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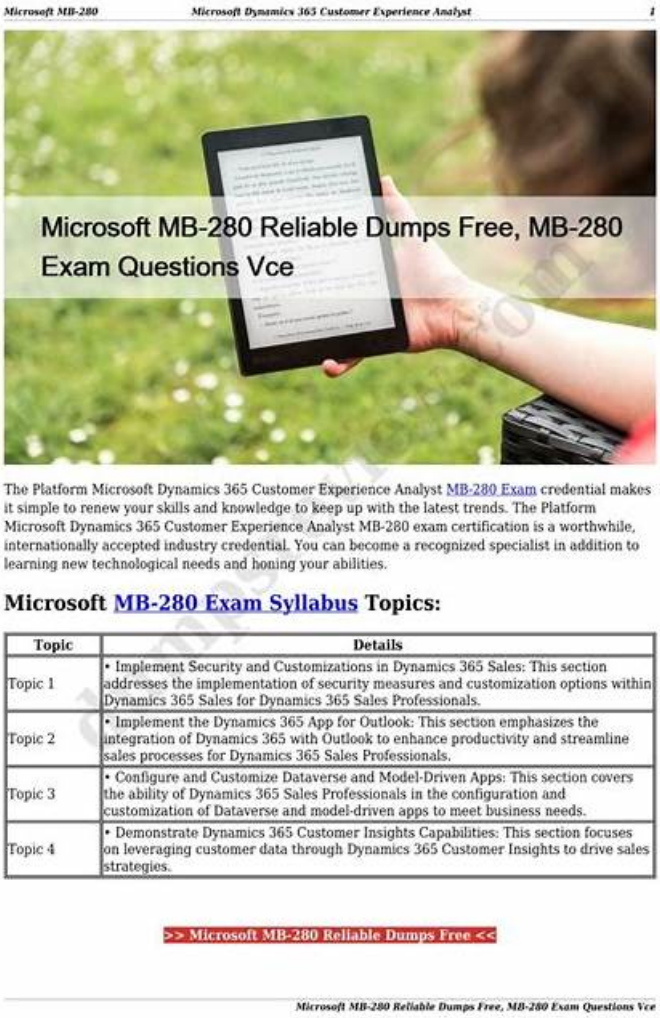

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MB-280 Actualtest | Pass-Sure Microsoft MB-280: Microsoft Dynamics 365 Customer Experience Analyst

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Microsoft Dynamics 365 Customer Experience Analyst Sample Questions (Q121-Q126):

NEW QUESTION # 121
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.

Column name	Type	Required
Name	Single line of text	Business required
Type	Choice	Business required
Dietary requirements	Multiple lines of text	Optional
Litter type	Choice	Optional
Breed	Single line of text	Optional
Description	Multiple lines of text	Optional

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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:

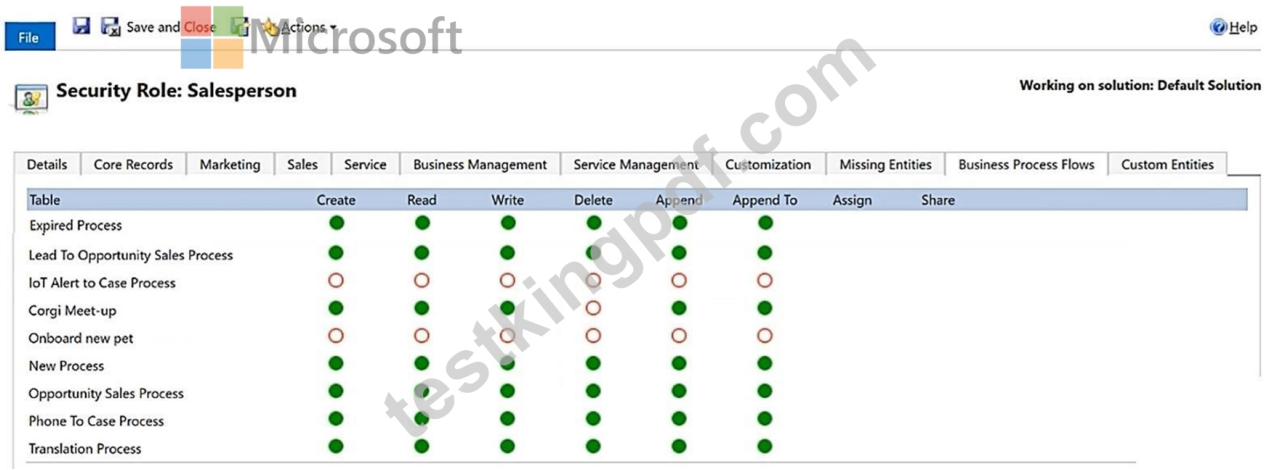
1. completing the registrations that the founder started, and
2. registering more Corgis for the upcoming gala.

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.

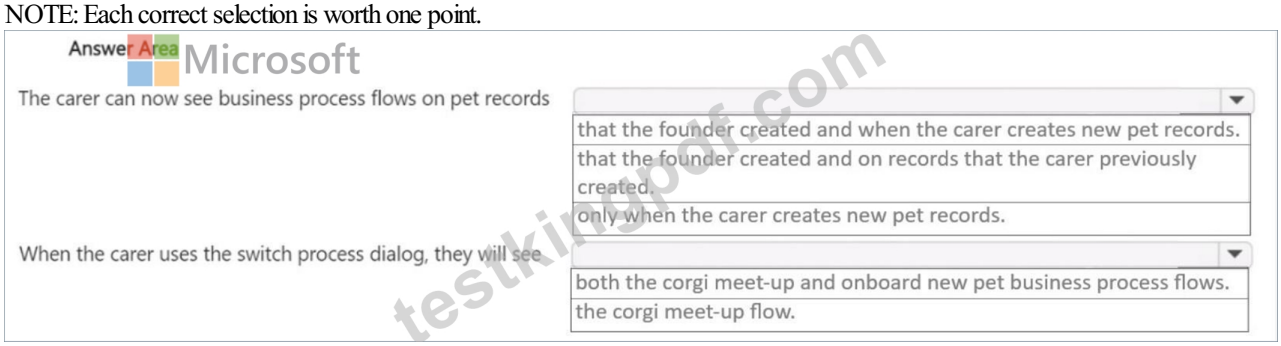
Hotspot Question

The founder has edited the Salesperson security role to allow the carer to use the Corgi meet-up business process flow, as shown in the following exhibit.



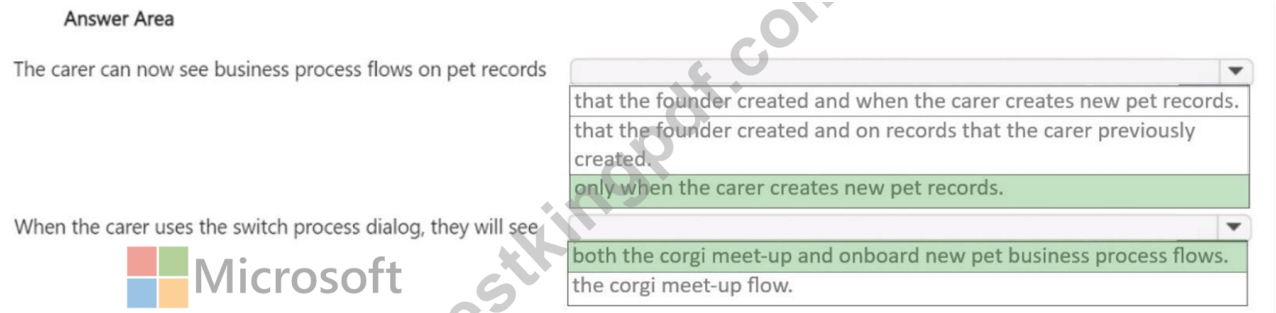
Use the drop-down menus to select the answer choice that completes each statement based on the information presented in the exhibit.

NOTE: Each correct selection is worth one point.



Answer:

Explanation:



NEW QUESTION # 122

Hotspot Question

You are working a list of leads in Dynamics 365 Sales.

You have a custom security role that contains the following privileges:

- create and edit user-level privileges on the lead and note entities.
- business unit-level append, append to, and assign privileges on the lead and note entities.
- organization-level share privileges on the lead and note entities.

You need to perform the following actions on leads:

- add notes to leads.
- assign leads to other users.

How should you manage leads? To answer, select the appropriate options in the answer area.

NOTE: Each correct selection is worth one point.

Answer Area

Scenario	Privilege
Add notes to leads	Leads owned by people in your business unit only Leads owned by you only Leads owned by anyone in your organization
Assign leads to other users	Leads owned by your business unit and its child business units only Leads owned by people in your business unit only Leads owned by anyone in your organization

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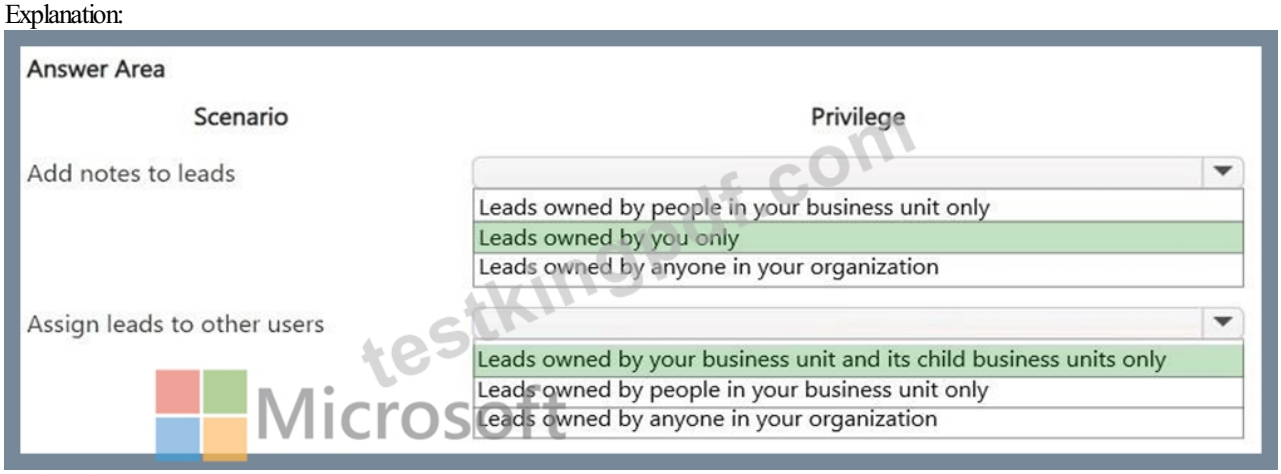
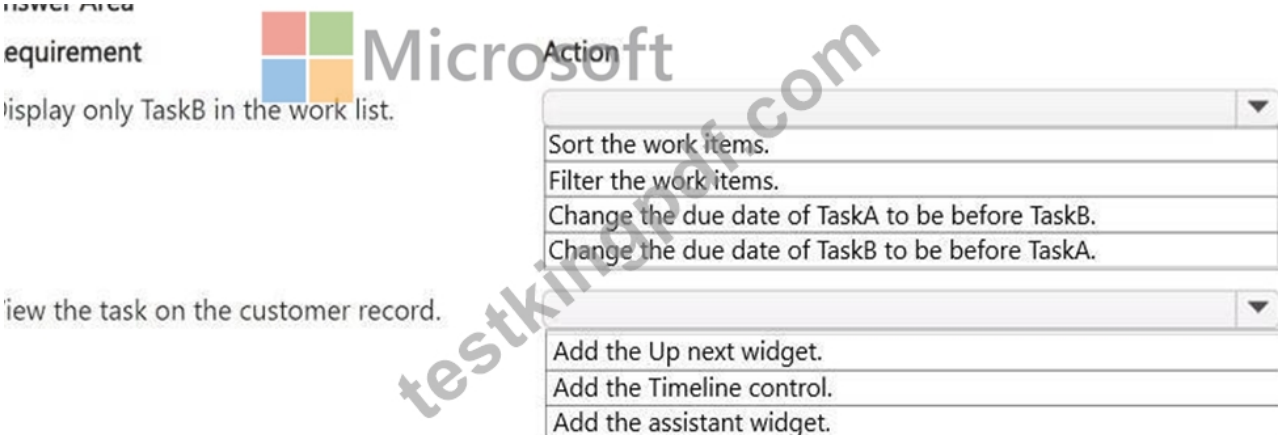
Answer:

Explanation:



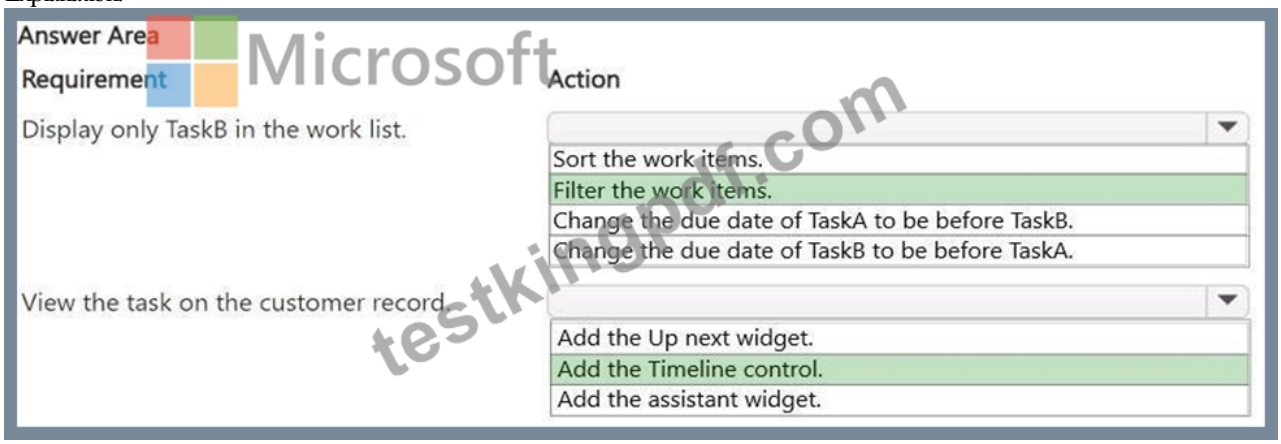
Explanation:
Add notes to leads - "Leads owned by you only"
The role has user-level create and edit privileges on the lead and note entities, meaning the user can only create and edit records that they personally own.
Assign leads to other users - "Leads owned by your business unit and its child business units only" The role has business unit-level assign privileges, which allows the user to assign leads within their own business unit and its child business units but not across the entire organization.

NEW QUESTION # 123
Hotspot Question
A company enables sales accelerator in Dynamics 365 Sales. All salespeople use a custom customer form.
A salesperson observes that a work list displays TaskA instead of TaskB for a customer.
The salesperson requires the following setup:
- Display only TaskB in the work list.
- View the task on the customer record as a visual cue.
You need to recommend changes to meet the requirements.
What should you do? To answer, select the appropriate options in the answer area.
NOTE: Each correct selection is worth one point.



Answer:

Explanation:



Explanation:
Display only TaskB in the work list - Filter the work items.
To ensure that only TaskB appears in the work list, the salesperson should filter the work items.
Sorting or changing due dates does not ensure that only TaskB is displayed.
View the task on the customer record - Add the Timeline control.
The Timeline control is used to display activities such as tasks, emails, phone calls, and notes on a customer record. Adding this control will allow the salesperson to see TaskB as a visual cue on the customer form.

NEW QUESTION # 124
You use document management in Dynamics 365 Sales. You use a single, parent SharePoint site collection with several child site records configured for each geographical region.
You make a change on SharePoint to rename one of the child sites.
You need to ensure the document management capabilities continue to function for all associated records.
What should you do?

- A. Create a new site record.
- B. Create a new document location.
- C. Update the relative URL.
- D. Update the absolute URL.

Answer: C

Explanation:
Since a child site within the existing SharePoint site collection has been renamed, the best approach is to update the relative URL in Dynamics 365 Sales. The relative URL defines the path within the parent site and must match the new name to ensure document management continues to function correctly.

NEW QUESTION # 125

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.
You are reviewing a Dynamics 365 implementation for your customer.
During the review, the customer tells you that they want a central search function which displays results by relevance.
You need to prepare to configure Dataverse search for the implementation.
Solution: Recognize that when you enable Dataverse search, it is enabled for all model-driven apps.
Does this meet the goal?

- A. No
- B. Yes

Answer: A

Explanation:
Correct:
* Recognize that when you enable Dataverse search, it is enabled for all model-driven apps.
Turning on Dataverse search allows global search in all model-driven apps in that environment and allows generative AI experiences to work.
Incorrect:
* Ensure that any tables you wish to display results from are included in the model-driven apps.
* Ensure that you add columns to the search criteria by editing the Advanced Find view for each table.
Reference:
https://learn.microsoft.com/en-us/power-platform/admin/configure-relevance-search-organization

NEW QUESTION # 126
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