Answer:** A

**Explanation:**

**Answer Area**

- Schedule Board**
- Schedule Assistant**
- Booking Rules**
- Resource Scheduling Optimization**
- Facility Scheduling**

View map of resource, organizational units, bookings, or requirements.

Filter resources to see select resources' actively scheduled work orders.

Filter resources based on requirements of the work order.

Schedule requirements that are part of a group.

**NEW QUESTION 16**

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:** C

**NEW QUESTION 18**

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:**

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

**NEW QUESTION 21**

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

**NEW QUESTION 25**

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 syncing to server.
- E. Check if sync filter on Bookable Resource Booking entity is too restrictive for offline mode.

**Answer:** ACE

**Explanation:**

References: <https://docs.microsoft.com/en-us/dynamics365/customer-engagement/field-service/mobile-faq-bookings-not-showing>

**NEW QUESTION 26**

**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:

**STEPS**

**ORDER**

- Click Receipt Products
- Create an Inventory Adjustment record.
- Click Show Purchase order Products not fully received yet.
- Click the drop-down arrow next to the P.O. name.
- Post the Receipt record.



- A. Mastered
- B. Not Mastered

**Answer:** A

**Explanation:**

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

**NEW QUESTION 28**

**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 Area**

- track the return
- other return to vendor options

Mark when the return was approved.

Mark when the return was shipped.

Mark when the return was received.

Issue credit to the customer.

Issue a credit memo.

- A. Mastered

B. Not Mastered

**Answer:** A

**Explanation:**

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

**NEW QUESTION 31**

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:**

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

**NEW QUESTION 36**

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

**NEW QUESTION 38**

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