1. How to create filtered lookup? - create field with  DT lookup. place on the form ,double click lookup field - go to  Related Records Filtering
2. Create contact using process. Use dialog, zcapture prompt and responses and step to create Contact record- assign user responses to the fields (fname, lname, phone etc.)- open contact form -Start dialog
3. Query D365 in dialog.
4. export import using excel, allow/deny duplicates.
5. lookup field on entity in case of 1:N, N:1, N:N?
6. dashboard - chart, list, iframe, WR
7. Can we export default/managed solution? - No
8. How to Deploy rdl/ssrs report in d365?

(a) System job-   used to define and track the execution of an asynchronous PI/WF operation.

(b) PlugIn trace log- to trace PI/WF

1. Want to see wat was the changed field, assign/share/creation of Entity- old value- new value...
2. Start Auditing(setting-admin- sys setting- start auditing)- enable audit on field -  view audit history in setting-audit-audit summary.
4. Hav 100 contacts and wants to display in a single page.
5. Use Options-General tab- Records per page=100 (user level settings/personalized setting).
6. PI trace log and System job (async PI/WF logs)
7. Export is possible for default and managed solution?
8. Settings- admin- sys settings- customization

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| --- | --- | --- |
| 1. Enable logging to plug-in trace log 2. I want a WF to trigger for entity which are changed at BU level or user level. how? - set scope of WF to user or BU 3. WF can be triggered for which all activities? 4. Record created, deleted, field change, record assigned, status change Multiple WF can be active at a time? 5. Want to trigger WF when Topic field value in opportunity changes. - While creating/editing WF, choose field changes (choose reqd field) activate the deactivated WF. 6. Format phone#, 10digit ? - use BR Url and signature fields.- single line with Url format, Multi-line with Pen control. 7. Search options in CRM - Advanced, Global, Quick find/search 8. PowerBI vs SSRS 9. The reports are static/readonly 10. Can be accessed in intranet 11. We don’t have a concept of dashboard 12. Limited sources support- sql, sqlite,   PowerBI   1. Reports are interactive – dynamic filters (ex: 2. Can be accesses from any where 3. Self service 4. Supports almost 50+ sources, 130+ visualizations for easy customizations |  |  |
|  |  |  |

Multiple choice questions

1. You create a business rule for the Case entity and set the scope to Case (form). Which action will cause the business rule to run?
2. Which action can you perform by using a business rule?

A.    Subtract $5.00 from a currency field.  
B.    Clear a two options field.  
C.    Concatenate two text fields.  
D.    **Add six days to a date field.**

1. You create a workflow and set the scope to User (default). User A owns the workflow. User B is making bulk changes on records that will trigger the workflow. Which records will this workflow affect?
2. A.    records owned by users in the same business unit as User B  
   B.    **records owned by User A**C.    records owned by User B  
   D.    records owned by either User A or User B
3. Which two of the following are valid security role permissions? Each correct answer presents a complete solution.

A.    Deactivate  
B.    **Share**  
C.    Edit  
D.    **Append**

1. You need to create a process that prompts users with questions and captures their answers. Which process type should you use?
2. A.    business rule  
   B.    **dialog**  
   C.    custom action  
   D.    background workflow
3. Which three actions can you add to a workflow? Each correct answer presents part of the solution.
4. A.    **Create Record**  
   B.    Share Record  
   C.    **Update Record**  
   D.    **Assign Record**  
   E.    Delete Record
5. You create a business rule. Which action can you perform?
6. A.    Hide a section.  
   B.    Show an error message when a rule fails to run.  
   C**.    Show an error message when a condition is met.**  
   D.    Hide a tab.
7. You add a new entity named Parts to Microsoft Dynamics 365. You need to grant all users that have the Salesperson security role read access to the Parts entity.  
   Which tab of the Security Role page should you use?
8. A.    Business Management  
   B.    Missing Entities  
   C.    **Custom Entities**  
   D.    Customization
9. You need to create a hyperlink field to capture the URL for a contact’s Linkedln profile.  
   Which data type should you use for the field?
10. A.    **single line of text**B.    web  
    C.    URL  
    D.    text area
11. Which two form areas allow you to read from and write to all visible fields? Each answer presents a complete solution.
12. A.    **Header**  
    B.    **Body**  
    C.    Navigation  
    D.    Footer
13. You need to grant users the ability to read all accounts in Microsoft Dynamics 365. Which access level should you apply to the Read permission for the Account entity?
14. A.    **Organization**  
    B.    System  
    C.    All  
    D.    Global
15. Which form type is used by the Microsoft Dynamics 365 for tablets app?
16. A.    Mobile  
    B.    **Main**  
    C.    Mobile – Express  
    D.    Turbo
17. You need to enable auditing for the account entity.  
    Which two actions should you perform? Each correct answer presents part of the solution.
18. A.    **Start auditing.**  
    B.    Enable change tracking.  
    C.    **Enable auditing for common entities.**D.    Enable auditing for user access.
19. Which three actions can you perform by using business rules? (Each correct answer presents a complete solution. Choose THREE.)
20. **A.    Display an error message at the field level.  
    B.    Set a default field value.**  
    C.    Set the active business process flow (BPF) stage.  
    D.    Display an error message at the form level.  
    **E.    Clear a field value**