



**Microsoft**

## **Exam Questions MB-280**

Microsoft Dynamics 365 Customer Experience Analyst

NEW QUESTION 1

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

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

Answer: BD

Explanation:

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

NEW QUESTION 2

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

FileSave and CloseActions

Security Role: Salesperson

Working on solution

DetailsCore RecordsMarketingSalesServiceBusiness ManagementService ManagementCustomizationMissing EntitiesBusiness Process FlowsCus

Table	Create	Read	Write	Delete	Append	Append To	Assign	Share
Expired Process	●	●	●	●	●	●		
Lead To Opportunity Sales Process	●	●	●	●	●	●		
IoT Alert to Case Process	○	○	○	○	○	○		
Corgi Meet-up	●	●	●	○	●	●		
Onboard new pet	○	○	○	○	○	○		
New Process	●	●	●	●	●	●		
Opportunity Sales Process	●	●	●	●	●	●		
Phone To Case Process	●	●	●	●	●	●		
Translation Process	●	●	●	●	●	●		

Key

○ None Selected

● User

● Business Unit

● Parent: Child Business Units

● Organization

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 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 configuring Security Roles in 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

? For Business Process Flow configurations, including permissions and visibility settings, refer to the guide on Create 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 3

- (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 4

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 5

- (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 correct selection 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 6

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

Open Northwind Opportunities\*

Edit columns

Edit filters

Filter by keyword

Pipeline value

\$3,975,000.00

Number of deals in pipeline

5

Won amount

N/A

Number of won deals

0

Lost amount

N/A

Number of lost deals

0

List

Topic\*

Potential Customer\*

Est. close ...

Est. revenue

Contact

Account

Proba...

Rating

En

London Office

Northwind Traders

6/4/2024

\$1,000,000.00

Client Contact1

Northwind Traders

75

Warm

Toronto Office

Northwind Traders

6/12/2024

\$400,000.00

Client Contact2

Northwind Traders

75

Warm

Mexico City Office

Northwind Traders

6/18/2024

\$475,000.00

Client Contact1

Northwind Traders

90

Warm

Seattle Office

Northwind Traders

6/19/2024

\$1,000,000.00

Client Contact2

Northwind Traders

50

Warm

- 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 7

- (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 attributes must uniquely identify records and be consistent across the data source. Whole Number and GUID are commonly used data types for primary keys because they can uniquely identify records and are natively supported for primary keys in databases. String can also be used as a primary key if it uniquely identifies each record (e.g., an email address). Integer and Boolean are 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 8**

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**

Create a product property.	▼
Create a unit.	
Create a price list item.	
Create a product family.	
Create a product property.	
Select the new bread flavor in the opportunity product.	▼
Update the price list.	
Modify and publish the product.	
Delete the opportunity product and readd the item.	
Select the new bread flavor in the opportunity product.	

- A. Mastered
- B. Not Mastered

**Answer:** A

**Explanation:**

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

**NEW QUESTION 9**

- (Topic 3)

The remote sales workforce of your organization has been using the integrated Teams chat to collaborate internally. To save time, you indicate to the sales leader that suggested contacts can be displayed when a seller starts a new connected chat.

The sales leader asked you to configure the ability to use suggested contacts.

Which three users can you use as a rule for suggesting contacts? Each correct answer presents a complete solution. Choose three.

NOTE: Each correct selection is worth one point.

- A. The user assigned as your manager on your system user record.
- B. The Record Owner of your linked business unit.
- C. The Record Owner of the initiating record.
- D. The Created By of the initiating record.
- E. The Last Modified By of the initiating record.
- F. The system user who updated a timeline activity on the initiating record.

**Answer:** ACD

**Explanation:**

? Manager on System User Record:  
 ? Record Owner of the Initiating Record:  
 ? Created By of the Initiating Record:  
 Reference: Microsoft Documentation - Configure Suggested Contacts for Dynamics 365 and Teams

These selections align with the rules typically used for suggesting contacts in integrated Teams chats, ensuring relevant parties are automatically suggested based on record associations and user relationships.

**NEW QUESTION 10**

#### 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	Order
In the <b>Forms</b> area, create a quick create form with the required columns.	
In the <b>Forms</b> area, create a card form with the required columns.	
Select <b>Tables &gt; Lead</b> .	
In the <b>Forms</b> area, create a quick view form with the required columns.	
Select <b>Tables &gt; Opportunity</b> .	
In the <b>Forms</b> area, select the main form you wish to update.	
Add the quick view form as a component.	

- A. Mastered
- B. Not Mastered

**Answer:** A

#### Explanation:

A screenshot of a computer

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 10

- (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 11

- (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 13

DRAG DROP - (Topic 3)

A company uses Dynamics 365 Sales with assignment rules. The assignment rules use a segment to filter the lead records.

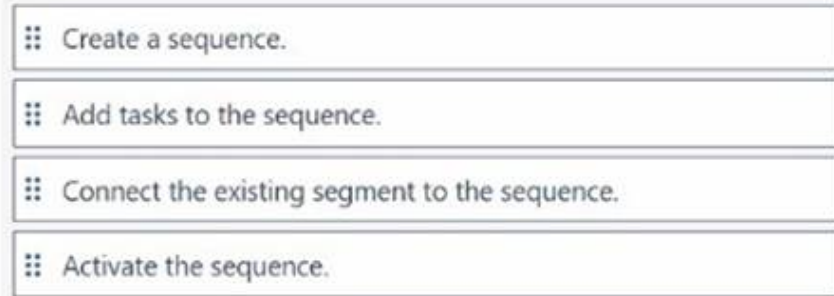
A sales manager wants to automatically add a series of tasks by using the same criteria as the assignment rules.

You need to create the tasks and assign the tasks to the lead records.

In which order should you perform the actions? To answer, move all actions from the list of actions to the answer area and arrange them in the correct order.

Actions

Answer area

- 
- Create a sequence.
  - Add tasks to the sequence.
  - Connect the existing segment to the sequence.
  - Activate the sequence.

- A. Mastered
- B. Not Mastered

**Answer:** A

#### Explanation:

A screenshot of a computer Description automatically generated

The correct order of actions to create a sequence of tasks and assign them to lead records based on the same criteria as assignment rules is as follows:

- ? Create a sequence.
- ? Add tasks to the sequence.
- ? Connect the existing segment to the sequence.
- ? Activate the sequence.
- ? Create a Sequence:

### NEW QUESTION 15

- (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 18

- (Topic 3)

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

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

**Answer:** D

#### Explanation:

To make Power BI insights available within Dynamics 365 Sales, specifically contextualized for accounts, you should embed 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 19

- (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 20

- (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 families allow 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 using Product 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 24

- (Topic 3)



A company plans to use server-side synchronization to synchronize emails, tasks, and appointments between Microsoft Exchange and Dynamics 365 Sales. The salespeople want to know when their emails will be synced. You need to describe the server-side synchronization frequency for the salespeople. How should you describe the frequency?

- A. user-defined
- B. constant
- C. equal intervals
- D. dependent on volume

Answer: C

Explanation:

Server-side synchronization typically syncs at equal intervals, which can be configured in Dynamics 365. These intervals determine how often data is synchronized between Microsoft Exchange and Dynamics 365 Sales, affecting emails, tasks, and appointments. The synchronization frequency can be adjusted by the administrator but operates at consistent, regular intervals by default. Reference: Microsoft Documentation - Server-Side Synchronization and Sync Intervals

NEW QUESTION 29

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

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

Opportunity updated today is NOT included in the chart.

Time period for the goal is inaccurate.

Action

Update roll-up settings.

Update goal criteria.

Update roll-up settings.

Update personal options.

Have the manager update the goal.

Have the salesperson update the goal.

Have the manager update the goal.

- A. Mastered

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B. Not Mastered

**Answer:** A

**Explanation:**

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

**NEW QUESTION 33**

- (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 table 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 the primary table in Customer Insights during the unification process, the goal is to choose the table that provides the most robust and accurate customer profile information.

Criterion A is crucial because having complete and reliable customer profile data ensures that the unified profile is accurate and comprehensive.

Criterion C is recommended by Microsoft when using Dynamics 365 data, as the contact table often 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 38**

- (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:**

The Query Assist feature 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 40**

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.

Actions

⋮

Create a N:N self-referential relationship and mark the relationship as hierarchical.

⋮

Create a new Card form and select this as the default card.

⋮

Create a new Quick View form and select this as the default form.

⋮

Create a new account plan table.

⋮

Open the advanced Relationship settings.

⋮

Create a 1:N self-referential relationship and mark the relationship as hierarchical.

⋮

Go to the Hierarchy Settings grid view.

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 41

- (Topic 3)  
A company's IT department has a .CSV file stored on one of their Shared Documents folders within their Microsoft SharePoint sites. The data from the .CSV file is ingested into Dynamics 365 Customer Insights - Data.  
The file contains a row header and columns of different types, such as quantities and prices. The file also contains some rows with a high proportion of nulls. You need to clean and transform the data in Customer Insights - Data to be ready for unification.  
Solution: Transform the first row to be used as headers. Define column types to be appropriate field types and name the query. Create a full name and full address columns by merging the appropriate columns if they exist. Select Next and your data is now ready for unification-Does this meet the goal?  
  
A. Yes  
B. No

Answer: B

Explanation:

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

NEW QUESTION 45

DRAG DROP - (Topic 3)  
The sellers at your organization are keen to adopt generative AI capabilities and use them efficiently.  
They have been editing Contact records directly in Copilot for Sales and have now provided feedback that they would be more productive if they could also edit Account records directly in Copilot for Sales.  
However, the vice president of sales does NOT want the sellers to be able to edit the "Revenue Forecast" field in Copilot for Sales.  
You need to enable these requirements.  
Which four actions should you perform in sequence? To answer, move the four appropriate actions from the list of actions to the answer area. Arrange the four actions in the correct order.

Actions	Order
<div><div></div><div>In the <b>Editing records</b> section, select <b>Edit records inside Copilot for Sales</b>.</div></div>	
<div><div></div><div>Hide the column from the Account form in Dynamics 365.</div></div>	
<div><div></div><div>In the <b>Manage fields</b> section, uncheck <b>Required</b> for the "Revenue Forecast" field.</div></div>	
<div><div></div><div>In Copilot for Sales admin settings, select <b>Forms</b>.</div></div>	
<div><div></div><div>In the settings for the <i>Account</i> table, select <b>Forms</b>.</div></div>	
<div><div></div><div>Select the Account record type.</div></div>	
<div><div></div><div>In the <b>Manage fields</b> section, turn off <b>Allow editing</b> for the "Revenue Forecast" field.</div></div>	

- A. Mastered
- B. Not Mastered

Answer: A

Explanation:

The correct order of actions to configure the editing capabilities for the Account records in Copilot for Sales while restricting the "Revenue Forecast" field is as follows:

- ? In Copilot for Sales admin settings, select Forms.
- ? In the settings for the Account table, select Forms.
- ? Select the Account record type.
- ? In the Manage fields section, turn off Allow editing for the "Revenue Forecast" field.
- Step by Step Comprehensive Detailed Explanation with ALL Microsoft Dynamics 365 References:
- ? In Copilot for Sales Admin Settings, Select Forms:
- ? In the Settings for the Account Table, Select Forms:
- ? Select the Account Record Type:
- ? In the Manage Fields Section, Turn Off Allow Editing for the "Revenue Forecast" Field:

NEW QUESTION 47

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