

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 to [Create and edit views](#).

NEW QUESTION 2

- (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. The sync to external search index setting (Option C) is for integration with external search tools and does not directly impact internal search capabilities.

? Adding columns 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 to [Configure relevance search in Dynamics 365](#) for more information on indexing tables to enhance search capabilities.

NEW QUESTION 3

- (Topic 1)

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

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

Answer: B

Explanation:

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

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

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

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

References from Microsoft Documentation:

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

NEW QUESTION 4

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 in the following

File Save and Close Actions

Security Role: Salesperson Working on solution

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 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!

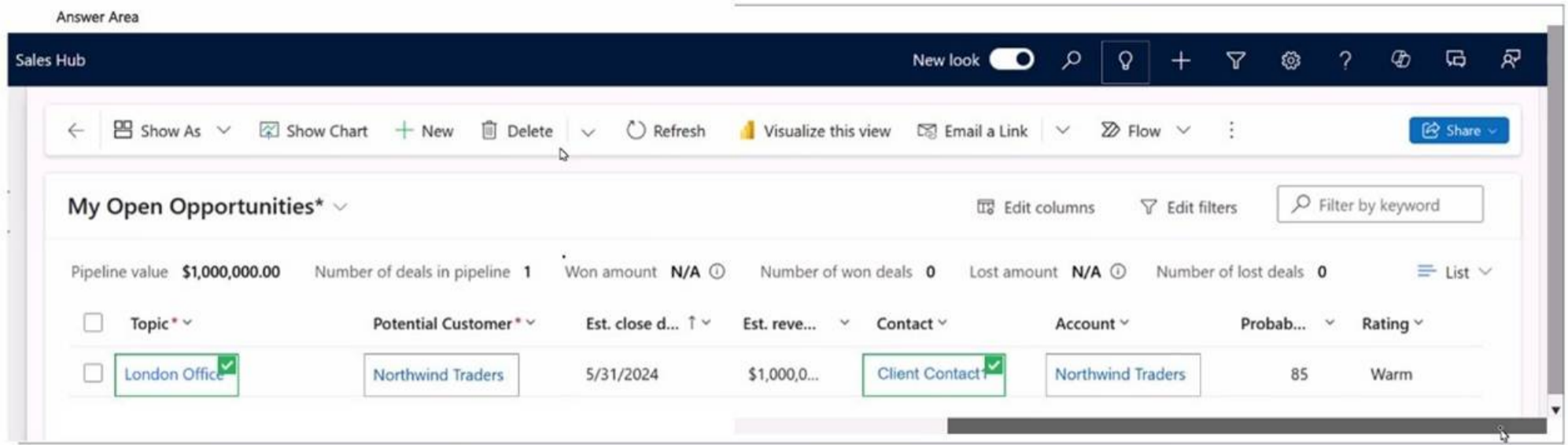
NEW QUESTION 5

HOTSPOT - (Topic 2)

BDM1 has returned from vacation and needs to catch up on their scheduled tasks and activities.

Which two items can BDM1 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 6

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.

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.

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

- 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 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.

● ● ● ● ●

Answer Area

System Settings

Set system-level settings for Microsoft Dynamics 365.

? X


General | **Formats** | Auditing | Email | Marketing | Customization | Reporting | Calendar | Goals | Sales | Service | Synchronization | Mobile Client | Previews

Audit Settings

- Start Auditing
- Audit user access
- Start Read Auditing View these logs in the Office 365 Security & Compliance Center. [Learn more](#)

Enable Auditing in the following areas

- Common Entities
- Sales Entities
- Marketing Entities
- Customer Service Entities

 For a complete list of Entities and their Audit states visit [Entity and Field Audit Settings](#).

OK
Cancel

- A. Mastered
- B. Not Mastered

Answer: A

Explanation:
 ? Start Auditing:

NEW QUESTION 8

- (Topic 3)

You are creating a pricing list in Dynamics 365 Sales. All prices must end in You need to select the function that establishes this pricing requirement. What should you use?

- A. Rounding Policy
- B. Percentage
- C. Rounding Amount
- D. Pricing Method

Answer: A

Explanation:

In Dynamics 365 Sales, the Rounding Policy feature allows you to control how pricing values are rounded, such as ensuring prices end in specific digits (e.g., nearest whole number or a specified decimal value).

The Rounding Policy can be configured to automatically adjust prices to the nearest whole value or any other desired rounding amount, ensuring consistency with pricing requirements.

This feature is especially useful for scenarios where pricing must conform to specific formats, such as all prices ending in ??0?? or ??5.??

Reference: Microsoft Documentation - Configure Rounding Policies for Price Lists

NEW QUESTION 9

- (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 column in 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 column to 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 10

- (Topic 3)

You have opportunities that have values in multiple currencies. You manually update currency exchange rates once per month. You need to ensure that currency values are accurately reported. When is the new currency exchange rate applied to the opportunity records?

- A. When an opportunity changes the status reason.
- B. When the calculate rollup field system job for the msdyn_projectteam table runs.
- C. When the calculate rollup field system job for the account table runs.
- D. When an opportunity changes the status.

Answer: A

Explanation:

In Dynamics 365 Sales, currency exchange rates are applied to opportunity records when specific triggers occur. These exchange rates are updated manually on a periodic basis (e.g., once a month) to reflect current currency values. Exchange rates are recalculated for an opportunity when there is a change in the status reason(e.g., from open to won or lost). This trigger ensures that the most recent exchange rate is used when key changes occur in the opportunity lifecycle, maintaining accurate currency reporting. Reference:Microsoft Documentation - Currency Management in Dynamics 365

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

NEW QUESTION 12

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 14

- (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: 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 the Close as Won dialog without completing the business process flow does not ensure that 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 17

- (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 uses Microsoft SharePoint for document storage, access to documents is controlled through SharePoint permissions rather than Dynamics 365 security roles.

To restrict document access to only the contracts team, you should update the users list in the SharePoint site where 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 21

- (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 25

- (Topic 3)

You use business process flows for all Dynamics 365 opportunities.

Some opportunities are closed before business process flow durations are calculated. You need to ensure that business process flow duration values are calculated. Solution: Create a flow to update the Status Reason of the business process flow table

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

- A. Yes
- B. No

Answer: A

Explanation:

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

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

NEW QUESTION 30

DRAG DROP - (Topic 3)

You have enabled Dynamics 365 App for Outlook for your sales team.

Users report that they are dissatisfied that they must track the emails manually, so you propose folder-level tracking.

You need to enable folder-level tracking in your environment in order for your users to configure the rules.

Which three actions should you perform in sequence before saving your changes? To answer, move the three appropriate actions from the list of actions to the answer area. Arrange the three actions in the correct order.

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

- A. Mastered
- B. Not Mastered

Answer: A

Explanation:

? Access Environment Settings in the Power Platform Admin Center:

NEW QUESTION 32

- (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 an inactive state allows 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 37

- (Topic 3)

A battery manufacturer wants to sell their batteries in boxes of 12 and cases of 24 boxes. You need to set up a unit group so that the manufacturer can sell different quantities. What should you create first?

- A. primary unit
- B. related unit
- C. base unit

Answer: C

Explanation:

In Dynamics 365 Sales, when setting up a unit group, you must first define the base unit. This is the fundamental unit of measurement for a product and serves as the foundation for defining related units within the group.

For the battery manufacturer, defining a base unit (such as a single battery) is necessary before configuring related units for boxes of 12 and cases of 24 boxes, as these will be multiples or related units derived from the base unit.

Reference: Microsoft Documentation - Create Unit Groups and Units

NEW QUESTION 42

HOTSPOT - (Topic 3)

You are a Dynamics 365 Sales consultant for a food service company. The company caters meals for client companies.

The company wants to set up a product bundle so that the sales staff does not forget items when they create an opportunity.

The lunch bundle is created at \$200.00. It will include the following.

Product	Quantity	Unit Cost	Amount	Configuration
Sandwich	50	\$5.00	\$250.00	Required
Napkins	50	\$0.25	\$12.50	Optional
Soda	50	\$1.00	\$50.00	Optional

You need to explain how the sales staff should manage the product bundle in the opportunity. What should they do for each scenario? To answer, select the appropriate options in the answer area. NOTE: Each correct selection is worth one point.

Answer Area

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

- A. Mastered
- B. Not Mastered

Answer: A

Explanation:

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

NEW QUESTION 43

- (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 to add 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 48

- (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 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 53

- (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 57

- (Topic 3)

Your company wants to enable AI features in their systems and use Copilot for Sales to connect to Dynamics 365 Sales data. You need to ensure that all eligible users have access.

Which three actions should you perform? Each correct answer presents part of the solution. Choose three. NOTE: Each correct selection is worth one point.

- A. Create a policy in Teams to install and pin Copilot for Sales and enable meeting transcripts.
- B. Enable Copilot for Sales in Dynamics 365.
- C. Install Copilot for Sales in Microsoft Outlook.
- D. Verify server-side synchronization is enabled and users have the correct security roles in Dynamics 365.
- E. Assign users the correct privileges to use Copilot for Sales in Teams.

Answer: BDE

Explanation:

? Enable Copilot for Sales in Dynamics 365:

? Verify Server-Side Synchronization and Security Roles:

? Assign Privileges for Copilot in Teams:

Reference:Microsoft Documentation - Configure and Use Copilot for Sales

NEW QUESTION 60

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

Order

- ☰ 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.

- 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 65

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

- 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 69

- (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 73

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