

Microsoft

Exam Questions MB-280

Microsoft Dynamics 365 Customer Experience Analyst



NEW QUESTION 1

- (Topic 1)

You need to identify the duplicate pet records, so they can be manually merged by the carer. What must you create?

- A. Two duplicate detection jobs and two duplicate detection rules
- B. One duplicate detection job and three duplicate detection rules.
- C. Two duplicate detection jobs and three duplicate detection rules.
- D. Three duplicate detection rules only.

Answer: B

Explanation:

? To identify duplicate records, you need to configure both duplicate detection rules and duplicate detection jobs.

? Since Terra Flora requires identifying duplicate pet records across various fields, creating three duplicate detection rules is likely necessary to cover different columns (such as name, breed, and dietary requirements) in the Pet table.

? One duplicate detection job is sufficient to run these rules concurrently, scanning the database for duplicates across the specified columns. This job can be scheduled or run manually.

? Option B is correct as it ensures comprehensive coverage with three rules addressing various fields and one job to manage the duplicate detection process.

References from Microsoft Documentation:

? For guidance on setting up duplicate detection jobs and rules, refer to Detect duplicate records in Dynamics 365.

NEW QUESTION 2

- (Topic 1)

You have added the timeline control to the Pet main form, then saved and published your changes. You need to configure the timeline to display related Pet activities as required by Terra Flora. Which two actions should you perform? Each correct answer presents a complete solution. Choose two, NOTE: Each correct selection is worth one point.

- A. In the Record types of the timeline settings, uncheck the Notes option.
- B. In the Activity area of the timeline settings, remove all activity types, except for Task, Email, and Phone Call.
- C. Email and Phone Call.
- D. In the Record types of the timeline settings, uncheck the Posts option.
- E. In the Record types of the timeline settings, uncheck the Activities option.
- F. In the Notes area of the timeline settings, uncheck the Remove notes title when authoring option.

Answer: BC

Explanation:

? The timeline control in Dynamics 365 allows users to view and interact with activities, notes, and posts associated with a record. To meet Terra Flora's requirements for displaying specific activities, you need to customize the timeline to show only certain activity types.

? Removing All Other Activity Types Except Task, Email, and Phone Call (Option B):

? Unchecking the Posts Option (Option C):

? Other Options Explanation:

References from Microsoft Documentation:

? For configuring and customizing the timeline control, refer to Customize a timeline control in Dynamics 365 documentation for detailed steps on modifying timeline settings and activity visibility.

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.

Actions

- ☰ Set the form duplicate records strategy to the audience default strategy.
- ☰ Set the form target audience to leads.
- ☰ Create a custom matching strategy.
- ☰ Create a new form.
- ☰ Set the form target audience to contacts.
- ☰ Select a form template.
- ☰ Set the form duplicate records strategy to the custom form matching strategy.
- ☰ Publish the form.

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 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.

Answer Area

Scenario

Add a new flavor to the product catalog.

An existing opportunity wants to change an order to one of the new bread flavors.

Action

- A. Mastered
- B. Not Mastered

Answer: A

Explanation:

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 Description automatically generated
 ? Scenario 1: Adding a New Flavor to the Product Catalog

NEW QUESTION 5

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

Actions

- ☰ In the **Forms** area, create a quick create form with the required columns.
- ☰ In the **Forms** area, create a card form with the required columns.
- ☰ 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.

Order

- A. Mastered
- B. Not Mastered

Answer: A

Explanation:

A screenshot of a computer

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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 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 the Dynamics 365 App for Outlook security role to 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 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.

The Vice president of sales role includes privileges related to managing sales territories,

unlike the Sales team member or Salesperson roles, which are more focused on direct sales tasks. The System customizer role 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 8

- (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 to capture the scoring.

Answer: B

Explanation:

For team members to view lead scoring insights, they must have appropriate permissions, specifically the Lead Score Viewer role 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 the Lead Score Viewer role 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 9

- (Topic 3)

You are a Dynamics 365 Sales administrator. You are setting up a product catalog. You need to configure the base unit group. Which quantity or measurement should you configure?

- A. the least frequently used to sell the service
- B. the lowest needed to sell the product or service
- C. the most frequently used to sell the service
- D. the highest needed to sell the product or service

Answer: B

Explanation:

? Understanding the Base Unit in Dynamics 365 Sales:

? Selecting the Base Unit - Why the Lowest Quantity?

Reference: Microsoft Documentation - Create Unit Groups and Units

Benefits of Using the Lowest Needed Unit:

Configuring the base unit as the smallest measurable unit enables flexibility and supports various sales scenarios without restrictions. It simplifies the management of units and ensures that other unit variations align correctly in the product catalog.

By setting the base unit to the lowest quantity needed to sell the product or service, you establish a robust foundation for building out the unit group and accommodating different sales quantities in Dynamics 365 Sales.

NEW QUESTION 10

- (Topic 3)

A large construction company uses Dynamics 365 Sales to manage their sales pipeline.

All future jobs are logged in the system as opportunities. Depending on the type of work, some opportunities close faster, and others take longer due to dependency on the third-party vendors.

The sales team does NOT currently use the "On hold" option, as it does NOT provide enough details.

When working with open opportunities, the sales manager wants to know whether opportunities are pending permits or require asbestos removal.

You need to ensure that a salesperson can only select the "Pending Permits" or "Asbestos Removal" option when working with their opportunities to indicate the deal is taking longer.

What should you do?

- A. Edit the statuscode column: add "Asbestos Removal" and "Pending Permits" status values to the "Open" status reasons.
- B. Edit the statecode column: rename the "Open" status value to "Asbestos Removal" and add a new "Pending Permits" status value.
- C. Edit the statecode column: rename the "On hold" status to "Asbestos Removal" and add a new "Pending Permits" status value.
- D. Edit the statuscode column: add "Pending Permits" to the "Open" status reason values, and rename "On hold" to "Asbestos Removal."

Answer: A

Explanation:

? Understanding the Statuscode and Statecode Columns:

Reference: Microsoft Documentation - Statecode and Statuscode in Dynamics 365

Modifying Status Reasons for Open Opportunities:

The construction company wants to indicate when opportunities are delayed due to specific external factors. To accommodate this, they need specific status reasons like "Pending Permits" and "Asbestos Removal."

By adding these as status reasons under the "Open" state, you enable sales team members to select these options directly from their current status options.

Reference: Microsoft Documentation - Customize Status Reasons for Opportunity

Steps to Add New Status Reasons to Open Opportunities:

Navigate to Solution: Go to the Dynamics 365 Sales app, then to Settings > Customizations > Customize the System.

Locate the Opportunity Entity: In the default solution, find and expand the "Entities" list, then select "Opportunity."

Edit Statuscode Values: Within the "Opportunity" entity, select "Fields," then find and edit the statuscode field. Here, you can add new options under the "Open" status. Add "Pending Permits" and "Asbestos Removal."

Publish the Changes: After adding and saving the new status reasons, publish the changes so that they are available to users.

Verifying Custom Status Reason Visibility:

Ensure the new options are available on the Opportunity form for selection.

Test by opening an Opportunity and confirming that the "Pending Permits" and "Asbestos Removal" options are available under the Open status reasons.

Reference:Microsoft Documentation - Publishing Customizations in Dynamics 365

By following these steps, the sales team can now use specific status reasons to indicate why certain opportunities are delayed, providing clearer visibility into the sales pipeline's status.

NEW QUESTION 10

- (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 to 30 stages across all entities within a single process. Since each entity here (Lead, Opportunity, Quote, Order, Invoice) has 10 stages, the total would be 50 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 15

- (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, the Get Data functionality 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 20

- (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 to ensure that business process flow duration values are calculated. Solution: Create a flow to update the Status Reason of the business process flow table

record to "Finished" and the Status to "Inactive" when the opportunity is won. Does the solution meet the goal?

- A. Yes
- B. No

Answer: A

Explanation:

Creating a flow to update the Status Reason of the business process flow table record to "Finished" and the Status to "Inactive" upon opportunity closure ensures that the business process flow is marked as complete. This triggers the calculation of duration values.

This solution explicitly handles the process completion state, which guarantees that the business process flow duration is recorded even if the opportunity is won prematurely.

NEW QUESTION 23

HOTSPOT - (Topic 3)

You are a Dynamics 365 Sales administrator. You create a forecast by using the forecast category layout shown in the exhibit:

Territory		Quota	Manager	Best case	Committed	Lost	Omitted	Pipeline	Won
C	City	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/> 75%
S	South	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/> 75%
N	North	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/> 75%

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 26

DRAG DROP - (Topic 3)

A company uses Dynamics 365 Sales to manage product lines.

You need to set up the product catalog, including the ability for sellers to apply quantity discounts.

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.

NOTE: More than one order of answer choices is correct. You will receive credit for any of the correct orders you select.

Actions

- Create units.
- Add products.
- Create price lists.
- Add price list items.
- Create discount lists.

Answer area

- A. Mastered
- B. Not Mastered

Answer: A

Explanation:

The correct order of actions to set up a product catalog, including the ability for sellers to apply quantity discounts, is as follows:

- ? Create units.
- ? Add products.
- ? Create price lists.
- ? Add price list items.
- ? Create discount lists.
- ? Create Units:

NEW QUESTION 31

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 in the correct order.

Actions	Order
☰ Select Server Profiles.	
☰ Turn tracking "On."	
☰ Disable Use tracking token.	
☰ Access Environment Settings in the Power Platform Admin Center.	
☰ Select Email Tracking settings.	
☰ Enable Use folder-level tracking from Exchange folders.	

- A. Mastered
- B. Not Mastered

Answer: A

Explanation:

? Access Environment Settings in the Power Platform Admin Center:

NEW QUESTION 32

HOTSPOT - (Topic 3)

You are a Dynamics 365 administrator. The sales team uses goals to track actual to target opportunity amounts.

A salesperson reviews their goals chart and observes the following:

- An opportunity updated today is not included in the chart.
- The time period for the goal is not accurate. You need to resolve these issues.

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

Answer Area

Issue	Action
Opportunity updated today is NOT included in the chart.	<div style="border: 1px solid gray; padding: 2px;"> <div style="background-color: #f0f0f0; padding: 2px;">Update roll-up settings.</div> <div style="padding: 2px;">Update goal criteria.</div> <div style="background-color: #0070c0; color: white; padding: 2px;">Update roll-up settings.</div> <div style="padding: 2px;">Update personal options.</div> </div>
Time period for the goal is inaccurate.	<div style="border: 1px solid gray; padding: 2px;"> <div style="background-color: #f0f0f0; padding: 2px;">Have the manager update the goal.</div> <div style="padding: 2px;">Have the salesperson update the goal.</div> <div style="background-color: #0070c0; color: white; padding: 2px;">Have the manager update the goal.</div> </div>

- A. Mastered
- B. Not Mastered

Answer: A

Explanation:

? Opportunity Updated Today is Not Included in the Chart: Update roll-up settings

NEW QUESTION 37

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.

Answer Area

Scenario	Action
Determine the price of the product bundle.	<ul style="list-style-type: none"> Use the lunch bundle price. Use the lunch bundle price. Add the prices of the sandwiches, napkins, and sodas. Add the lunch bundle price and the prices of the napkins and sodas. Subtract the prices of the napkins and sodas from the lunch bundle price. Add another line item for sandwiches with the default price.
Increase the number of sodas at no additional charge.	<ul style="list-style-type: none"> Increase the quantity of sodas in the line item. Increase the quantity of sodas in the line item. Add a new line item for sodas and override the price. Add a new line item for sodas with the default price. Delete the soda line item from the bundle and add a new line item for all the sodas with the default price.
Increase the number of sandwiches and charge the price list price for each additional sandwich.	<ul style="list-style-type: none"> Add another line item for sandwiches with the default price. Increase the quantity of sandwiches in the line item. Add another line item for sandwiches and override the price. Add another line item for sandwiches with the default price. Delete the sandwich line item from the bundle and add a new line item for all the sandwiches with the default price.

- A. Mastered
- B. Not Mastered

Answer: A

Explanation:

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

NEW QUESTION 42

- (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 to Power Automate and 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 44

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