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## Microsoft MB-280 Exam Syllabus Topics:

Topic	Details
Topic 1	• Implement Security and Customizations in Dynamics 365 Sales: This section addresses the implementation of security measures and customization options within Dynamics 365 Sales for Dynamics 365 Sales Professionals.
Topic 2	• 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 3	• Configure and Customize Dataverse and Model-Driven Apps: This section covers the ability of Dynamics 365 Sales Professionals in the configuration and customization of Dataverse and model-driven apps to meet business needs.
Topic 4	• Demonstrate Dynamics 365 Customer Insights Capabilities: This section focuses on leveraging customer data through Dynamics 365 Customer Insights to drive sales strategies.

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## Microsoft Dynamics 365 Customer Experience Analyst Sample Questions (Q44-Q49):

### NEW QUESTION # 44

The sellers at your organization are keen to adopt generative AI 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 area. Arrange the four actions in the correct order.

Actions	Order
<ul style="list-style-type: none"> <li>In the <b>Editing records</b> section, select <b>Edit records inside Copilot for Sales</b>.</li> </ul>	
<ul style="list-style-type: none"> <li>Hide the column from the Account form in Dynamics 365.</li> </ul>	
<ul style="list-style-type: none"> <li>In the <b>Manage fields</b> section, uncheck <b>Required</b> for the "Revenue Forecast" field.</li> </ul>	
<ul style="list-style-type: none"> <li>In Copilot for Sales admin settings, select <b>Forms</b>.</li> </ul>	
<ul style="list-style-type: none"> <li>In the settings for the <i>Account</i> table, select <b>Forms</b>.</li> </ul>	
<ul style="list-style-type: none"> <li>Select the Account record type.</li> </ul>	
<ul style="list-style-type: none"> <li>In the <b>Manage fields</b> section, turn off <b>Allow editing</b> for the "Revenue Forecast" field.</li> </ul>	

### Answer:

### Explanation:

Actions	Order
<ul style="list-style-type: none"> <li>In the <b>Editing records</b> section, select <b>Edit records inside Copilot for Sales</b>.</li> </ul>	
<ul style="list-style-type: none"> <li>Hide the column from the Account form in Dynamics 365.</li> </ul>	
<ul style="list-style-type: none"> <li>In the <b>Manage fields</b> section, uncheck <b>Required</b> for the "Revenue Forecast" field.</li> </ul>	
<ul style="list-style-type: none"> <li>In Copilot for Sales admin settings, select <b>Forms</b>.</li> </ul>	<ul style="list-style-type: none"> <li>In Copilot for Sales admin settings, select <b>Forms</b>.</li> </ul>
<ul style="list-style-type: none"> <li>In the settings for the <i>Account</i> table, select <b>Forms</b>.</li> </ul>	<ul style="list-style-type: none"> <li>In the settings for the <i>Account</i> table, select <b>Forms</b>.</li> </ul>
<ul style="list-style-type: none"> <li>Select the Account record type.</li> </ul>	<ul style="list-style-type: none"> <li>Select the Account record type.</li> </ul>
<ul style="list-style-type: none"> <li>In the <b>Manage fields</b> section, turn off <b>Allow editing</b> for the "Revenue Forecast" field.</li> </ul>	<ul style="list-style-type: none"> <li>In the <b>Manage fields</b> section, turn off <b>Allow editing</b> for the "Revenue Forecast" field.</li> </ul>

### 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 # 45

You are customizing a workspace in the sales accelerator.

The workspace must display the industry of a company.

You need to configure the work item appearance for a company.

Which two settings should you modify? To answer, select the appropriate UI element in the answer area.  
NOTE: Each correct selection is worth one point.

**Workspace configuration**

Work item appearance

Customize the way your work items look on your focused view workspace. Learn more

Lock customization ⓘ

Select record type ⓘ

Contacts

Preview ⓘ

Customize ⓘ

Reset to default ↶ ↷

Full name  
• **Job Title · Company name** \*

Up next activity 00:00 AM/PM

Ri

Full Name ★ ↓ + ⓘ

Job Title ↓ Company Name ↓ + ⓘ

Up next activity 00:00 AM/PM ⓘ

Switch to admin mode  Yes

Microsoft

Save Cancel

**Answer:**

Explanation:

**Workspace configuration**

Work item appearance

Customize the way your work items look on your focused view workspace. Learn more

Lock customization ⓘ

Select record type ⓘ

Contacts

Preview ⓘ

Customize ⓘ

Reset to default ↶ ↷

Full name  
• **Job Title · Company name** \*

Up next activity 00:00 AM/PM

Ri

Full Name ★ ↓ + ⓘ

Job Title ↓ Company Name ↓ + ⓘ


Up next activity 00:00 AM/PM ⓘ

Switch to admin mode  Yes

Microsoft

Save Cancel

Explanation:

**Workspace configuration**  Microsoft

Work item appearance ✕

Customize the way your work items look on your focused view workspace. [Learn more](#)  Lock customization ⓘ

Select record type ⓘ

Contacts

Preview ⓘ Customize ⓘ Reset to default ↶ ↷

**Full name** ★

• **Job Title • Company name** ★

Up next activity 00:00 AM/PM

**Ri** ★ Full Name Job Title Company Name + ✕

Up next activity 00:00 AM/PM ✎

Switch to admin mode  Yes **Save** Cancel

**NEW QUESTION # 46**

You need to create and start a new customer journey to send "Welcome" emails to new customers.

Which three actions should you perform in sequence before you publish the journey? To answer, move the three appropriate actions from the list of actions to the answer area. Arrange the three actions in the correct order.

**Actions**

- Select the frequency as a **one-time** journey where newly added members can start at any time.
- Create a segment-based journey for a segment that includes the primary contacts from accounts where the *contoso\_clienttier* field contains data.
- Create a trigger-based journey that triggers on changes to the *contoso\_clienttier* field.
- Add the journey steps.
- Set the frequency to repeat every day.
- Select the frequency as a **one-time** journey with a **static** audience.

**Order**

**Answer:**

**Explanation:**

## Actions

Select the frequency as a <b>one-time</b> journey where <b>newly added members can start at any time</b> .
Create a segment-based journey for a segment that includes the primary contacts from accounts where the <i>contoso_clienttier</i> field contains data.
Create a trigger-based journey that triggers on changes to the <i>contoso_clienttier</i> field.
Add the journey steps.
Set the frequency to repeat every day.
Select the frequency as a <b>one-time</b> journey with a <b>static</b> audience.

## Order

Create a trigger-based journey that triggers on changes to the <i>contoso_clienttier</i> field.
Select the frequency as a <b>one-time</b> journey where <b>newly added members can start at any time</b> .
Add the journey steps.

### Explanation:

Create a trigger-based journey that triggers on changes to the <i>contoso_clienttier</i> field.
Select the frequency as a <b>one-time</b> journey where <b>newly added members can start at any time</b> .
Add the journey steps.

1. Create a trigger-based journey that triggers on changes to the *contoso\_clienttier* field.

Since the "Welcome" email should be sent when an account first enters any client tier, a trigger-based journey is required. The trigger should activate when the *contoso\_clienttier* field is updated with a value.

2. Select the frequency as a one-time journey where newly added members can start at any time.

A one-time journey with newly added members ensures that each new primary contact will enter the journey when their account first gets assigned a tier.

3. Add the journey steps.

After defining the journey type and trigger, the necessary email steps (sending the "Welcome" email) must be added before publishing.

### NEW QUESTION # 47

A company uses Microsoft SharePoint document management in Dynamics 365 Sales to store contracts.

The company wants only the contracts team to have access to the documents. The contracts team has a custom security role.

You need to restrict privileges to secure the documents.

What should you do?

- A. Update privileges in the Dynamics 365 Sales security role of the contract team.
- B. Create a new security role in Dynamics 365 Sales.
- C. Update the users list in the SharePoint site.
- D. Create a new group in the SharePoint site.

**Answer: C**

Explanation:

Since the company uses Microsoft SharePoint for document storage, access to documents is controlled through SharePoint permissions rather than Dynamics 365 security roles.

To restrict document access to only the contracts team, you should update the users list in the SharePoint site where the documents are stored. This involves configuring SharePoint permissions to ensure that only the contracts team (or a specific SharePoint group associated with them) has access to the document library where contracts are stored.

Reference: Microsoft Documentation - Manage SharePoint Permissions for Document Management in Dynamics 365

#### **NEW QUESTION # 48**

You are the Dynamics 365 administrator at an organization that uses both Dynamics 365 Customer Insights - Journeys and Dynamics 365 Sales.

You have configured Customer Insights - Journeys to create leads from web form submissions. You also allow your sales users to create leads using the user interface.

Your organization has recently hosted an event at a conference.

\* You have a Customer Insights - Journeys web form to capture leads immediately at the conference.

\* You expect sales users to enter lead information for prospects they meet at the event in the week after the conference.

You need to keep your data clean while also capturing all the valid leads from the event. What should you do?

- **A. Go to business management settings and enable duplicate detection on leads based on email.**
- B. Go to The settings area in Customer Insights - Journeys and ensure the default form matching strategy is selected.
- C. Go to the form in Customer Insights - Journeys and update the form so that it can either create new leads or update existing leads.
- D. Go to the classic editor and remove Create permissions from the security group for sales users.

**Answer: A**

Explanation:

\* Requirement Analysis:

\* The organization is collecting lead data from two sources: a web form created in Customer Insights - Journeys and manual entries by sales users. This setup could lead to duplicate entries if a lead is submitted through the web form and then entered manually by a sales user afterward.

\* To ensure data integrity and avoid duplication, it is essential to implement a mechanism that identifies and manages duplicates automatically.

\* Solution - Enabling Duplicate Detection:

\* In Dynamics 365, duplicate detection can be configured to alert users or prevent the creation of records that already exist based on certain criteria (such as email).

\* By enabling duplicate detection based on email addresses, the system will compare incoming lead data with existing records and prompt users if a duplicate is identified. This feature will ensure that leads collected from different sources are not duplicated unnecessarily.

\* Steps to Enable Duplicate Detection for Leads Based on Email:

\* Navigate to Settings > Data Management > Duplicate Detection Rules in Dynamics 365.

\* Create a new Duplicate Detection Rule for the Lead entity. Specify that the system should check for duplicate records based on the email field.

\* Publish the rule and ensure it is activated.

\* After activation, this rule will prompt users whenever a duplicate email is detected, either from the Customer Insights - Journeys web form or manual entry by sales users.

Reference: Microsoft Documentation - Configure Duplicate Detection Rules in Dynamics 365 Benefits of Using Duplicate Detection:

This approach does not restrict users from creating leads but ensures that duplicate entries are flagged, allowing users to review and decide whether to proceed.

It maintains data cleanliness by preventing unnecessary duplicates while ensuring all valid leads are captured from different sources.

By implementing this solution, the organization can effectively manage potential duplicate leads, keeping the data clean and accurate across both Customer Insights - Journeys and Dynamics 365 Sales.

#### **NEW QUESTION # 49**

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