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Microsoft Dynamics 365 Customer Experience Analyst Sample Questions (Q25-Q30):

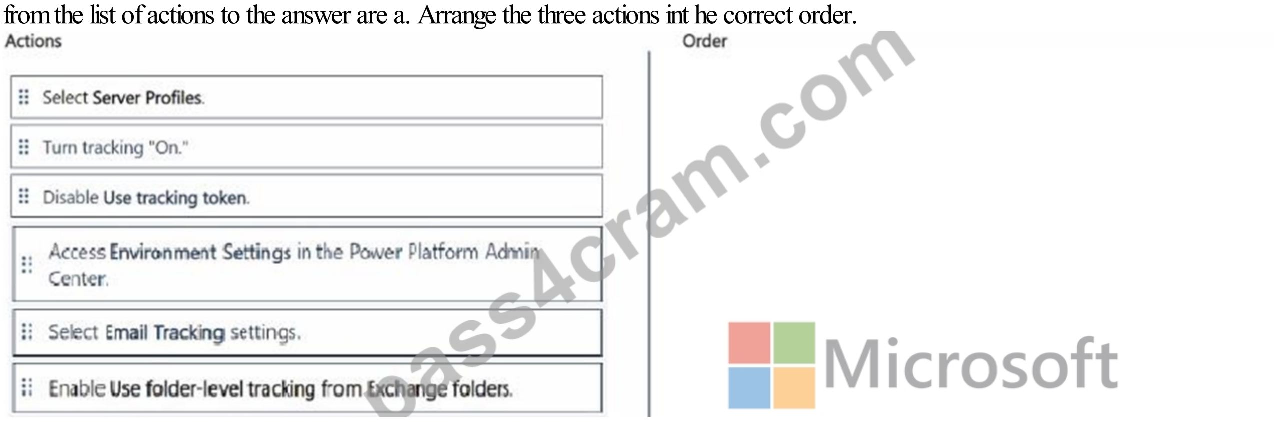
NEW QUESTION # 25
You are configuring offline mode for a model-driven app on a customer project.
You need to ensure that the customer is aware of the capabilities and limitations of offline mode.
Which two facts should you convey? Each correct answer presents a complete solution.
NOTE: Each correct selection is worth one point.

- A. System views are supported on tables, whereas personal views are unsupported.
- B. Column-level security is supported.
- C. Appointments will auto-send invites to recipients.
- D. Users must manually advance offline qualified leads.

Answer: A,D

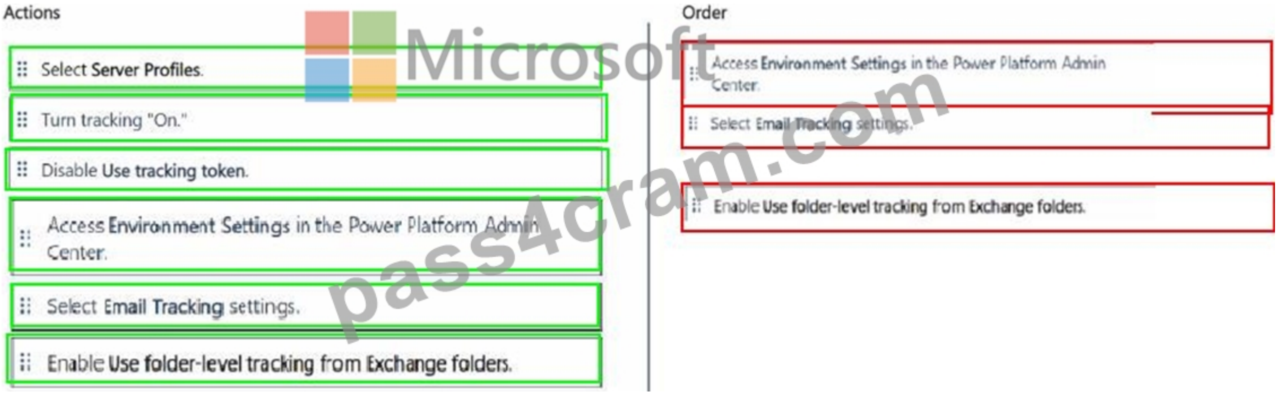
Explanation:
[A] Supported type of views: Only system views and quick views are supported in mobile offline.
Personal views aren't supported.
[B] Qualify a lead: When a lead created in mobile offline is qualified and when the user goes online, the business process stage shows the qualified stage. The user has to manually select Next stage to move to the next stage.
Reference:
https://learn.microsoft.com/en-us/power-apps/mobile/offline-limitations

NEW QUESTION # 26
You have enabled Dynamics 365 App for Outlook for your sales team.
Users report that they are dissatisfied that they must track the emails manually, so you propose folder-level tracking.
You need to enable folder-level tracking in your environment in order for your users to configure the rules.
Which three actions should you perform in sequence before saving your changes? To answer, move the three appropriate actions from the list of actions to the answer are a. Arrange the three actions int he correct order.



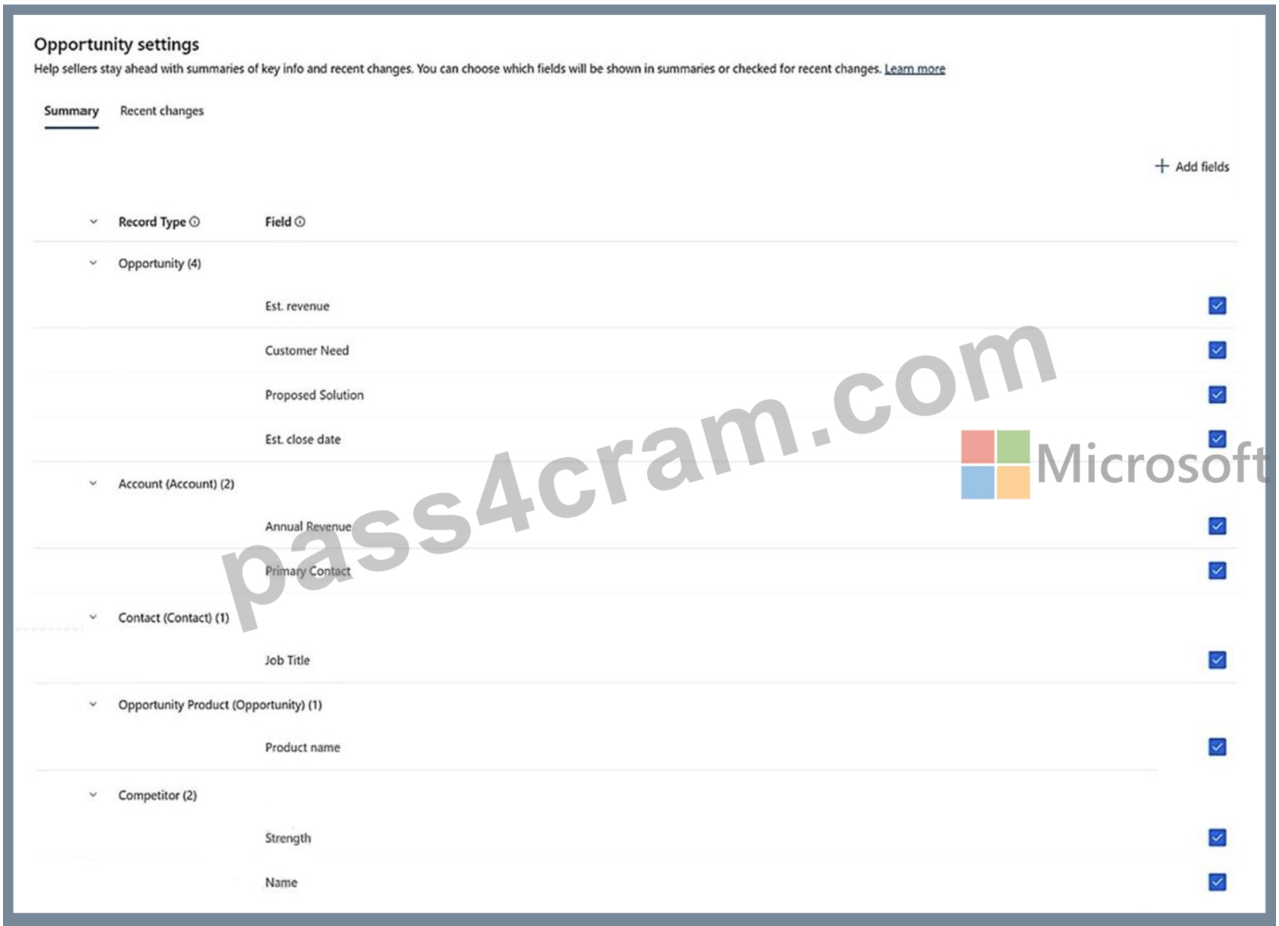
Answer:

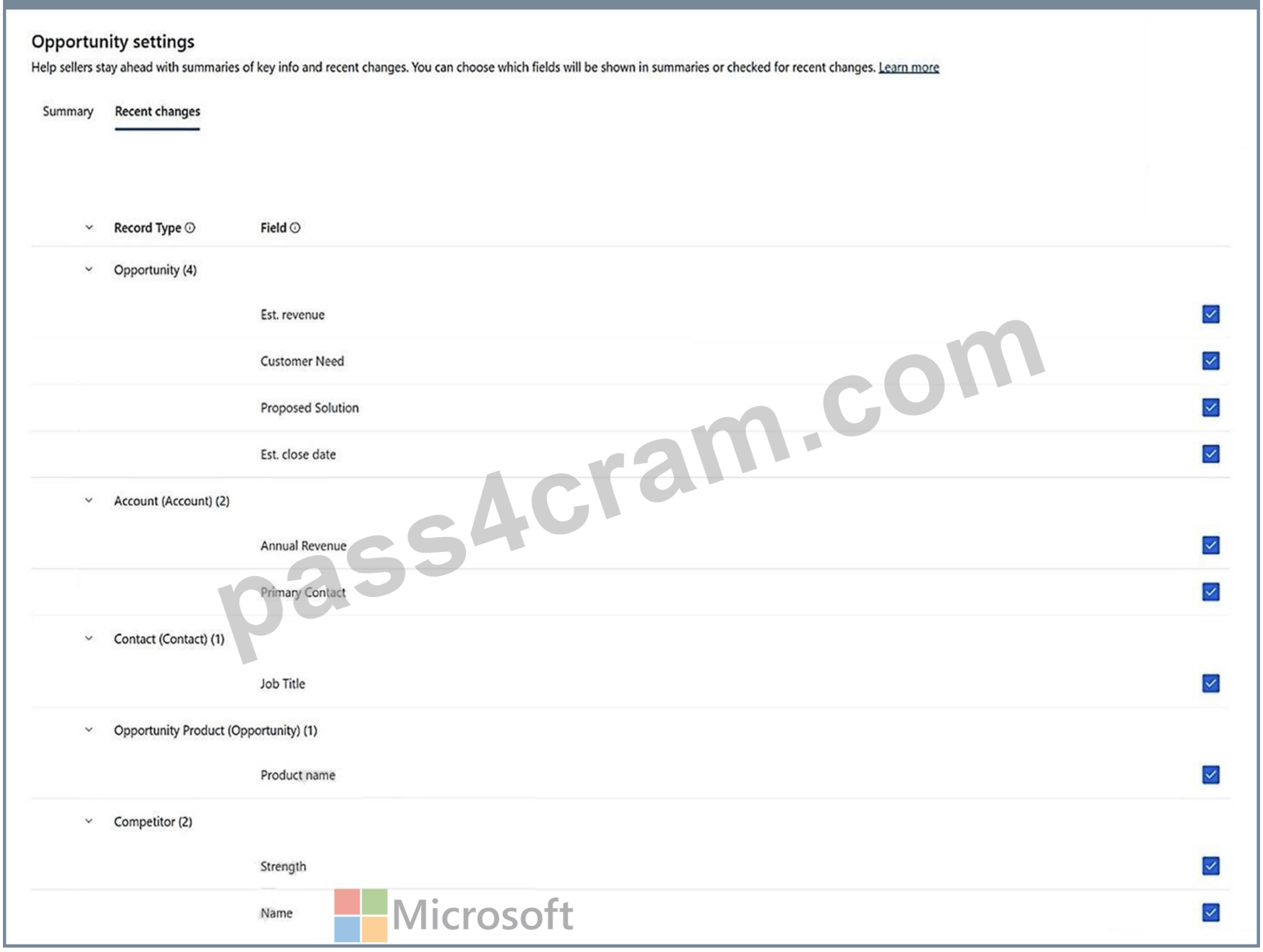
Explanation:



Reference:
Select Email Tracking Settings:
Within the environment settings, go to Email Tracking settings. This area contains the configuration options for email tracking, including methods for tracking emails automatically or manually, and where folder-level tracking can be configured.
Enable Use Folder-Level Tracking from Exchange Folders:
Once in the Email Tracking settings, enable the Use folder-level tracking from Exchange folders option. This feature allows users to automatically track emails by moving them into designated folders in their mailbox. It removes the need for manual tracking, as moving an email to a tracked folder automatically links it to Dynamics 365.
After enabling this setting, save the changes to activate folder-level tracking across the environment.
By following these steps, folder-level tracking will be enabled, allowing users to configure tracking rules based on specific folders in their Exchange mailboxes, streamlining the email tracking process within Dynamics 365.

NEW QUESTION # 27
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

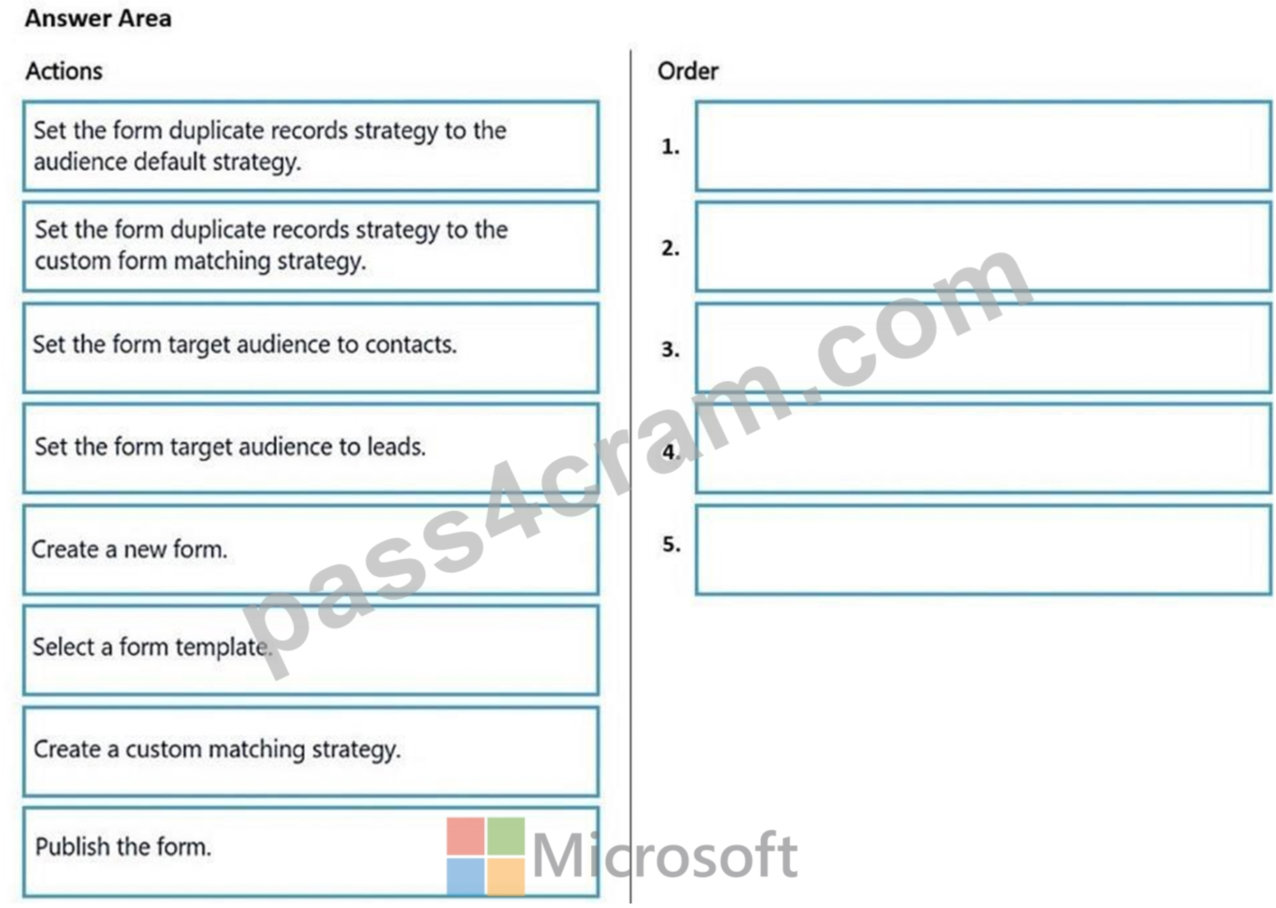
Business development managers

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.
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:

Answer Area

Actions

- Set the form duplicate records strategy to the audience default strategy.
- Set the form target audience to contacts.
- Create a custom matching strategy.

Order

1. Create a new form.
2. Select a form template.
3. Set the form target audience to leads.
4. Set the form duplicate records strategy to the custom form matching strategy.
5. Publish the form.

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 # 28
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:

Table	Number of Stages	Number of Steps per Stage
Lead	10	10
Opportunity	10	10
Quote	10	10
Order	10	10
Invoice	10	10

You need to modify the business process flow to make it valid. What should you reduce?

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

Answer: B

Explanation:

* In Dynamics 365, business process flows are limited to 30 stages across all entities within a single process. Since each entity here (Lead, Opportunity, Quote, Order, Invoice) has 10 stages, the total would be 50 stages, exceeding the limit.
* To meet the requirements, you need to reduce the total number of stages to comply with this limitation. Reducing the total number of steps per stage, tables, or steps won't directly address the stage limit issue.

NEW QUESTION # 29
A company uses Dynamics 365 Sales. You have administrator privileges.
The sales manager plans to require the sales team to track emails from Microsoft Outlook.
You need to direct users to where they can deploy their own App for Outlook instance.
To where should you direct them?

- A. Dynamics 365 App for Outlook area
- B. Advanced settings
- C. Microsoft AppSource
- D. Email settings

Answer: A

NEW QUESTION # 30
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