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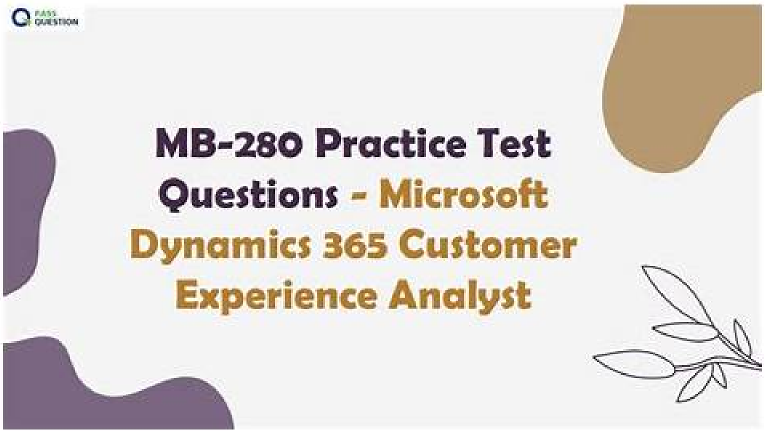

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Microsoft MB-280 Exam Syllabus Topics:

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	• Demonstrate Dynamics 365 Customer Insights Capabilities: This section focuses on leveraging customer data to drive sales strategies through Dynamics 365 Customer Insights.
Topic 3	• 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 4	• 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.

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Microsoft Dynamics 365 Customer Experience Analyst Sample Questions

(Q12-Q17):

NEW QUESTION # 12

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
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 # 13
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 recently implemented Dynamics 365 Sales within your organization's sales team. Based on the initial evaluation,

adoption is limited as most sales users prefer to work from Microsoft Outlook.
You decide to enable the Dynamics 365 App for Outlook.
You need to perform the various actions required. Each correct action is part of the solution but does NOT solve the problem completely.
Action: Within the system settings and email configuration, you set Process Email Using to Dynamics 365 for Outlook.
Does this meet the goal?

- A. NO
- B. Yes

Answer: A

Explanation:
Correct:
* : From the email settings in the Advanced settings, you migrate email router data from server-side synchronization to Dynamics 365 app for Outlook. [See step 1 below. Use Server-side synchronization]
* You test the email configuration and enable the mailboxes for the Dynamics 365 App for Outlook designated users. [Yes, see step 2 below] Incorrect:
* Within the system settings and email configuration, you set Process Email Using to Dynamics 365 for Outlook. [No, set this to Server-side synchronization. See step 1 below] Note:
Deploy and install Dynamics 365 App for Outlook
Step 1: Set the default synchronization method
To use Dynamics 365 App for Outlook, you need to set server-side synchronization for your email processing.
1. From your app, go to Settings > Advanced Settings.
2. Go Settings > Administration and then select System Settings.
3. Select the Email tab, and set Process Email Using to Server-Side Synchronization.
Step 2: Test email configuration and enable mailboxes
Enable and test your user mailboxes so they can use Dynamics 365 App for Outlook.
Reference:
https://learn.microsoft.com/en-us/dynamics365/outlook-app/deploy-dynamics-365-app-for-outlook

NEW QUESTION # 14
You created and published lead scoring models in the Dynamics 365 Customer Insights - Journeys application.
Your marketing team members inform you that they are NOT able to view the lead scoring insights. You confirm the lead scoring models are published and are Live.
You need the marketing team to be able to view the lead scoring insights.
What should you do?

- A. Set all leads to Active state to capture the insights.
- B. Assign the Lead Score Viewer security role to the users.
- C. Re-publish the lead scoring models to allow the system to capture the insights.
- D. Set automatic lead scores cleanup to No to capture the scoring.

Answer: B

Explanation:
To view lead scoring insights in Dynamics 365 Customer Insights - Journeys, users need the appropriate permissions granted by a specific security role. The Lead Score Viewer security role provides users with the necessary access to see lead scoring insights. Without this role, the marketing team will not have visibility into the lead scores, even if the models are published and live.

NEW QUESTION # 15
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 table
- B. Rollup query
- C. Goal metric
- D. Drill-down table

Answer: B

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.
Incorrect:
Not B: Define rollup fields
Rollup fields are used to calculate the actual and in-progress values for a goal metric.
Not D: Set goal metrics
Goal metrics let you define how a goal will be measured. For example, a sales team's performance can be measured based on the number of leads they get or the revenue amount.
Reference:
https://learn.microsoft.com/en-us/dynamics365/sales/goals-overview

NEW QUESTION # 16
A company uses Dynamics 365 Sales with assignment rules. The assignment rules use a segment to filter the lead records.
A sales manager wants to automatically add a series of tasks by using the same criteria as the assignment rules.
You need to create the tasks and assign the tasks to the lead records.
In which order should you perform the actions? To answer, move all actions from the list of actions to the answer area and arrange them in the correct order.

Answer:

Explanation:

Reference:
Add Tasks to the Sequence:
After creating the sequence, add the specific tasks that need to be automatically generated and assigned to the leads. These tasks can be calls, follow-ups, emails, etc., that need to be completed as part of the sales process.
Connect the Existing Segment to the Sequence:
Once the tasks are added, connect the sequence to the existing segment that filters the lead records based on assignment rules. This ensures that only leads within this specific segment are targeted by the sequence.
The segment is a subset of leads that meet certain criteria, and connecting it to the sequence allows for automated task assignment according to the segment's filtering rules.
Activate the Sequence:
Finally, activate the sequence to begin the automated assignment of tasks to lead records that meet the segment criteri a. Activation makes the sequence live, enabling the automated process to assign tasks to each lead as per the sequence setup.
By following these steps, the sales manager can ensure that tasks are automatically generated and assigned to leads according to the same criteria used by the assignment rules, streamlining task management for the sales team.

NEW QUESTION # 17
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