Microsoft

Exam Questions MB-280

Microsoft Dynamics 365 Customer Experience Analyst

NEW QUESTION 1
- (Topic 1)
You need to ensure the active stage of the business process flow is visible in the view. Which two actions should you perform? Each correct answer presents a complete solution. Choose two. NOTE: Each correct selection is worth one point.

A. Add a page for the Onboard new pet table to the Sales Professional app.
B. Add columns from the stable to the Active Onboard new pet view.
C. Add columns from the Pet table to the All Onboard new pet view.
D. Create a new column on the Pet table named "Onboarding stage" and add it to the Active pets view.

Answer: BD

Explanation:
? Adding Columns to the Active Onboard New Pet View (Option B):
? Creating and Adding a New "Onboarding Stage" Column (Option D):
? Other Options:
References from Microsoft Documentation:
? For configuring views and columns in Dynamics 365, refer toCreate and edit views.

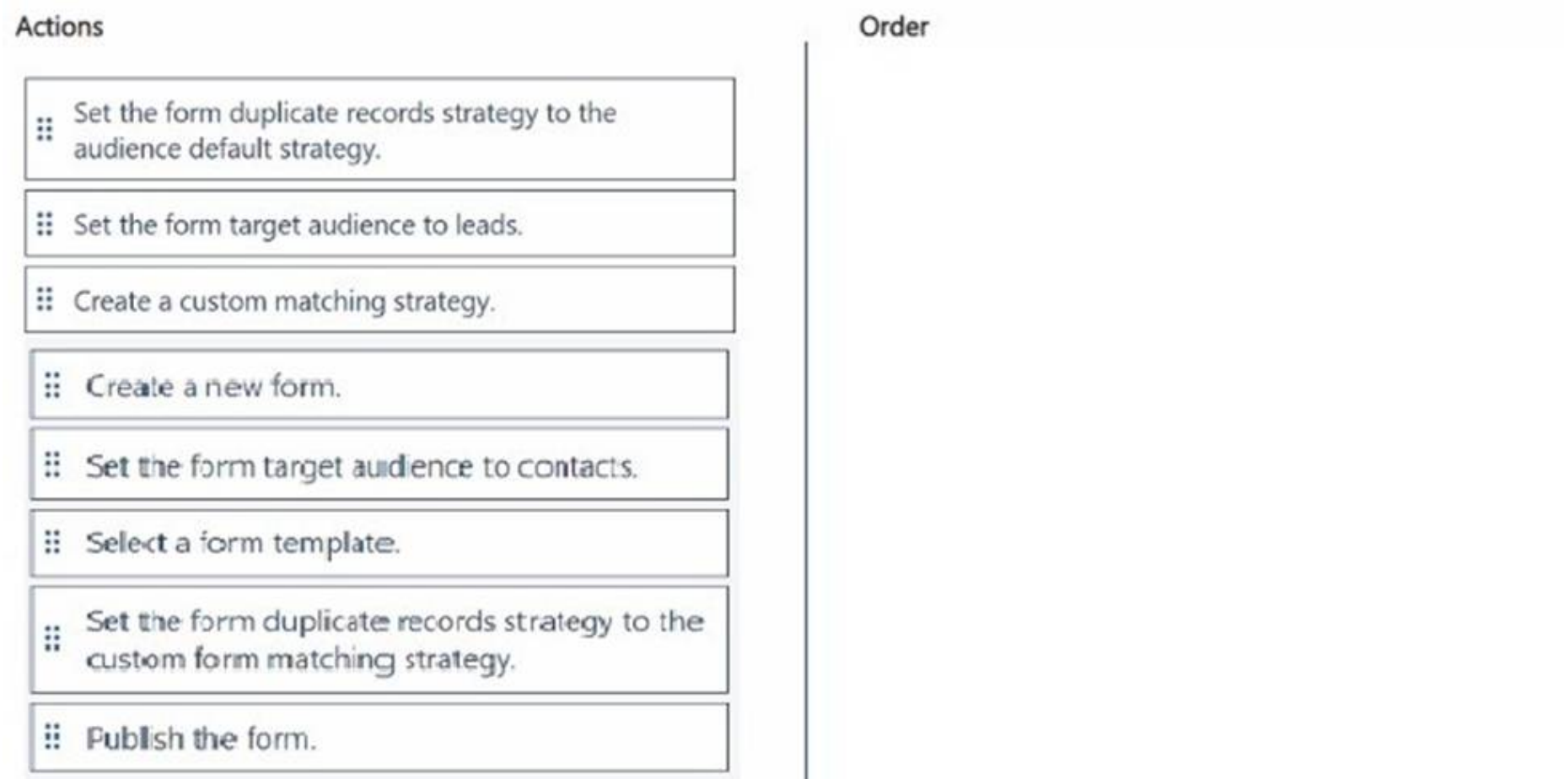
NEW QUESTION 2
- (Topic 1)
You need to configure the required audit settings.
Which two actions should you perform? Each correct answer presents part of Ihe solution. Choose two. NOTE: Each correct selection is worth one point.

A. Enable auditing on the Dietary requirements column.
B. Enable auditing on the Pettable.
C. Enable auditing on the Contact tab\e.
D. Enable auditing on the Email address column.
E. Enable Start read auditing in system settings.
F. Enable Audit user access in system settings.

Answer: AB

Explanation:
? Enable Auditing on Columns (Options A and D):
? Enable Auditing on Pet and Contact Tables (Options B and C):
? Enable Audit User Access (Option F):
? Option E (Start Read Auditing):
References from Microsoft Documentation:
? For setting up auditing, seeAuditing overview for Dynamics 365.

NEW QUESTION 3
DRAG DROP - (Topic 2)
You need to configure a new Customer Insights - Journeys form to satisfy the digital sales team lead's request.
Which five required actions should you perform in sequence? To answer, move the five appropriate actions from the list of actions to the answer area. Arrange the five actions in the correct order.

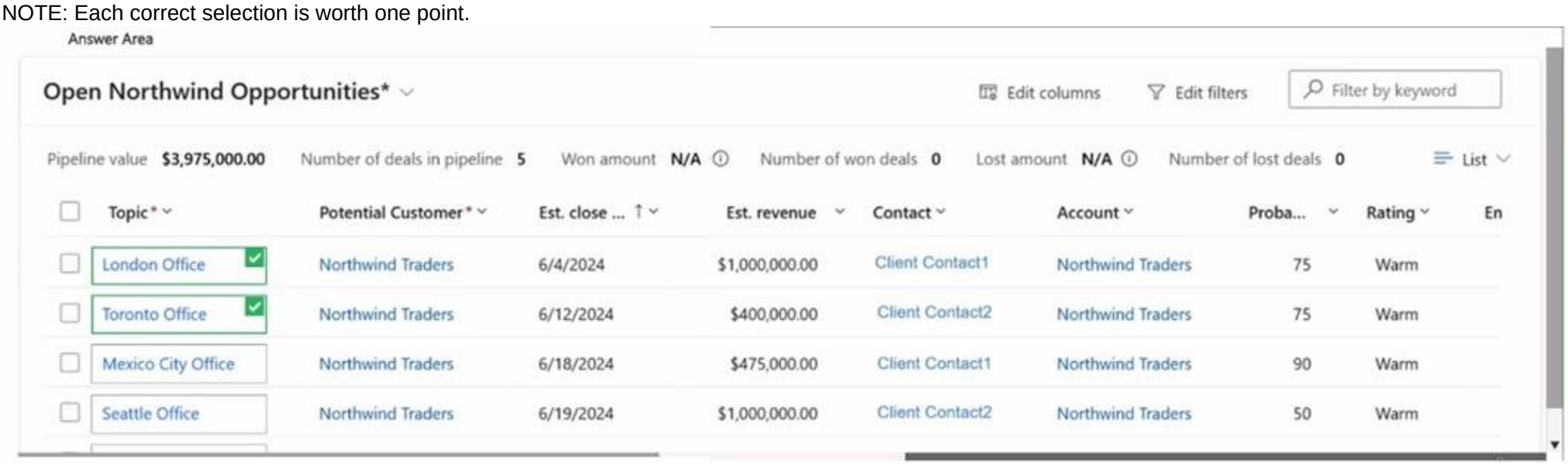


A. Mastered
B. Not Mastered

Answer: A

Explanation:
Here??s the correct sequence to configure a new Customer Insights - Journeys form to handle lead duplicates automatically, as per the requirements:
Create a new form:
Start by creating a new form within Customer Insights - Journeys. This is the initial step to set up a form that will capture new leads.
Select a form template:
Choose a template that best fits the purpose of the form. This provides a structure for the form fields and layout, streamlining the setup process.
Set the form target audience to leads:
Since the form will be capturing lead information, specify that the form??s target audience is ??leads.?? This will ensure that the data is processed and stored as lead records.
Set the form duplicate records strategy to the audience default strategy:
Define how duplicate records are managed. First, apply the default duplicate record strategy for leads. This sets an initial strategy for managing duplicates.
Publish the form:
After completing the setup and configuring the necessary options, publish the form to make it available for use.
Additional Context:
The Create a custom matching strategy and Set the form duplicate records strategy to the custom form matching strategy steps are optional and can be used for further refinement if the default strategy does not meet specific requirements for matching leads based on certain criteria.
By following these steps, you ensure the form is configured for capturing leads and
manages duplicates effectively based on the default duplicate record strategy. Microsoft Dynamics 365 References:
Set up a Customer Insights - Journeys form Duplicate Detection Rules in Dynamics 365

NEW QUESTION 4
HOTSPOT - (Topic 2)
BDM1 logs into the Sales Hub on June 3. 2024. BDM1 opens the assistant from the navigation bar.
Which two open opportunities will BDM1 see mentioned in the close date coming soon reminder cards? To answer, select the appropriate options in the answer area.
NOTE: Each correct selection is worth one point.

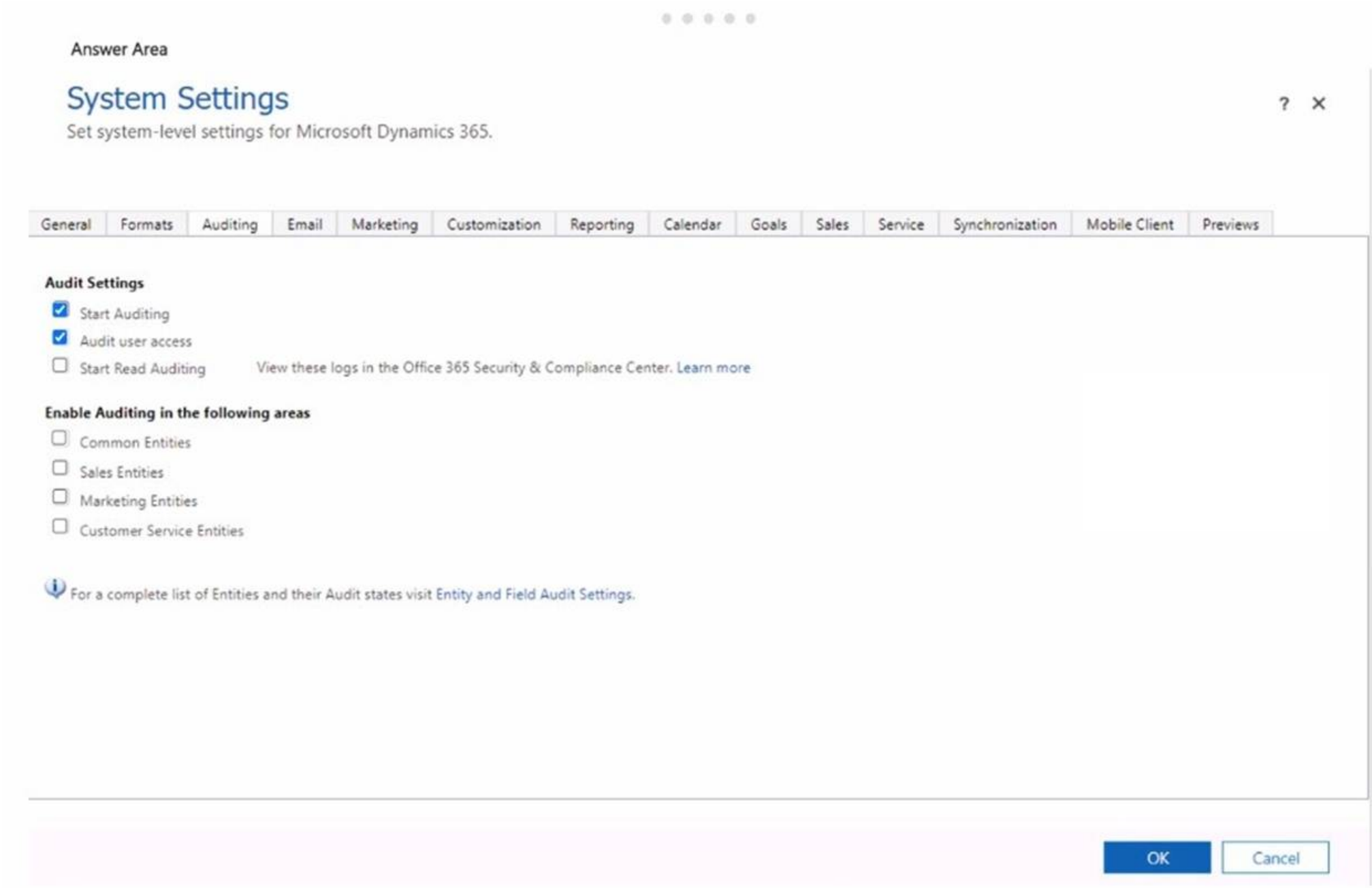


A. Mastered
B. Not Mastered

Answer: A

Explanation:
BDM1 has a reminder setting for close dates that are coming up within the next 21 days, as configured in the system. Given that BDM1 logs in on June 3, 2024, here??s how to determine which opportunities will be highlighted in the "Close date coming soon" reminder cards:
? Calculate the Reminder Period:
? Evaluate Close Dates for Opportunities:
Based on this,London OfficeandToronto Officeare within the specified period and thus will appear as close date reminders for BDM1.
Microsoft Dynamics 365 References:
? Assistant and Insights cards in Dynamics 365 Sales
By applying the specified close date threshold, we can confirm that the reminder cards for opportunities closing on June 4 and June 12 will be displayed to BDM1, which corresponds toLondon OfficeandToronto Office.

NEW QUESTION 5
HOTSPOT - (Topic 3)
Your organization has been noticing some peculiar field changes on certain records and wants to know what is causing this. You need to audit user access and updates for several custom tables.
Which two boxes must be checked as prerequisites steps? To answer, select the appropriate check boxes in the answer area. NOTE: Each correct selection is worth one point.



A. Mastered
B. Not Mastered

Answer: A

Explanation:
? Start Auditing:

NEW QUESTION 6
- (Topic 3)
You need to enable the Dynamics 365 App for Outlook for the sales team.
You need to perform the prerequisite actions before you can add the app for all users. Which two actions should you perform? Each correct answer presents part of the solution.
Choose two.
NOTE: Each correct selection is worth one point.

A. Enable mailboxes.
B. Add the Dynamics 365 App to Outlook desktop app.
C. Add the Dynamics 365 App for Outlook security role.
D. Enable sending on behalf of other users setting.

Answer: AC

Explanation:
Enable Mailboxes:
? To use the Dynamics 365 App for Outlook, each user??s mailbox must be enabled for server-side synchronization. This ensures that emails, appointments, and tasks can sync between Outlook and Dynamics 365.
? Without enabling the mailboxes, the synchronization won??t be functional, making it a critical prerequisite.
Reference:Microsoft Documentation - Enable Mailboxes for Dynamics 365
Add the Dynamics 365 App for Outlook Security Role:
Users need to be assigned theDynamics 365 App for Outlook security roleto access the app. This role grants the necessary permissions to interact with Dynamics 365 through Outlook.
Assigning this role ensures that users have the correct access rights to use the app within their Outlook environment.
Reference:Microsoft Documentation - Security Roles for Dynamics 365 App for Outlook

NEW QUESTION 7
- (Topic 3)
You are a Dynamics 365 Sales administrator. You configure a forecast template that uses the Forecast category as a starting point for a layout for the sales team. The sales manager wants the value of the Lost column to come from the Total Detail Amount instead of the default value because the revenue is always driven by the items. You need to make the change. What should you do?

A. Edit the existing forecast and update the Amount column in the layout.
B. Edit the existing forecast, remove the Lost column, and add a new calculated column.
C. Create a new forecast and update the Amount column in the layout.
D. Create a new forecast, remove the Lost column, and add a new calculated column.

Answer: A

Explanation:
Since the sales manager wants theLost columnin the forecast to reflect the Total Detail Amount, which is item-driven, you should update the Amount column in the existing forecast layout.
By editing the existing forecast and changing the source for theAmount columnto the Total Detail Amount, you can ensure the forecast accurately reflects item-based revenue calculations without needing to create a new forecast or add calculated columns. Reference:Microsoft Documentation - Configure Forecasts in Dynamics 365 Sales

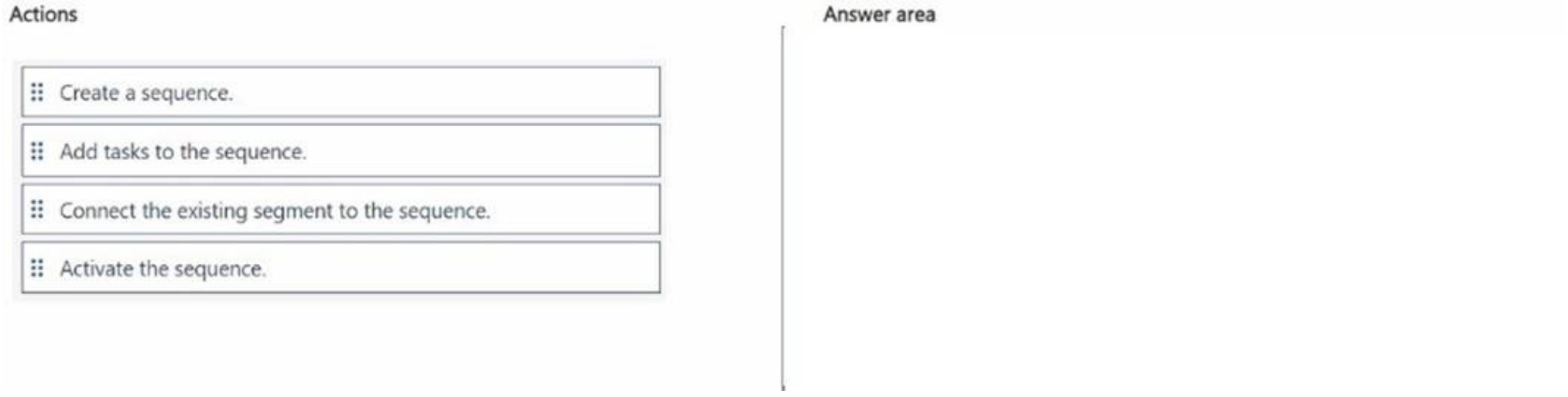
NEW QUESTION 8
- (Topic 3)
You need to ensure that a user named User1 can assign salespeople to sales territories. The solution must use the principle of least privilege. To which security role should you assign User1?

A. System customizer
B. Sales team member
C. Vice president of sales
D. Salesperson

Answer: C

Explanation:
To assign salespeople to sales territories, the user needs permissions to manage territory assignments, which is typically a higher-level responsibility.
TheVice president of salesrole includes privileges related to managing sales territories,
unlike the Sales team member or Salesperson roles, which are more focused on direct sales tasks.
TheSystem customizerrole does not specifically grant territory management permissions and is more focused on customization and configuration tasks.
Reference:Microsoft Documentation - Security Roles and Privileges in Dynamics 365

NEW QUESTION 9
DRAG DROP - (Topic 3)
A company uses Dynamics 365 Sales with assignment rules. The assignment rules use a segment to filter the lead records.
A sales manager wants to automatically add a series of tasks by using the same criteria as the assignment rules.
You need to create the tasks and assign the tasks to the lead records.
In which order should you perform the actions? To answer, move all actions from the list of actions to the answer area and arrange them in the correct order.



A. Mastered
B. Not Mastered

Answer: A

Explanation:
A screenshot of a computer Description automatically generated
The correct order of actions to create a sequence of tasks and assign them to lead records based on the same criteria as assignment rules is as follows:
? Create a sequence.
? Add tasks to the sequence.
? Connect the existing segment to the sequence.
? Activate the sequence.
? Create a Sequence:

NEW QUESTION 10
- (Topic 3)
The analytics team at your organization has created Power BI reports that enrich data about your accounts from Dynamics 365 Sales with data NOT contained in Dynamics 365 Sales. The Power BI reports are referenced by your executive leadership as the primary source of truth about account success metrics. Sales leadership has requested that sales users can see these insights about the accounts they have access to within Dynamics 365 Sales. You need to enable the insights to be available to sales users in Dynamics 365 Sales. What should you do?

A. Provide a link to the Power BI report in the ribbon on the account form.
B. Create a dashboard in Dynamics 365 Sales that contains account data.
C. Embed the Power BI Dashboard as a dashboard in the Dynamics 365 Sales application.

D. Embed the Power BI report using contextual filtering for accounts.

Answer: D

Explanation:
To make Power BI insights available within Dynamics 365 Sales, specifically contextualized for accounts, you shouldembed the Power BI report with contextual filtering. This ensures that the report dynamically adjusts based on the specific account record a user is viewing. Embedding with contextual filtering enables sales users to see account-specific insights directly within the Dynamics 365 interface, improving accessibility and relevance. Reference:Microsoft Documentation - Embed Power BI Reports in Dynamics 365 Sales

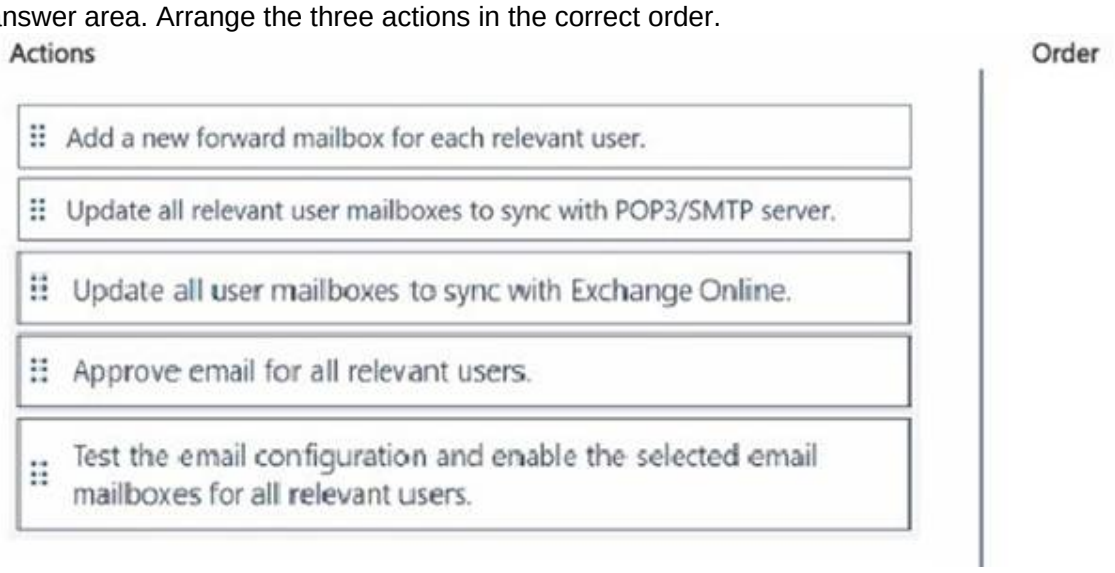
NEW QUESTION 10
- (Topic 3)
You are the Dynamics 365 administrator at an organization that uses both Dynamics 365 Customer Insights - Journeys and Dynamics 365 Sales.
You have configured Customer Insights - Journeys to create leads from web form submissions. You also allow your sales users to create leads using the user interface.
Your organization has recently hosted an event at a conference.
• You have a Customer Insights - Journeys web form to capture leads immediately at the conference.
• You expect sales users to enter lead information for prospects they meet at the event in the week after the conference.
You need to keep your data clean while also capturing all the valid leads from the event. What should you do?

A. Go to the classic editor and remove Create permissions from the security group for sales users.
B. Go to the form in Customer Insights - Journeys and update the form so that it can either create new leads or update existing leads.
C. Go to The settings area in Customer Insights - Journeys and ensure the default form matching strategy is selected.
D. Go to business management settings and enable duplicate detection on leads based on email.

Answer: D

Explanation:
? Requirement Analysis:
? Solution - Enabling Duplicate Detection:
? Steps to Enable Duplicate Detection for Leads Based on Email:
Reference:Microsoft Documentation - Configure Duplicate Detection Rules in Dynamics 365
Benefits of Using Duplicate Detection:
This approach does not restrict users from creating leads but ensures that duplicate entries are flagged, allowing users to review and decide whether to proceed.
It maintains data cleanliness by preventing unnecessary duplicates while ensuring all valid leads are captured from different sources.
By implementing this solution, the organization can effectively manage potential duplicate leads, keeping the data clean and accurate across both Customer Insights - Journeys and Dynamics 365 Sales.

NEW QUESTION 13
DRAG DROP - (Topic 3)
Your organization used Gmail previously and had only one Gmail server profile.
You recently moved to Exchange Online and you need to complete the set up for server- side sync with Exchange Online and ensure all mailboxes are working.
Which three actions should you perform in sequence before saving your changes? To answer, move the three appropriate actions from the list of actions to the answer area. Arrange the three actions in the correct order.



A. Mastered
B. Not Mastered

Answer: A

Explanation:
A screenshot of a computer Description automatically generated
? Update All User Mailboxes to Sync with Exchange Online:

NEW QUESTION 15
HOTSPOT - (Topic 3)
You are a Dynamics 365 Sales administrator. You create a forecast by using the forecast category layout shown in the exhibit:

Use the drop-down menus to select the answer choice that answers each question based on the information presented in the graphic.
NOTE:Each correct selection is worth one point.

Answer Area

Where should you rename the Omitted column to Cancelled for this forecast?

Layout column settings
Forecast Category option set
Forecast view
Layout column settings
Preview grid

Where should you delete the Lost column for this forecast?

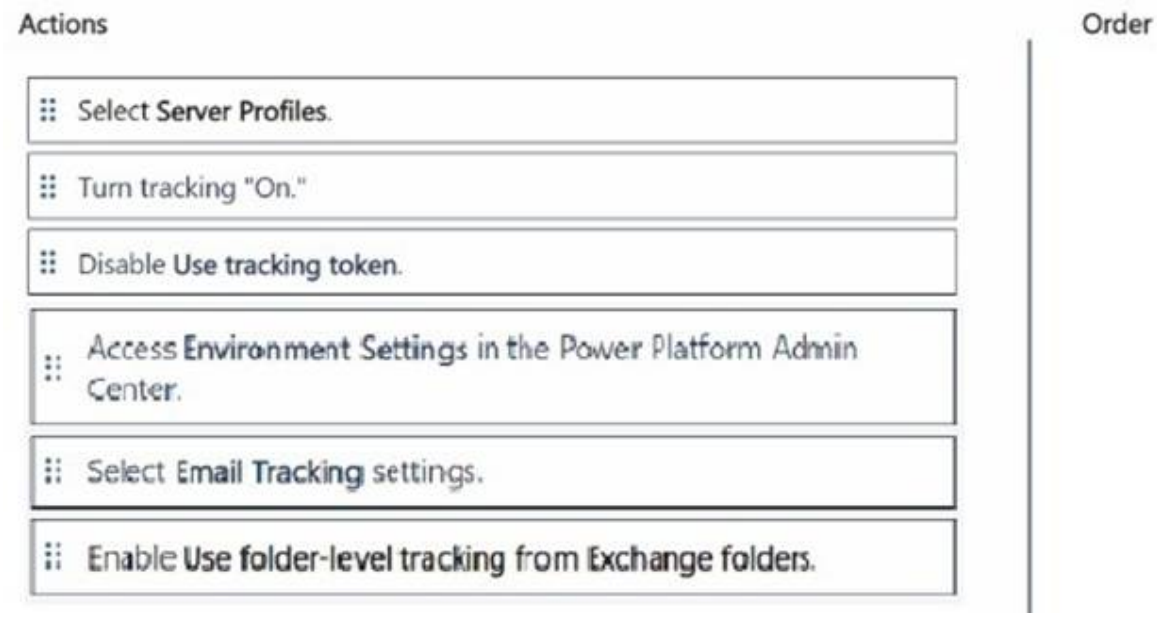
Forecast configuration
Forecast configuration
Forecast configuration filter data
Forecast Category option set value
Forecast view

A. Mastered
B. Not Mastered

Answer: A

Explanation:
? Renaming the Omitted Column to Cancelled:

NEW QUESTION 19
DRAG DROP - (Topic 3)
You have enabled Dynamics 365 App for Outlook for your sales team.
Users report that they are dissatisfied that they must track the emails manually, so you propose folder-level tracking.
You need to enable folder-level tracking in your environment in order for your users to configure the rules.
Which three actions should you perform in sequence before saving your changes? To answer, move the three appropriate actions from the list of actions to the answer area. Arrange the three actions int he correct order.



A. Mastered
B. Not Mastered

Answer: A

Explanation:
? Access Environment Settings in the Power Platform Admin Center:

NEW QUESTION 24
- (Topic 3)
A battery manufacturer wants to sell their batteries in boxes of 12 and cases of 24 boxes. You need to set up a unit group so that the manufacturer can sell different quantities. What should you create first?

A. primary unit
B. related unit
C. base unit

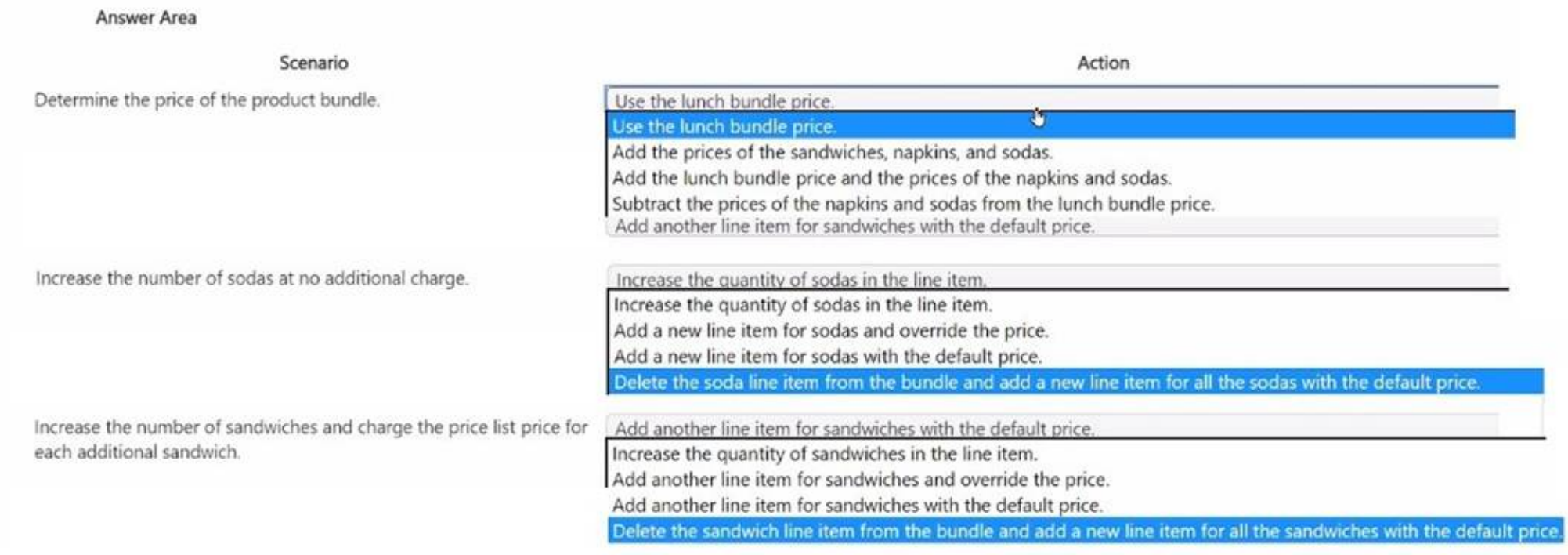
Answer: C

Explanation:
In Dynamics 365 Sales, when setting up aunit group, you must first define thebase unit. This is the fundamental unit of measurement for a product and serves as the foundation for defining related units within the group.
For the battery manufacturer, defining abase unit(such as a single battery) is necessary before configuring related units for boxes of 12 and cases of 24 boxes, as these will be multiples or related units derived from the base unit.
Reference:Microsoft Documentation - Create Unit Groups and Units

NEW QUESTION 29
HOTSPOT - (Topic 3)
You are a Dynamics 365 Sales consultant for a food service company. The company caters meals for client companies.
The company wants to set up a product bundle so that the sales staff does not forget items when they create an opportunity.
The lunch bundle is created at $200.00. It will include the following.

Product	Quantity	Unit Cost	Amount	Configuration
Sandwich	50	$5.00	$250.00	Required
Napkins	50	$0.25	$12.50	Optional
Soda	50	$1.00	$50.00	Optional

You need to explain how the sales staff should manage the product bundle in the opportunity. What should they do for each scenario? To answer, select the appropriate options in the answer area. NOTE: Each correct selection is worth one point.

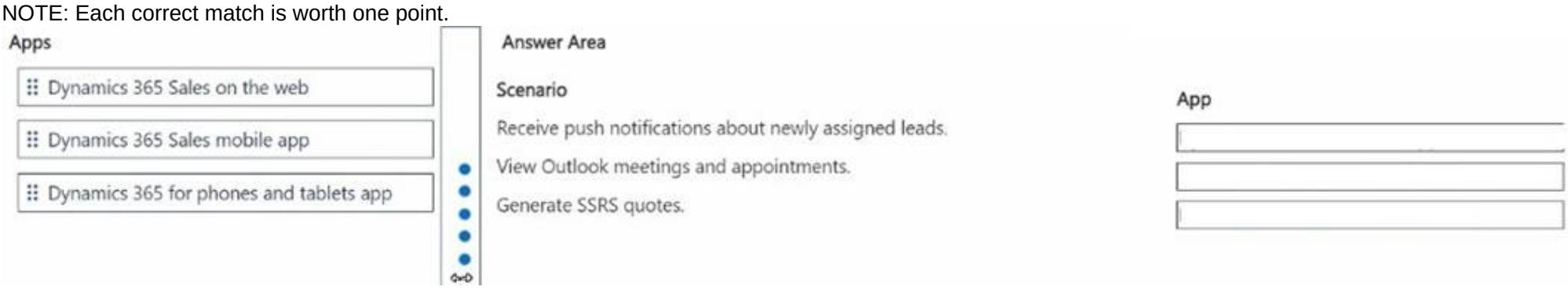


A. Mastered
B. Not Mastered

Answer: A

Explanation:
? Determine the Price of the Product Bundle:Use the lunch bundle price

NEW QUESTION 32
DRAG DROP - (Topic 3)
A company has implemented Dynamics 365 Sales Enterprise. The salespeople often travel to meet customers and require mobile-friendly solutions to various scenarios.
You need to provide a solution for the traveling salespeople.
Which apps should you recommend in each scenario? To answer, move the appropriate apps to the correct scenarios. You may use each app once, more than once, or not at may need to move the split bar between panes or scroll to view content.
NOTE: Each correct match is worth one point.



A. Mastered
B. Not Mastered

Answer: A

Explanation:
? Receive Push Notifications about Newly Assigned Leads:Dynamics 365 Sales mobile app

NEW QUESTION 34
- (Topic 3)
You are implementing Dynamics 365 Customer Insights - Data as the company's Customer Data Platform. You set up the data sources and start the unification process. You need to identify the primary table within the Matching conditions page.
Which two criteria should you use to determine the primary table? Each correct answer presents a complete solution. Choose two. NOTE: Each correct selection is worth one point.

A. Choose the table with the most complete and reliable profile data about your customers.
B. Choose the table that has the most related tables.
C. Choose the Dynamics 365 contact\ab\e when this is available as the data source.
D. Choose the table that has several attributes in common with other tables.

Answer: AC

Explanation:
When determining theprimary tablein Customer Insights during the unification process, the goal is to choose the table that provides the most robust and accurate customer profile information.
Criterion Ais crucial because having complete and reliable customer profile data ensures that the unified profile is accurate and comprehensive.
Criterion Cis recommended by Microsoft when using Dynamics 365 data, as thecontact tableoften serves as the primary source of customer information within the Dynamics 365 ecosystem.
While tables with many related tables or common attributes with other tables may provide supplementary information, they do not necessarily constitute the primary source for reliable customer data.
Reference:Microsoft Documentation - Data Unification Process in Customer Insights

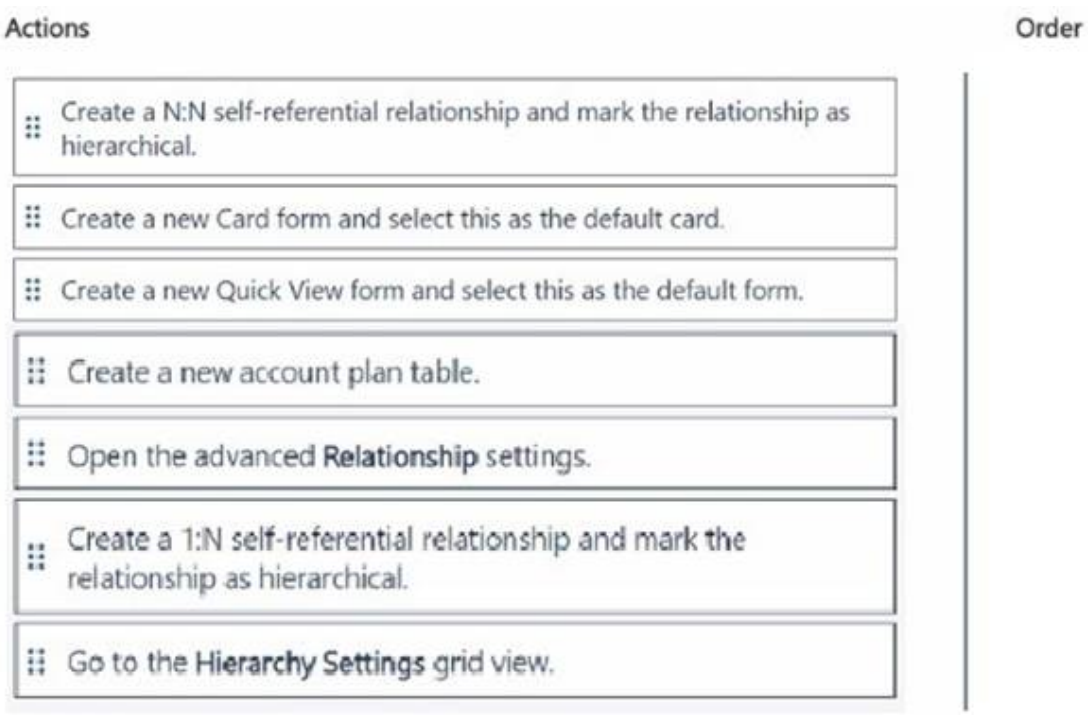
NEW QUESTION 37
- (Topic 3)
Your company wants to enable AI features in their systems and use Copilot for Sales to connect to Dynamics 365 Sales data. You need to ensure that all eligible users have access.
Which three actions should you perform? Each correct answer presents part of the solution. Choose three. NOTE: Each correct selection is worth one point.

A. Create a policy in Teams to install and pin Copilot for Sales and enable meeting transcripts.
B. Enable Copilot for Sales in Dynamics 365.
C. Install Copilot for Sales in Microsoft Outlook.
D. Verify server-side synchronization is enabled and users have the correct security roles in Dynamics 365.
E. Assign users the correct privileges to use Copilot for Sales in Teams.

Answer: BDE

Explanation:
? Enable Copilot for Sales in Dynamics 365:
? Verify Server-Side Synchronization and Security Roles:
? Assign Privileges for Copilot in Teams:
Reference:Microsoft Documentation - Configure and Use Copilot for Sales

NEW QUESTION 42
DRAG DROP - (Topic 3)
Your organization works with larger customers (accounts) that can have a single holding and then many subsidiaries through different levels in a parent-child relationship.
The chief commercial officer wants the sales team to start creating different account plans for each individual subsidiary.
You need to create a new custom account plan table so that records can have the same parent-child relationships as the account records. The relationships must be able to be visualized in a hierarchy.
Which four actions should you perform in sequence before saving and publishing your changes' To answer, move the four appropriate actions from the list of actions to the answer area. Arrange the four actions in the correct order.



A. Mastered
B. Not Mastered

Answer: A

Explanation:
The correct order of actions to create a new custom account plan table with a hierarchical parent-child relationship visualization is as follows:
? Create a new account plan table.
? Create a 1
self-referential relationship and mark the relationship as hierarchical.
? Open the advanced Relationship settings.
? Go to the Hierarchy Settings grid view.
Step by Step Comprehensive Detailed Explanation with ALL Microsoft Dynamics 365 References:
? Create a New Account Plan Table:

NEW QUESTION 45
- (Topic 3)
A company's IT department has a .CSV file stored on one of their Shared Documents folders within their Microsoft SharePoint sites. The data from the .CSV file is ingested into Dynamics 365 Customer Insights - Data.
The file contains a row header and columns of different types, such as quantities and prices. The file also contains some rows with a high proportion of nulls.
You need to clean and transform the data in Customer Insights - Data to be ready for unification.
Solution: Transform the first row to be used as headers. Define column types to be appropriate field types and name the query. Create a full name and full address columns by merging the appropriate columns if they exist. Select Next and your data is now ready for unification-Does this meet the goal?

A. Yes
B. No

Answer: B

Explanation:
This solution also includes transforming headers and defining column types, along with creating merged columns. However, itstill does not remove rows with a high proportion of nulls. Addressing null values is important for data quality and ensuring accurate unification.
Without removing rows with many nulls, the data may still have integrity issues that could impact the unification process. As a result, this solution doesnot completely meetthe goal.

NEW QUESTION 49
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