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Microsoft Dynamics 365 Customer Experience Analyst Sample Questions (Q76-Q81):

NEW QUESTION # 76
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. Add Location to the App Designer.
- B. Create a Location Sub Area.
- C. Create a Location Group.
- D. Add Location as an Area.

Answer: A

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.

NEW QUESTION # 77
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:

Explanation:
Reference:
Steps to Create a Product Property:
Go to Sales > Product Catalog > Products.
Open the existing product (bread) and navigate to Product Properties.
Add a new property (flavor) and define the possible values (e.g., new flavors).
Save and publish the product with the updated properties.
Scenario 2: Changing an Order to a New Bread Flavor in an Opportunity
When a customer wants to change their order to a new flavor within an existing opportunity, the selected product in the opportunity can be updated to reflect the new flavor.
Since flavors are configured as product properties, you can select the specific flavor for the opportunity product directly without needing to recreate or delete the product from the opportunity.
This approach leverages product properties, ensuring that the change is streamlined and does not require re-adding or modifying the core product.
Steps to Select a New Flavor in the Opportunity Product:
Open the specific opportunity record in Dynamics 365.
Navigate to the product line items and select the bread product.
In the product properties, update the flavor to the new option as required.
Save the changes to ensure the opportunity reflects the new flavor selection.
These actions allow the bakery to manage new flavors flexibly within their product catalog and seamlessly adjust opportunities to accommodate flavor changes, enhancing customer satisfaction and operational efficiency.

NEW QUESTION # 78

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.

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.

Drag and Drop Question

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.

Answer:

Explanation:

Explanation:

Create a new form: The first step is to establish a new form for collecting lead information.

Select a form template: Choosing an appropriate template ensures that the form aligns with the desired layout and functionality.

Set the form target audience to leads: This action defines who the form is intended for, ensuring that it collects information from the right audience.

Set the form duplicate records strategy to the custom form matching strategy: This step is crucial for handling duplicates effectively, as specified by the digital sales team.

Publish the form: Finally, publishing the form makes it live and accessible for use in lead generation.

NEW QUESTION # 79

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:

Explanation:

Reference:

Steps to Modify the Status Reason Option Set:

Go to Settings > Customizations > Customize the System.

Locate the Opportunity entity and open its Fields section.

Find and select the statuscode (Status Reason) field.

Add new options to represent specific loss types and save the changes.

Publish the customization to make the new Status Reason options available for users.

Requirement: Record the Loss for Forecasting

Sales managers need to include lost opportunities and their reasons in forecasting. To ensure that this information is captured accurately, modifying the Opportunity Close form will allow users to specify details when marking an opportunity as closed (won or lost).

By customizing the Opportunity Close form, you can include fields that capture detailed information required for forecasting, such as the type of loss and any competitor information. This ensures that loss details are available for analysis and forecasting without needing custom code.
Steps to Modify the Opportunity Close Form:
In the Sales Hub, navigate to App Settings > Close Opportunity Experience.
Customize the Opportunity Close form to include fields that are relevant to capturing loss information, such as adding fields for competitors or reasons.
Save and publish the form to reflect the changes.
By modifying the Status Reason option set and customizing the Opportunity Close form, you enable the sales team to record detailed reasons for lost opportunities, which will support accurate forecasting and analysis, all without using custom code.
New

NEW QUESTION # 80
A sales manager wants to set up goals for all salespeople. The goal measurement is based on the total outgoing calls finished each year. The goals for the fiscal year are based on a calendar year (January - December).
You need to create the rollup query for the goal metrics.
Which option should you select? To answer, select the appropriate options in the answer area.
NOTE: Each correct selection is worth one point.

Answer:

Explanation:
Reference:
Rollup Field - Actual (integer):
The Actual (integer) rollup field is suitable for counting the total number of completed outgoing calls. This setting ensures that each completed call is tallied accurately, providing a straightforward measure of the sales team's activity in terms of call volume.
Using an integer type for the rollup field is appropriate for count-based metrics like this.
Source Record Type Status - Completed:
The Completed status ensures that only calls marked as completed are counted towards the goal. This is crucial for measuring finished activities, as it excludes calls that may still be in progress or have other statuses.
Setting the source record type status to Completed aligns with the requirement to measure only outgoing calls that have been fully executed.
By selecting Actual End as the date field, Actual (integer) for the rollup field, and Completed for the source record type status, you ensure that the goal measurement accurately reflects completed outgoing calls within the specified calendar year timeframe.

NEW QUESTION # 81
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