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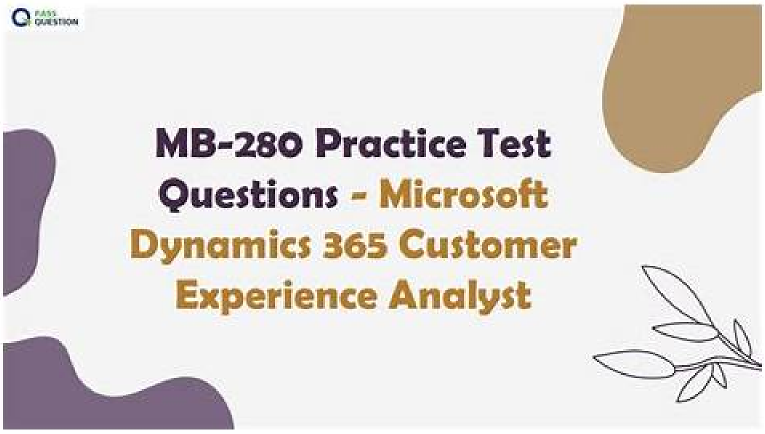

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Microsoft MB-280 Exam Syllabus Topics:

Topic	Details
Topic 1	• Implement the Dynamics 365 App for Outlook: This section emphasizes the integration of Dynamics 365 with Outlook to enhance productivity and streamline sales processes for Dynamics 365 Sales Professionals.
Topic 2	• Extend and Enhance Dynamics 365 Sales Capabilities: For Dynamics 365 Sales Professionals, this section evaluates the ability to extend Dynamics 365 Sales functionality and integrate it with other applications using Power Platform tools.
Topic 3	• Demonstrate Dynamics 365 Customer Insights Capabilities: This section focuses on leveraging customer data to drive sales strategies through Dynamics 365 Customer Insights.

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Microsoft Dynamics 365 Customer Experience Analyst Sample Questions (Q10-Q15):

NEW QUESTION # 10
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 QUESTION # 11
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.
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. Dataverse record change trigger
- B. Custom trigger with contact profile data
- C. Custom trigger with lead profile data
- D. Email Link Clicked interaction trigger

Answer: A

Explanation:
Dataverse record change trigger: This trigger is ideal for monitoring changes to records in Dynamics 365, such as when the opportunity status is updated to "Won." By using this trigger, you can initiate the journey to send the "Getting started" email when the specific condition of the opportunity being marked as won is met.

NEW QUESTION # 12
You manage a Dynamics 365 Sales environment where users can only view and edit their own records.
User2 is assisting with User1's opportunities while User1 is on vacation. User1 remains the owner of User1's opportunities.
User2 has reported that they CANNOT update User1's opportunities.
You need to diagnose the issue.
What should you do?

- A. Ensure User2 is granted the Stakeholder role.
- B. Ensure User2 is added to the Sales team.
- C. Ensure the record is shared with User2.
- D. Instruct User2 to follow the record.

Answer: B

Explanation:
Correct:
* Ensure User2 is added to the Sales team.
In Dynamics 365 Sales, a user within the Sales team can update another user's opportunities, but it depends on their security roles and privileges. If a user has the necessary permissions, they can edit and update opportunities owned by other users.
Incorrect:
* Ensure the record is assigned to User2.
* Ensure the record is shared with User2.
* Ensure User2 is added to an Access team.
* Ensure User2 is added to the Owner team.
* Ensure User2 is granted the Stakeholder role.
A user with the Stakeholder role in Dynamics 365 Sales cannot directly update another user's opportunities, even if they are the owner of those opportunities. The Stakeholder role primarily defines a relationship with an opportunity (e.g., influencing it, providing expertise), not the ability to manage its core record data. To update another user's opportunities, the user would need a security role that grants write access to the Opportunity entity, and potentially also the ability to work with records owned by other users.
* Instruct User2 to follow the record.
Reference:
https://learn.microsoft.com/en-us/dynamics365/sales/security-roles-for-sales

NEW QUESTION # 13
A company sends its salespeople to trade shows to meet potential customers. One day after the trade shows, the salespeople currently send a follow-up email manually to the potential customers they met. They would like a task to remind them to call the potential customers a week after that.
You need to increase the follow-up rate for salespeople after a tradeshow.
Which actions should you take? To answer, select the appropriate options in the answer area.
NOTE: Each correct selection is worth one point.

Answer:

Explanation:
Reference:
Ensure That the Process Applies Only to Tradeshow Leads: Use segments
Segments are used to filter leads based on specific criteria. By using segments, you can ensure that the automated sequence is triggered only for leads generated from trade shows.
This action targets the automation specifically at the tradeshow leads, ensuring that other leads are not inadvertently included in this process.
Ensure Proper Timing of Activities: Set relative due date
Setting a relative due date allows you to define a timeframe between actions in the sequence. For example, the follow-up call task can be scheduled for one week after the initial email.

This ensures that tasks are executed with the correct timing, aligning with the desired schedule of following up with potential customers one week after the first contact.
By implementing sequences to automate follow-ups, using segments to filter for tradeshow-specific leads, and setting relative due dates for timely task execution, the company can optimize its post-tradeshow follow-up process and enhance the likelihood of successful customer engagement.

NEW QUESTION # 14
The sellers at your organization are keen to adopt generative Al capabilities and use them efficiently.
They have been editing Contact records directly in Copilot for Sales and have now provided feedback that they would be more productive if they could also edit Account records directly in Copilot for Sales.
However, the vice president of sales does NOT want the sellers to be able to edit the "Revenue Forecast" field in Copilot for Sales.
You need to enable these requirements.
Which four actions should you perform in sequence? To answer, move the four appropriate actions from the list of actions to the answer are a. Arrange the four actions in the correct order.

Answer:

Explanation:
Reference:
By following these steps, you enable the sellers to edit Account records in Copilot for Sales while restricting access to the "Revenue Forecast" field, ensuring both productivity and compliance with organizational policies.

NEW QUESTION # 15
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