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QUESTION 1

You are a Dynamics 365 Customer Engagement administrator. You create workflows to automate business processes. You need to configure a workflow to meet the following requirements:

Be triggered when a condition is met.

Run immediately.

Perform an action when a condition is met.

How should you configure the workflow? To answer, select the appropriate options in the answer area. NOTE: Each correct selection is worth one point.

Hot Area:

Answer Area

Workflow Requirement

Be triggered when a condition is met.

Configuration Option

Publish workflow.
Subject contains data.
Trigger when a Microsoft Flow button is pressed.

Run immediately.

Approve the workflow.
Configure the workflow to run now.
Configure the child workflow to run now.

Perform an action when a condition is met.

Send an email.
View chart.
Update a security role.

Correct Answer:



Answer Area

Workflow Requirement

Be triggered when a condition is met.

Configuration Option

▼
Publish workflow.
Subject contains data.
Trigger when a Microsoft Flow button is pressed.

Run immediately.

▼
Approve the workflow.
Configure the workflow to run now.
Configure the child workflow to run now.

Perform an action when a condition is met.

▼
Send an email.
View chart.
Update a security role.

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 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 for Customer Service system administrator. You use the Data Performance tool. There are 14 items in the All Data Performance Logs view. Some log items detail positive operational impact percentages while others detail negative operational percentages.

Users report that the system is less responsive than in the past.

You need to improve system performance.

Solution: Select optimize for log items that have optimizations available and an operational impact of zero percent.

Does the solution meet the goal?

A. Yes

B. No

Correct Answer: A

QUESTION 3

You need to set up annual surveys. What should you do?



- A. Enable Voice of the Customer.
- B. Use dialogs.
- C. Enable Customer Insights.
- D. Install a custom workflow solution.

Correct Answer: A

References: <https://docs.microsoft.com/en-us/dynamics365/customer-engagement/voice-of-customer/design-basic-survey>

QUESTION 4

You are a Dynamics 365 for Customer Service administrator.

You identify the following issues:

Remote sales team members report that they cannot access the latest data on commuters, phones, and tablets.

Help desk team members must be able to access all inbound emails from multiple queues in a single queue.

You need to resolve the issues.

Which options should you configure? To answer, drag the appropriate security methods to the correct teams. Each security method may be used once, more than once.

NOTE: Each correct selection is worth one point.

Select and Place:

Options	Team	Options
none	Remote sales team	
Forward mailbox	Help desk team	
Server-side synchronization		
Dynamics 365 for Outlook		

Correct Answer:



Options

none
Dynamics 365 for Outlook

Answer Area

Team

Remote sales team

Help desk team

Options

Server-side synchronization
Forward mailbox

QUESTION 5

You are a Dynamics 365 for Customer Services system administrator. Sales team members access Dynamics 365 by using a tablet device.

Sales team members report several issues when they access Dynamics 365.

You need to resolve the issues.

What should you do? To answer, select the appropriate options in the answer area.

NOTE: Each correct selection is worth one point.

Hot Area:

Answer Area

Issue

Solution

Customizations made on the form do not display on the devices.

▼
Log off and back on.
Clear the cache.
Restart the tablet.

The wrong form displays when account records are opened

▼
Delete all the forms except the one you want to use.
The form is not set as the first form in the entity.
Publish all forms.
Clear the cache.

The devices continuously display error messages indicating that you must restart the app.

▼
Reinstall the app.
Set privileges for the user.
Restart the app.
Restart the tablet.



Correct Answer:

Answer Area

Issue	Solution
Customizations made on the form do not display on the devices.	<div>▼</div> <div>Log off and back on.</div> <div>Clear the cache.</div> <div>Restart the tablet.</div>
The wrong form displays when account records are opened	<div>▼</div> <div>Delete all the forms except the one you want to use.</div> <div>The form is not set as the first form in the entity.</div> <div>Publish all forms.</div> <div>Clear the cache.</div>
The devices continuously display error messages indicating that you must restart the app.	<div>▼</div> <div>Reinstall the app.</div> <div>Set privileges for the user.</div> <div>Restart the app.</div> <div>Restart the tablet.</div>

References: <https://docs.microsoft.com/en-us/dynamics365/customer-engagement/mobile-app/troubleshooting-things-know-about-phones-tablets>

QUESTION 6

You are a Dynamics 365 for Customer Service administrator. You install the Gamification solution for Dynamics 365.

Users must be granted the minimum privileges required to perform tasks.

You need to assign minimal security roles to users.

Which security roles should you use? To answer, select the appropriate options in the answer area.

NOTE: Each correct selection is worth one point.

Hot Area:

**Answer Area****Task****Role**

Configure a connection between Gamification and Dynamics 365.

▼
Game Manager
Microsoft 365 Global Administrator
Dynamics 365 System Administrator

Manage security roles.

▼
Game Manager
Commissioner
Dynamics 365 System Administrator

Create games and KPIs.

▼
Game Manager
Commissioner
User

Follow active players statistics.

▼
Game Manager
Teams Member
User

Import players and fans from Dynamics 365.

▼
Game Manager
Commissioner
Dynamics 365 System Administrator

Correct Answer:



Answer Area

Task

Configure a connection between Gamification and Dynamics 365.

Manage security roles.

Create games and KPIs.

Follow active players statistics.

Import players and fans from Dynamics 365.

Role

▼
Game Manager
Microsoft 365 Global Administrator
Dynamics 365 System Administrator

▼
Game Manager
Commissioner
Dynamics 365 System Administrator

▼
Game Manager
Commissioner
User

▼
Game Manager
Teams Member
User

▼
Game Manager
Commissioner
Dynamics 365 System Administrator

References: <https://docs.microsoft.com/en-us/dynamics365/customer-engagement/gamification/understand-security-roles>

You are a Dynamics 365 Customer Engagement system administrator. You have the following security design for a Parent Business Unit:

QUESTION 7

You are a Dynamics 365 for Customer Service system administrator. You create a custom entity named Buildings and add it to the Sales app.

When a user views the Buildings form, a field for Location is missing. You create the field and add the field to the form, but the user cannot see it.

You need to make the Location field visible to the user.

What should you do?

A. Add the Location field to the Buildings form.



- B. Publish customizations.
- C. Change privileges to the user's security role.
- D. Create a new Buildings form.

Correct Answer: B

QUESTION 8

You are a Dynamics 365 for Customer Service system administrator. You have a production instance named Organization1 that is integrated with an ERP system. When a new account is created in the ERP system, an account is created in Organization1 and with the ERP Account field set to Yes.

When the field value is set, an account must be created in a separate production instance named Organization2.

You need to use Microsoft Flow to create the account.

How should you configure the flow? To answer, select the appropriate options in the answer area.

NOTE: Each correct selection is worth one point.

Hot Area:

Answer Area

The screenshot displays a Microsoft Flow configuration interface. The flow starts with a trigger 'When a record is created' with dropdowns for 'Organization Name' and 'Entity Name', both set to 'Organization1' and 'Accounts'. This is followed by a 'Condition' step: 'When a record is created > ERP Account' is equal to 'Yes'. If the condition is 'If yes', it leads to an action 'Create a new record' with 'Organization Name' and 'Entity Name' set to 'Organization2' and 'Accounts'. If the condition is 'If no', there is an 'Add an action' placeholder. A large 'GeekCert.com' watermark is visible across the interface.



Correct Answer:

Answer Area

The screenshot displays a configuration interface for a record creation trigger. It consists of three main sections:

- When a record is created:** This section contains two dropdown menus. The first, labeled "* Organization Name", has a list of options: "Organization1", "Organization2", and "Accounts". The second, labeled "* Entity Name", also has a list of options: "Organization1", "Organization2", and "Accounts".
- Condition:** This section is titled "Condition" and contains a rule: "When a record is created > ERP A:count" followed by "Create a new record > ERP Account". The condition is set to "is equal to" and "Yes". There is a "Collapse condition" link.
- If yes / If no:** Below the condition, there are two paths. The "If yes" path (highlighted in green) leads to a section titled "Create a new record". This section contains two dropdown menus: "* Organization Name" (with options "Organization1", "Organization2", "Accounts") and "* Entity Name" (with options "Organization1", "Organization2", "Accounts"). There is an "Add an action" button at the bottom. The "If no" path (highlighted in red) leads to a section titled "If no" with an "Add an action" button.

QUESTION 9

You need to prompt the caseworker when populating the allergies field.

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.

Select and Place:



Actions

Add a condition.

Display an error message.

Set a default value for the field.

Configure the Lock/Unlock option.

Set the Business Required option to **true**.

Set the text field visibility to **true**.

Add a recommendation.

Answer Area

Correct Answer:

Actions

Display an error message.

Configure the Lock/Unlock option.

Set the Business Required option to **true**.

Add a recommendation.

Answer Area

Set a default value for the field.

Add a condition.

Set the text field visibility to **true**.

QUESTION 10

You manage a Dynamics 365 environment for a company.

You must prevent users from launching and using Microsoft Flow.



You need to hide the Flows button on the user interface.

Which configuration setting should you change?

- A. the Customizations section of System Settings
- B. the SiteMap
- C. the Buttons tab of Flow
- D. the Entity component of the default solution

Correct Answer: A

Reference: <https://www.inogic.com/blog/2018/10/show-or-hide-microsoft-flow-button-in-dynamics-365/>

QUESTION 11

You import data into Dynamics 365 for Customer Service by using the Import Data wizard. Errors occur when you try to import the following data lines:

```
"Fabrikam, Inc.', "123 Main Street"  
Company Name,Address,City,State/t
```

You need to identify the cause of the errors.

What error types have occurred? To answer, drag the appropriate error types to the correct data. Each error 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 selection is worth one point.

Select and Place:

Error types	Answer Area						
Inconsistent field delimiter	<table border="1"><thead><tr><th>Data</th><th>Error type</th></tr></thead><tbody><tr><td>"Fabrikam, Inc.', "123 Main Street"</td><td></td></tr><tr><td>Company Name,Address,City,State/t</td><td></td></tr></tbody></table>	Data	Error type	"Fabrikam, Inc.', "123 Main Street"		Company Name,Address,City,State/t	
Data	Error type						
"Fabrikam, Inc.', "123 Main Street"							
Company Name,Address,City,State/t							

Correct Answer:



Error types

Answer Area

Data

"Fabrikam, Inc.", "123 Main Street"

Error type

Inconsistent data delimiter

Company Name,Address,City,State/t

Inconsistent field delimiter

QUESTION 12

You set up a new instance of Dynamics 365 for Customer Service. Users report a variety of issues working with cases on mobile devices. You need to configure the mobile app to be able to view cases. NOTE: Each correct selection is worth one point.

Hot Area:

Answer Area

Scenario	Action needed
Users cannot see case records on mobile devices.	<div>▼</div> <div>Configure mobile settings set on the case entity level.</div> <div>Configure mobile settings at the field level within the case form.</div> <div>Configure a security role in the mobile permission set for appropriate users.</div>
Users can open cases but cannot see the subject of the case.	<div>▼</div> <div>Configure mobile settings set at the case entity level.</div> <div>Configure mobile settings at the field level within the case form.</div> <div>Configure a security role in the mobile permission set for appropriate users.</div>
Users report that they cannot access the system from the Dynamics 365 mobile app.	<div>▼</div> <div>Configure mobile settings set at the case entity level.</div> <div>Configure mobile settings at the field level within the case form.</div> <div>Configure a security role in the mobile permission set for appropriate users.</div>

Correct Answer:



Answer Area

Scenario	Action needed
Users cannot see case records on mobile devices.	<div>▼</div> <div>Configure mobile settings set on the case entity level.</div> <div>Configure mobile settings at the field level within the case form.</div> <div>Configure a security role in the mobile permission set for appropriate users.</div>
Users can open cases but cannot see the subject of the case.	<div>▼</div> <div>Configure mobile settings set at the case entity level.</div> <div>Configure mobile settings at the field level within the case form.</div> <div>Configure a security role in the mobile permission set for appropriate users.</div>
Users report that they cannot access the system from the Dynamics 365 mobile app.	<div>▼</div> <div>Configure mobile settings set at the case entity level.</div> <div>Configure mobile settings at the field level within the case form.</div> <div>Configure a security role in the mobile permission set for appropriate users.</div>

QUESTION 13

You manage a Dynamics 365 for Customer Service instance.

You must modify the unit price from two decimal places to four decimal places.

You need to ensure the unit price displays with four digits after the decimal.

What should you configure?

- A. Currency Precision to use four decimal places.
- B. Base Currency to use four decimal places.
- C. Currency field type to whole number.
- D. Currency Conversion to use four decimal places.

Correct Answer: A

QUESTION 14

An organization plans to deploy Dynamics 365.

You need to ensure that the organization can track the following information:

Prospect to cash process

Customer service cases

Work breakdown structure



Serviceable assets for customers

Which apps should you implement? To answer, drag the appropriate apps to the correct features. Each app 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.

Select and Place:

Apps	Answer Area	
	Feature	App
Project Service Automation	Prospect to Cash Process	
Field Service	Case Management	
Sales	Work Breakdown Structure	
Customer Service	Customer Asset Management	

Correct Answer:

Apps	Answer Area	
	Feature	App
	Prospect to Cash Process	Sales
	Case Management	Customer Service
	Work Breakdown Structure	Project Service Automation
	Customer Asset Management	Field Service

QUESTION 15

You are a Dynamics 365 for Customer Service system administrator. Your organization deploys Dynamics 365 for Outlook.

The sales team reports the following synchronization issues between Dynamics 365 and Outlook:

Microsoft PowerPoint presentations are missing from meeting invitations that are sent from Dynamics 365.

Outlook task lists are not visible in Dynamics 365.

You need to enable system settings to help address these issues.

Which two settings should you enable? Each correct answer presents part of the solution.

NOTE: Each correct selection is worth one point.

A. Exchange folder-level tracking.



B. Synchronize appointment attachments with Outlook or Exchange.

C. Synchronize tasks that assigned in Outlook.

D. Go Offline

Correct Answer: BC

References: <https://docs.microsoft.com/en-us/dynamics365/customer-engagement/outlook-addin/admin-guide/configure-synchronization-appointments-contacts-tasks>

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