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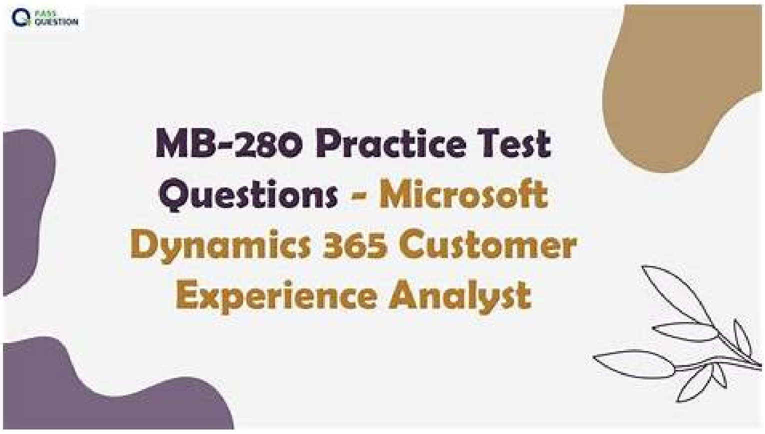

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Microsoft MB-280 Exam Syllabus Topics:

Topic	Details
Topic 1	• 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 2	• Demonstrate Dynamics 365 Customer Insights Capabilities: This section focuses on leveraging customer data to drive sales strategies through Dynamics 365 Customer Insights.
Topic 3	• Extend and Enhance Dynamics 365 Sales Capabilities: For Dynamics 365 Sales Professionals, this section evaluates the ability to extend Dynamics 365 Sales functionality and integrate it with other applications using Power Platform tools.

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Microsoft Dynamics 365 Customer Experience Analyst Sample Questions (Q131-Q136):

NEW QUESTION # 131

Hotspot Question
A company is using Dynamics 365 Sales to track their sales pipeline.
Sales managers require their forecasting to include reasons why opportunities were lost, including losses to competitors.
You need to configure the sales process WITHOUT using custom code.
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:
Add the type of loss: Modify the Status Reason option set - This action allows you to add specific reasons for losses, including losses to competitors, which can then be used in the sales pipeline.
Record the loss for forecasting: Modify the Opportunity Close form - This modification will enable the capturing of loss reasons directly when closing opportunities, which is essential for accurate forecasting.

NEW QUESTION # 132
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.
Hotspot Question
You are creating a business process flow named "Onboard new pet" to support onboarding of new clients for a pet care business.
A partially completed business process flow is 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:
Explanation:
To enable the business process flow to pass validation, you should ensure that - The false side of the condition is connected to a stage. A business process flow (BPF) must have all possible outcomes leading to a valid stage. In the given BPF, only the true condition (if the pet is a cat) is leading to a stage. However, the false condition (for dogs and birds) must also be connected to a stage to avoid validation errors.
After the flow has been updated to pass validation, when a user starts creating a new pet record, the user will see - Two stages The process starts with the Basic Details stage. If the pet is a cat, it moves to the Litter Type stage. If the pet is not a cat, the process would still need to continue but may follow a different path. Since only two stages are visible in the design, the user will see two stages.

NEW QUESTION # 133
You are a Dynamics 365 Sales administrator. You configure a forecast template that uses the Forecast category as a starting point for a layout for the sales team. The sales manager wants the value of the Lost column to come from the Total Detail Amount instead of the default value because the revenue is always driven by the items. You need to make the change. What should you do?

- A. Edit the existing forecast and update the Amount column in the layout.
- B. Edit the existing forecast, remove the Lost column, and add a new calculated column.
- C. Create a new forecast and update the Amount column in the layout.
- D. Create a new forecast, remove the Lost column, and add a new calculated column.

Answer: A

Explanation:
* Since the sales manager wants the Lost column in the forecast to reflect the Total Detail Amount, which is item-driven, you should update the Amount column in the existing forecast layout.
* By editing the existing forecast and changing the source for the Amount column to the Total Detail Amount, you can ensure the forecast accurately reflects item-based revenue calculations without needing to create a new forecast or add calculated columns.

NEW QUESTION # 134
An organization is using Microsoft Power Query when connecting to data sources in Dynamics 365 Customer Insights - Dat a. You need to load contacts to Customer Insights - Data using Power Query. Which is an appropriate action to take when using Power Query to ingest data?

- A. You can only add additional columns to the dataset in Power Query before the data source is created in Customer Insights - Data.
- B. You can add additional tables to the data source using Get Data functionality in the Power Query.
- C. You must create a separate Power Query data source for each table you wish to ingest.
- D. After you save a Power Query data source, you have to manually trigger the initial refresh process.

Answer: B

Explanation:
* In Dynamics 365 Customer Insights - Data, when using Power Query to ingest data, the Get Data functionality allows users to add multiple tables from various data sources.
* This flexibility enables users to enrich the dataset by pulling in additional tables that may be related or necessary for the data unification process.
* Power Query in Customer Insights supports creating robust data flows by allowing multiple tables to be added within a single data source setup, providing a comprehensive data modeling environment.

NEW QUESTION # 135
A company sends its salespeople to trade shows to meet potential customers. One day after the trade shows, the salespeople

currently send a follow-up email manually to the potential customers they met. They would like a task to remind them to call the potential customers a week after that.
You need to increase the follow-up rate for salespeople after a tradeshow.
Which actions should you take? To answer, select the appropriate options in the answer area.
NOTE: Each correct selection is worth one point.
□

Answer:

Explanation:
□
Reference:
Ensure That the Process Applies Only to Tradeshow Leads: Use segments
Segments are used to filter leads based on specific criteria. By using segments, you can ensure that the automated sequence is triggered only for leads generated from trade shows.
This action targets the automation specifically at the tradeshow leads, ensuring that other leads are not inadvertently included in this process.
Ensure Proper Timing of Activities: Set relative due date
Setting a relative due date allows you to define a timeframe between actions in the sequence. For example, the follow-up call task can be scheduled for one week after the initial email.
This ensures that tasks are executed with the correct timing, aligning with the desired schedule of following up with potential customers one week after the first contact.
By implementing sequences to automate follow-ups, using segments to filter for tradeshow-specific leads, and setting relative due dates for timely task execution, the company can optimize its post-tradeshow follow-up process and enhance the likelihood of successful customer engagement.

NEW QUESTION # 136
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