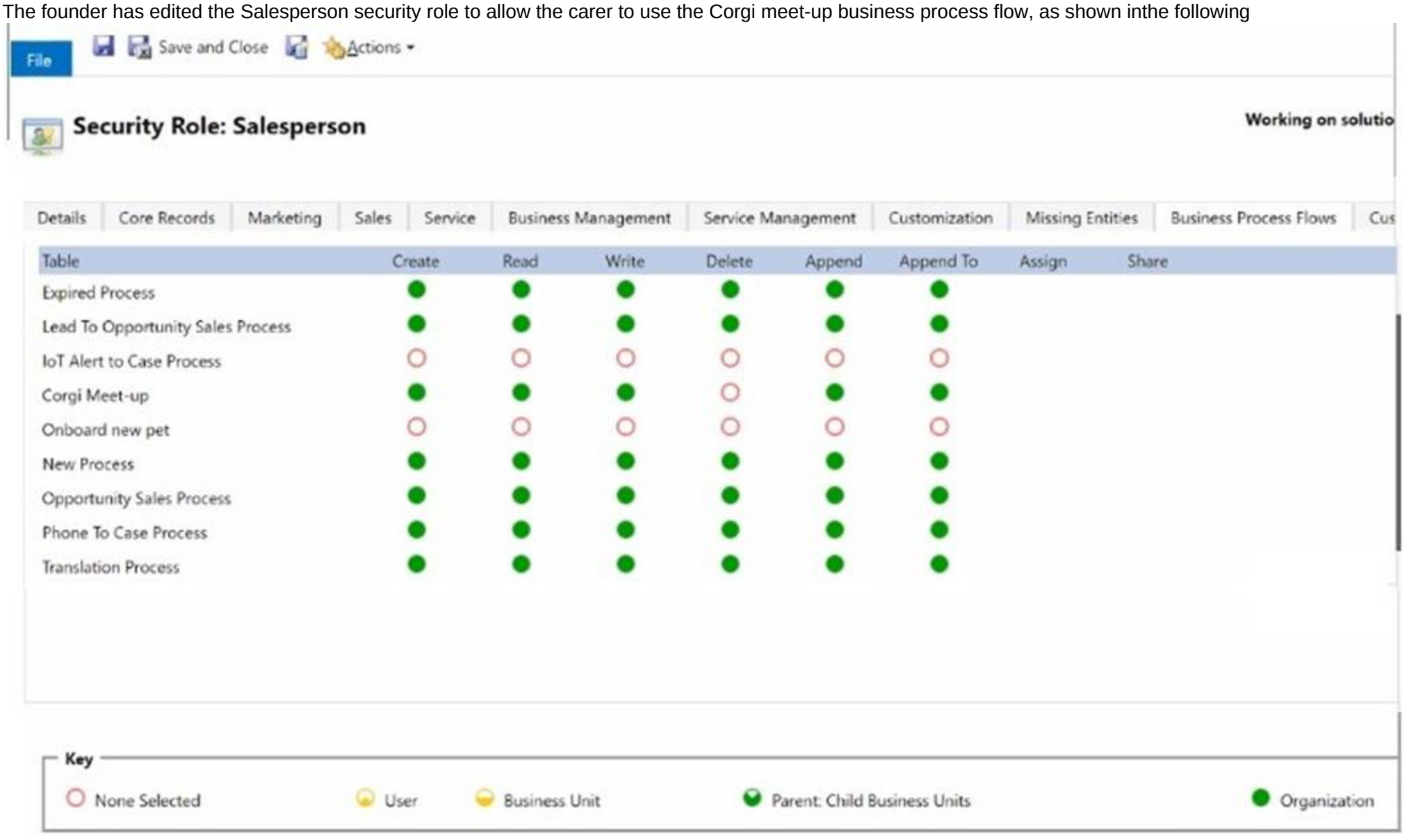
Microsoft

Exam Questions MB-280

Microsoft Dynamics 365 Customer Experience Analyst

NEW QUESTION 1
HOTSPOT - (Topic 1)
The founder has edited the Salesperson security role to allow the carer to use the Corgi meet-up business process flow, as shown inthe following



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

Answer Area

The carer can now see business process flows on pet records

- that the founder created and when the carer creates new pet records.
- **that the founder created and when the carer creates new pet records.**
- that the founder created and on records that the carer previously created.
- only when the carer creates new pet records.

When the carer uses the switch process dialog, they will see

- the corgi meet-up flow.
- both the corgi meet-up and onboard new pet business process flows.
- **the corgi meet-up flow.**

A. Mastered
B. Not Mastered

Answer: A

Explanation:
The configurations in the Salesperson security role will determine the access and visibility the carer has to the "Corgi meet-up" business process flow. The carer should be able to view and interact with specific business process flows on the Pet records based on the permissions configured by the founder.
? Business Process Flow Access Configuration:
? Visibility of Business Process Flows on Pet Records:
? Switch Process Dialog Visibility:
References from Microsoft Documentation:
? Microsoft??s official documentation on configuringSecurity Rolesin Dynamics 365 provides detailed guidance on setting permissions for different entities and processes. More information can be found in the Dynamics 365 security model documentation:Manage security, users, and teams
? ForBusiness Process Flowconfigurations, including permissions and visibility settings, refer to the guide onCreate a business process flow in Dynamics 365.
This setup ensures that the carer has the appropriate level of access to perform their duties, specifically in handling pet records and business processes like the "Corgi meet- up."
If you have further questions or need more details on this configuration, feel free to ask!

NEW QUESTION 2
- (Topic 2)
You need to build a trigger-based journey to send the "Getting started" emails requested by the global sales lead. Which trigger should you use to start the journey?

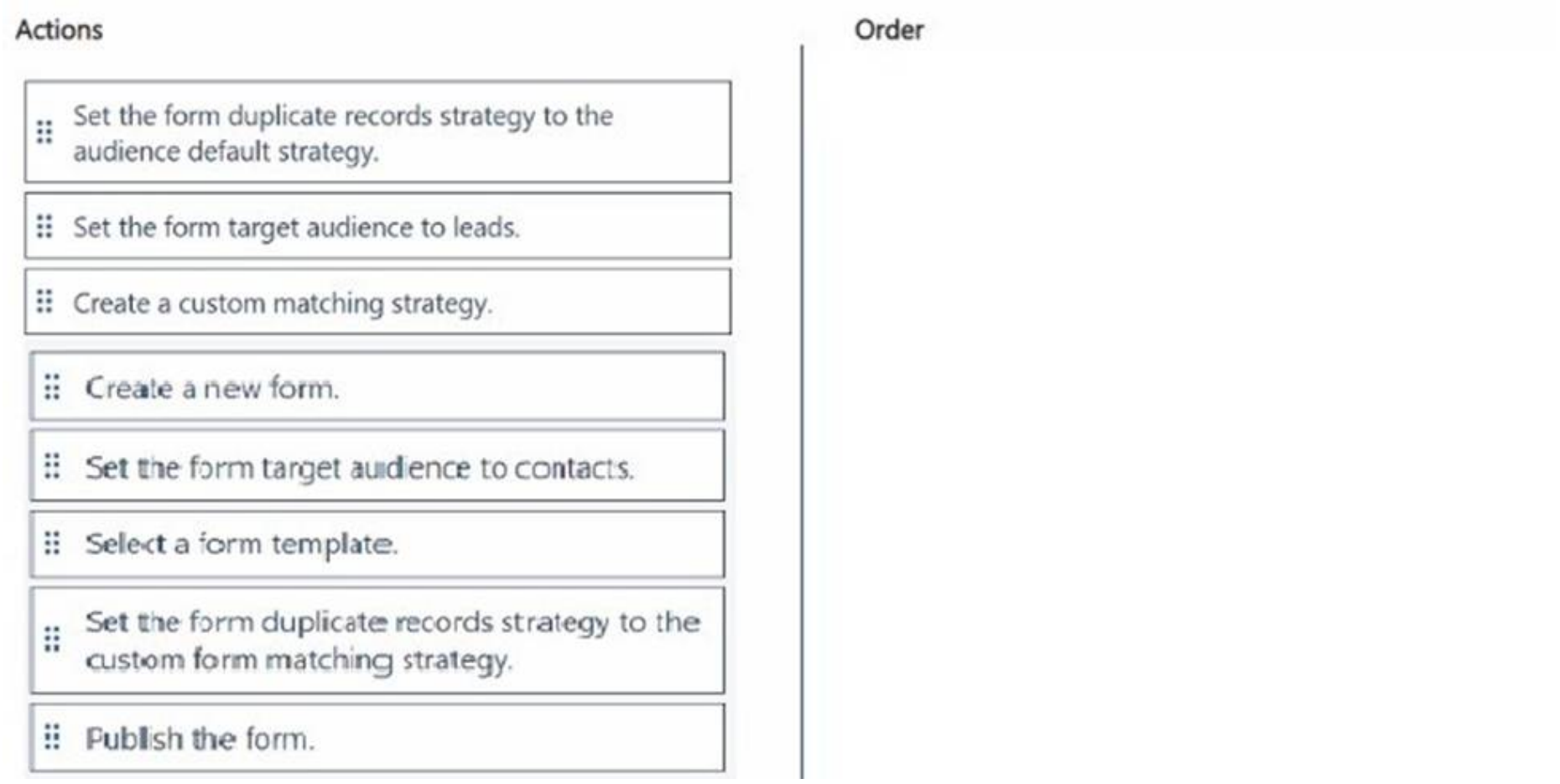
A. Dataverse record change trigger

B. Custom trigger with lead profile data
C. Custom trigger with contact profile data
D. Email Link Clicked interaction trigger

Answer: A

Explanation:
To build a trigger-based journey that sends "Getting started" emails when an opportunity is marked as "Won," the appropriate trigger to use is theDataverse record change trigger. This trigger is specifically designed to initiate actions based on changes in
Microsoft Dataverse records, which are integral to Dynamics 365. Here??s the detailed reasoning:
? Dataverse Record Change Trigger:
? Why Not Other Triggers?
Microsoft Dynamics 365 References:
? Create and manage trigger-based journeys
? Work with Dataverse triggers in journeys
By using theDataverse record change trigger, you ensure that the journey aligns directly with the sales process and automatically sends the "Getting started" email when an opportunity reaches the "Won" status, as requested by the global sales lead.

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
- (Topic 2)
You need to update the role configuration for the digital sales team to enable the capability requested. What two actions should you perform? Each correct answer presents part of the solution. Choose two. NOTE: Each correctselection is worth one point.

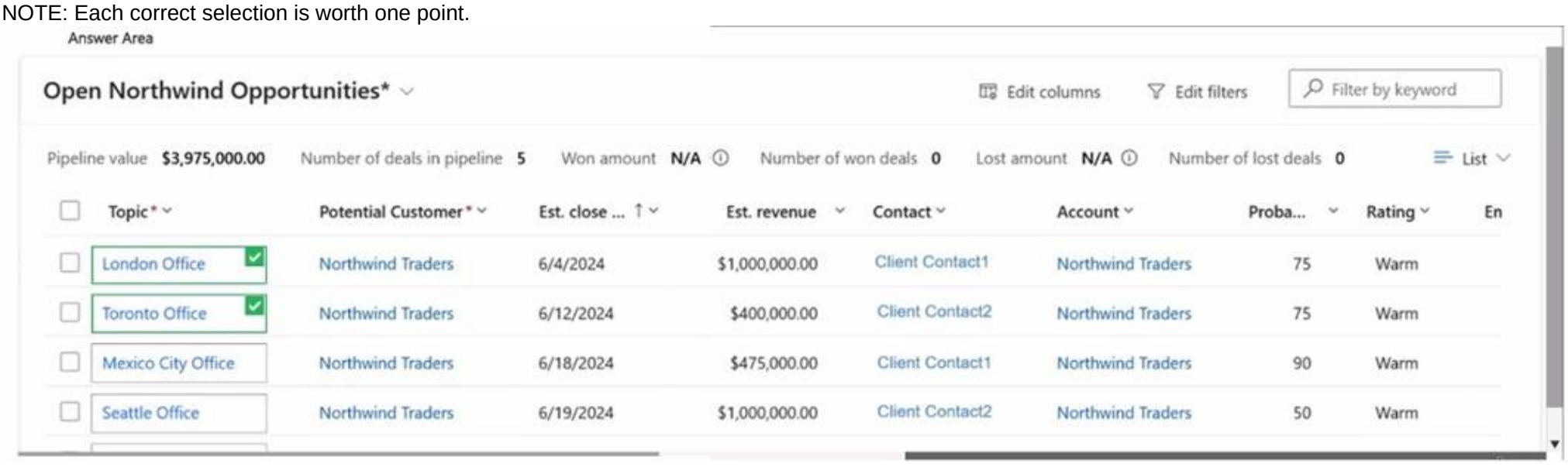
A. Grant View Audit Summary permissions to the Digital seller security role.
B. Assign the Sales Copilot user role to the members of the digital sales team.
C. Grant View Audit History permissions to the Digital seller security role.
D. Grant View Audit Partitions permissions to the Digital seller security role.

Answer: BC

Explanation:
To enable the digital sales team's request to use Copilot for summarizing changes to lead records, you need to ensure that they have the necessary permissions and access to the required features. Here??s how to proceed:
? Assign the Sales Copilot User Role:
? Grant View Audit History Permissions:
By implementing these two actions, the digital sales team will have both the necessary access to Copilot features and the required permissions to audit lead record changes, enabling them to leverage Copilot for summarizing changes to leads effectively.

NEW QUESTION 5
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.

Answer Area



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 6
- (Topic 3)
One of the data sources being ingested into Dynamics 365 Customer Insights - Data is Microsoft Dataverse. During the unification process, you need to identify the primary key.
Which three data types can you use as a primary key attribute? Each correct answer presents a complete solution. Choose three. NOTE: Each correct selection is worth one point.

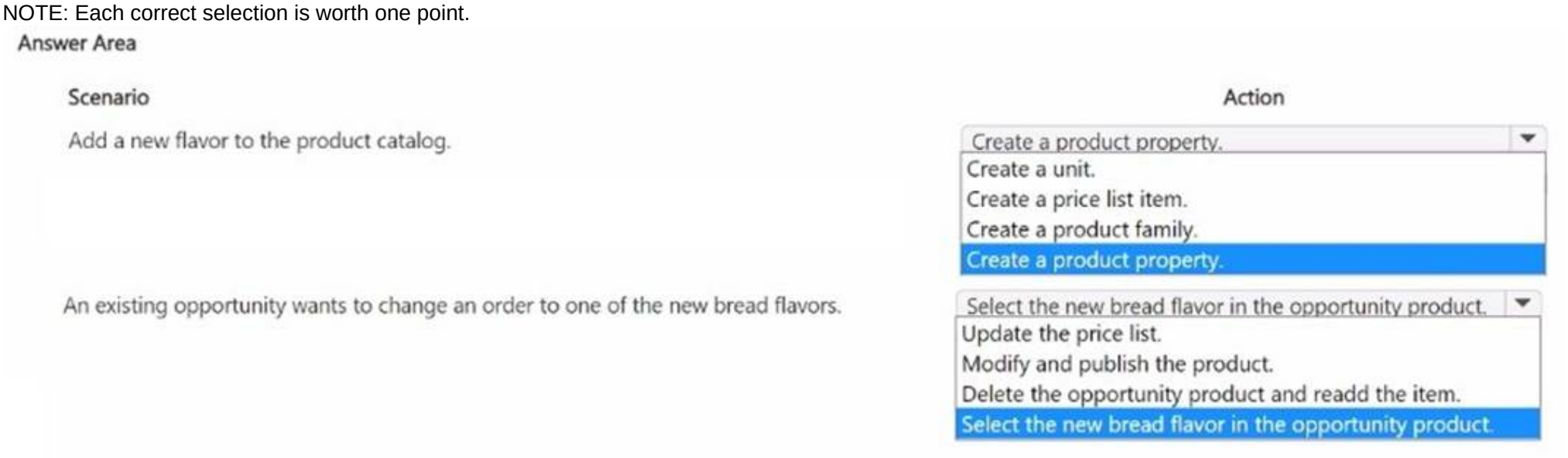
A. Integer
B. Whole Number
C. String
D. Boolean
E. GUID

Answer: BCE

Explanation:
In Dynamics 365 Customer Insights - Data,primary key attributesmust uniquely identify records and be consistent across the data source.
Whole NumberandGUIDare commonly used data types for primary keys because they can uniquely identify records and are natively supported for primary keys in databases. Stringcan also be used as a primary key if it uniquely identifies each record (e.g., an email address).
IntegerandBooleanare generally not used as primary keys in Customer Insights because they may not provide unique identifiers suitable for all scenarios.
Reference:Microsoft Documentation - Configure Primary Key in Dynamics 365 Customer Insights

NEW QUESTION 7
HOTSPOT - (Topic 3)

A bakery uses Dynamics 365 Sales. All loaves of bread sold at the bakery are priced the same. Special bread flavors are developed regularly.
You need to add a new flavor to the product catalog.
What should you do for each scenario? To answer, select the appropriate options in the answer area.
NOTE: Each correct selection is worth one point.

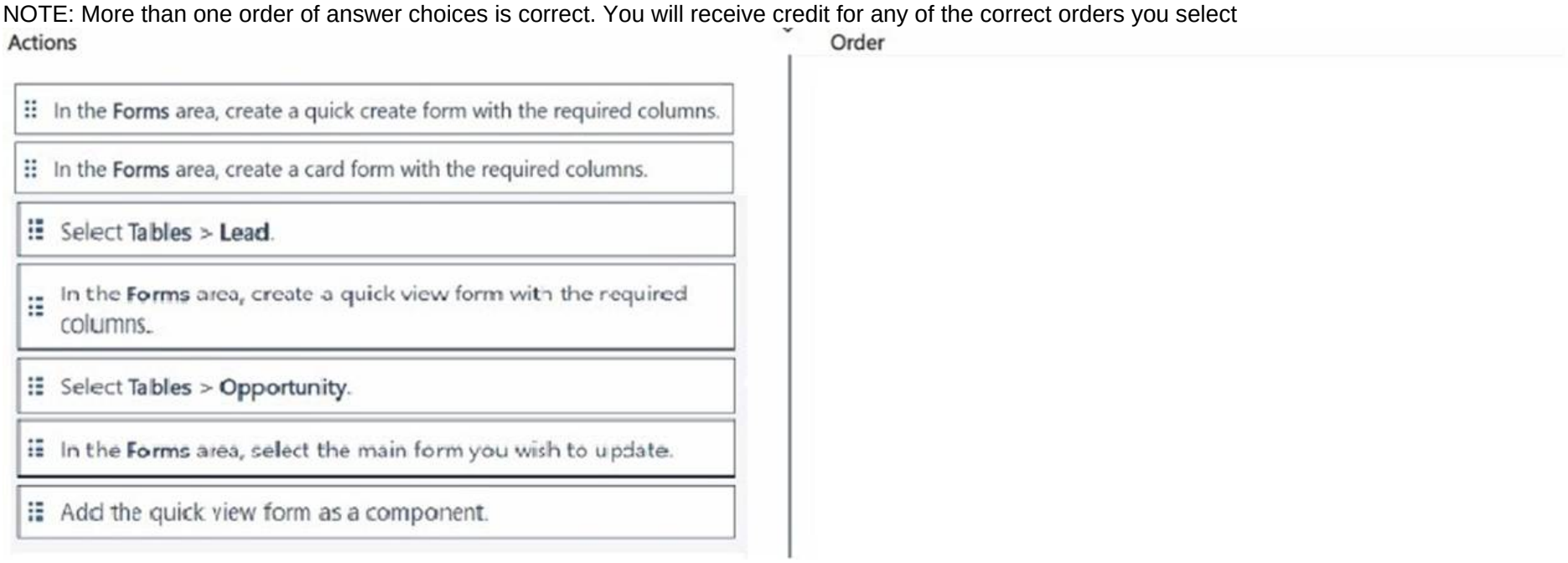


A. Mastered
B. Not Mastered

Answer: A

Explanation:
A white background with black text
Description automatically generated
? Scenario 1: Adding a New Flavor to the Product Catalog

NEW QUESTION 8
DRAG DROP - (Topic 3)
You are designing the user experience for sales users at your organization for a variety of tasks.
One of the user experience requirements is for sales users to be able to see information from custom attributes created for originating leads for opportunities WITHOUT having to navigate to the Lead record.
You are already signed in to the correct editing application and you now need to configure the user experience in Dynamics 365 Sales to enable this.
Which five actions should you perform in sequence before saving and publishing your changes? To answer, move the five appropriate actions from the list of actions to the answer area. Arrange the five actions in the correct order.
NOTE: More than one order of answer choices is correct. You will receive credit for any of the correct orders you select



A. Mastered
B. Not Mastered

Answer: A

Explanation:
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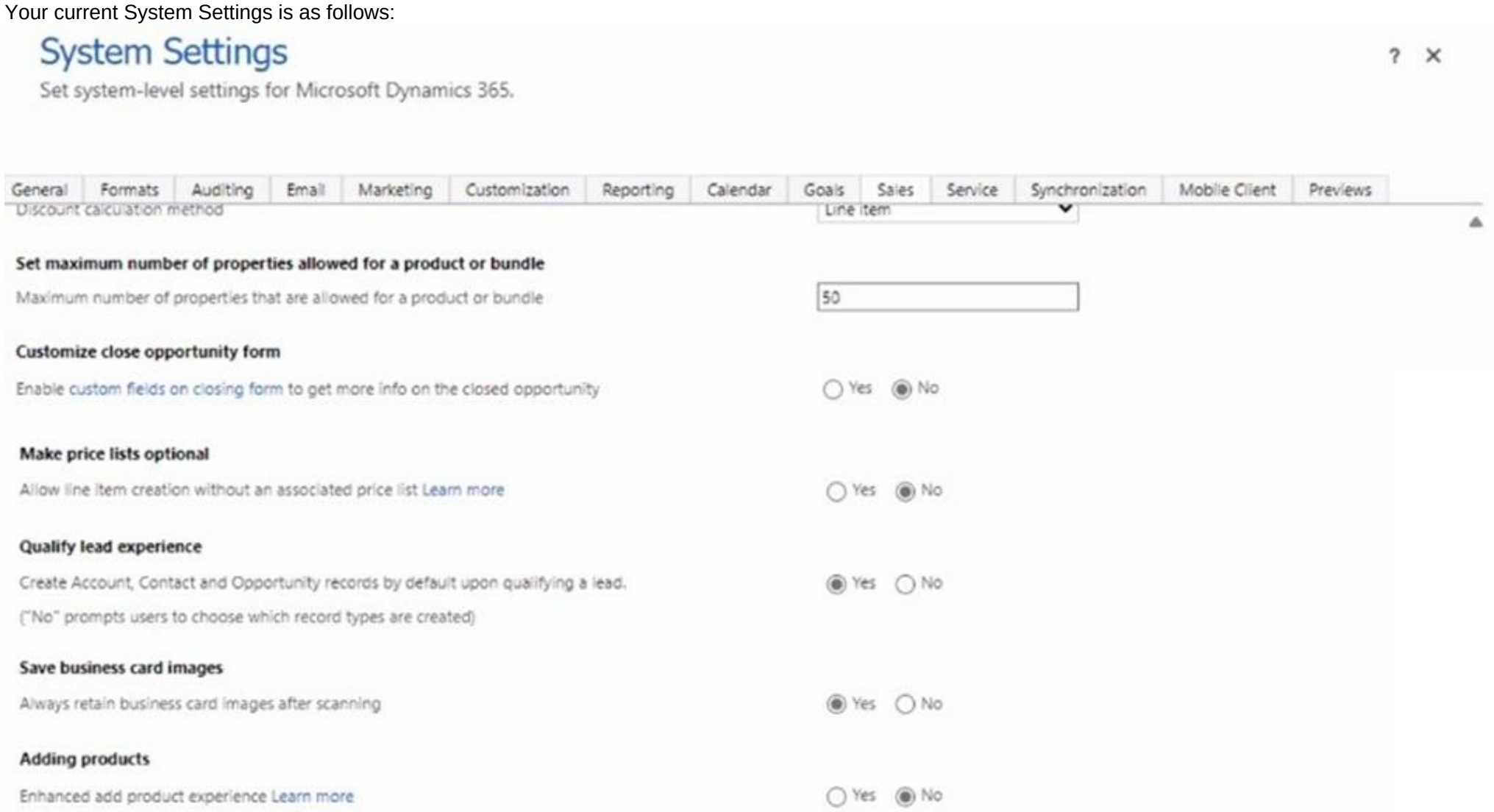
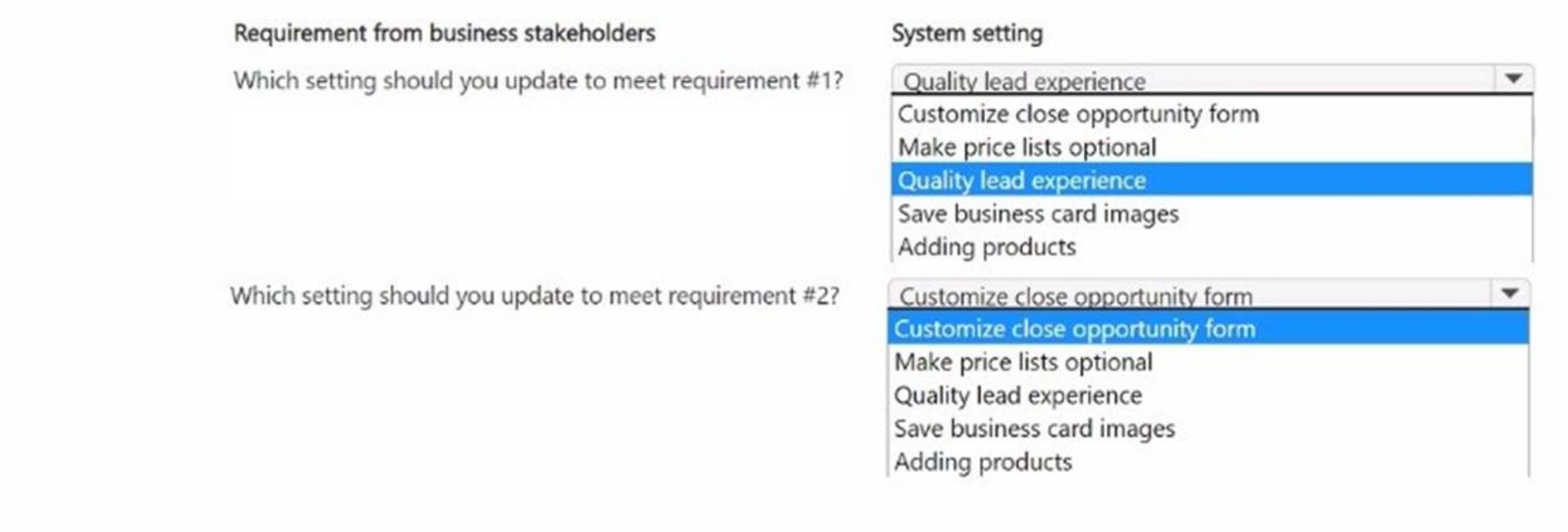
Description automatically generated
The correct order of actions to enable sales users to view information from custom attributes on leads directly within opportunity records, without navigating to the lead record, is as follows:
? Select Tables > Lead.
? In the Forms area, create a quick view form with the required columns.
? Select Tables > Opportunity.
? In the Forms area, select the main form you wish to update.
? Add the quick view form as a component.
Step by Step Comprehensive Detailed Explanation with ALL Microsoft Dynamics 365 References:
? Select Tables > Lead:

NEW QUESTION 9

HOTSPOT - (Topic 3)
You are configuring Dynamics 365 Sales as part of a new implementation at your organization. Your organization has Sales Professional licensing.
Your organization sells over 100 different types of products across different divisions. A lot of selling occurs at conferences where sellers meet prospects and gather business cards to create leads.
After reviewing the requirements from your business stakeholders, you identify that:
* 1. Sellers sometimes only want to convert leads gathered at events to contacts before they start tracking any deals with that contact.
* 2. Sellers must be given multiple different options for specifying the final status of deals they have been tracking.
Your current System Settings is as follows:



Use the drop-down menus to select the answer choice that answers each question. NOTE: Each correct selection is worth one point.
Answer Area

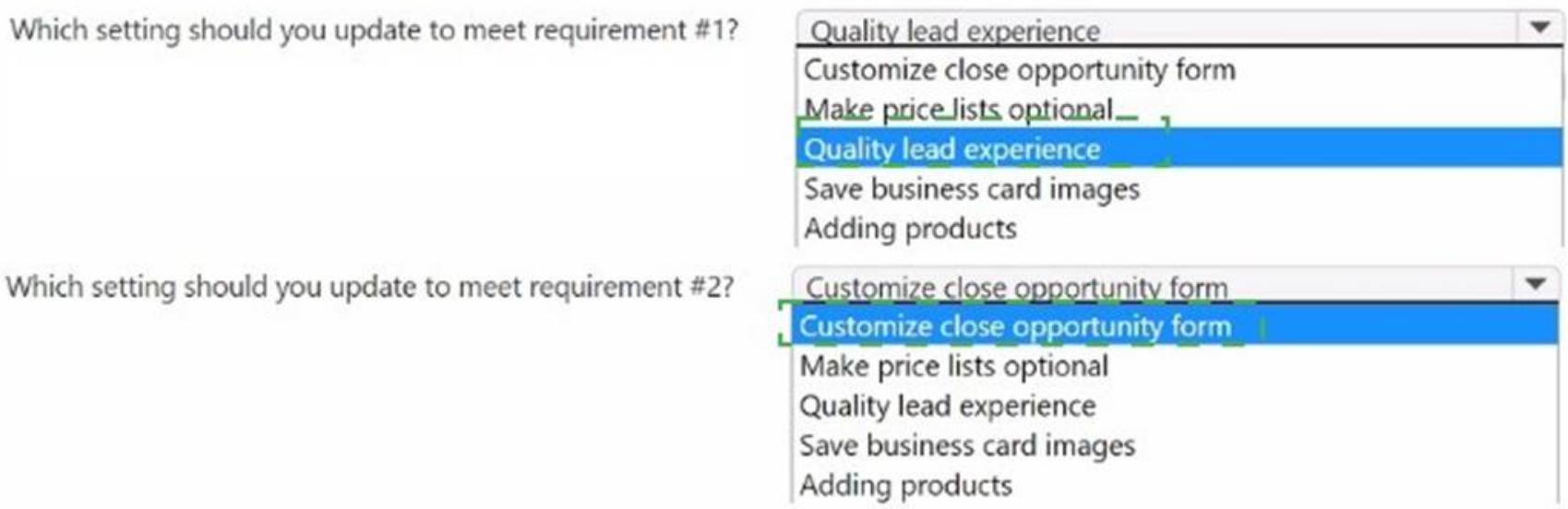


A. Mastered
B. Not Mastered

Answer: A

Explanation:

Answer Area



NEW QUESTION 10
- (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 10
- (Topic 3)
You are creating a pricing list in Dynamics 365 Sales. All prices must end in You need to select the function that establishes this pricing requirement. What should you use?

A. Rounding Policy
B. Percentage
C. Rounding Amount
D. Pricing Method

Answer: A

Explanation:
In Dynamics 365 Sales, theRounding Policyfeature allows you to control how pricing values are rounded, such as ensuring prices end in specific digits (e.g., nearest whole number or a specified decimal value).
TheRounding Policycan be configured to automatically adjust prices to the nearest whole value or any other desired rounding amount, ensuring consistency with pricing requirements.
This feature is especially useful for scenarios where pricing must conform to specific formats, such as all prices ending in ??0?? or ??5.??
Reference:Microsoft Documentation - Configure Rounding Policies for Price Lists

NEW QUESTION 11
- (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 the appropriate field types and name the query. Select Next and your data is now ready for unification.
Does this meet the goal?

A. Yes
B. No

Answer: B

Explanation:
While transforming the first row to be used as headers and defining column types are necessary steps, the solution does not addressremoving rows with high proportions of nulls. Rows with significant null values can interfere with the quality of the unification process in Customer Insights - Data.
Therefore, this solution doesnot fully meetthe goal as it does not handle data quality issues caused by null values.

NEW QUESTION 13
- (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 14
- (Topic 3)
You created and published lead scoring models in the Dynamics 365 Customer insights - Journeys application.
Your marketing team members inform you that they are NOT able to view the lead scoring insights. You confirm the lead scoring models are published and are Live.
You need the marketing team to be able to view the lead scoring insights.

A. Re-publish the lead scoring models to allow the system to capture the insights.
B. Assign the Lead Score Viewer security role to the users.
C. Set all leads to Active state to capture the insights.
D. Set automatic lead scores cleanup to No lo capture the scoring.

Answer: B

Explanation:
For team members to view lead scoring insights, they must have appropriate permissions, specifically theLead Score Viewerrole in Dynamics 365 Customer Insights - Journeys.
Even though the lead scoring models are published and live, without the correct security role, users will not have access to view the insights.
Assigning theLead Score Viewerrole ensures that the users have the necessary access rights to review the lead scoring insights generated by the models.
Reference:Microsoft Documentation - Configure Security Roles for Lead Scoring

NEW QUESTION 16
- (Topic 3)
You use business process flows for all Dynamics 365 opportunities. Some opportunities are closed before business process flow durations are calculated. You need lo ensure that business process flow duration values are calculated.
Solution: When closing an opportunity, use the close as won dialog without completing the business process flow. Does this meet the goal?

A. Yes
B. No

Answer: B

Explanation:
Using theClose as Wondialog without completing the business process flow doesnot ensurethat the business process flow duration is calculated. The process flow needs to be marked as completed or transitioned to an inactive state for duration values to be captured.
Simply closing an opportunity as won without completing the flow may bypass the finalization of process flow metrics, hence the goal is not met in this case.

NEW QUESTION 17
- (Topic 3)
You are the Dynamics 365 administrator for a group of financial advisors.
Advisors must use one business process flow to guide them through the standard lead to invoice process.
Each table has the following number of stages and steps:

Table	Number of Stages	Number of Steps per Stage
Lead	10	10
Opportunity	10	10
Quote	10	10
Order	10	10
Invoice	10	10

You need to modify the business process flow to make it valid. What should you reduce?

A. number of steps per stages
B. number of tables
C. total number of steps
D. total number of stages

Answer: D

Explanation:
In Dynamics 365, business process flows are limited to30 stagesacross all entities within a single process. Since each entity here (Lead, Opportunity, Quote, Order, Invoice) has10 stages, the total would be50 stages, exceeding the limit.
To meet the requirements, you need to reduce the total number of stages to comply with this limitation. Reducing the total number of steps per stage, tables, or steps won??t directly address the stage limit issue.
Reference:Microsoft Documentation - Business Process Flow Limits

NEW QUESTION 18
- (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 23
- (Topic 3)
An organization is using Microsoft Power Query when connecting to data sources in Dynamics 365 Customer Insights - Data. You need to load contacts to Customer Insights - Data using Power Query. Which is an appropriate action to take when using Power Query to ingest data?

A. You must create a separate Power Query data source for each table you wish to ingest.
B. You can only add additional columns to the dataset in Power Query before the data source is created in Customer Insights - Data.
C. After you save a Power Query data source, you have to manually trigger the initial refresh process.
D. You can add additional tables to the data source using Get Data functionality in the Power Query.

Answer: D

Explanation:
In Dynamics 365 Customer Insights - Data, when using Power Query to ingest data, theGet Datafunctionality allows users to add multiple tables from various data sources.
This flexibility enables users to enrich the dataset by pulling in additional tables that may be related or necessary for the data unification process.
Power Query in Customer Insights supports creating robust data flows by allowing multiple tables to be added within a single data source setup, providing a comprehensive data modeling environment.
Reference:Microsoft Documentation - Use Power Query in Customer Insights

NEW QUESTION 25

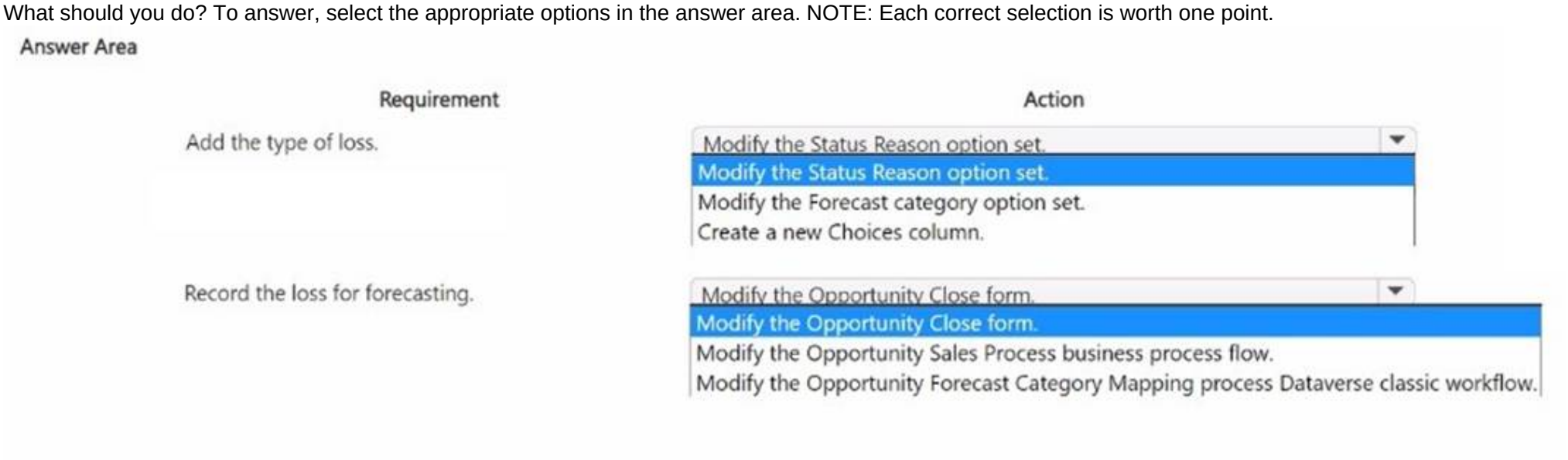
- (Topic 3)
You are the Dynamics 365 Sales administrator for an electronics company.
The sales team is having difficulty locating different products in the same category - for instance; all versions of flat screen TV available.
You need to make it easier for the sales team to navigate through products via taxonomy. What should you use?

A. Product families
B. Product unit groups
C. Related products
D. Product bundles

Answer: A

Explanation:
? Product familiesallow you to group related products under a common category, making it easier for the sales team to navigate and find products within the same category, such as all versions of flat-screen TVs.
? By usingProduct families, you can organize products into a hierarchical structure that reflects their categorization, enabling sales users to browse and select items more efficiently within Dynamics 365 Sales.
Reference:Microsoft Documentation - Organize Products Using Product Families
Using product families, you can streamline the user experience and improve navigation within the product catalog by grouping similar products together, which simplifies the search process for sales teams.

NEW QUESTION 26
HOTSPOT - (Topic 3)
A company is using Dynamics 365 Sales to track their sales pipeline.
Sales managers require their forecasting to include reasons why opportunities were lost, including losses to competitors.
You need to configure the sales process WITHOUT using custom code.
What should you do? 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:

NEW QUESTION 29
- (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, remove rows that contain null values, and name the query. Select Next and your data is now ready for unification.
Does this meet the goal?

A. Yes

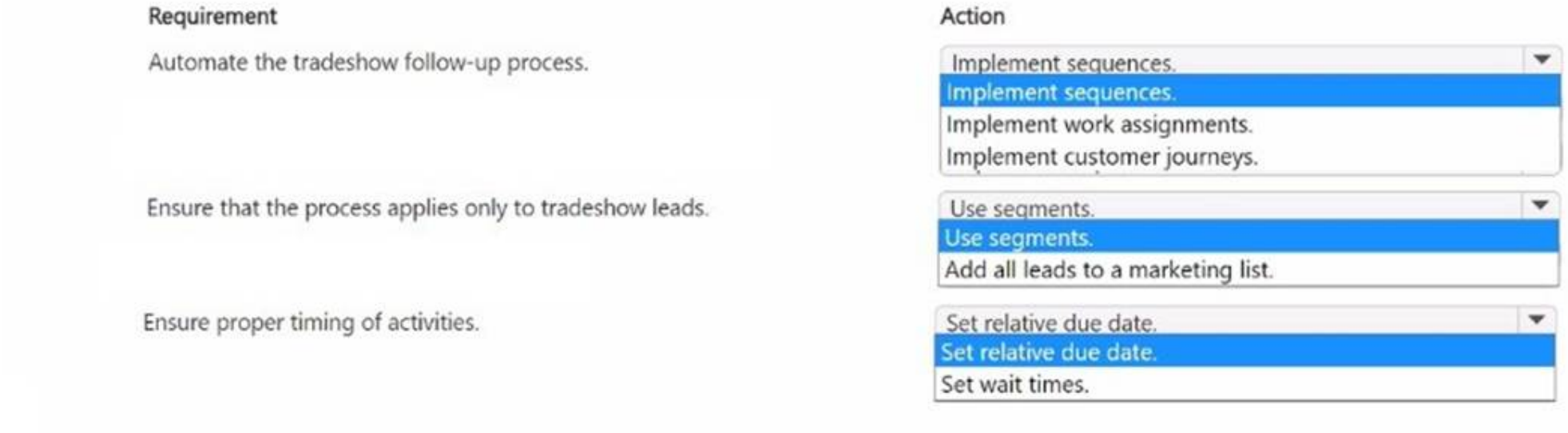
B. No

Answer: A

Explanation:
Transforming the first row to be used as headers, removing rows with null values, and naming the query prepares the data appropriately for unification inCustomer Insights - Data.
By setting the headers and removing rows with high proportions of nulls, the data becomes cleaner and more structured, which is essential for successful unification in Customer Insights. Therefore, this solution meets the goal of preparing the data for unification.

NEW QUESTION 32
HOTSPOT - (Topic 3)
A company sends its salespeople to trade shows to meet potential customers. One day after the trade shows, the salespeople currently send a follow-up email manually to the potential customers they met. They would like a task to remind them to call the potential customers a week after that.
You need to increase the follow-up rate for salespeople after a tradeshow.
Which actions should you take? To answer, select the appropriate options in the answer area.
NOTE: Each correct selection is worth one point.

Answer Area



A. Mastered
B. Not Mastered

Answer: A

Explanation:
? Automate the Tradeshow Follow-up Process:Implement sequences

NEW QUESTION 37
- (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 42
- (Topic 3)
A company created a new table named Locations.
The sales team needs your help to make the Locations table visible in the Sales Hub. What should you do?

A. Create a Location Sub Area.
B. Add Location as an Area.
C. Create a Location Group.
D. Add Location to the App Designer.

Answer: D

Explanation:
To make a new table, like Locations, visible within the Sales Hub, you need toadd it to the App Designer. This involves updating the Sales Hub app module to include the Locations table as a new entity that users can access.
By adding the table in the App Designer, you ensure it becomes part of the navigation and is available within the Sales Hub application.

Reference:Microsoft Documentation - Configure Apps Using App Designer in Dynamics 365

NEW QUESTION 45
- (Topic 3)
A company is implementing the Dynamics 365 Sales mobile app.
The company requires setup of several push notifications for sellers who use the app. You need to create the push notifications.
Which feature should you use?

A. Plug-in
B. Cloud flow
C. Classic Dataverse workflow

Answer: B

Explanation:
? Understanding the Requirement:
? Solution - Using Cloud Flows:
Reference:Microsoft Documentation - Set Up Cloud Flows with Power Automate
Steps to Create a Cloud Flow for Push Notifications:
Go toPower Automateand create a new Cloud Flow.
Set up a trigger based on a Dynamics 365 event (e.g., when a record is created or updated).
Add an action to send a push notification to the user??s mobile device.
Customize the notification message and publish the flow to activate the notifications. Using Cloud Flows in Power Automate enables dynamic push notifications for mobile users, providing timely updates to sales team members based on real-time data changes.

NEW QUESTION 48
- (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 53
- (Topic 3)
You are a marketing automation consultant.
Your customer wants to understand the benefits of using the query assist feature in Dynamics 365 Customer Insights - Journeys. Why might your customer want to use this feature?

A. Using the natural language feature allows marketers to build segments using simple words to specify what audience they want to target.
B. When looking at a marketing journey created by another user, the natural language feature makes it easier to understand the logic of the journey and decide whether it meets the campaign goals.
C. Using the natural language feature allows marketers to search Dataverse to retrieve single records using a right-hand pane on the model-driven app
D. When looking at a segment created by another user, the natural language feature makes it easier to identify which journeys the segment is used in.

Answer: A

Explanation:
TheQuery Assistfeature in Dynamics 365 Customer Insights - Journeys utilizes natural language processing to help marketers easily build segments.
By using simple language, marketers can describe their target audience without needing to know complex query syntax, making segmentation more accessible.
This feature is designed to streamline segment creation, allowing marketers to quickly define their audience with natural language inputs, which is particularly useful for users who may not be familiar with technical query building.
Reference:Microsoft Documentation - Use Query Assist for Segmentation in Customer Insights

NEW QUESTION 54
- (Topic 3)
Your company wants to enable Al 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.

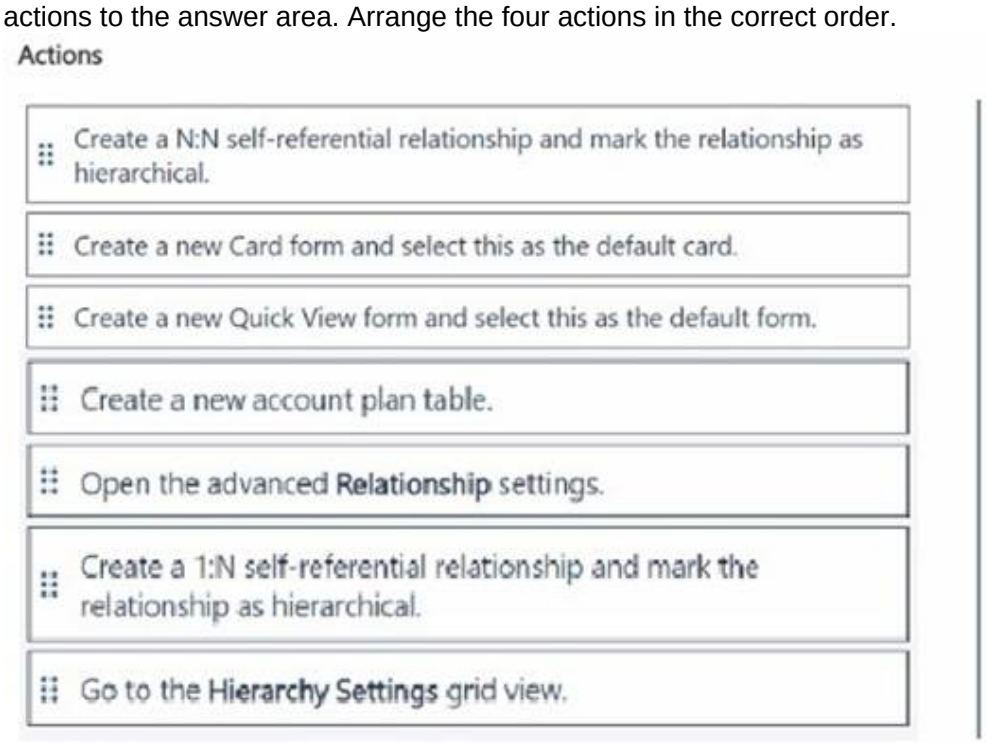
A. Create a policy in Teams to install and pin Copilot for Sales and enable meeting transcripts.

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 55
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 57
- (Topic 3)
You are creating a forecast. You want to include only opportunities that sell You need to configure this within the system. What should you configure?

A. separate views
B. additional filters
C. multiple columns
D. premium forecasting
E. advanced features

Answer: B

Explanation:
? Requirement Analysis:
? Solution - Using Additional Filters:
? Steps to Configure Additional Filters in Forecasting:
Reference:Microsoft Documentation - Configure Filters in Forecasts
Benefits of Using Filters:
Filters provide flexibility to customize the forecast view, allowing for detailed segmentation of opportunities based on specific conditions.
This approach ensures that the forecast reflects only the opportunities that are relevant to your defined criteria, which in this case is opportunities that have "sold."
By using additional filters, you can effectively control which opportunities are included in your forecast, aligning it with specific business needs and improving

forecast accuracy.

NEW QUESTION 60

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