Microsoft

Exam Questions MB-280

Microsoft Dynamics 365 Customer Experience Analyst

NEW QUESTION 1
- (Topic 1)
You need to configure search to ensure the administrators can find all records which reference Corgis. Which action must you perform?

A. Within system settings, select up to 10 relevant tables.
B. Within the solution, ensure all relevant tables are indexed.
C. For all relevant tables, ensure that the Can enable sync to external search index setting is False.
D. Add columns to be searched to the Lookup view for each relevant table.

Answer: B

Explanation:
? To enable comprehensive search capabilities for administrators to find all records referencing specific terms (such as ??Corgis??), it is essential to ensure that all relevant tables are indexed.
? In Dynamics 365, configuring search functionality for specific tables involves setting up the tables to be searchable, which can be done by indexing them within the solution.
? Indexing relevant tables makes them accessible in the search feature and ensures all fields within those tables can be searched, allowing for quick retrieval of records that reference specific terms.
? System settings(Option A) is limited to selecting up to 10 tables and is more about quick search rather than full indexing. Thesync to external search indexsetting (Option C) is for integration with external search tools and does not directly impact internal search capabilities.
? Addingcolumns to the Lookup view(Option D) affects how lookups work but does not influence full-text search results.
References from Microsoft Documentation:
? For configuring search indexing, refer toConfigure relevance search in Dynamics 365for more information on indexing tables to enhance search capabilities.

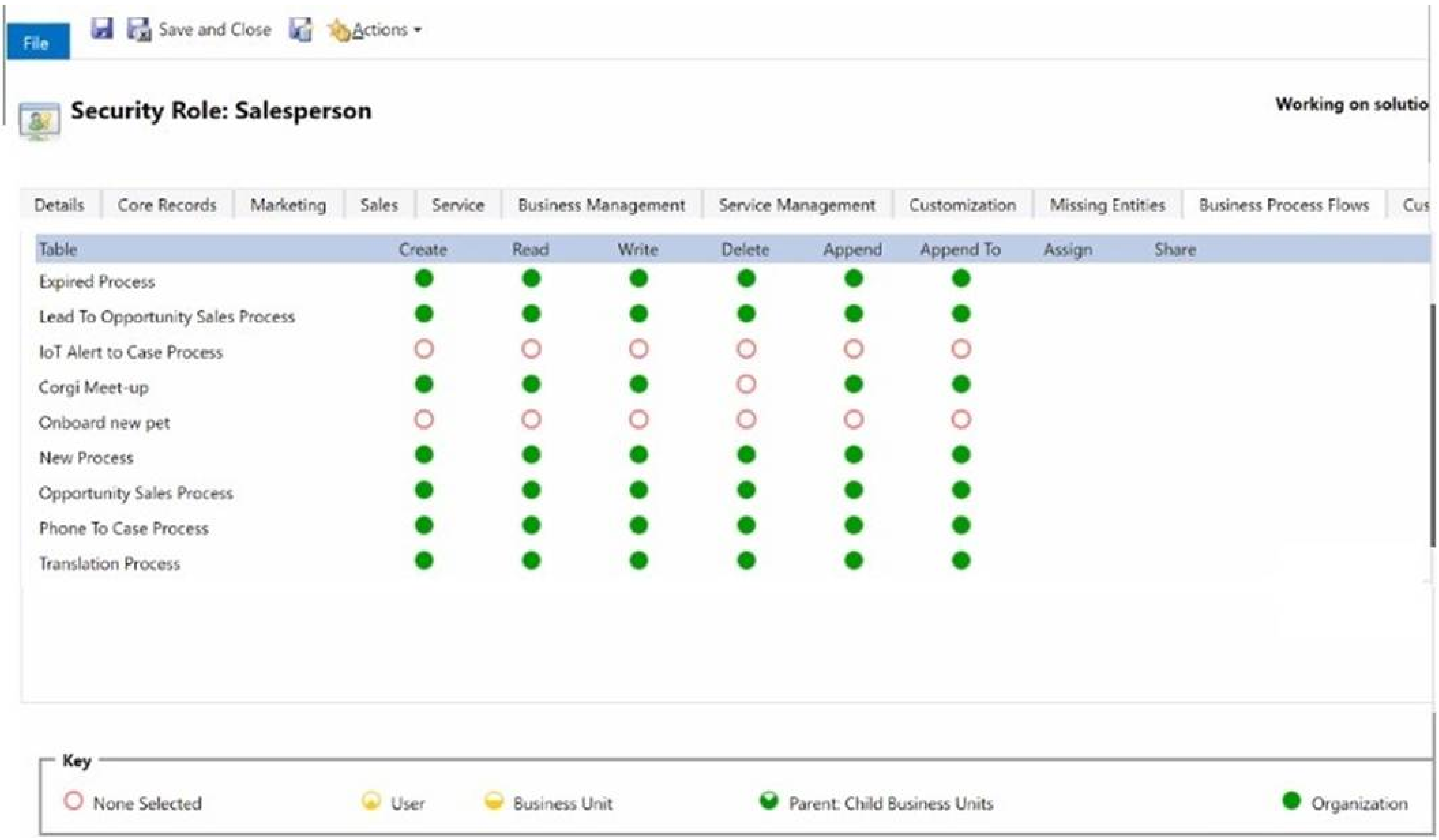
NEW QUESTION 2
- (Topic 1)
You need to identify the duplicate pet records, so they can be manually merged by the
carer. What must you create?

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.

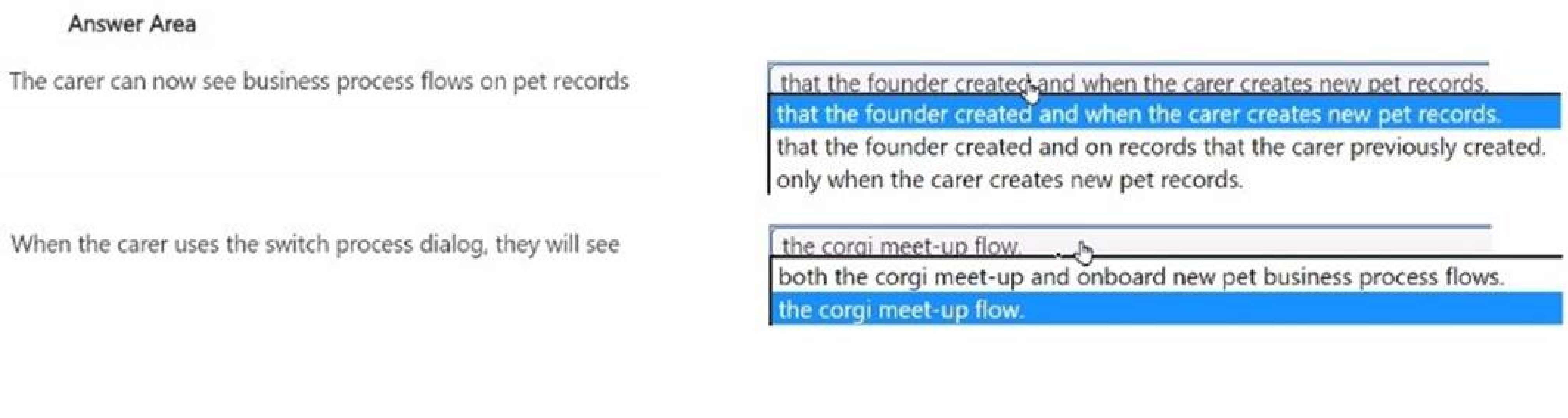
Answer: B

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 3
HOTSPOT - (Topic 1)
The founder has edited the Salesperson security role to allow the carer to use the Corgi meet-up business process flow, as shown inthe following



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



A. Mastered
B. Not Mastered

Answer: A

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

NEW QUESTION 4
- (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 Tas
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 toCustomize a timeline controlin Dynamics 365 documentation for detailed steps on modifying timeline settings and activity visibility.

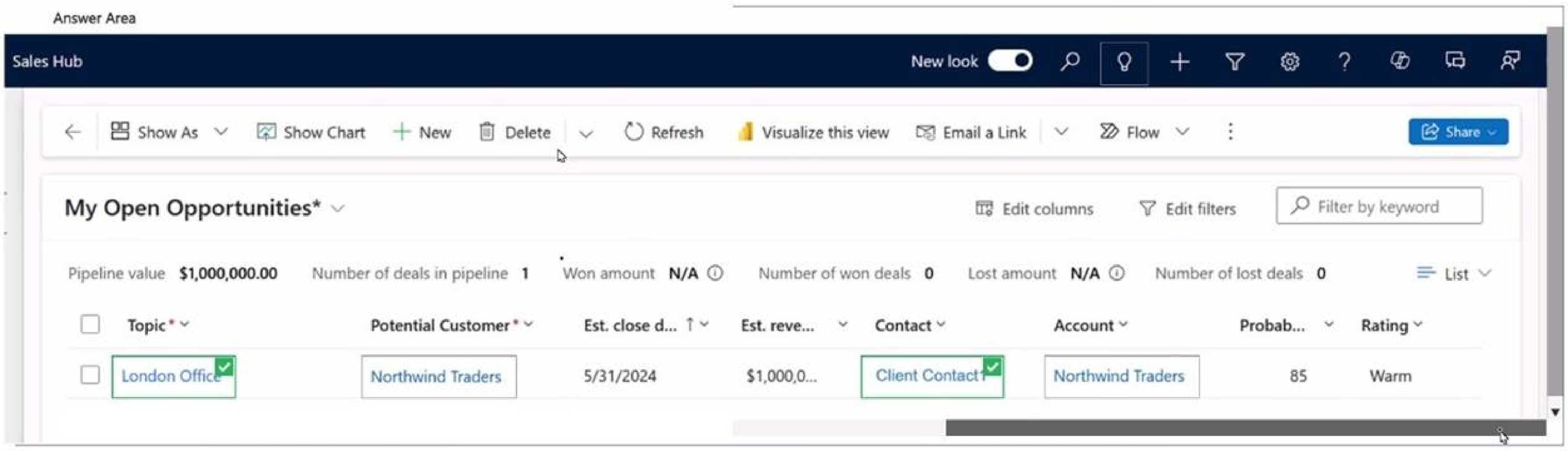
NEW QUESTION 5
- (Topic 1)
You need to configure the required audit settings.
Which two actions should you perform? Each correct answer presents part of Ihe solution. Choose two. NOTE: Each correct selection is worth one point.

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 6
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.



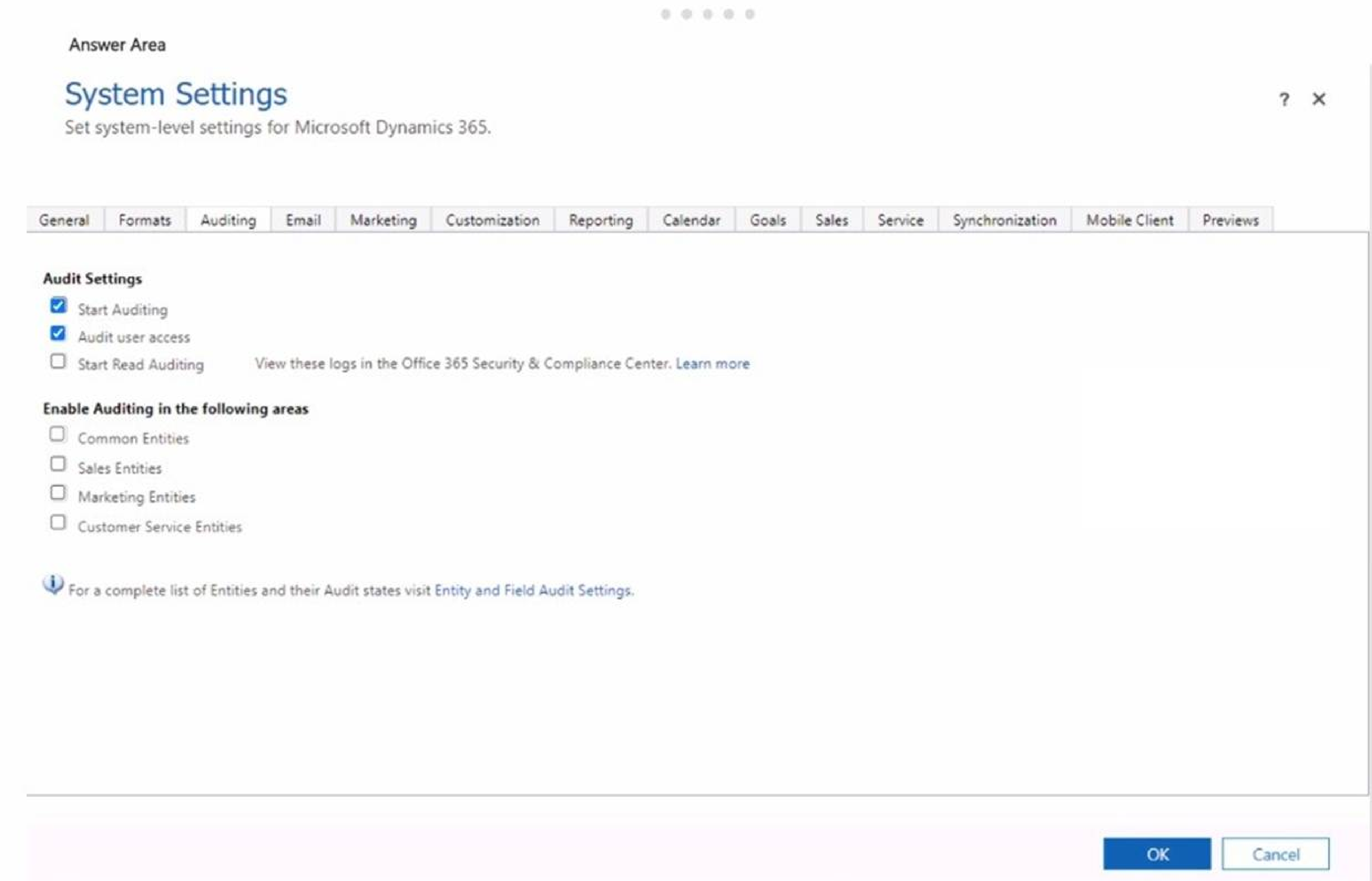
A. Mastered
B. Not Mastered

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 7
HOTSPOT - (Topic 3)

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

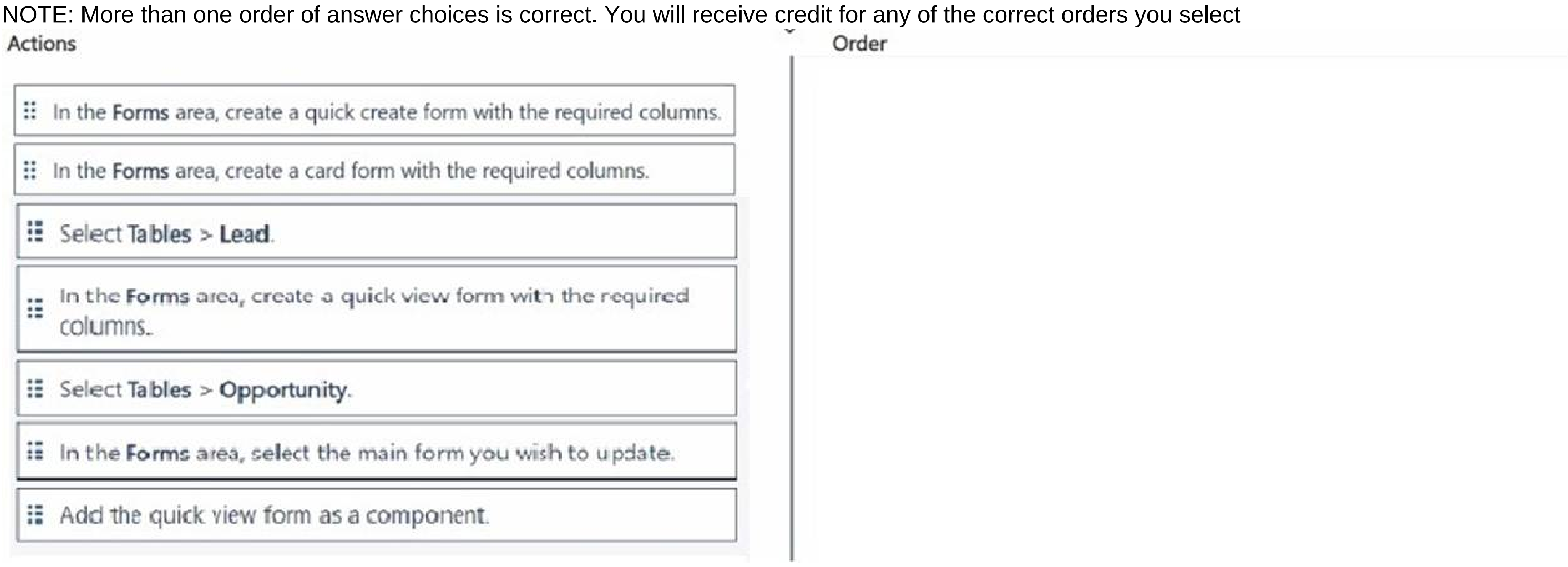


A. Mastered
B. Not Mastered

Answer: A

Explanation:
? Start Auditing:

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

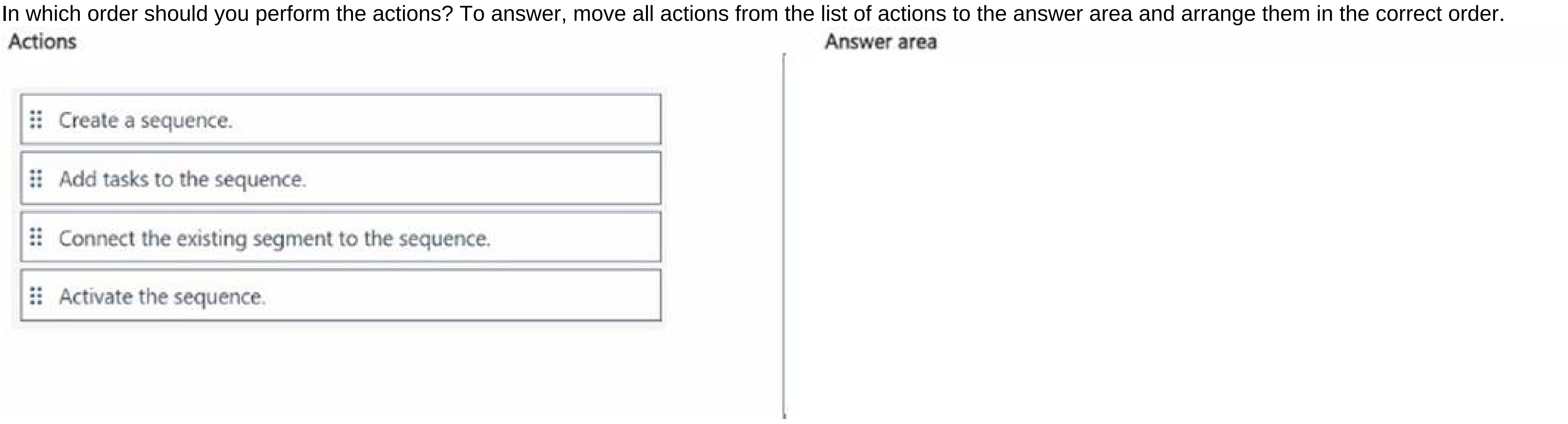


A. Mastered
B. Not Mastered

Answer: A

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



A. Mastered
B. Not Mastered

Answer: A

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

NEW QUESTION 10
- (Topic 3)
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 10
- (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 12
- (Topic 3)
You are the Dynamics 365 administrator for a group of financial advisors.
Advisors must use one business process flow to guide them through the standard lead to invoice process.
Each table has the following number of stages and steps:

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

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

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

Answer: D

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

NEW QUESTION 16
- (Topic 3)
A company uses Microsoft SharePoint document management in Dynamics 365 Sales to store contracts.
The company wants only the contracts team to have access to the documents. The contracts team has a custom security role.
You need to restrict privileges to secure the documents. What should you do?

A. Create a new security role in Dynamics 365 Sales.
B. Update the users list in the SharePoint site.
C. Update privileges in the Dynamics 365 Sales security role of the contract team.
D. Create a new group in the SharePoint site.

Answer: B

Explanation:
Since the company usesMicrosoft SharePointfor document storage, access to documents is controlled throughSharePoint permissionsrather than Dynamics 365 security roles.
To restrict document access to only the contracts team, you shouldupdate the users list in the SharePoint sitewhere the documents are stored. This involves configuring SharePoint permissions to ensure that only the contracts team (or a specific SharePoint group associated with them) has access to the document library where contracts are stored.
Reference:Microsoft Documentation - Manage SharePoint Permissions for Document Management in Dynamics 365

NEW QUESTION 18
- (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?

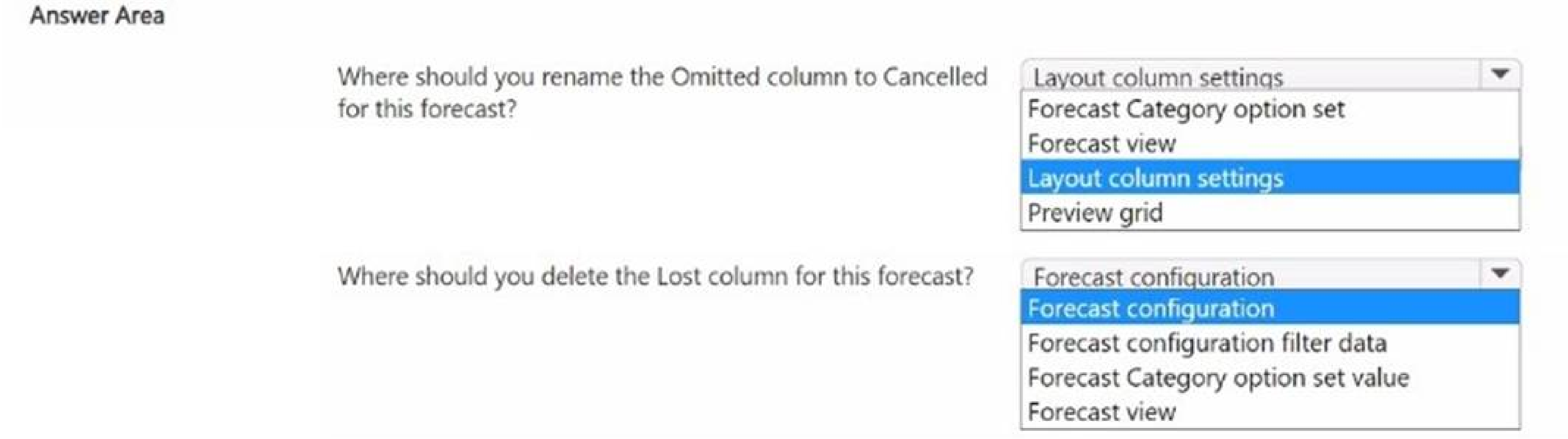
A. Yes
B. No

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 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:

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:

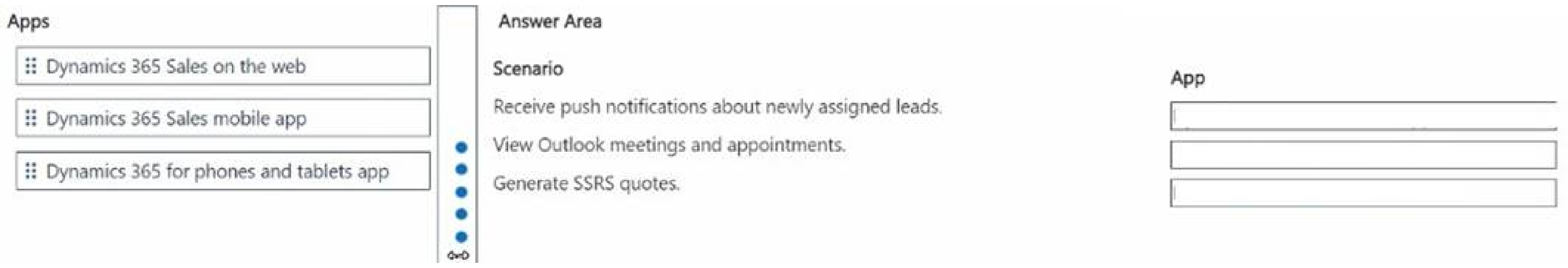
NEW QUESTION 24
- (Topic 3)
You use business process flows for all Dynamics 365 opportunities. Some opportunities are closed before business process flow durations are calculated. You need to ensure that business process flow duration values are calculated.
Solution: Change the opportunity to an inactive 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 25
DRAG DROP - (Topic 3)
A company has implemented Dynamics 365 Sales Enterprise. The salespeople often travel to meet customers and require mobile-friendly solutions to various scenarios.
You need to provide a solution for the traveling salespeople.
Which apps should you recommend in each scenario? To answer, move the appropriate apps to the correct scenarios. You may use each app once, more than once, or not at may need to move the split bar between panes or scroll to view content.
NOTE: Each correct match is worth one point.

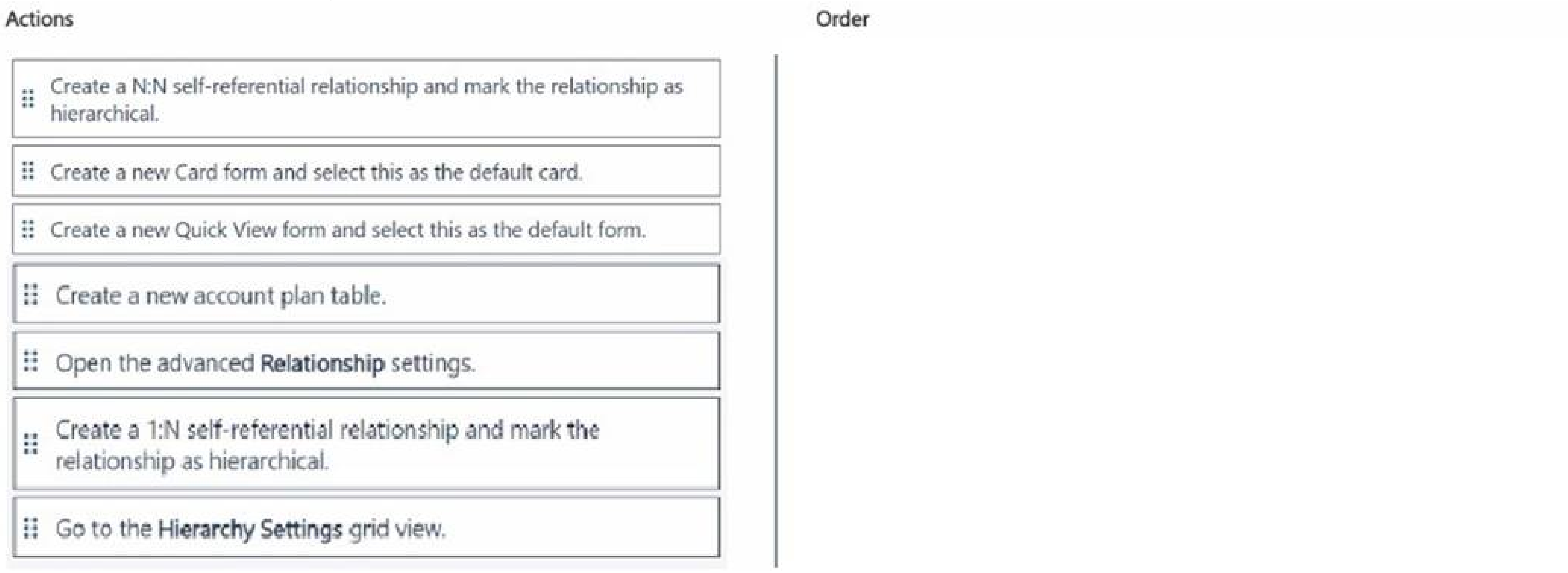


A. Mastered
B. Not Mastered

Answer: A

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

NEW QUESTION 28
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 30
DRAG DROP - (Topic 3)
The sellers at your organization are keen to adopt generative Al 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.

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 32
- (Topic 3)
You are creating a forecast. You want to include only opportunities that sell You need to configure this within the system. What should you configure?

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

Answer: B

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

NEW QUESTION 34
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