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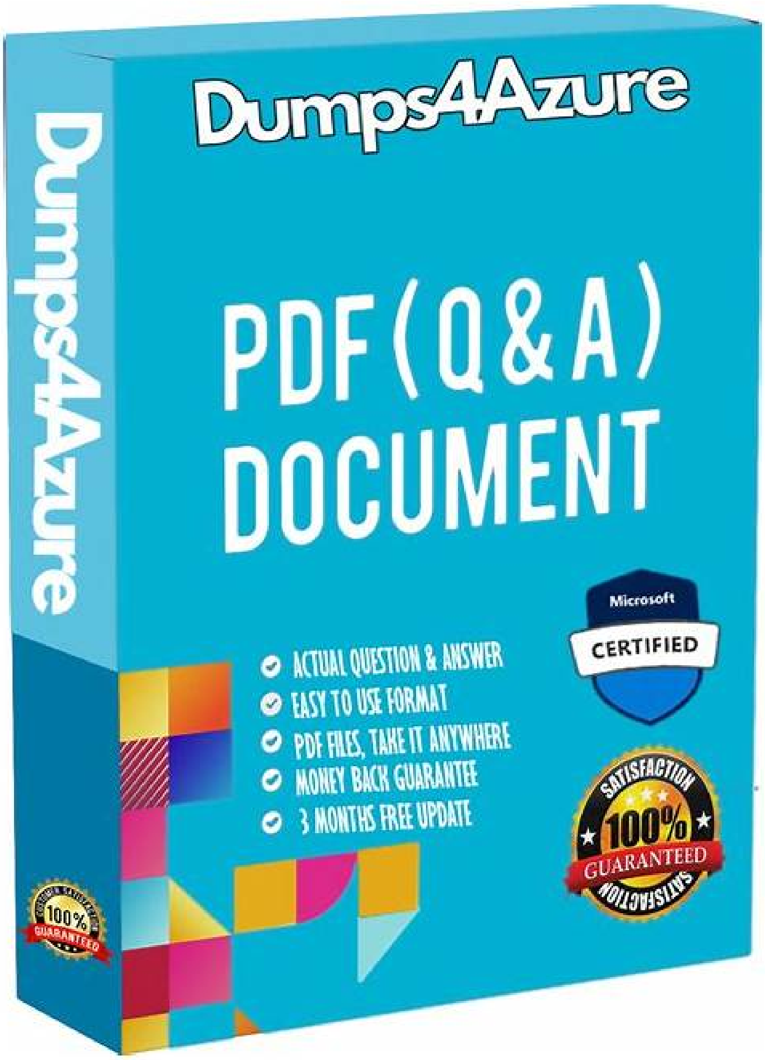

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Microsoft MB-280 Exam Syllabus Topics:

Topic	Details
Topic 1	• Configure and Customize Dataverse and Model-Driven Apps: This section covers the ability of Dynamics 365 Sales Professionals in the configuration and customization of Dataverse and model-driven apps to meet business needs.
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.

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

NEW QUESTION # 76
Note: This question is part of a series of questions that present the same scenario. Each question in the series contains a unique solution that might meet the stated goals. Some question sets might have more than one correct solution, while others might not have a correct solution.
After you answer a question in this section, you will NOT be able to return to it. As a result, these questions will not appear in the review screen.
A company's IT department has a .CSV file stored on one of their Shared Documents folders within their Microsoft SharePoint sites. The data from the .CSV file is ingested into Dynamics 365 Customer Insights - Data.
The file contains a row header and columns of different types, such as quantities and prices. The file also contains some rows with a high proportion of nulls.
You need to clean and transform the data in Customer Insights - Data to be ready for unification.
Solution: Remove any rows where the primary key is missing, delete any leading or trailing zeros on the primary key, and name the query. Select Next and your data is now ready for unification.
Does this meet the goal?

- A. No
- B. Yes

Answer: A

Explanation:
Correct:
* Transform the first row to be used as headers. Define column types to be the appropriate field types and name the query. Create a full name and full address columns by merging the appropriate columns if they exist. Select Next and your data is now ready for unification.
The proposed solution effectively prepares the data for unification in Dynamics 365 Customer Insights - Data. Here's how each step contributes to meeting the goal:
Transform the first row to be used as headers: This step is necessary to define the column names, which is critical for accurate data interpretation.
Define column types to be the appropriate field types: Specifying the correct data types for each column ensures that the data will be processed correctly during unification, maintaining data integrity.
Create a full name and full address columns by merging the appropriate columns if they exist:
This step enhances the dataset by consolidating relevant information into single columns, which can simplify data usage and improve data quality. Merging columns helps ensure that users can easily access essential information without navigating through multiple fields.
Select Next: This indicates that the data transformation steps are completed and the dataset is ready for the unification process.

NEW QUESTION # 77
Case Study 2 - Terra Flora
Background information
Terra Flora, Incorporated is a boutique pet hotel that has been in business for six (6) months. The hotel guests include both dogs and cats.
The founder created the Dynamics 365 Sales Professional environment to grow their network and pipeline. They started out using out-of-the-box capabilities only and using the Sales Professional app only. Only one environment (production) is in use.
The pet hotel is gaining in popularity and the number of bookings is growing. The founder has shifted their focus to customizing their environment to record the information they need to delight their customers by tailoring the experience to their unique pets.
Terra Flora has recently hired a part-time carer for the resident pets. The carer has been granted the Salesperson security role to allow them to record new leads and update customer information.
You are a Dynamics 365 Customer Experience consultant who has been hired to assist Terra Flora with their customizations, resolve issues, and advise on best designs to meet their requirements.
Configurations
Overall configurations
To better understand their four-legged customers, Terra Flora has created a custom Pet table, which is user-owned and related 1-n with the Contact table, which represents the pets' primary owner.
The Pet table has been added to the Sales Professional app sitemap. The table has the following columns, each created WITHOUT making any changes to the advanced options.

Column name	Type	Required
Name	Single line of text	Business required
Type	Choice	Business required
Dietary requirements	Multiple lines of text	Optional
Litter type	Choice	Optional
Breed	Single line of text	Optional
Description	Multiple lines of text	Optional

A pet sub-grid has been added to the Contact main form, using the Active Pets view.
Additionally, Read, Write, and Update, Append, Append To, and Assign access to the Pet table has been added to the Salesperson security role.
"Onboard new pet" business process flow
The founder is creating a business process flow named Onboard new pet to ensure that appropriate information is recorded for all new pets, starting with ensuring the correct litter choices are selected for cats who will be staying at Terra Flora.
When the Onboard new pet business process flow is done, the founder wants to have access to a view that will display all active pets including the and Type columns, as well as the current stage on the Onboard new pet business process flow.
Name
Pet table icon
A custom image .svg file has been created for the Pet table.
Terra Flora wants to ensure this image is displayed alongside the pet page within the app.
Related Pet table activities
Terra Flora wants carers to be able to see their pets' activity history, as well as add new activities related to their pets. They want the following information to appear on their pets' timeline:
- Tasks carers completed or should do.
- E-mails exchanged with pet's owner (customer).
- A record of phone calls.

Other types of activities should NOT appear to users on the Pets forms.
The founder edited the Pet table advanced setting to enable associating Pet records with activities. The founder also added Pet table to the app sitemap that is being used.
Attachments are enabled for the Pet table, including notes and files. But users should NOT see posts in the pet's activity timeline.
Post configuration is NOT enabled for the Pet table.
Logs
Auditing, log access, and read logs have been enabled in the production environment.
Auditing has started on the Terra Flora environment and has been enabled for common entities.
Marketing
Breed galas
To celebrate their upcoming first year in operation, the founder is planning a series of breed galas. The series begins with a Corgi dog breed meet-up gala.
The breed of an owner's pet may be mentioned in many places within the system, including:
1. Emails (subject or body).
2. Notes (including Word documents exports of PDFs uploaded as attachments).

3. Single or multiple lines of text columns on any standard table (including lead, contact and opportunity at minimum).
4. On the Pet table in either the Description or in the Breed columns.
Additionally, the breed may be referenced in several ways including singular, multiple, shorthand (for example: corgi, corgis, or corgs), and may have been misspelled.
Corgi meet-up gala
The carer needs to be assigned ownership of several Contact records (representing customers that own Corgis) that live nearby so that event flyers can be delivered personally. When the carer is delivering flyers, they need to quickly check the owner and related pet information on their phone.
When the Contact records are assigned to carer, any pets that are related to these contacts via the primary owner relationship should also be assigned to the carer.
The founder has created a business process flow on the Pet table named Corgi meet-up to allow Corgis to be registered as attending the gala. This business process flow is second in the default order on the Pet table. If the carer has a conversation with the owners, the carer is required to add notes to the timeline and complete the first stage of the business process flow.
Issues
Duplicate records
Before the creation of the Pet table, information regarding pets was either added to the owner's Contact record in the form of notes or created as records themselves.
Contact
These Contact records used the name of the pet in the Last Name column and the owner's address in the first set of Address columns.
When these pet Contact records are identified, they are deactivated.
No duplicate detection rules have been published and duplicate pet records are currently present across both the Contact and Pet tables.
Auditing
When a pet's dietary requirements or a Contact's email address is updated, Terra Flora requires the following information to be logged:
1. The user who made the change.
2. The current and previous values of the columns.
3. The time and date of the changes.
Terra Flora also needs to track any exports of records to Microsoft Excel within the compliance center.
Relationship behavior
Recently, a pet owner informed Terra Flora that their pet cat has been rehomed.
After receiving this information, the carer deleted the owner's Contact record from the system, which in turn deleted the Pet record.
Shortly after, the new pet owner contacted Terra Flora to book their cat for a stay and was frustrated that Terra Flora had NOT retained a record of their cat's dietary requirements or any of the previous carer notes about the cat.
In such situations, Terra Flora now requires that the owner's Contact record should NOT be allowed to be deleted if any Pet records are related to it via the primary owner look-up column.
Users should be required to update the look-up column to new owner's Contact record or remove the current value first before they can delete the Pet record. If the new owner's Contact record is selected on a pet, any active bookings against the pet should also be updated to the new owner, but previous inactive bookings should NOT be updated.
Business process flows and the Corgi meet-up gala
The founder has recently made an update to the Onboard new pet business flow but now CANNOT activate it.
For the Corgi gala, the founder has asked the carer for help in:
1. completing the registrations that the founder started, and
2. registering more Corgis for the upcoming gala.
When the carer creates new pet records, the carer is UNABLE to see the Corgi meet-up business process flow.
Currently, when the carer checks the owner's record on their phone, the related pet information is difficult to view as they must scroll down to review the information.
You need to configure search to ensure the administrators can find all records which reference Corgis.
Which action must you perform?

- A. Add columns to be searched to the Lookup view for each relevant table.
- B. Within system settings, select up to 10 relevant tables.
- C. Within the solution, ensure all relevant tables are indexed.
- D. For all relevant tables, ensure that the Can enable sync to external search index setting is False.

Answer: B

Explanation:
To ensure administrators can search for all records that reference Corgis across different tables, configuring the search is required. Dynamics 365 allows system administrators to select up to 10 relevant tables within the system settings to enable global search

across those tables. This ensures that records such as contacts, opportunities, and custom entities (like Pet) that reference "Corgis" can be found during a search.
Options such as enabling sync to external search indexes and lookup view configuration won't address the global search scenario as effectively as selecting relevant tables in the system settings.

NEW QUESTION # 78
Note: This question is part of a series of questions that present the same scenario. Each question in the series contains a unique solution. Determine whether the solution meets the stated goals. Some question sets might have more than one correct solution, while others might not have a correct solution.
After you answer a question in this section, you will NOT be able to return to it. As a result, these questions will not appear in the review screen.
You configure forecasts for a clothing manufacturer.
A salesperson updates an opportunity and wants to refresh the forecast
You need to show the salesperson how to refresh the forecast.
Solution: Update the Opportunity Forecast Category Mapping process.
Does this meet the goal?

- A. No
- B. Yes

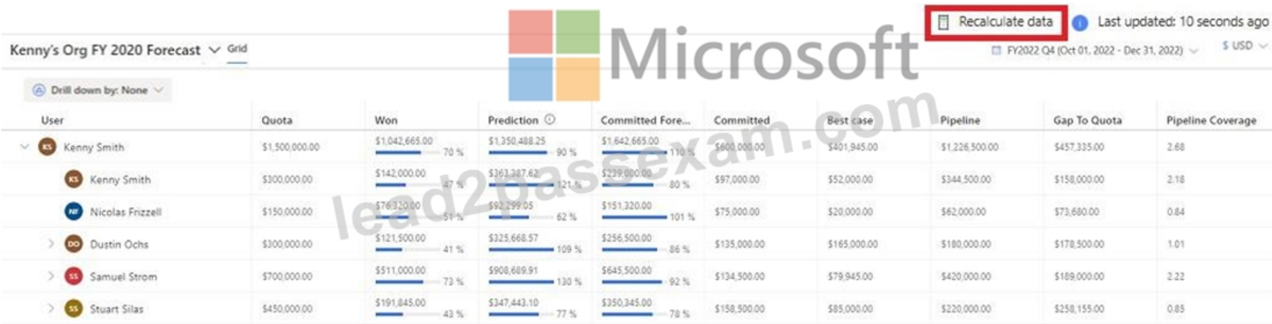
Answer: A

Explanation:
Correct:
* Recalculate the forecast
Incorrect:
* Recalculate the opportunity.
* Update the Opportunity Forecast Category Mapping process.
Open the Opportunity Forecast Category Mapping Process workflow. You can customize or deactivate the workflow according to your organization's requirements.
Note:
Example of forecast recalculation methods
Let's understand the different methods with an example. Consider a scenario where you have a forecast with 4 quarterly periods and an annual period. Assume that you're currently in Q4. The following table shows when and how the forecast data is updated for different scenarios and periods.

Scenario	Current quarter (Q4)	Past quarters	Annual
You updated the estimated revenue of an underlying opportunity from 100,000 to 200,000 on the **Forecasts** page.	Updated immediately	Updated immediately	Updated immediately
You updated the estimated revenue of an underlying opportunity from 100,000 to 200,000 on the **Opportunities** page.	Updated at the end of the day	Updated only after a manual recalculation	Updated at the end of the month.
You updated the forecast hierarchy.	Updated at the end of the day	Updated only after a manual recalculation	Updated at the end of the month
You adjusted the forecast value for Q4	Updated immediately	Updated immediately	Updated immediately

--
Dynamics 365 Sales, Recalculate forecasts manually
You want the forecast data to be up-to-date to make informed decisions. Forecast data is automatically recalculated at regular intervals. However, you can trigger a manual recalculation when you want to recalculate the forecast data immediately. You can also trigger a manual recalculation for past and future periods as they aren't automatically recalculated.
Recalculate and refresh forecast data manually
1. Open the forecast. Verify the Last updated timestamp on the command bar to know when the forecast was last recalculated successfully.

2. Select Recalculate data.



A notification appears at the top of the screen, confirming the recalculation. Recalculation happens in the background, and you can continue to work while recalculation is in progress.
3. After the application recalculates the forecast data, a notification appears to refresh the data. On the notification, select Refresh page.
Reference:
https://learn.microsoft.com/en-us/dynamics365/sales/keep-forecast-data-up-to-date
https://learn.microsoft.com/en-us/dynamics365/sales/forecast-recalculation-methods
https://learn.microsoft.com/en-us/dynamics365/sales/configure-forecast

NEW QUESTION # 79
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.

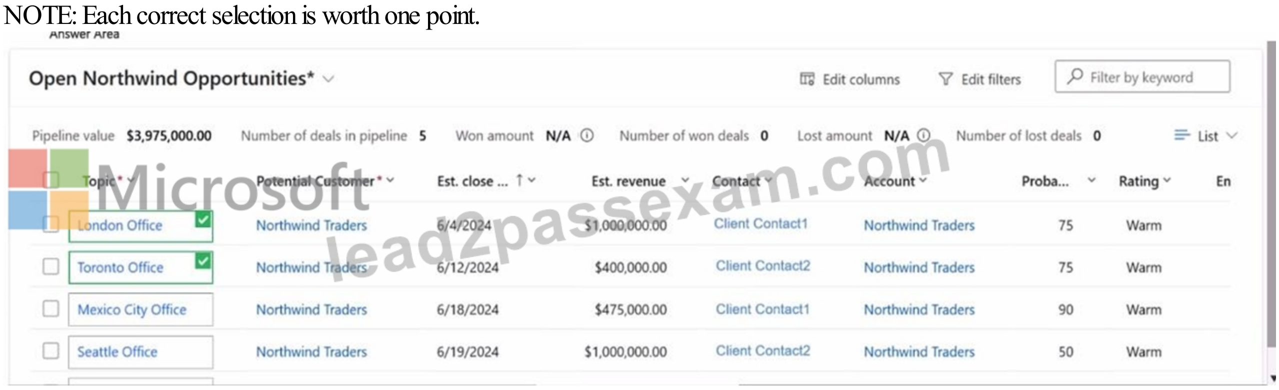
Answer:

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.

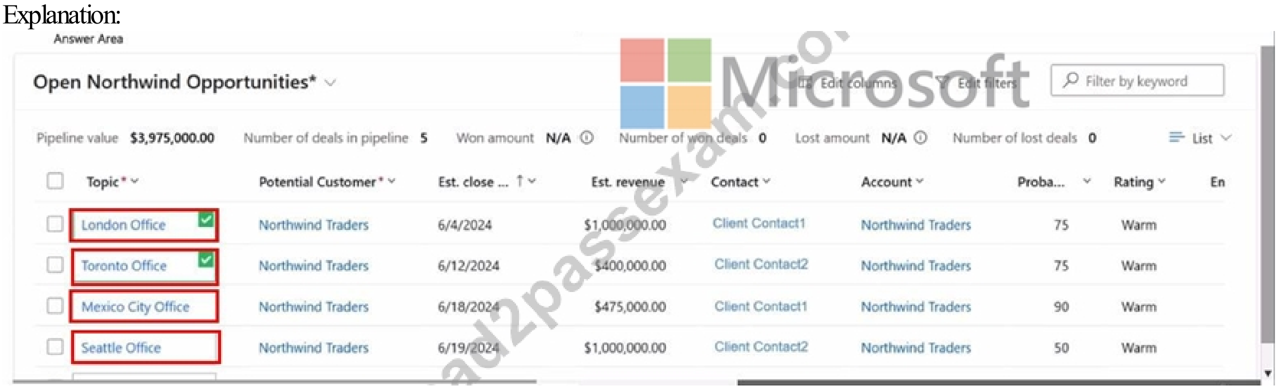
NEW QUESTION # 80
BDM1 logs into the Sales Hub on June 3. 2024. BDM1 opens the assistant from the navigation bar.
Which two open opportunities will BDM1 see mentioned in the close date coming soon reminder cards? To answer, select the appropriate options in the answer area.
NOTE: Each correct selection is worth one point.



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	

Answer:

Explanation:



Topic*	Potential Customer*	Est. close ...	Est. revenue	Contact	Account	Proba...	Rating	En
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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 QUESTION # 81
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