

# MB-300<sup>Q&As</sup>

Microsoft Dynamics 365 Core Finance and Operations

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### QUESTION 1

A company needs to be able to search for given addresses and remove all personally identifiable information about vendors, customers, and employees who might be in their system. You need to identify a tool to quickly accomplish this.

Which tool should you use?

- A. Person search report
- B. Global search reporting
- C. GDPR request
- D. Asset classification

Correct Answer: A

Reference: <https://docs.microsoft.com/en-gb/dynamics365/get-started/gdpr/>

<https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/gdpr/gdpr-guide>

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### QUESTION 2

#### HOTSPOT

A company uses Finance and Operations apps.

The company wants to use Power BI to view the actuals versus budget amounts of the current fiscal year. This requires handling several million transactions.

Some data must be near-real-time while other data must be updated every 10 minutes.

You need to identify which solution components meet these requirements.

Which component should you use for each requirement? To answer, select the appropriate options in the answer area.

NOTE: Each correct selection is worth one point.

Hot Area:

## Answer Area

### Requirement

View large data sets requiring near-real-time data that is optimized for reporting.

### Component

	▼
Transaction DB	
Common Data Service	
Entity Store	
Dynamics 365 entities	

Allow the data to refresh every 10 minutes.

	▼
Aggregate Measurements	
Power BI DirectQuery	
Common Data Service	
Business Events	

Correct Answer:

## Answer Area

### Requirement

View large data sets requiring near-real-time data that is optimized for reporting.

### Component

	▼
Transaction DB	
Common Data Service	
Entity Store	
Dynamics 365 entities	

Allow the data to refresh every 10 minutes.

	▼
Aggregate Measurements	
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Reference: <https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/analytics/power-bi-integration-entity-store>

### QUESTION 3

You are preparing to migrate data into Dynamics 365 Finance from an older system.

You must assign customer to specific receivables accounts by region. A custom field within the older system exists to assign the customer to a region.

You need to migrate the customer data.

What should you do?

- A. Add a field in Dynamics 365 Finance to mirror the older system configuration
- B. Map the custom field from the older system to the customer group field in Dynamics 365 Finance.
- C. Map the custom field from the older system to the customer account number in Dynamics 365 Finance.
- D. Map the value from the custom field in the older system to the customer segment field in Dynamics 365 Finance

Correct Answer: B

A customer group is a way of aggregating customers that are similar in some way. For example, you may use them to distinguish between retail and wholesale customers or between company employees and external customers etc.

Incorrect:

Not A: Segments let you create groups of related contacts that you can target with customer journeys. Segments are created using the segment designer. One way to build segments is by querying across related entities including contacts,

leads, accounts, events, marketing lists, and more. You can also query the marketing-insights service to find contacts that have engaged with your marketing initiatives. The marketing-insights service also allows you to query contacts that you

aren't reaching because of issues such as email bounces.

Reference:

<https://docs.microsoft.com/en-us/dynamicsax-2012/appuser-itpro/create-a-customer-group>

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### QUESTION 4

You are implementing Dynamics 365 Finance and evaluating reporting capabilities. The solution must allow business users to view cash flow forecasts as follows:

1.

by region

2.

across all legal entities

3.

in a graphical representation from within Dynamics 365 Finance

You need to select a tool to allow the business users to view the cash flow forecasts.

Which tool should you use?

- A. Microsoft Dataverse
- B. Financial reporter
- C. Power Automate
- D. Power BI embedded workspace

Correct Answer: D

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## QUESTION 5

### SIMULATION

You are a functional consultant for Contoso Entertainment System USA (USMF).

You need to assign the Purchasing agent security role to Wayne Samuel Jorden for USMF only.

To complete this task, sign in to the Dynamics 365 portal.

Correct Answer: explanation

1.

Navigate to System administration > Security > Assign users to roles

2.

Select the Purchasing Agent role.

3.

Click the Manually assign / exclude users button

4.

Select the Wayne Samuel Jorden user account and click the Assign to role button.

5.

Click the Assign organizations button

6.

Select the Grant access to specific organizations option

7.

Select the USMF legal entity and click the Grant button.

Reference: <https://www.dynamics-tips.com/system-administration/security-roles>

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