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Microsoft Dynamics 365 Customer Experience Analyst Sample Questions (Q127-Q132):

NEW QUESTION # 127

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. Create a dashboard in Dynamics 365 Sales that contains account data.
- B. Embed the Power BI Dashboard as a dashboard in the Dynamics 365 Sales application.
- **C. Embed the Power BI report using contextual filtering for accounts.**
- D. Provide a link to the Power BI report in the ribbon on the account form.

Answer: C

NEW QUESTION # 128

You are using a forecast template.

You must configure the forecast by territory.

You need to configure the forecast parameters.

Which parameter should you configure?

- A. Top of hierarchy
- B. Rollup table
- C. Hierarchy table
- **D. Hierarchy relationship**

Answer: D

Explanation:

Define a forecast model

Define the entities that must be used to generate the forecast.

1. In the General step of the Forecast configuration page, define the fields that should be used for the forecast.

[Steps 2 to 6 omitted]

7. Select a Rollup to hierarchy relationship.

This step establishes a relationship between the rollup and hierarchy entities. Each forecast template starts with a default rollup to hierarchy relationship:

Choose different values to support your organization ' s specific requirements if needed.

Note: Select a template

The fastest way to create a forecast is to use a template. The template that you select defines how the forecast groups data.

On the Forecast configurations page, select one of the following templates:

Org chart forecast: Rollup columns and projections are based on your organization ' s reporting structure. This template uses the Manager field of the User entity for the hierarchy.

Product forecast: Rollup columns and projections are based on the product hierarchy.

*- > Territory forecast: Rollup columns and projections are based on the sales territory hierarchy.

Reference:

<https://learn.microsoft.com/en-us/dynamics365/sales/define-general-properties-scheduling-forecast>

NEW QUESTION # 129

HOTSPOT

A Company uses Exchange Online. Users require their appointments and tasks to automatically synchronize with those available in Outlook.

You need to set up the default mailbox configuration.

What should you select for each field? To answer, select the appropriate options in the answer area.

NOTE: Each correct selection is worth one point.

Answer:

Explanation:

Explanation:

NEW QUESTION # 130

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:

You need to modify the business process flow to make it valid.

What should you reduce?

- A. number of tables
- **B. total number of steps**
- C. number of steps per stages
- D. total number of stages

Answer: B

Explanation:

Summary of Data

Each table (Lead, Opportunity, Quote, Order, Invoice) has:

Number of Stages: 10

Number of Steps per Stage: 10

Total Steps Calculation

For the entire process flow involving all tables:

Total Stages: 10 (Lead) + 10 (Opportunity) + 10 (Quote) + 10 (Order) + 10 (Invoice) = 50 stages Total Steps: 100 (Lead) + 100

(Opportunity) + 100 (Quote) + 100 (Order) + 100 (Invoice) = 500 steps Requirement for Valid Business Process Flow Dynamics

365 imposes limitations on business process flows, typically regarding the total number of steps and stages involved. The total

number of steps can be a limiting factor for the flow to be valid.

To make the business process flow valid, you should reduce total number of steps.

Reducing the total number of steps (e.g., by decreasing the number of steps per stage or the total number of stages) will help you stay within the limits imposed by Dynamics 365 for business process flows.

NEW QUESTION # 131

You need to ensure that a user named User1 can assign salespeople to sales territories. The solution must use the principle of least privilege. To which security role should you assign User1?

- A. System customizer
- B. Salesperson
- **C. Vice president of sales**
- D. Sales team member

Answer: C

Explanation:

To assign salespeople to sales territories, the user needs permissions to manage territory assignments, which is typically a higher-level responsibility.

The Vice president of sales role includes privileges related to managing sales territories, unlike the Sales team member or Salesperson roles, which are more focused on direct sales tasks.

The System customizer role does not specifically grant territory management permissions and is more focused on customization and configuration tasks.

Reference: Microsoft Documentation - Security Roles and Privileges in Dynamics 365

NEW QUESTION # 132

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