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.

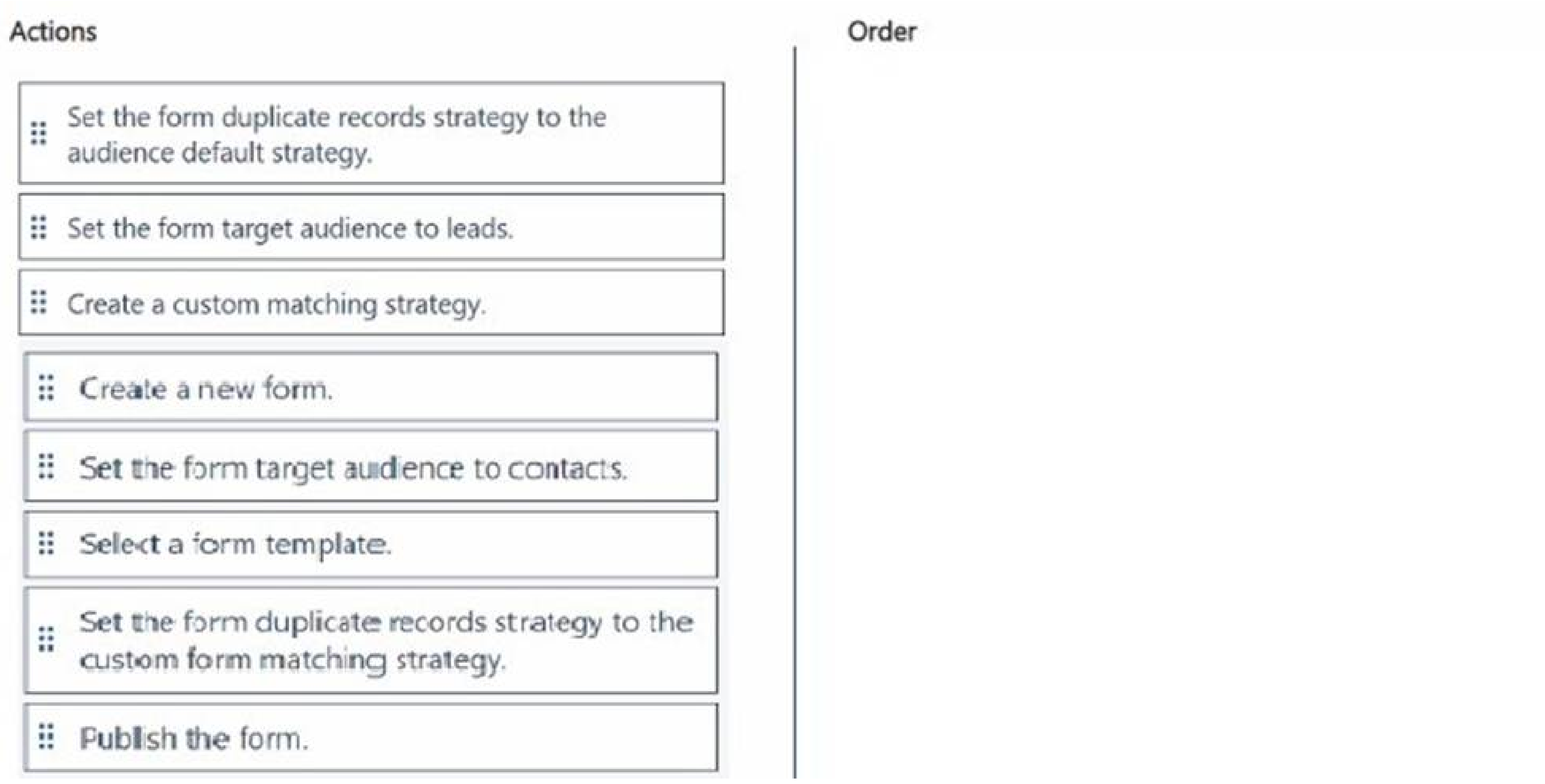
NEW QUESTION 2
- (Topic 1)
You need to identify the duplicate pet records, so they can be manually merged by the carer. What must you create?

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
DRAG DROP - (Topic 2)
You need to configure a new Customer Insights - Journeys form to satisfy the digital sales team lead's request.
Which five required actions should you perform in sequence? To answer, move the five appropriate actions from the list of actions to the answer area. Arrange the five actions in the correct order.

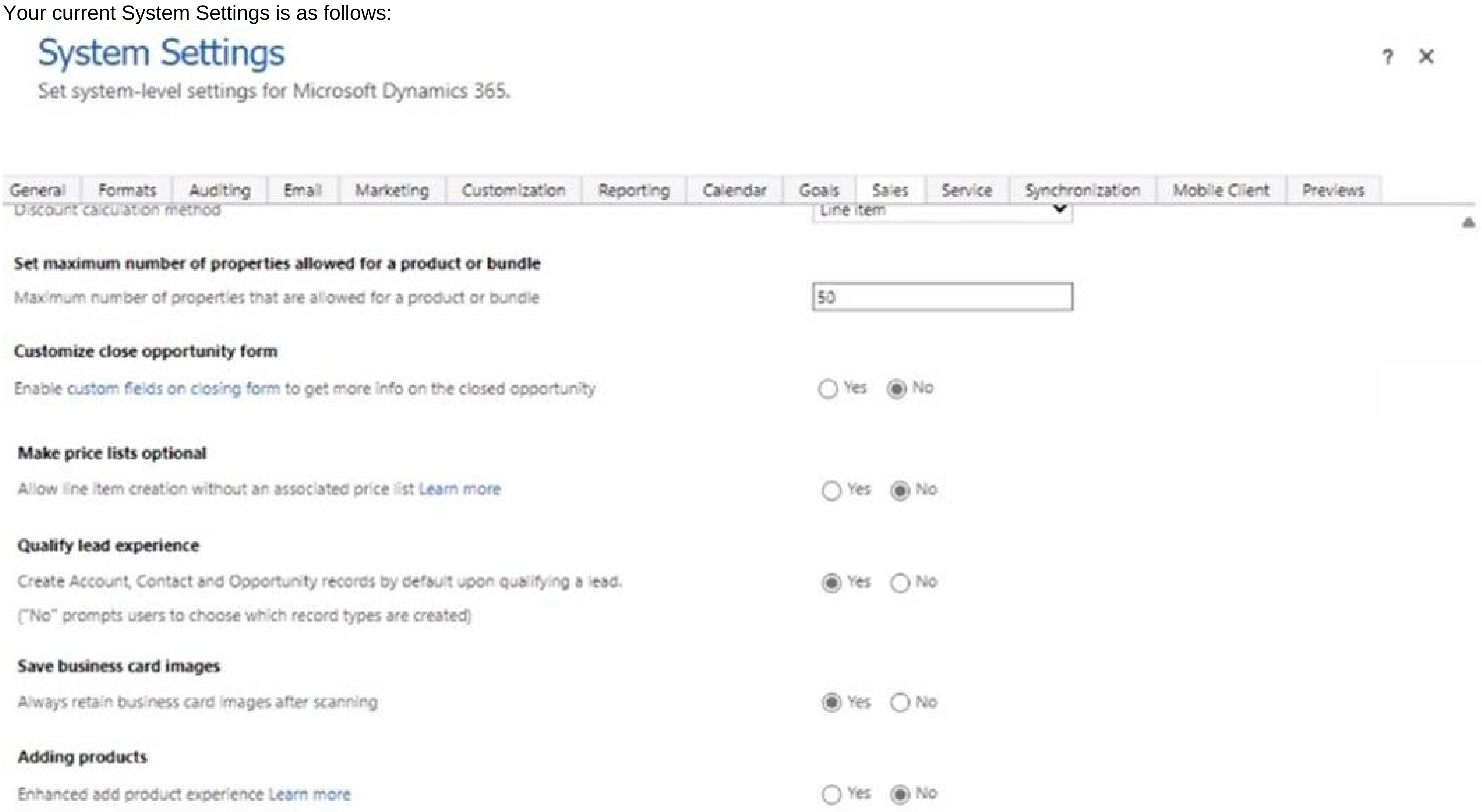


A. Mastered
B. Not Mastered

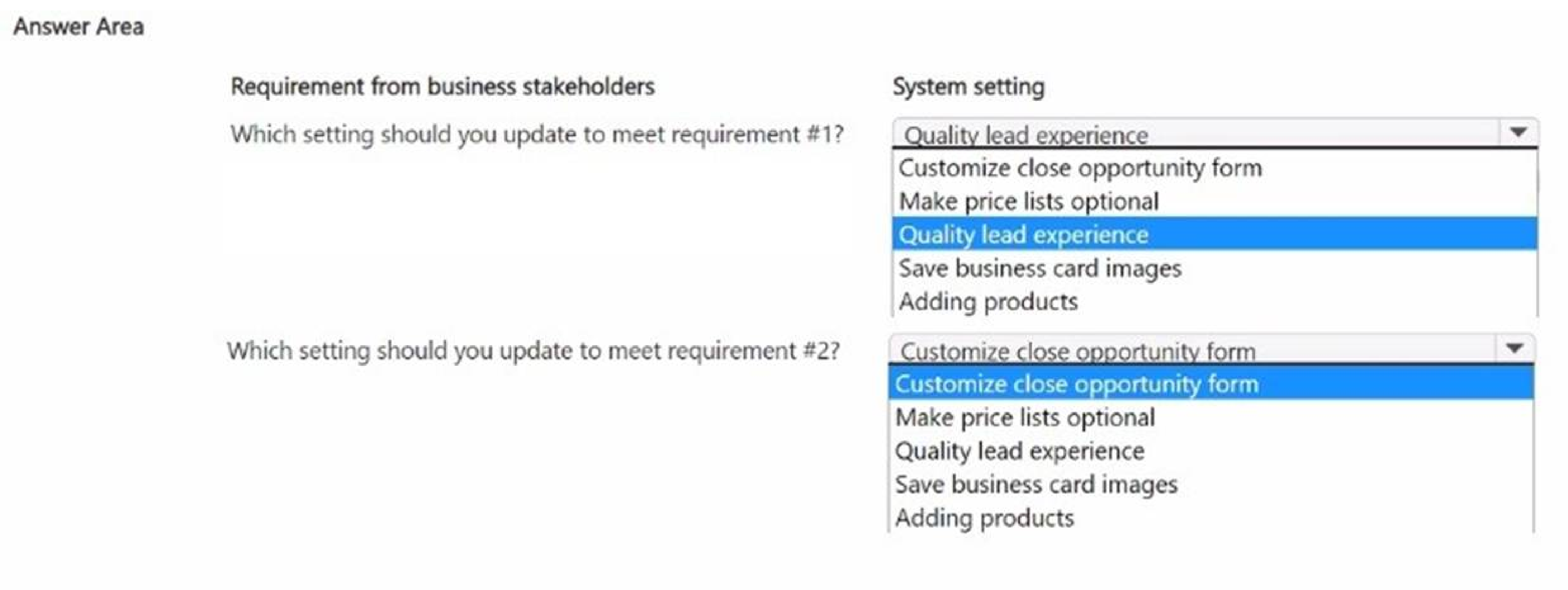
Answer: A

Explanation:
Here??s the correct sequence to configure a new Customer Insights - Journeys form to handle lead duplicates automatically, as per the requirements:
Create a new form:
Start by creating a new form within Customer Insights - Journeys. This is the initial step to set up a form that will capture new leads.
Select a form template:
Choose a template that best fits the purpose of the form. This provides a structure for the form fields and layout, streamlining the setup process.
Set the form target audience to leads:
Since the form will be capturing lead information, specify that the form??s target audience is ??leads.?? This will ensure that the data is processed and stored as lead records.
Set the form duplicate records strategy to the audience default strategy:
Define how duplicate records are managed. First, apply the default duplicate record strategy for leads. This sets an initial strategy for managing duplicates.
Publish the form:
After completing the setup and configuring the necessary options, publish the form to make it available for use.
Additional Context:
The Create a custom matching strategy and Set the form duplicate records strategy to the custom form matching strategy steps are optional and can be used for further refinement if the default strategy does not meet specific requirements for matching leads based on certain criteria.
By following these steps, you ensure the form is configured for capturing leads and
manages duplicates effectively based on the default duplicate record strategy. Microsoft Dynamics 365 References:
Set up a Customer Insights - Journeys form Duplicate Detection Rules in Dynamics 365

NEW QUESTION 4
HOTSPOT - (Topic 3)
You are configuring Dynamics 365 Sales as part of a new implementation at your organization. Your organization has Sales Professional licensing.
Your organization sells over 100 different types of products across different divisions. A lot of selling occurs at conferences where sellers meet prospects and gather business cards to create leads.
After reviewing the requirements from your business stakeholders, you identify that:
* 1. Sellers sometimes only want to convert leads gathered at events to contacts before they start tracking any deals with that contact.
* 2. Sellers must be given multiple different options for specifying the final status of deals they have been tracking.
Your current System Settings is as follows:



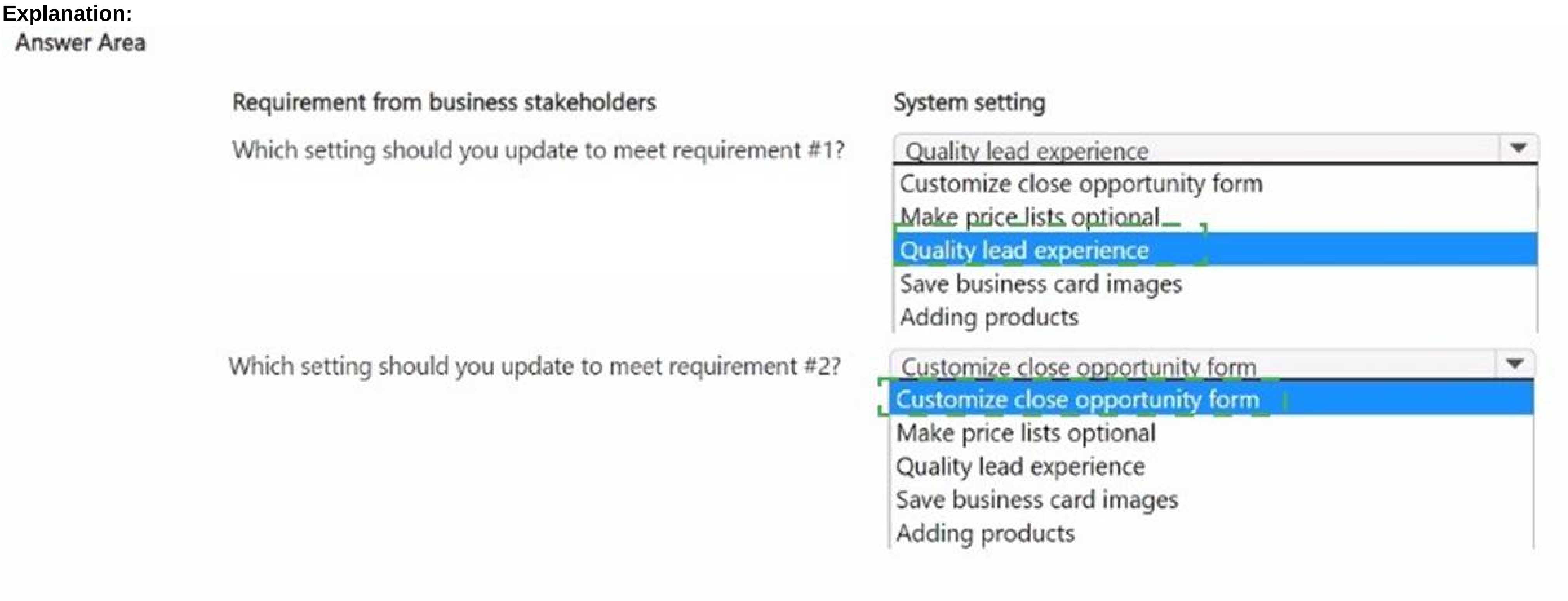
Use the drop-down menus to select the answer choice that answers each question. NOTE: Each correct selection is worth one point.



A. Mastered
B. Not Mastered

Answer: A

Explanation:



NEW QUESTION 5
- (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 6
- (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 7
- (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 8
- (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 9
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.

Answer Area

Requirement	Action
Add the type of loss.	Modify the Status Reason option set. **Modify the Status Reason option set.** Modify the Forecast category option set. Create a new Choices column.
Record the loss for forecasting.	Modify the Opportunity Close form. **Modify the Opportunity Close form.** Modify the Opportunity Sales Process business process flow. Modify the Opportunity Forecast Category Mapping process Dataverse classic workflow.

A. Mastered
B. Not Mastered

Answer: A

Explanation:
Answer Area

Requirement	Action
Add the type of loss.	Modify the Status Reason option set. **Modify the Status Reason option set.** Modify the Forecast category option set. Create a new Choices column.
Record the loss for forecasting.	Modify the Opportunity Close form. **Modify the Opportunity Close form.** Modify the Opportunity Sales Process business process flow. Modify the Opportunity Forecast Category Mapping process Dataverse classic workflow.

NEW QUESTION 10
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.
Answer Area

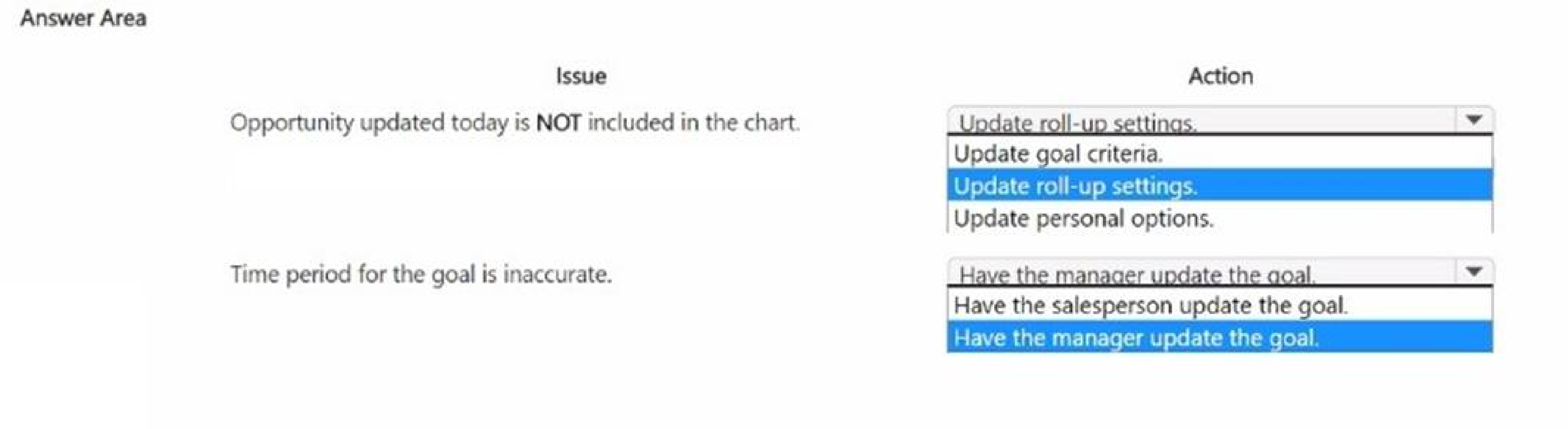
Question	Answer
Where should you rename the Omitted column to Cancelled for this forecast?	Layout column settings Forecast Category option set Forecast view **Layout column settings** Preview grid
Where should you delete the Lost column for this forecast?	Forecast configuration **Forecast configuration** Forecast configuration filter data Forecast Category option set value Forecast view

A. Mastered
B. Not Mastered

Answer: A

Explanation:
? Renaming the Omitted Column to Cancelled:

NEW QUESTION 10
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 12
- (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 16
- (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 18
- (Topic 3)
You are implementing Dynamics 365 Customer Insights - Data as the company's Customer Data Platform. You set up the data sources and start the unification process. You need to identify the primary table within the Matching conditions page.
Which two criteria should you use to determine the primary table? Each correct answer presents a complete solution. Choose two. NOTE: Each correct selection is worth one point.

A. Choose the table with the most complete and reliable profile data about your customers.
B. Choose the table that has the most related tables.
C. Choose the Dynamics 365 contact\ab\e when this is available as the data source.
D. Choose the table that has several attributes in common with other tables.

Answer: AC

Explanation:
When determining theprimary tablein Customer Insights during the unification process, the goal is to choose the table that provides the most robust and accurate customer profile information.
Criterion Ais crucial because having complete and reliable customer profile data ensures that the unified profile is accurate and comprehensive.
Criterion Cis recommended by Microsoft when using Dynamics 365 data, as thecontact tableoften serves as the primary source of customer information within the Dynamics 365 ecosystem.
While tables with many related tables or common attributes with other tables may provide supplementary information, they do not necessarily constitute the primary source for reliable customer data.
Reference:Microsoft Documentation - Data Unification Process in Customer Insights

NEW QUESTION 21
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