# Microsoft

## Exam Questions MB-280

Microsoft Dynamics 365 Customer Experience Analyst

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**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 bothduplicate detection rulesandduplicate detection jobs.
? Since Terra Flora requires identifying duplicate pet records across various fields, creatingthree duplicate detection rulesis likely necessary to cover different columns (such as name, breed, and dietary requirements) in the Pet table.
? One duplicate detection jobis sufficient to run these rules concurrently, scanning the database for duplicates across the specified columns. This job can be scheduled or run manually.
? Option Bis 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 toDetect duplicate records in Dynamics 365.

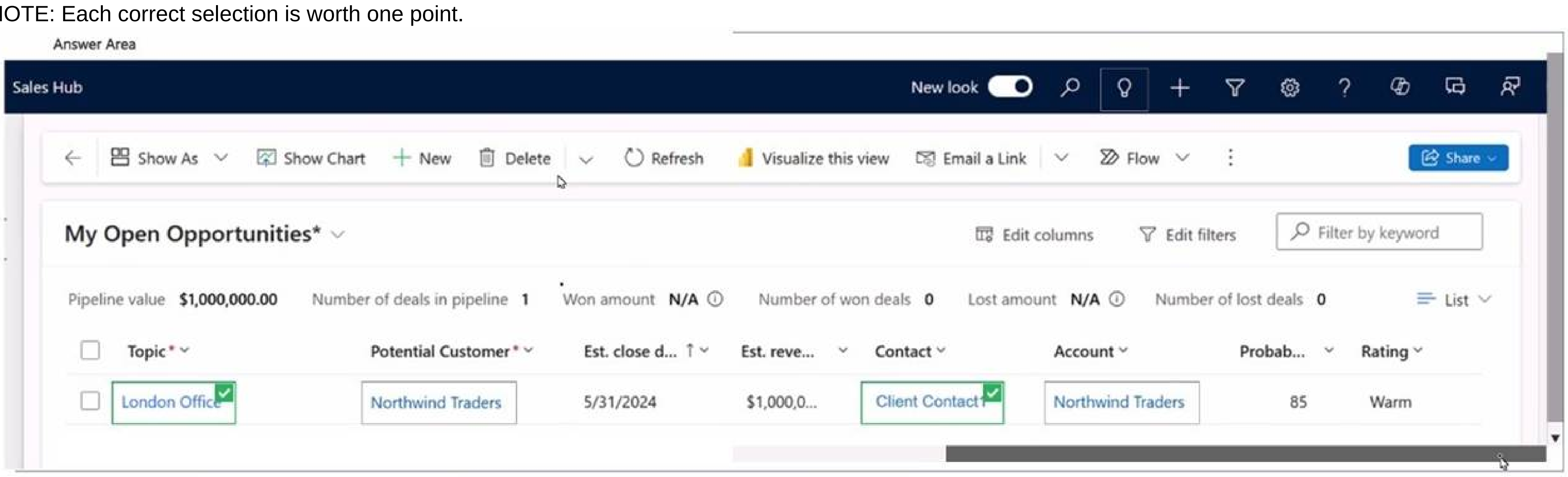
**NEW QUESTION 2**
- (Topic 1)
You need to configure the required audit settings.
Which two actions should you perform? Each correct answer presents part of Ihe solution. Choose two. NOTE: Each correct selection is worth one point.

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**
HOTSPOT - (Topic 2)
BDM1 has returned from vacation and needs to catch up on their scheduled tasks and activities.
Which two items can BMD1 select to see a reminder card for the meeting BDM2 scheduled in the assistant? To answer, select the appropriate options in the answer area.
NOTE: Each correct selection is worth one point.



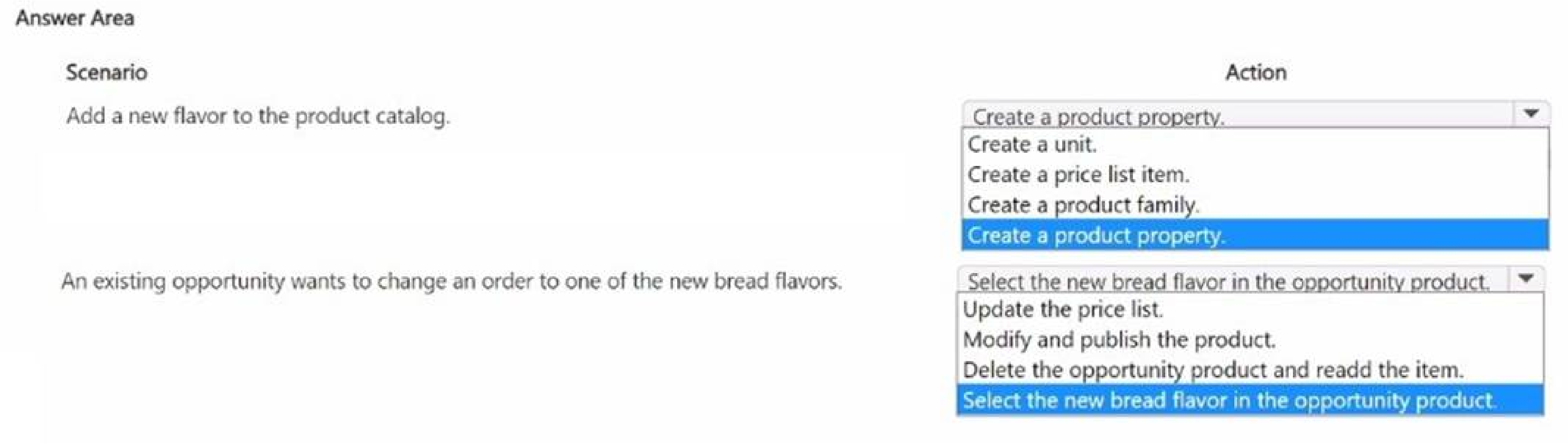

A. Mastered
B. Not Mastered

**Answer:** A

**Explanation:**
? Show As
? Visualize this view
To catch up on scheduled tasks and activities, BDM1 can use specific features in the Dynamics 365 Sales Hub interface. Here??s how they work in this scenario:
? Show As:

? Visualize this view:
Microsoft Dynamics 365 References:
? Using assistant cards in Dynamics 365 Sales
? Configuring views and visualizations in Dynamics 365
By selecting these options, BDM1 can effectively access and view the assistant card related to the scheduled meeting, facilitating a quick catch-up on all pending activities.

**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.




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 5**
- (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 6**
- (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 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**
- (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 10**
- (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 thelowest 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 o( 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 statuscodecolumn: 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 15**
- (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 19**
- (Topic 3)
The analytics team at your organization has created Power Bl reports that enrich data about your accounts from Dynamics 365 Sales with data NOT contained in Dynamics 365 Sales. The Power Bl 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 Bl report in the ribbon on the account form.
B. Create a dashboard in Dynamics 365 Sales that contains account data.
C. Embed the Power Bl Dashboard as a dashboard in the Dynamics 365 Sales application.
D. Embed the Power Bl 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 23**
- (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 24**
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 29**
- (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 33**
- (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.

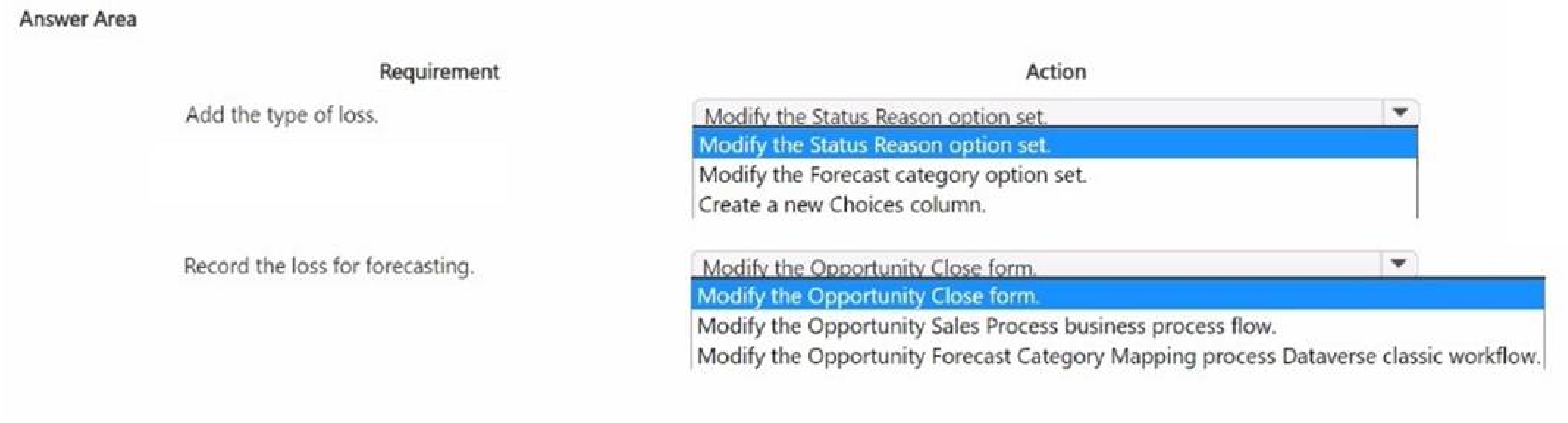
**NEW QUESTION 36**
- (Topic 3)
You use business process flows for all Dynamics 365 opportunities.
Some opportunities are closed before business process flow durations are calculated. You need to ensure that business process flow duration values are calculated. Solution: Create a flow to update the Status 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 theStatus Reasonof the business process flow table record to "Finished" and theStatusto "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.

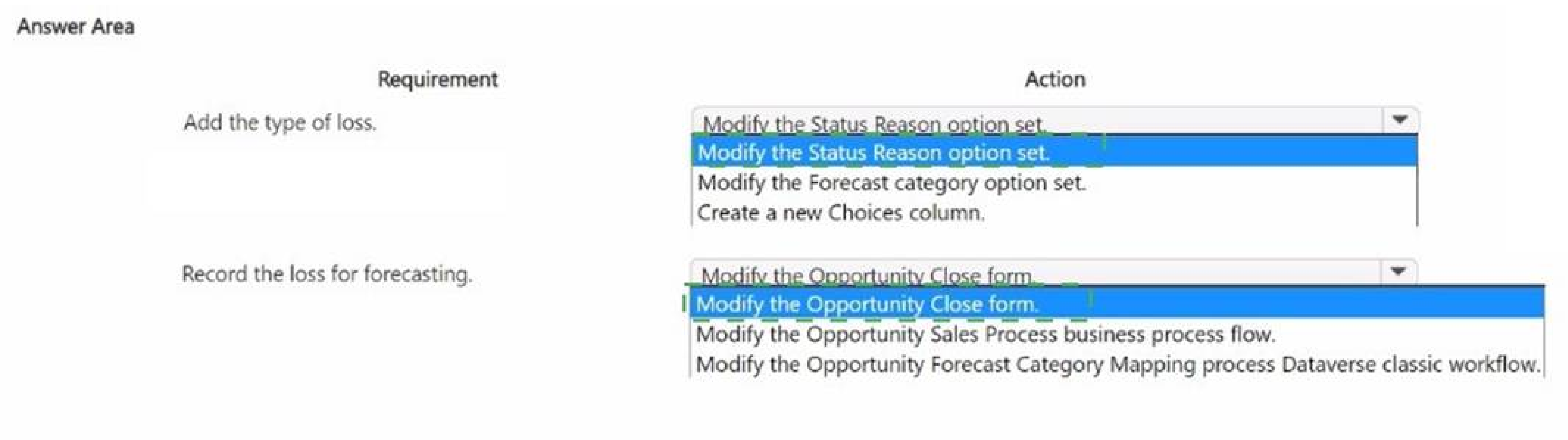
**NEW QUESTION 39**
HOTSPOT - (Topic 3)
A company is using Dynamics 365 Sales to track their sales pipeline.
Sales managers require their forecasting to include reasons why opportunities were lost, including losses to competitors.
You need to configure the sales process WITHOUT using custom code.
What 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

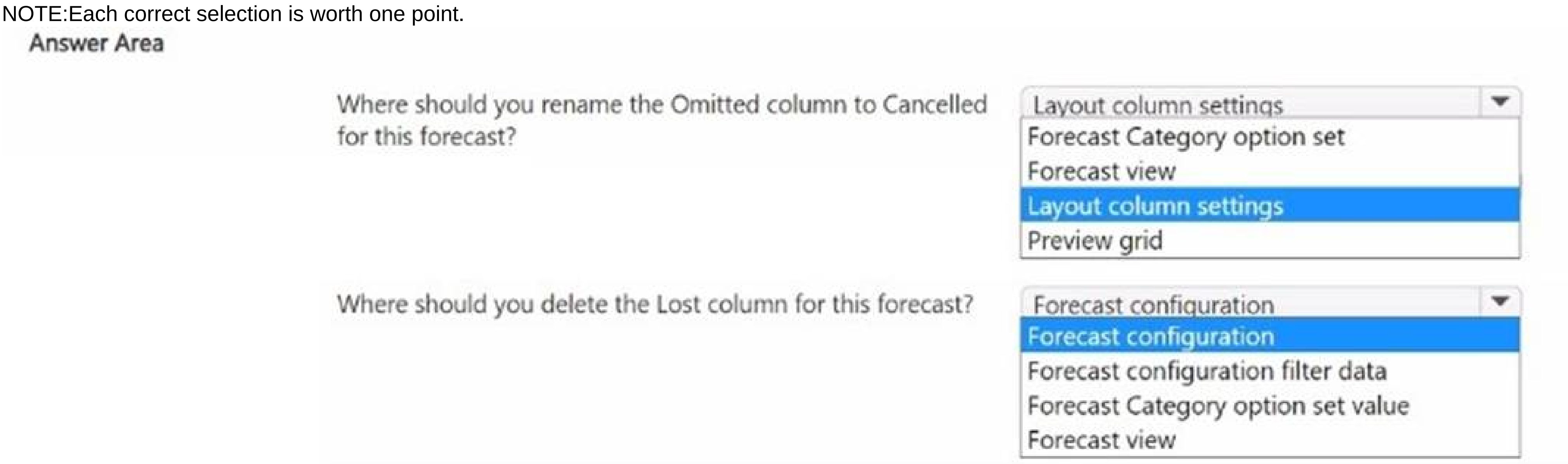
**Answer:** A

**Explanation:**




**NEW QUESTION 42**
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.

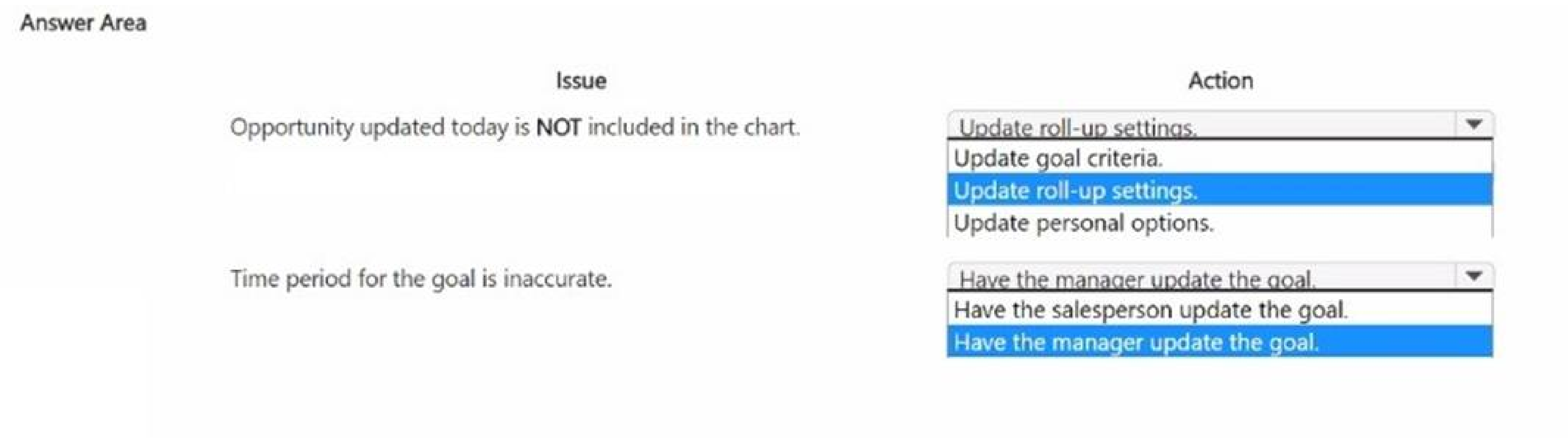



A. Mastered
B. Not Mastered

**Answer:** A

**Explanation:**
? Renaming the Omitted Column to Cancelled:

**NEW QUESTION 44**
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.




A. Mastered
B. Not Mastered

**Answer:** A

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

**NEW QUESTION 48**
- (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: Change the opportunity to an inactive state. Does this meet the goal?

A. Yes
B. No

**Answer:** A

**Explanation:**
Changing the opportunity to aninactive stateallows for the calculation of business process flow duration values, as this state transition prompts the system to finalize any duration metrics associated with the process flow.
Business process flows calculate duration upon completion or transition of the process, so marking the opportunity as inactive triggers the system to calculate these durations.

**NEW QUESTION 53**
- (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 56**
- (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.

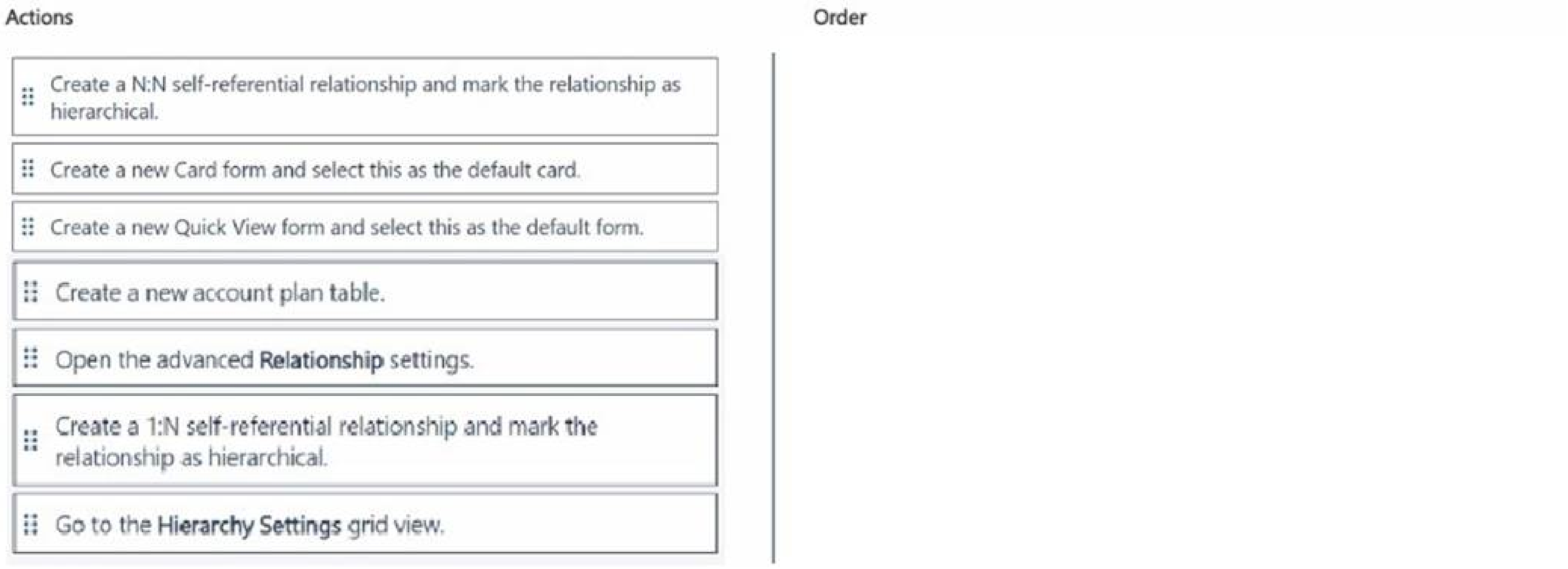
**NEW QUESTION 59**
- (Topic 3)
The assistant to the sales leader has some questions on how delegation works when using the Dynamics 365 App for Outlook. They want to know how columns are populated when an email is tracked.
You need to explain the behavior of the tracked email messages, in particular, what is set as the owner of the tracked email from a delegated mailbox.
What should you convey?

A. The delegate user.
B. System (as it is promoted by server-side synchronization).
C. The owner of the linked contact that sent the email.
D. The primary mailbox owner.

**Answer:** D

**Explanation:**
When an email is tracked in Dynamics 365 from a delegated mailbox, the primary mailbox owneris set as the owner of the tracked email. This means that if an assistant sends or tracks an email on behalf of another user, the email??s ownership will reflect the primary mailbox owner rather than the delegate.
This behavior ensures that activities are correctly associated with the user who owns the mailbox, aligning with the ownership structure in Dynamics 365.
Reference:Microsoft Documentation - Delegate Access and Email Tracking in Dynamics 365

**NEW QUESTION 64**
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 69**
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