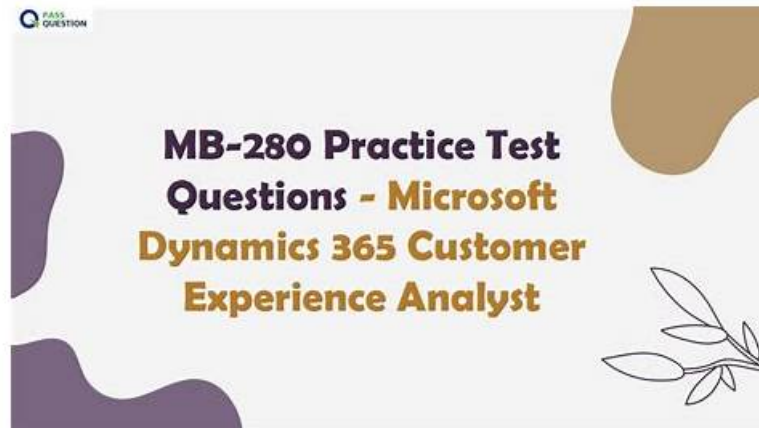


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Microsoft Dynamics 365 Customer Experience Analyst Sample Questions (Q59-Q64):

NEW QUESTION # 59

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. Yes
- B. No

Answer: B

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	Microsoft	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 # 60

Which entity must be configured before creating a Product Family in Dynamics 365 Sales?

- A. Discount List
- B. Price List
- **C. Unit Group**
- D. Product Catalog

Answer: C

NEW QUESTION # 61

You use opportunities in Dynamics 365 Sales.

Opportunities that were closed as lost frequently come back and are eventually won.

You need to be able to track these occurrences and have insight into the process.

What happens during the reopen and close process? To answer, select the appropriate options in the answer area.

NOTE: Each correct selection is worth one point.

Answer Area

Scenario	Result
A lost opportunity is reopened.	<input type="checkbox"/> The Opportunity Close record is deleted. <input type="checkbox"/> The Opportunity Close record changes status to Inactive. <input type="checkbox"/> The Opportunity Close record changes status to In Progress.
The same opportunity is closed as won.	<input type="checkbox"/> The current Opportunity Close record updates with the new close details and status of completed. <input type="checkbox"/> A new Opportunity Close record is created with the new close details and status of completed.

Answer:

Explanation:

Answer Area

Scenario	Result
A lost opportunity is reopened.	<input type="checkbox"/> The Opportunity Close record is deleted. <input type="checkbox"/> The Opportunity Close record changes status to Inactive. <input checked="" type="checkbox"/> The Opportunity Close record changes status to In Progress.
The same opportunity is closed as won.	<input type="checkbox"/> The current Opportunity Close record updates with the new close details and status of completed. <input checked="" type="checkbox"/> A new Opportunity Close record is created with the new close details and status of completed.

NEW QUESTION # 62

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 the solution, ensure all relevant tables are indexed.**
- C. Within system settings, select up to 10 relevant tables.
- D. For all relevant tables, ensure that the Can enable sync to external search index setting is False.

Answer: B

Explanation:

To enable comprehensive search capabilities for administrators to find all records referencing specific terms (such as "Corgis"), it is essential to ensure that all relevant tables are indexed.

In Dynamics 365, configuring search functionality for specific tables involves setting up the tables to be searchable, which can be done by indexing them within the solution.

Indexing relevant tables makes them accessible in the search feature and ensures all fields within those tables can be searched, allowing for quick retrieval of records that reference specific terms.

System settings (Option A) is limited to selecting up to 10 tables and is more about quick search rather than full indexing. The sync to external search index setting (Option C) is for integration with external search tools and does not directly impact internal search capabilities.

Adding columns to the Lookup view (Option D) affects how lookups work but does not influence full-text search results.

Reference from Microsoft Documentation:

For configuring search indexing, refer to Configure relevance search in Dynamics 365 for more information on indexing tables to

enhance search capabilities.

NEW QUESTION # 63

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. Yes
- **B. No**

Answer: B

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.

Incorrect:

* Define column types to be 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.

Does not address the problem with null values.

* 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.

Problem not related to the primary key.

* Transform the first row to be used as headers, and remove any special characters or spaces from header row. Remove rows with missing primary keys and name the query. Select Next and your data is now ready for unification.

Does not address the problem with null values.

* Transform the first row to be used as headers, define column types to be the appropriate field types and name the query. Select Next and your data is now ready for unification.

Solution removes all rows with null values, which can lead to significant data loss, especially if those rows contain important information.

It may compromise data quality by eliminating rows, which can impact analysis and insights.

* Transform the first row to be used as headers, remove rows that contain null values, and name the query. Select Next and your data is now ready for unification.

While the solution includes transforming the first row to be used as headers and naming the query, the step of removing rows that contain null values is problematic.

Removing all rows with null values can lead to significant data loss, particularly if those rows contain relevant information.

NEW QUESTION # 64

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