

MB-280 Dumps

Microsoft Dynamics 365 Customer Experience Analyst

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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 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 3

- (Topic 1)

You need to configure the required audit settings.

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

- A. Enable auditing on the Dietary requirements column.
- B. Enable auditing on the Pet table.
- C. Enable auditing on the Contact table.
- 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, see [Auditing overview for Dynamics 365](#).

NEW QUESTION 4

- (Topic 2)

You need to build a trigger-based journey to send the "Getting started" emails requested by the global sales lead. Which trigger should you use to start the journey?

- A. Dataaverse record change trigger
- B. Custom trigger with lead profile data
- C. Custom trigger with contact profile data
- D. Email Link Clicked interaction trigger

Answer: A

Explanation:

To build a trigger-based journey that sends "Getting started" emails when an opportunity is marked as "Won," the appropriate trigger to use is the Dataaverse record change trigger. This trigger is specifically designed to initiate actions based on changes in

Microsoft Dataverse records, which are integral to Dynamics 365. Here??s the detailed reasoning:

? Dataverse Record Change Trigger:

? Why Not Other Triggers?

Microsoft Dynamics 365 References:

? Create and manage trigger-based journeys

? Work with Dataverse triggers in journeys

By using theDataverse record change trigger, you ensure that the journey aligns directly with the sales process and automatically sends the "Getting started" email when an opportunity reaches the "Won" status, as requested by the global sales lead.

NEW QUESTION 5

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 6

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:

System Settings

Set system-level settings for Microsoft Dynamics 365.

General

Formats

Auditing

Email

Marketing

Customization

Reporting

Calendar

Goals

Sales

Service

Synchronization

Mobile Client

Previews

Discount calculation method

Line item

Set maximum number of properties allowed for a product or bundle

Maximum number of properties that are allowed for a product or bundle

50

Customize close opportunity form

Enable custom fields on closing form to get more info on the closed opportunity

☐ Yes
 ☒ No

Make price lists optional

Allow line item creation without an associated price list [Learn more](#)

☐ Yes
 ☒ No

Quality lead experience

Create Account, Contact and Opportunity records by default upon qualifying a lead.
(“No” prompts users to choose which record types are created)

☒ Yes
 ☐ No

Save business card images

Always retain business card images after scanning

☒ Yes
 ☐ No

Adding products

Enhanced add product experience [Learn more](#)

☐ Yes
 ☒ No

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

Answer Area

Requirement from business stakeholders

Which setting should you update to meet requirement #1?

Quality lead experience

Customize close opportunity form

Make price lists optional

Quality lead experience

Save business card images

Adding products

Which setting should you update to meet requirement #2?

Customize close opportunity form

Customize close opportunity form

Make price lists optional

Quality lead experience

Save business card images

Adding products

- A. Mastered
- B. Not Mastered

Answer: A

Explanation:

Answer Area

Requirement from business stakeholders

Which setting should you update to meet requirement #1?

Which setting should you update to meet requirement #2?

System setting

The image shows two screenshots of the Dynamics 365 system settings dropdown menu. In the first screenshot, 'Quality lead experience' is selected. In the second screenshot, 'Customize close opportunity form' is selected.

NEW QUESTION 7

- (Topic 3)

You need to enable the Dynamics 365 App for Outlook for the sales team.

You need to perform the prerequisite actions before you can add the app for all users. Which two actions should you perform? Each correct answer presents part of the solution.

Choose two.

NOTE: Each correct selection is worth one point.

- A. Enable mailboxes.
- B. Add the Dynamics 365 App to Outlook desktop app.
- C. Add the Dynamics 365 App for Outlook security role.
- D. Enable sending on behalf of other users setting.

Answer: AC

Explanation:

Enable Mailboxes:

? To use the Dynamics 365 App for Outlook, each user's mailbox must be enabled for server-side synchronization. This ensures that emails, appointments, and tasks can sync between Outlook and Dynamics 365.

? Without enabling the mailboxes, the synchronization won't be functional, making it a critical prerequisite.

Reference:Microsoft Documentation - Enable Mailboxes for Dynamics 365

Add the Dynamics 365 App for Outlook Security Role:

Users need to be assigned the Dynamics 365 App for Outlook security role to access the app. This role grants the necessary permissions to interact with Dynamics 365 through Outlook.

Assigning this role ensures that users have the correct access rights to use the app within their Outlook environment.

Reference:Microsoft Documentation - Security Roles for Dynamics 365 App for Outlook

NEW QUESTION 8

- (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 the Lost 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 the Amount 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 9

- (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)

A company is using Dynamics 365 Sales to provide quotes to their customers.

Preferred customers must be granted a separate flat rate discount on specific products, depending on their countries or regions. What should you create?

- A. A discount list for Preferred Customers.
- B. A sequence command step.
- C. A product bundle for each country/region.
- D. A price list for the currency of each country/region.

Answer: A

Explanation:

? Understanding the Requirement:

? Solution - Creating a Discount List:

Reference:Microsoft Documentation - Configure Discount Lists in Dynamics 365

Steps to Create a Discount List for Preferred Customers:

Navigate toSettings>Product Catalog>Discount Lists.

Create a new Discount List and specify criteria for preferred customers.

Add discount values for the specific products and set conditions based on regions or countries as needed.

Save and publish the Discount List for it to be available for quotes.

By using a Discount List, the company can apply specific discounts to preferred customers while taking into account regional pricing variations, providing a tailored and efficient solution for quote management.

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 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 theClose as Won dialog 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 15

- (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 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 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 administrator at an organization that uses both Dynamics 365 Customer Insights - Journeys and Dynamics 365 Sales.

You have configured Customer Insights - Journeys to create leads from web form submissions. You also allow your sales users to create leads using the user interface.

Your organization has recently hosted an event at a conference.

- You have a Customer Insights - Journeys web form to capture leads immediately at the conference.
- You expect sales users to enter lead information for prospects they meet at the event in the week after the conference.

You need to keep your data clean while also capturing all the valid leads from the event. What should you do?

- A. Go to the classic editor and remove Create permissions from the security group for sales users.
- B. Go to the form in Customer Insights - Journeys and update the form so that it can either create new leads or update existing leads.
- C. Go to The settings area in Customer Insights - Journeys and ensure the default form matching strategy is selected.
- D. Go to business management settings and enable duplicate detection on leads based on email.

Answer: D

Explanation:

? Requirement Analysis:

? Solution - Enabling Duplicate Detection:

? Steps to Enable Duplicate Detection for Leads Based on Email:

Reference: Microsoft Documentation - Configure Duplicate Detection Rules in Dynamics 365

Benefits of Using Duplicate Detection:

This approach does not restrict users from creating leads but ensures that duplicate entries are flagged, allowing users to review and decide whether to proceed.

It maintains data cleanliness by preventing unnecessary duplicates while ensuring all valid leads are captured from different sources.

By implementing this solution, the organization can effectively manage potential duplicate leads, keeping the data clean and accurate across both Customer Insights - Journeys and Dynamics 365 Sales.

NEW QUESTION 21

DRAG DROP - (Topic 3)

Your organization used Gmail previously and had only one Gmail server profile.

You recently moved to Exchange Online and you need to complete the set up for server- side sync with Exchange Online and ensure all mailboxes are working.

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

Actions

- ⋮ Add a new forward mailbox for each relevant user.
- ⋮ Update all relevant user mailboxes to sync with POP3/SMTP server.
- ⋮ Update all user mailboxes to sync with Exchange Online.
- ⋮ Approve email for all relevant users.
- ⋮ Test the email configuration and enable the selected email mailboxes for all relevant users.

Order

- A. Mastered
- B. Not Mastered

Answer: A

Explanation:

A screenshot of a computer Description automatically generated
? Update All User Mailboxes to Sync with Exchange Online:

NEW QUESTION 25

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.	<div>Modify the Status Reason option set.</div> <div>Modify the Status Reason option set.</div> <div>Modify the Forecast category option set.</div> <div>Create a new Choices column.</div>
Record the loss for forecasting.	<div>Modify the Opportunity Close form.</div> <div>Modify the Opportunity Close form.</div> <div>Modify the Opportunity Sales Process business process flow.</div> <div>Modify the Opportunity Forecast Category Mapping process Dataverse classic workflow.</div>

- A. Mastered
- B. Not Mastered

Answer: A

Explanation:

Answer Area

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

NEW QUESTION 28

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

- A. Mastered
- B. Not Mastered

Answer: A

Explanation:
? Access Environment Settings in the Power Platform Admin Center:

NEW QUESTION 29

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	Action
Opportunity updated today is NOT included in the chart.	<div>Update roll-up settings.</div> <div>Update goal criteria.</div> <div>Update roll-up settings.</div> <div>Update personal options.</div>
Time period for the goal is inaccurate.	<div>Have the manager update the goal.</div> <div>Have the salesperson update the goal.</div> <div>Have the manager update the goal.</div>

- A. Mastered
- B. Not Mastered

Answer: A

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

NEW QUESTION 31

- (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 32

- (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 33

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Thank You for Trying Our Product

* 100% Pass or Money Back

All our products come with a 90-day Money Back Guarantee.

* One year free update

You can enjoy free update one year. 24x7 online support.

* Trusted by Millions

We currently serve more than 30,000,000 customers.

* Shop Securely

All transactions are protected by VeriSign!

100% Pass Your MB-280 Exam with Our Prep Materials Via below:

<https://www.certleader.com/MB-280-dumps.html>