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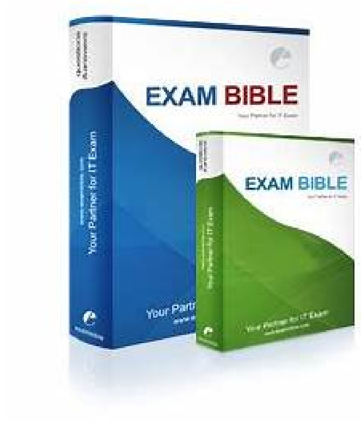

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Microsoft MB-280 Exam Syllabus Topics:

Topic	Details
Topic 1	• Implement Dynamics 365 Sales: This section focuses on the essential processes for setting up and managing Dynamics 365 Sales effectively for Dynamics 365 Sales Professionals.
Topic 2	• Demonstrate Dynamics 365 Customer Insights Capabilities: This section focuses on leveraging customer data to drive sales strategies through Dynamics 365 Customer Insights.
Topic 3	• Implement Security and Customizations in Dynamics 365 Sales: This section addresses the implementation of security measures and customization options within Dynamics 365 Sales for Dynamics 365 Sales Professionals.

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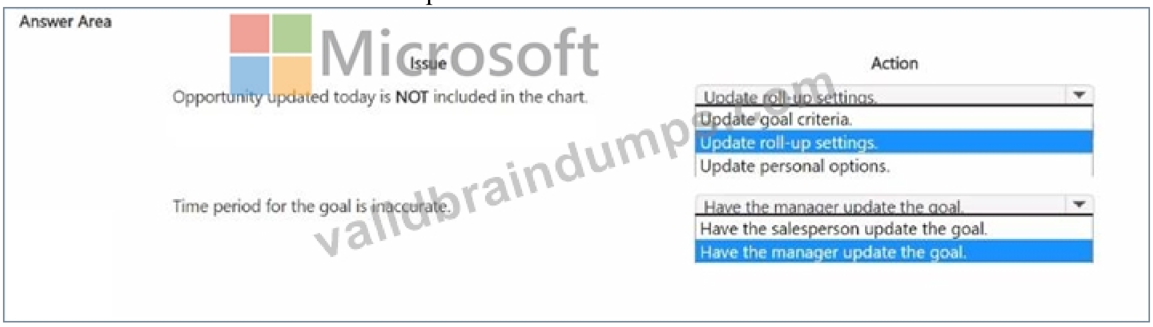
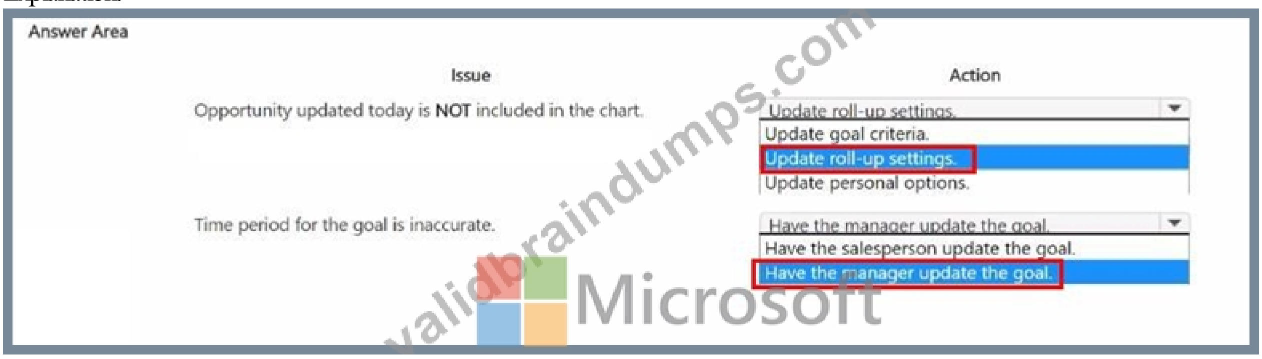
Microsoft Dynamics 365 Customer Experience Analyst Sample Questions (Q133-Q138):

NEW QUESTION # 133
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:

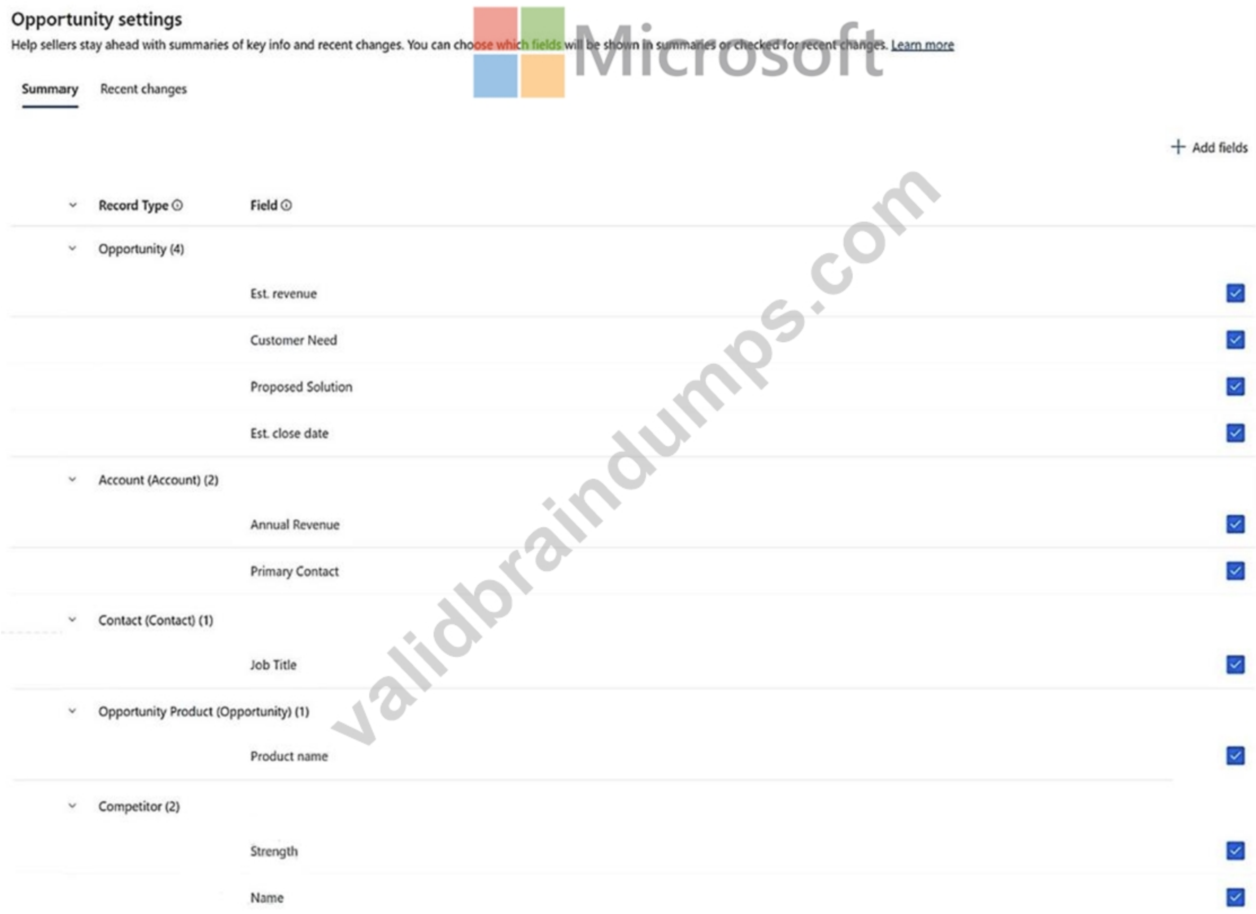
Explanation:

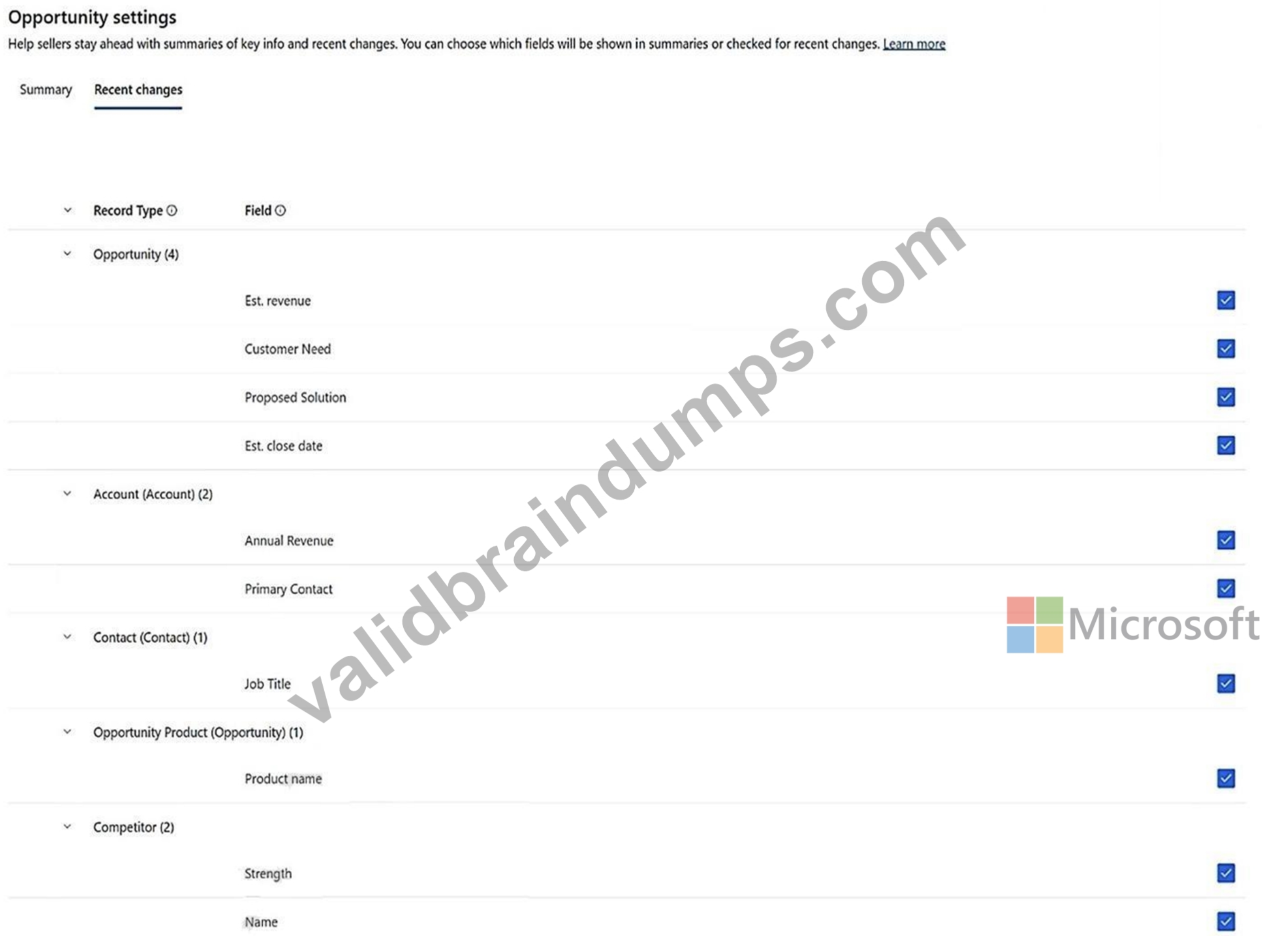


Reference:
Time Period for the Goal is Inaccurate: Have the manager update the goal If the goal's time period is incorrect, the data might not align with the expected reporting period. To correct this, you need to have the manager update the goal to ensure that the time period accurately reflects the intended tracking duration.
Managers typically have the required permissions to adjust goal settings, including the start and end dates, which directly affect how goals are calculated and displayed.
By updating the roll-up settings and ensuring the goal's time period is correct, you can address these issues, ensuring that the goal chart reflects accurate and up-to-date information for the sales team.

NEW QUESTION # 134
Case Study 1 - Contoso Ltd
Background information
Contoso Ltd. has started a new division that provides janitorial services to businesses.
The sales teams for this division are using a dedicated instance of Dynamics 365 Sales.
Contoso Ltd.'s sellers are becoming accustomed to Copilot in Sales and Sales Insights features.
They have identified several desired enhancements.

System configuration
The base currency for all opportunities in the system is US dollars (USD). The administrator has NOT enabled installed premium Sales Insights features. All users have Premium licenses.
Contoso Ltd. uses Exchange Online for email.
Only three default insights cards are turned on:
1. Close date coming soon
2. Meeting today
3. Upcoming meeting
The system administrator has set the following days before notifying me value for the Close date coming soon card to 21 days.
Contoso Ltd. has also just set up Dynamics 365 Customer Insights
- Journeys for marketing automation. No segments or customer journeys have been defined yet.
Dynamics 365 Sales and Customer Insights - Journeys both share the same instance of Microsoft Dataverse.
Copilot in Dynamics 365 Sales settings
The following screenshots show the configured fields for opportunity settings summaries and recent changes in Copilot.





Contoso Ltd. Personnel

Business development managers

Contoso Ltd. has 30 business development managers (BDMs) across its sales teams. Each BDM is responsible for selling janitorial services to new and existing clients. All BDMs are assigned the sales manager security role in Dynamics 365 Sales.

Any BDM can own an opportunity, even if a different BDM owns the client account record. Any other BDMs assigned to work on the opportunity will be included in the opportunity record's sales team. Opportunity records owned by a BDM will never include any additional client stakeholders other than the named contact for the opportunity.

The BDMs have been told to document all client communications in Dynamics 365, but they frequently exchange emails with client contacts through Microsoft Exchange WITHOUT tracking them in Dynamics 365.

Digital sales team

Contoso Ltd. has a digital sales team that comprises 10 junior sales resources who focus on lead qualification and conversion to opportunities. Members of this team are assigned a single custom security role named Digital seller that is a copy of the standard Salesperson role. View audit history and view audit summary permissions are disabled.

The team currently receives leads from an online form on Contoso Ltd.'s website. Many online lead submissions end up being duplicates, and the team manually reconciles the duplicates by comparing last name, email address, and phone number for all submitted leads.

Clients

Client tiers

Clients are grouped into tiers based on annual revenue as calculated in a system outside Dynamics 365 Sales. Clients receive different levels of ongoing service and support based on their tier assignment.

Annual revenue values for accounts and corresponding tier values are written to Dynamics 365 through a nightly batch process. Client tier values are only updated when they change, and tier value will always be blank for accounts with no calculated annual revenue.

The tier structure is:

Tier A -- annual revenue greater than or equal to $10,000,000 USD

Tier B -- annual revenue greater than $5,000,000 USD and less than $10,000,000 USD Tier C -- annual revenue greater than $0 USD and less than or equal to $5,000,000 USD The tier label is stored in a custom text field named Client tier (contoso_clienttier) that contains only a single letter or is blank.

Northwind Traders account

There are three BDMs who frequently work together on large opportunities.

BDM1 is the account owner for Northwind Traders, a multinational client.

- BDM1 owns all Northwind Traders opportunities with estimated revenue greater than or equal to $1,000,000. BMD2 and BDM3 are assisting BDM1 with several opportunities for Northwind Traders in different cities.
- BDM3 owns all other Northwind Traders opportunities. BDM3 is NOT a sales team member for any of the opportunities BDM1 owns.
- BDM2 is a sales team member for all Northwind Traders opportunities.

Client Contact1 is the primary contact for the Northwind Traders' account. There are two other client contacts with whom the Northwind account team regularly engages - Client Contact2 and Client Contact3.

BDM1 and Northwind Traders account

BDM1 has been on vacation for two weeks. During vacation, BDM1 did NOT log into Dynamics 365, and BDM2 made the following updates to several open Northwind Traders opportunities.

Updated field	Opportunities	When the updates were made
Estimated close date	New York City office, London office, Toronto office	Two days before BDM1's return
Forecast category	Mexico City office	Five days before BDM1's return
Proposed solution	Seattle office	Nine days before BDM1's return

BMD2 also scheduled an internal meeting with BMD1 for the day they return to discuss a request from the primary contact for the account. The meeting has the "London office" opportunity as its regarding value.

Desired enhancements

The global sales lead requests the following enhancements:

1. A "Welcome" email should be sent to the primary contact for an account when the account first enters any client tier. This email should only be sent to the primary contact once.
2. Account owners should receive immediate notifications in the assistant in Dynamics 365 Sales when accounts change tiers. The notifications should include the account name and current tier.
3. A "Getting started" email should be sent to the main contact associated with an opportunity when the opportunity status is set to "Won."
1. The email should include a link to a custom onboarding form where the contact can supply information required to start the janitorial services for a given location.
2. If the contact does NOT click any links in the email, a follow-up email should be sent.
4. All emails between BDMs and client contacts should be available for relationship analytics KPIs. Emails sent by other users outside of Dynamics 365 should NOT be included in the KPIs.

The digital sales team lead requests the following enhancements:

1. The ability for team members to use Copilot to summarize changes to lead records.
2. Replace the current online form used by their team to capture new leads. The new form should automatically handle duplicates using the rules the team currently applies manually.

Hotspot Question

BDM1 logs into the Sales Hub on June 3, 2024. BDM1 opens the assistant from the navigation bar. Which two open opportunities will BDM1 see mentioned in the close date coming soon reminder cards? To answer, select the appropriate options in the answer area.

NOTE: Each correct selection is worth one point.

Answer Area

Open Northwind Opportunities*

Edit columns | Edit filters | Filter by keyword

Pipeline value $3,975,000.00 | Number of deals in pipeline 5 | Won amount N/A | Number of won deals 0 | Lost amount N/A | Number of lost deals 0 | List

Topic*	Potential Customer*	Est. close ...	Est. revenue	Contact	Account	Proba...	Rating	En
London Office	Northwind Traders	6/4/2024	$1,000,000.00	Client Contact1	Northwind Traders	75	Warm	
Toronto Office	Northwind Traders	6/12/2024	$400,000.00	Client Contact2	Northwind Traders	75	Warm	
Mexico City Office	Northwind Traders	6/18/2024	$475,000.00	Client Contact1	Northwind Traders	90	Warm	
Seattle Office	Northwind Traders	6/19/2024	$1,000,000.00	Client Contact2	Northwind Traders	50	Warm	
New York City Office	Northwind Traders	6/26/2024	$1,100,000.00	Client Contact1	Northwind Traders	10	Cold	

Answer:

Explanation:

Answer Area

Open Northwind Opportunities*

Edit columns | Edit filters | Filter by keyword

Pipeline value **$3,975,000.00** Number of deals in pipeline **5** Won amount **N/A** Number of won deals **0** Lost amount **N/A** Number of lost deals **0** List

Topic*	Potential Customer*	Est. close ... ↑	Est. revenue	Contact	Account	Proba...	Rating	En...
London Office	Northwind Traders	6/4/2024	$1,000,000.00	Client Contact1	Northwind Traders	75	Warm	
Toronto Office	Northwind Traders	6/12/2024	$400,000.00	Client Contact2	Northwind Traders	75	Warm	
Mexico City Office	Northwind Traders	6/18/2024	$475,000.00	Client Contact1	Northwind Traders	90	Warm	
Seattle Office	Northwind Traders	6/19/2024	$1,000,000.00	Client Contact2	Northwind Traders	50	Warm	
New York City Office	Northwind Traders	6/26/2024	$1,100,000.00	Client Contact1	Northwind Traders	10	Cold	

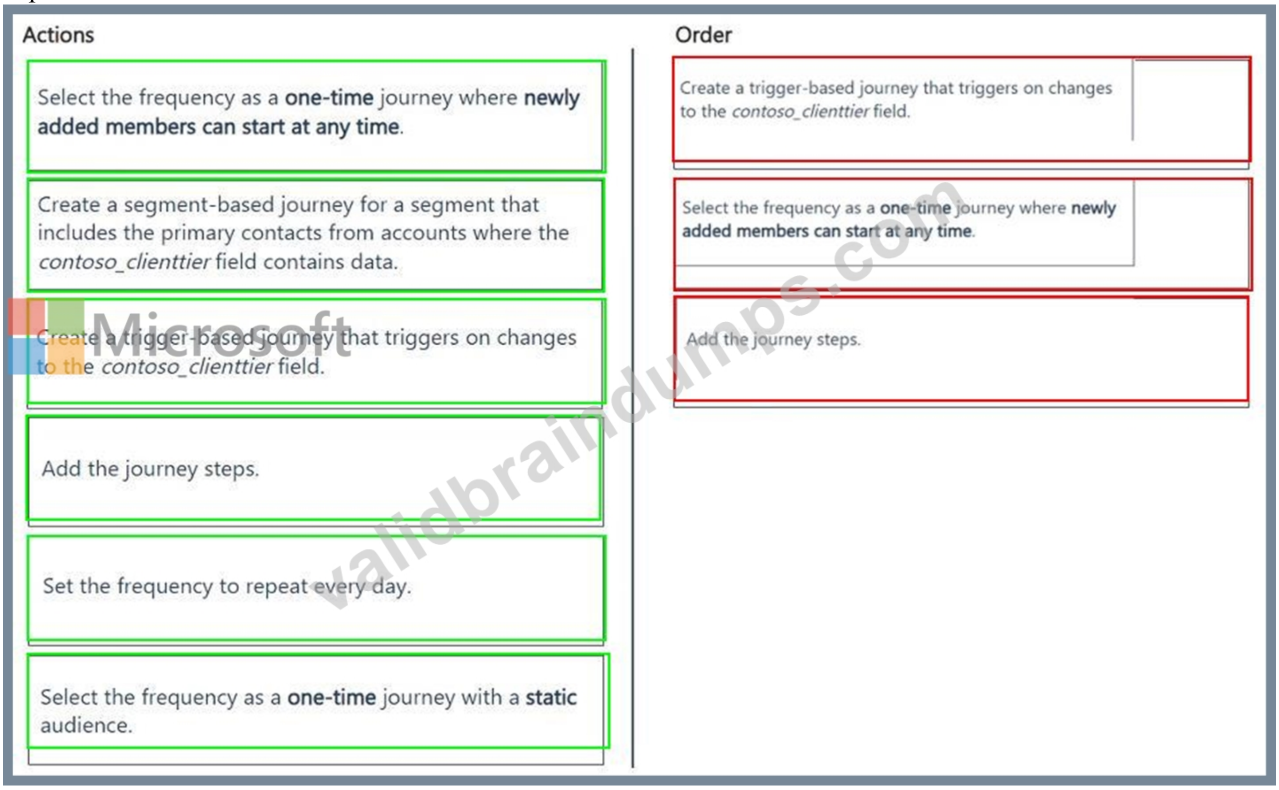
Explanation:
Based on the scenario provided and the visual data from the images, the key information needed to determine which opportunities BDM1 will see in the "Close date coming soon" reminder cards are:
The "Close date coming soon" insight card is set to notify 21 days before the estimated close date.
BDM1 logs into the system on June 3, 2024.
In the "Open Northwind Opportunities", the following opportunities are listed with their estimated close dates:
London Office: 6/04/2024
Toronto Office: 6/12/2024
Mexico City Office: 6/18/2024
Seattle Office: 6/19/2024
New York City Office: 6/26/2024
Since BDM1 logged in on June 3, 2024, and the system will show opportunities closing within the next 21 days, the opportunities BDM1 will see are:
London Office (close date of June 4, 2024)
Toronto Office (close date of June 12, 2024)
These two opportunities are within 21 days of June 3, 2024, and will trigger the "Close date coming soon" reminder cards.

NEW QUESTION # 135
You need to create and start a new customer journey to send "Welcome" emails to new customers.
Which three actions should you perform in sequence before you publish the journey? To answer, move the three appropriate actions from the list of actions to the answer are a. Arrange the three actions in the correct order.

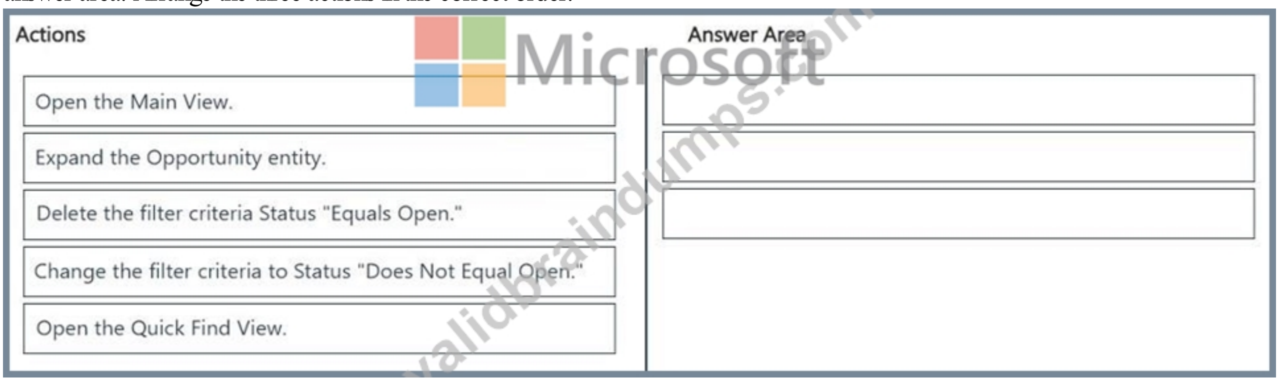
Actions	Order
Select the frequency as a **one-time** journey where **newly added members can start at any time.**	
Create a segment-based journey for a segment that includes the primary contacts from accounts where the *contoso_clienttier* field contains data.	
Create a trigger-based journey that triggers on changes to the *contoso_clienttier* field.	
Add the journey steps.	
Set the frequency to repeat every day.	
Select the frequency as a **one-time** journey with a **static** audience.	

Answer:

Explanation:

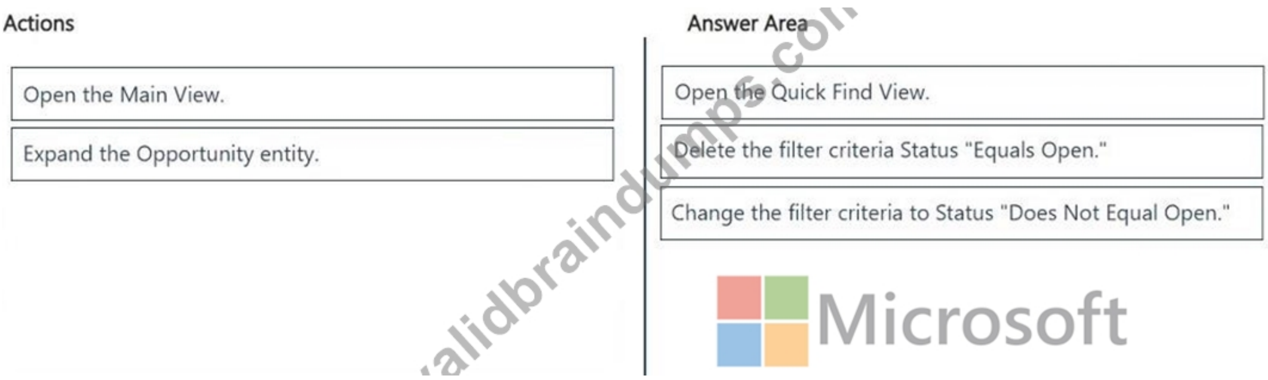


NEW QUESTION # 136
Drag and Drop Question
You are a Dynamics 365 Sales system customizer.
Salespeople report that they cannot search for open and closed opportunities using the search tool in the Quick Find View.
You need to configure the search tool to show the open and closed opportunities in the Customize the System area.
Which three actions should you perform in sequence? To answer, move the three appropriate actions from the list of actions to the answer area. Arrange the three actions in the correct order.



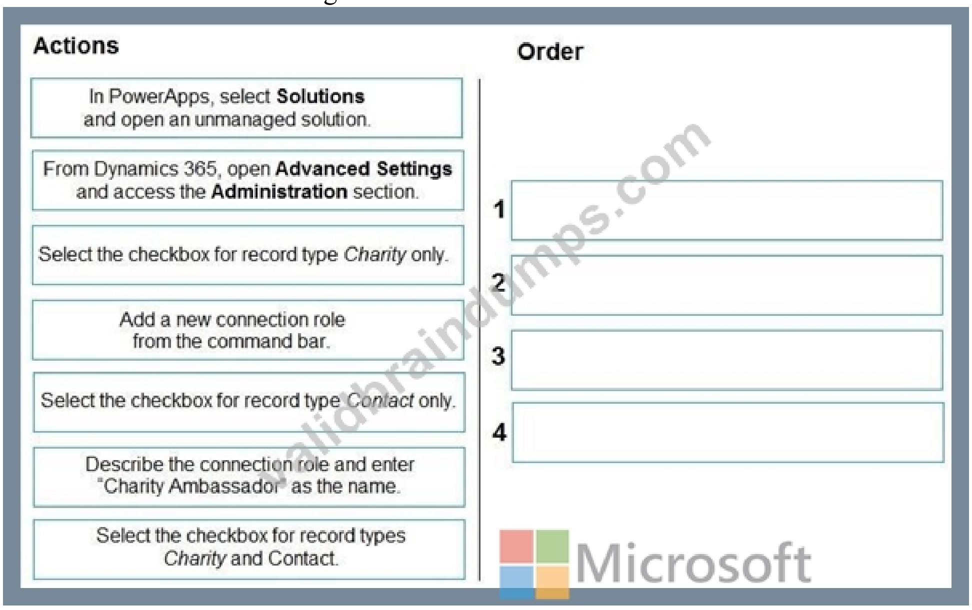
Answer:

Explanation:



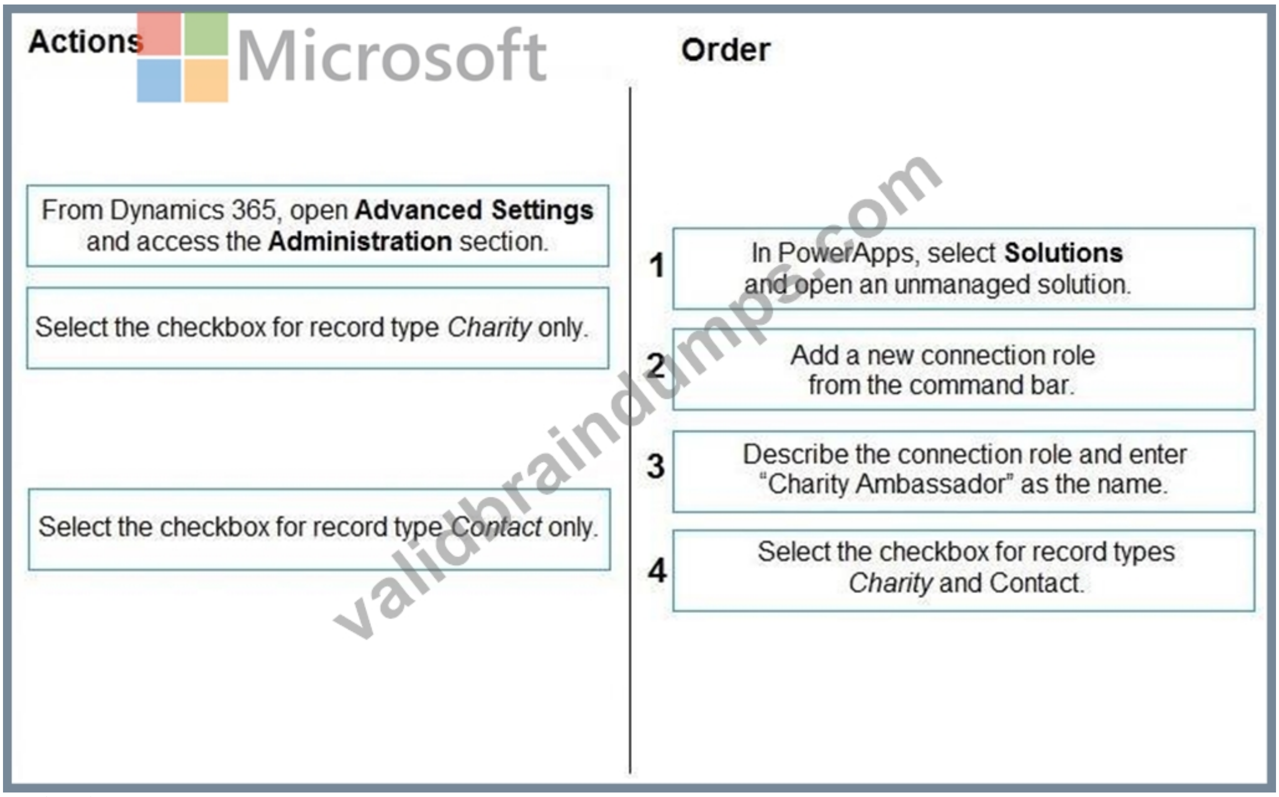
Explanation:
1. Open the Quick Find View.
The Quick Find View controls what records are shown when users search for opportunities.
2. Delete the filter criteria Status "Equals Open."
The current filter is restricting search results to only open opportunities.
3. Change the filter criteria to Status "Does Not Equal Open."
This ensures that both open and closed opportunities are included in search results.

NEW QUESTION # 137
Drag and Drop Question
Within your non-profit organization you have set up your different charities in a custom table to store charity records.
In the Contact table, you have various famous people who can be special charity ambassadors.
You need to set up the charity ambassador connection role so that charity managers can link the charity through a connection from the contact 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.

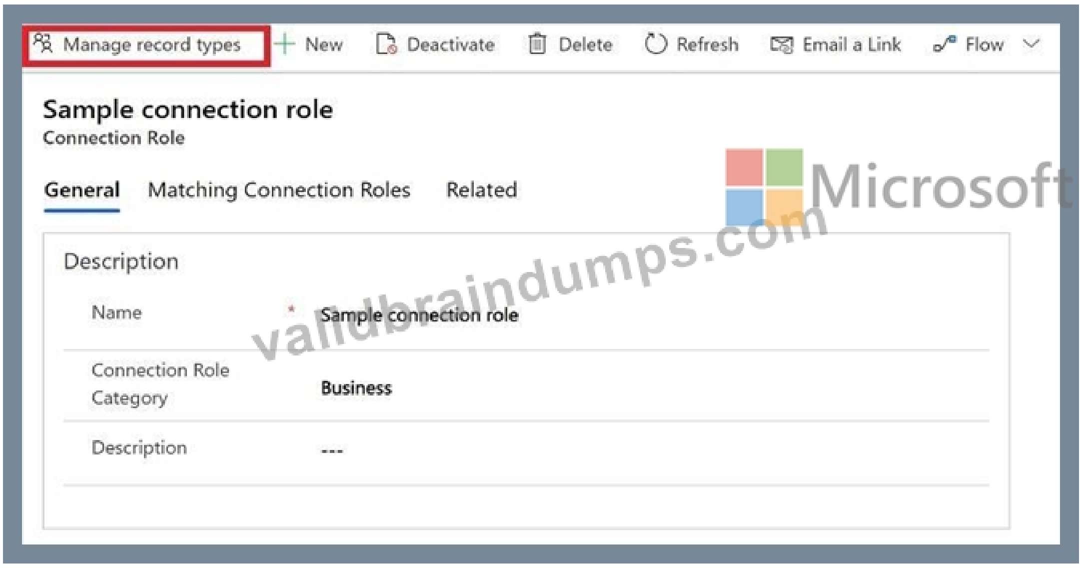


Answer:

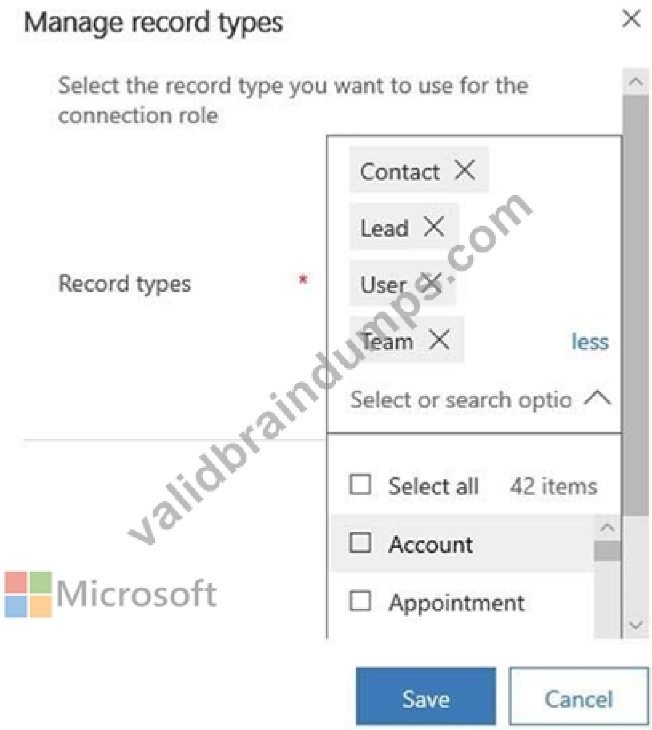
Explanation:



Explanation:
Step 1: In PowerApps, select Solutions and open an unmanaged solution.
Add connection roles to a solution
Because connection roles are solution aware, which means that they can be included in a solution, you can also add connection roles to a solution you distribute.
Create a connection role
1. Sign in to Power Apps and then on the left pane select Solutions. If the item isn't in the side panel pane, select ...More and then select the item you want.
Step 2: Add a new connection role from the command bar.
2. Open the unmanaged solution your want, and then on the command bar select New > Other > Connection role.
Step 3: Describe the connection role and enter "Charity Ambassador" as the name.
To create a connection role you must specify the following information:
Use the ConnectionRole.Name to specify a role name. [Step 3]
Use the ConnectionRole.Description to add a role description. [Step 3]
Use the ConnectionRole.Category to specify a role category. The possible values for this are defined in the connectionrole_category choices.
When you create a connection role, you can specify a table type that the role will be applied to, such as lead, account, or competitor. If you do not specify a particular table type, then you can apply a connection role to all Microsoft Dataverse tables.
Step 4: Select the checkbox for record types Charity and Contact.
Charity managers must be able to link the charity through a connection from the contact.
You can also manage the connection role types that you want to associate with the connection role.
1. Open the connection role and then select Manage Row Type on the command.



2. This opens a list of connection role types that you can add or remove for this connection role.



NEW QUESTION # 138

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