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Exam : **PL-500**

Title : Microsoft Power Automate
RPA Developer (beta)

Version : DEMO

1. Topic 1, Contoso Pharmaceuticals

Background

Contoso Pharmaceuticals distributes specialty pharmaceuticals, ingredients, and raw materials throughout North America. The company has 33 offices and 12 warehouses across the US, Mexico, and Canada. As their customers' needs grow in sophistication, Contoso wants to delight customers with breakthrough products, exceptional service, and on-time delivery of materials. They want to automate time consuming and manual processes that are prone to error. Contoso wants to consolidate and automate ordering and fulfillment processes.

- The company has a fleet of 500 delivery trucks. The company has 150 drivers and uses third-party contractors to deliver goods.
- The company has 400 warehouse workers and 30 finance clerks.
- Contoso has 85 sales representatives and 50 customer service representatives. Sales representatives spend most of their time on the road visiting customers or prospects.
- The IT department consists of four system administrators and six system analysts.

Current environment

Overview

Contoso Pharmaceuticals has a custom enterprise resource management (ERP) system. It is difficult to integrate other applications and services with the system. Office staff manually key in purchase orders, customer orders, and invoices after they receive a scan or hard copy of an agreement.

Applications

- The company uses a custom supplier management system named SMSApps that runs on each user's workstation. The system is costly to run and maintain. SMSApp does not have an API.
- Sales representatives manage customer requests by using Dynamics 365 Sales.
- Contoso has Microsoft Power Platform development, user acceptance testing (UAT), and production environments.
- Administrators create one Accounts Payable (AP) mailbox for each environment to support testing.
- The use of a DLP policy and Desktop Flow development is specified as part of the automation requirements.

Business process

1. Sales representatives create quotes by using a Microsoft Word document template. The template allows representatives to include product quantity, and cost estimation details that will be needed to fulfil an order. The representative converts quotes to a PDF file and emails the file to the customer for approval.
2. The sales representative alerts the finance team about the new order and emails the finance team a copy of the quote for processing.
3. The finance team prints the quote and manually creates a purchase order (PO) into SMSApp to request materials from a known and trusted vendor.
4. The SMSApp distributes the PO to stakeholders. The system sends a copy to a shared finance team mailbox.

5. Once a PO is fulfilled by a vendor, the system sends an email to the finance mailbox. The finance team releases an order to the warehouse.
6. Materials are shipped from the vendor to one of Contoso's warehouses. Warehouse workers enter key information from the waybill into SMSApp. The materials are unloaded and racked in the warehouse until they are shipped to customers.
7. Upon checking for new daily orders in SMSApp, they see an open order is pending that is awaiting the newly received materials
8. The Warehouse worker loads an order onto a truck for delivery and marks the order as complete in SMSApp.
9. Sales representatives provide fulfillment status and tracking information for orders.
10. A finance clerk prepares an invoice and sends the invoice to the customer by email. The clerk sends a copy of the email to the shared AP mailbox.
11. The AP team monitors the shared mailbox to confirm that the customer has paid the invoice.

Requirements

Functional requirements

- Large volume orders must be processed before other orders.
- Invoices must be cross-checked with received items against packing slip for shipments.
- The finance team must be able to analyze patterns in transactional data to conduct fraud prevention activities.
- You must automate the process of entering data about incoming orders into SMSApp.
- The solution must follow the principle of least privilege.

Purchase Order Quantity flow

- You must create an unmanaged solution to update purchase order details in SMSApp. The flow must use a manual trigger.
- Members of Accounts Payable team will be testers for the solution. They must be able to access the Purchase Order Quantity flow.

Flow for processing invoice data

- You must create a flow to monitor the AP mailbox. When an invoice arrives as an attachment in the inbox, the flow must automatically process the invoice data by using a form processing model. The flow must cross-check the received items against the packing slip.
- You must use different Accounts Payable email addresses for development user acceptance testing (UAT), and production environments.
- You must use an environment variable to represent the Accounts Payable mailbox for the environment in use.
- You must be able to use the environment variable across multiple cloud flows, a custom connector, and a canvas app.

Technical requirements

- Users must only be allowed to connect to and access systems that are required for the employee to perform required job tasks.
- All automation flows must be either co-owned or shared between staff.
- All employees must be able to access the new environment to build personal productivity automations.

- You must distribute the workload for desktop flows to optimize productivity.

Monitor flows

- All data extracted from Invoices should be stored in a custom Dataverse entity. Only employees who are part of Finance role should be able to edit all Invoice data but must be prevented from creating or deleting one.

Issues

Invoice data

All users report that they can see and modify invoice data.

New environment

- The IT department creates a new environment. A user creates a cloud flow named FlowA in the environment that triggers a desktop flow. A user reports that the cloud flow does not trigger the desktop flow to run.
- Microsoft Dataverse is not provisioned in the new environment. You attempt to create a Desktop flow in the default environment but receive a Dataverse error message and cannot proceed.

Data entry automation flow

An administrator runs a new desktop flow in the development environment to automate data entry into SMSApp. The flow automatically reverts to a suspended state.

Order fulfillment flow

You must automate the customer communication process by using an unattended desktop flow. The flow must check the fulfillment status of each active order in SMSApp. If an order is fulfilled, the flow must send the customer an email that includes tracking information for their order.

You need to identify the cause for the SMSApp data entry issue.

What is the root cause?

- A. The DLP policy that contains the desktop flow connector was deleted.
- B. The default policy group is set to Blocked.
- C. The desktop flow was not shared with the finance clerk.
- D. The Power Automate Management connector is assigned to the Business category.

Answer: B

Explanation:

According to the scenario, the SMSApp data entry issue occurred after a DLP policy change that excluded the development environment from its scope. This means that any desktop flow that uses connectors in the development environment will be blocked by the DLP policy¹. Therefore, the root cause of the issue is option D.

2. You need to configure the flow for processing invoices that arrive in the AP mailbox.

Which three elements should you use? Each correct answer presents part of the solution. NOTE: Each correct selection is worth one point.

- A. Document type

- B. Location
- C. Pages
- D. AI model
- E. Form type
- F. Form

Answer: B, C, D

Explanation:

To configure a flow for processing invoices that arrive in an email, you need to use three elements: document type, AI model, and form type.

Document type specifies what kind of document you want to process, such as invoices, receipts, or business cards.

AI model determines how the document data will be extracted and analyzed, such as using a prebuilt model or a custom model.

Form type defines how the extracted data will be mapped to a table in Dataverse, such as using a standard form or a custom form.

3. You need to implement security to resolve the invoice data issue

Which three actions should you perform? Each correct answer presents part of the solution. NOTE: Each correct selection is worth one point.

- A. Clear the Create and Delete permissions. Set the Read permission and Write permission values to Organization.
- B. Select the Finance role, select Custom Entities and navigate to the table.
- C. In Microsoft Power Platform admin center, navigate to the Users section.
- D. In Microsoft Power Platform admin center, navigate to the Security roles section.
- E. Clear the Create and Delete permissions. Set the Read permission and Write permission values to Business unit.
- F. Select the Finance role select Core Records, and then navigate to the table.

Answer: BDE

Explanation:

To implement security to resolve the invoice data issue, you need to perform three actions:

In Microsoft Power Platform admin center, navigate to the Security roles section. This is where you can manage the security roles for your environment and assign them to users or teams.

Select the Finance role, select Custom Entities and navigate to the table. This is where you can configure the access level for each entity in your environment based on your security role.

Clear the Create and Delete permissions. Set the Read permission and Write permission values to Business unit. This will restrict users with this role from creating or deleting records in this table, but allow them to read or write records within their business unit.

4. HOTSPOT

You need to configure the solution.

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

Answer Area

Requirement	Option
Automate the SMSApp data entry process.	<ul style="list-style-type: none">ActionWorkflowDesktop flowMobile task flow
Handle invoices sent to the Accounts payable mailbox.	<ul style="list-style-type: none">When a folder is createdWhen an item is createdWhen a new email arrivesWhen a new email arrives in a shared mailbox
Implement the order process.	<ul style="list-style-type: none">WorkflowsInstant flowsBusiness rulesBusiness process flows

Answer:

Answer Area

Requirement	Option
Automate the SMSApp data entry process.	<ul style="list-style-type: none">ActionWorkflowDesktop flowMobile task flow
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Implement the order process.	<ul style="list-style-type: none">WorkflowsInstant flowsBusiness rulesBusiness process flows

5.You need to resolve the fulfillment status flow issue.

Which three actions should you perform? Each correct answer presents part of the solution. NOTE: Each correct selection is worth one point.

- A. Ensure that the flow instance does not remain in the queue for more than three hours.
- B. Ensure that all users are signed out from the target machine.
- C. Use different local Windows accounts for all machines.
- D. Ensure that the flow is not using elevated privileges.
- E. Trigger the flow by using an on-premises data gateway.

Answer: B, C, E

Explanation:

To resolve the fulfillment status flow issue, you need to perform three actions:

Ensure that all users are signed out from the target machine. This will prevent any interference or interruption from other users who might be logged in to the same machine where the desktop flow is running¹.

Use different local Windows accounts for all machines. This will ensure that each machine has a unique identity and credentials for running desktop flows¹.

Ensure that the flow is not using elevated privileges. This will avoid any security risks or errors that might occur when running desktop flows with administrator rights¹.