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

NEW QUESTION # 10

A company implements Dynamics 365 Sales.

The company has the following requirements:

- Employees must have quarterly goals. The goals must calculate all deals won by quarter for each goal.
- Managers must be able to look at the goals and calculations at any time.

The solution must use goal features WITHOUT customization.

You need to create the calculation.

What should you configure?

- A. Rollup query
- B. Drill-down table
- C. Rollup table
- D. Goal metric

Answer: A

Explanation:

Dynamics 365 Sales, Define and track your sales goals

Define rollup queries

Rollup queries are used to define the records that should be included in the goal rollup. Rollup queries are created for each goal rollup field. For example, you could create a goal metric that measures all invoices closed within a specific period. You could then create a rollup query to show invoices that are owned by a person, or raised for customers in a territory.

Goals roll up from the bottom of the goal hierarchy to the top, with Dynamics 365 rolling child goal totals into their parent goal totals. Goals at the top of a hierarchy reflect a summation of all the goals in the organization.

You can only query one entity type in a query, but the query builder helps you make a query as simple or as complex as you need.

As you fine-tune your query, you can test the results.

NEW QUESTION # 11

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.

□ 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 ensure the active stage of the business process flow is visible in the view.

Which two actions should you perform? Each correct answer presents a complete solution.

(Choose two.)

NOTE: Each correct selection is worth one point.

- A. Add columns from the Pet table to the All Onboard new pet view.
- B. Add columns from the Pet table to the Active Onboard new pet view.

- C. Create a new column on the Pet table named "Onboarding stage" and add it to the Active pets view.
- D. Add a page for the Onboard new pet table to the Sales Professional app.

Answer: B,C

Explanation:

Add columns from the Pet table to the Active Onboard new pet view: To ensure that the active stage of the business process flow is visible in the view, you need to add relevant columns from the Pet table to the view. This makes sure that the key details about the business process flow are displayed within the active records.

Create a new column on the Pet table named "Onboarding stage" and add it to the Active pets view: Creating a column named "Onboarding stage" allows you to track the current stage of the business process flow directly in the Pet table. Adding this column to the Active pets view ensures that users can easily see where each pet is in the onboarding process.

NEW QUESTION # 12

Your organization recently implemented Dynamics 365 Sales. Sales representatives report that duplicate leads are being added, making it difficult to know which record to update.

The sales representatives still need the ability to add duplicate records when necessary, but want a simple way to receive a warning when a potential duplicate is being entered.

What should you do?

- A. Implement an alternate key on the Lead table.
- B. Enable and configure duplicate detection rules for the Lead table.
- C. Create a new custom table to store duplicate leads.
- D. Create a Power Automate to delete the duplicate leads.

Answer: B

NEW QUESTION # 13

You are working with the Contact table in Dynamics 365 Sales.

The sellers want to add additional information from the Account table to the existing read-only columns visible on the Contact form. You need to identify which form to update.

Which type of form should you look for in the available options for the Account table?

- A. Quick create form
- B. Card form
- C. Main form
- D. Quick view form

Answer: D

NEW QUESTION # 14

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:

To build a trigger-based journey that sends "Getting started" emails when an opportunity is marked as "Won," the appropriate trigger to use is the Dataverse record change trigger. This trigger is specifically designed to initiate actions based on changes in Microsoft Dataverse records, which are integral to Dynamics 365.

Here's the detailed reasoning:

Dataverse Record Change Trigger:

The Dataverse record change trigger is used to initiate journeys when there is a change in a record within Dataverse, such as an

opportunity's status.

Since the requirement is to send a "Getting started" email once an opportunity status changes to "Won," this trigger can detect the status update in real-time.

Using this trigger, you can specify the criteria for the journey to start, such as filtering for opportunities with a status of "Won," thus automating the email sending based on this condition.

Why Not Other Triggers?

Custom trigger with lead profile data and Custom trigger with contact profile data: These are generally used for initiating journeys based on custom events or data points outside of standard Dataverse records, which isn't applicable here as the journey is triggered by an opportunity status change, a native Dataverse record.

Email Link Clicked Interaction Trigger: This trigger is used to follow up after an email link is clicked, which does not align with the scenario. The journey must start based on an opportunity status change, not email interaction.

Microsoft Dynamics 365 Reference:

Create and manage trigger-based journeys

Work with Dataverse triggers in journeys

By using the Dataverse record change trigger, you ensure that the journey aligns directly with the sales process and automatically sends the "Getting started" email when an opportunity reaches the "Won" status, as requested by the global sales lead.

NEW QUESTION # 15

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