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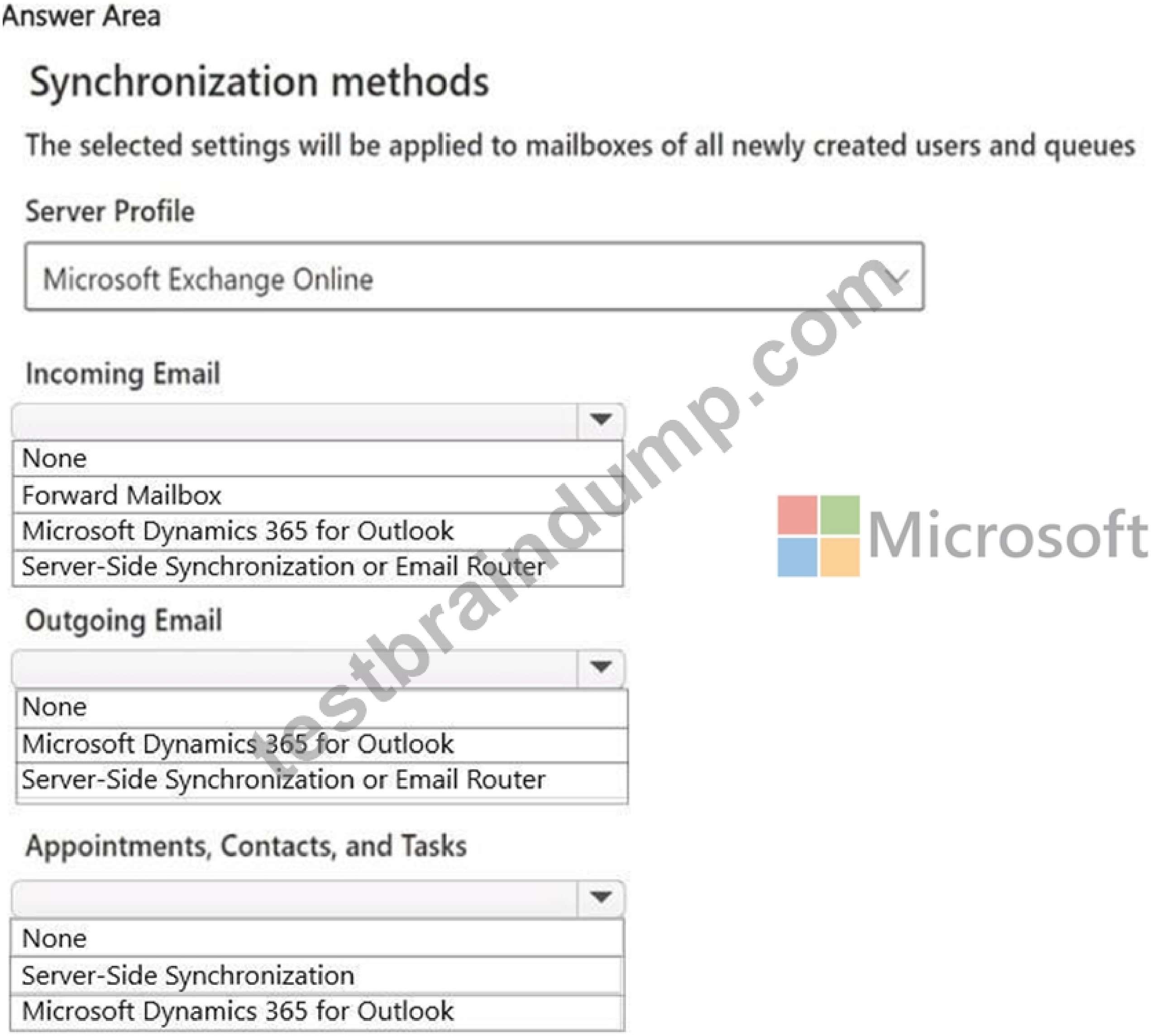
Microsoft MB-280 Exam Syllabus Topics:

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	• 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.
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	• Implement Dynamics 365 Sales: This section focuses on the essential processes for setting up and managing Dynamics 365 Sales effectively for Dynamics 365 Sales Professionals.

Microsoft Dynamics 365 Customer Experience Analyst Sample Questions (Q39-Q44):

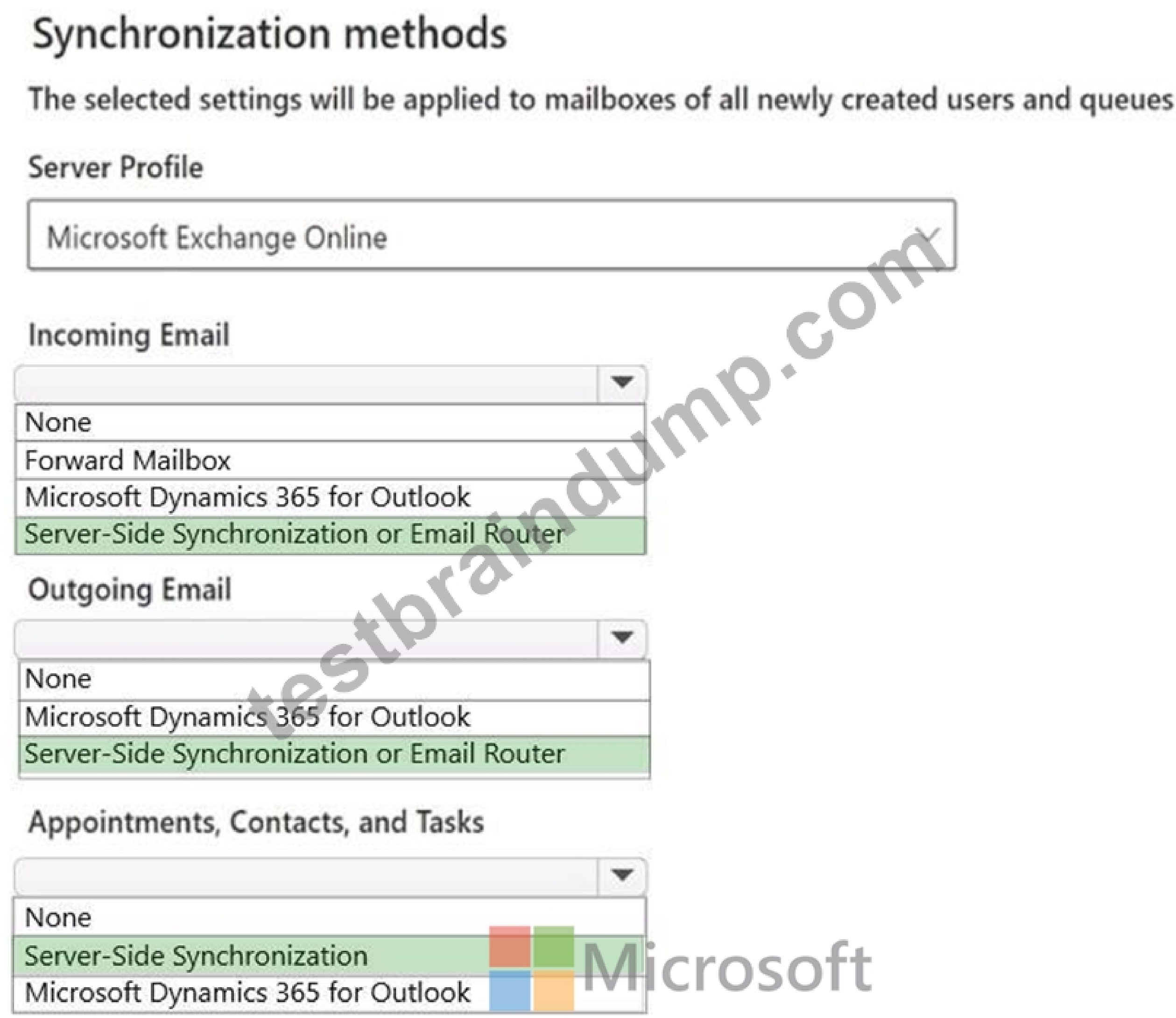
NEW QUESTION # 39
Hotspot Question
A Company uses Exchange Online. Users require their appointments and tasks to automatically synchronize with those available in Outlook.
You need to set up the default mailbox configuration.
What should you select for each field? To answer, select the appropriate options in the answer area.
NOTE: Each correct selection is worth one point.



Answer:

Explanation:

Answer Area



Explanation:
Incoming Email - Server-Side Synchronization or Email Router
Since the company uses Exchange Online, Server-Side Synchronization is the best choice as it allows seamless automatic email tracking and eliminates the need for manual synchronization.
Outgoing Email - Server-Side Synchronization or Email Router
To ensure emails sent from Dynamics 365 sync automatically with Outlook, Server-Side Synchronization is required.
Appointments, Contacts, and Tasks - Server-Side Synchronization
To automatically sync user appointments and tasks with Outlook, Server-Side Synchronization is required instead of using the Dynamics 365 for Outlook client.

NEW QUESTION # 40
Drag and Drop Question
You are designing the user experience for sales users at your organization for a variety of tasks.
One of the user experience requirements is for sales users to be able to see information from custom attributes created for originating leads for opportunities WITHOUT having to navigate to the Lead record.
You are already signed in to the correct editing application and you now need to configure the user experience in Dynamics 365 Sales to enable this.
Which five actions should you perform in sequence before saving and publishing your changes?
To answer, move the five appropriate actions from the list of actions to the answer area. Arrange the five actions in the correct order.
NOTE: More than one order of answer choices is correct. You will receive credit for any of the correct orders you select.

Actions	Order
Select **Tables** > **Lead**.	1.
Add the quick view form as a component.	2.
In the **Forms** area, create a quick create form with the required columns.	3.
In the **Forms** area, create a quick view form with the required columns.	4.
Select **Tables** > **Opportunity**.	5.
In the **Forms** area, create a card form with the required columns.	
In the **Forms** area, select the main form you wish to update.	

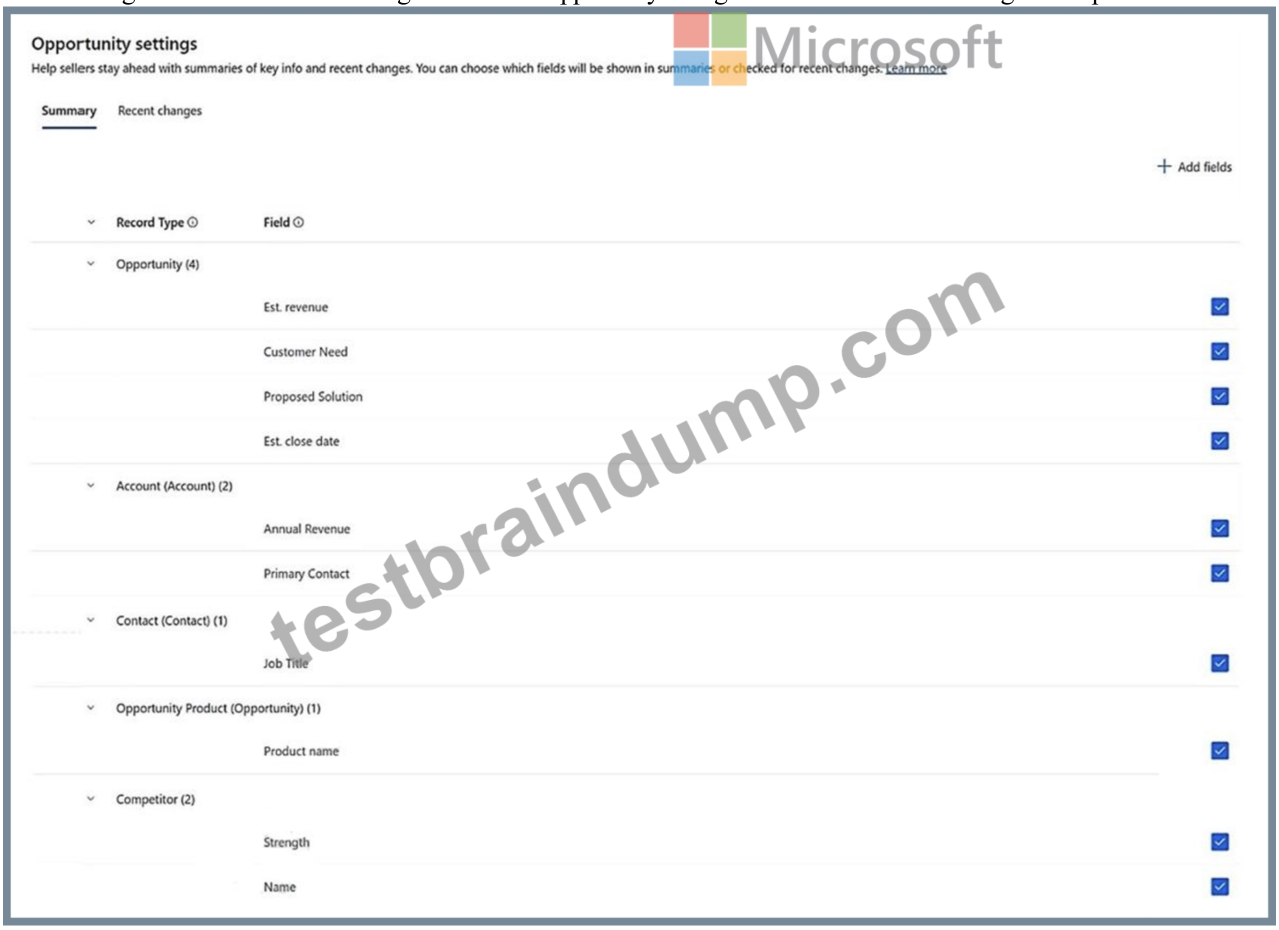
Answer:

Explanation:

Actions	Order
	1. Select **Tables** > **Lead**.
	2. In the **Forms** area, create a quick view form with the required columns.
In the **Forms** area, create a quick create form with the required columns.	3. Select **Tables** > **Opportunity**.
	4. In the **Forms** area, select the main form you wish to update.
In the **Forms** area, create a card form with the required columns.	5. Add the quick view form as a component.

Explanation:
1. Select Tables > Lead: Begin by selecting the table that contains the information you want to display (Lead table).
2. In the Forms area, create a quick view form with the required columns: Create a quick view form for the Lead table to display the necessary lead information.
3. Select Tables > Opportunity: Move to the Opportunity table where you want to display the information.
4. In the Forms area, select the main form you wish to update: Select the main form for the Opportunity table that will display the information.
5. Add the quick view form as a component: Add the previously created quick view form to the Opportunity form to display lead information without navigating away.

NEW QUESTION # 41
Case Study 1 - Contoso Ltd
Background information
Contoso Ltd. has started a new division that provides janitorial services to businesses.
The sales teams for this division are using a dedicated instance of Dynamics 365 Sales.
Contoso Ltd.'s sellers are becoming accustomed to Copilot in Sales and Sales Insights features.
They have identified several desired enhancements.
System configuration
The base currency for all opportunities in the system is US dollars (USD). The administrator has NOT enabled installed premium Sales Insights features. All users have Premium licenses.
Contoso Ltd. uses Exchange Online for email.
Only three default insights cards are turned on:
1. Close date coming soon
2. Meeting today
3. Upcoming meeting
The system administrator has set the following days before notifying me value for the Close date coming soon card to 21 days.
Contoso Ltd. has also just set up Dynamics 365 Customer Insights
- Journeys for marketing automation. No segments or customer journeys have been defined yet.
Dynamics 365 Sales and Customer Insights - Journeys both share the same instance of Microsoft Dataverse.
Copilot in Dynamics 365 Sales settings
The following screenshots show the configured fields for opportunity settings summaries and recent changes in Copilot.



Contoso Ltd. Personnel

Business development managers

Contoso Ltd. has 30 business development managers (BDMs) across its sales teams. Each BDM is responsible for selling janitorial services to new and existing clients. All BDMs are assigned the sales manager security role in Dynamics 365 Sales.

Any BDM can own an opportunity, even if a different BDM owns the client account record. Any other BDMs assigned to work on the opportunity will be included in the opportunity record's sales team. Opportunity records owned by a BDM will never include any additional client stakeholders other than the named contact for the opportunity.

The BDMs have been told to document all client communications in Dynamics 365, but they frequently exchange emails with client contacts through Microsoft Exchange WITHOUT tracking them in Dynamics 365.

Digital sales team

Contoso Ltd. has a digital sales team that comprises 10 junior sales resources who focus on lead qualification and conversion to opportunities. Members of this team are assigned a single custom security role named Digital seller that is a copy of the standard Salesperson role. View audit history and view audit summary permissions are disabled.

The team currently receives leads from an online form on Contoso Ltd.'s website. Many online lead submissions end up being duplicates, and the team manually reconciles the duplicates by comparing last name, email address, and phone number for all submitted leads.

Clients

Client tiers

Clients are grouped into tiers based on annual revenue as calculated in a system outside Dynamics 365 Sales. Clients receive different levels of ongoing service and support based on their tier assignment.

Annual revenue values for accounts and corresponding tier values are written to Dynamics 365 through a nightly batch process. Client tier values are only updated when they change, and tier value will always be blank for accounts with no calculated annual revenue.

The tier structure is:

Tier A -- annual revenue greater than or equal to $10,000,000 USD

Tier B -- annual revenue greater than $5,000,000 USD and less than $10,000,000 USD Tier C -- annual revenue greater than $0 USD and less than or equal to $5,000,000 USD The tier label is stored in a custom text field named Client tier (contoso_clienttier) that contains only a single letter or is blank.

Northwind Traders account

There are three BDMs who frequently work together on large opportunities.

BDM1 is the account owner for Northwind Traders, a multinational client.

- BDM1 owns all Northwind Traders opportunities with estimated revenue greater than or equal to $1,000,000. BMD2 and BDM3 are assisting BDM1 with several opportunities for Northwind Traders in different cities.
- BDM3 owns all other Northwind Traders opportunities. BDM3 is NOT a sales team member for any of the opportunities BDM1 owns.
- BDM2 is a sales team member for all Northwind Traders opportunities.

Client Contact1 is the primary contact for the Northwind Traders' account. There are two other client contacts with whom the Northwind account team regularly engages - Client Contact2 and Client Contact3.

BDM1 and Northwind Traders account

BDM1 has been on vacation for two weeks. During vacation, BDM1 did NOT log into Dynamics 365, and BDM2 made the following updates to several open Northwind Traders opportunities.

Updated field	Opportunities	When the updates were made
Estimated close date	New York City office, London office, Toronto office	Two days before BDM1's return
Forecast category	Mexico City office	Five days before BDM1's return
Proposed solution	Seattle office	Nine days before BDM1's return

BMD2 also scheduled an internal meeting with BMD1 for the day they return to discuss a request from the primary contact for the account. The meeting has the "London office" opportunity as its regarding value.

Desired enhancements

The global sales lead requests the following enhancements:

1. A "Welcome" email should be sent to the primary contact for an account when the account first enters any client tier. This email should only be sent to the primary contact once.
2. Account owners should receive immediate notifications in the assistant in Dynamics 365 Sales when accounts change tiers. The notifications should include the account name and current tier.
3. A "Getting started" email should be sent to the main contact associated with an opportunity when the opportunity status is set to "Won."

1. The email should include a link to a custom onboarding form where the contact can supply information required to start the janitorial services for a given location.
2. If the contact does NOT click any links in the email, a follow-up email should be sent.

4. All emails between BDMs and client contacts should be available for relationship analytics KPIs. Emails sent by other users outside of Dynamics 365 should NOT be included in the KPIs.

The digital sales team lead requests the following enhancements:

1. The ability for team members to use Copilot to summarize changes to lead records.
2. Replace the current online form used by their team to capture new leads. The new form should automatically handle duplicates using the rules the team currently applies manually.

Hotspot Question

BDM3 is reviewing relationship analytics for several Northwind Traders opportunities.

You need to help BDM3 understand which internal and external contacts are considered contacts of interest for relationship analytics KPI calculations for the two opportunities shown in the following exhibit.

Topic*	Potential Customer*	Est. close ... ↑	Est. revenue	Contact	Account
London Office	Northwind Traders	6/4/2024	$1,000,000.00	Client Contact1	Northwind Traders
Toronto Office	Northwind Traders	6/12/2024	$400,000.00	Client Contact2	Northwind Traders

Use the drop-down menus to select the answer choice that completes each statement.

NOTE: Each correct selection is worth one point.

Answer Area

BDM2 is a contact of interest for

- the London Office opportunity,
- the Toronto Office Opportunity.
- both the London Office and Toronto Office opportunities.

BDM3 is a contact of interest for

- the London Office opportunity,
- the Toronto Office Opportunity.
- both the London Office and Toronto Office opportunities.

Client Contact2 is a contact of interest for

- the London Office opportunity,
- the Toronto Office Opportunity.
- both the London Office and Toronto Office opportunities.

Client Contact1 is a contact of interest for

- the London Office opportunity,
- the Toronto Office Opportunity.
- both the London Office and Toronto Office opportunities.

Answer:

Explanation:

Answer Area

BDM2 is a contact of interest for

- the London Office opportunity,
- the Toronto Office Opportunity.
- both the London Office and Toronto Office opportunities.

BDM3 is a contact of interest for

- the London Office opportunity,
- the Toronto Office Opportunity.
- both the London Office and Toronto Office opportunities.

Client Contact2 is a contact of interest for

- the London Office opportunity,
- the Toronto Office Opportunity.
- both the London Office and Toronto Office opportunities.

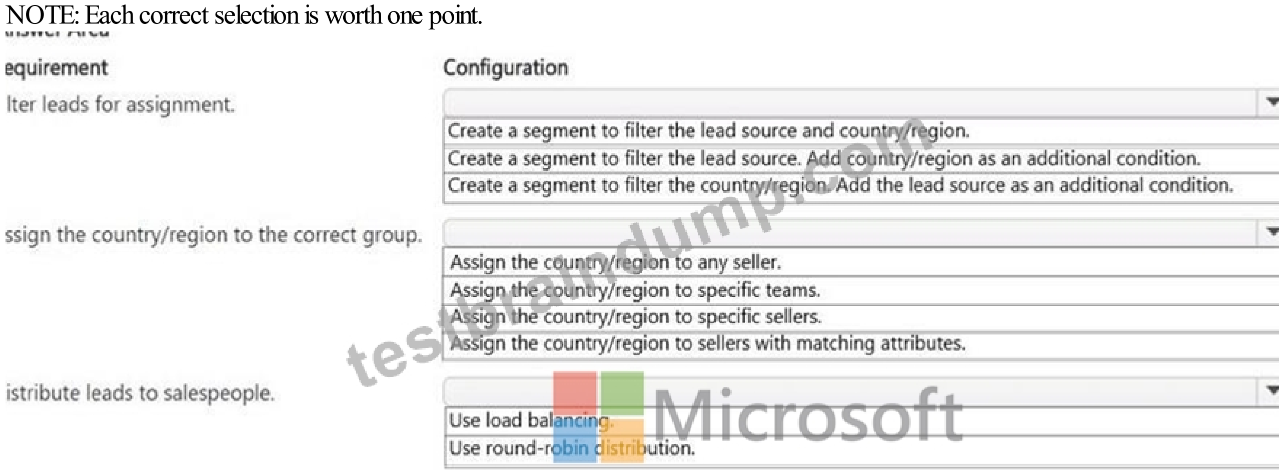
Client Contact1 is a contact of interest for

- the London Office opportunity,
- the Toronto Office Opportunity.
- both the London Office and Toronto Office opportunities.

Explanation:
BDM2 is a contact of interest for - both the London Office and Toronto Office opportunities.
BDM2 is a sales team member for all Northwind Traders opportunities, meaning they are involved in both the London Office and Toronto Office opportunities.
BDM3 is a contact of interest for - the Toronto Office opportunity.
BDM3 owns all Northwind Traders opportunities except those owned by BDM1. Since BDM1 owns the London Office opportunity, BDM3 is only involved in the Toronto Office opportunity.
Client Contact2 is a contact of interest for - the Toronto Office opportunity.
The Toronto Office opportunity lists Client Contact2 as the primary contact, making them a contact of interest for that opportunity.
Client Contact1 is a contact of interest for - the London Office opportunity.
The London Office opportunity lists Client Contact1 as the primary contact, making them a contact of interest for that opportunity.

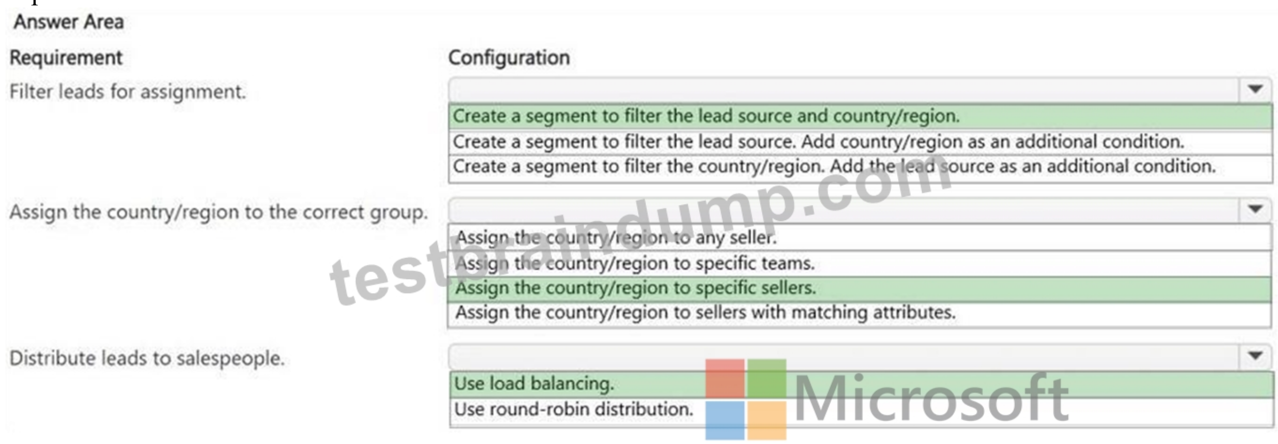
NEW QUESTION # 42
Hotspot Question

A company generates leads from a webform. Salespeople manage leads by country/region. All salespeople are part of the same Dynamics 365 Sales team.
The sales manager requires the following functionality:
- Automate lead assignments.
- Ensure each seller can never have more than 20 open leads.
You create a country/region attribute for the process. You must simplify the process. You plan to use segments when possible.
You need to create a lead assignment rule for each country/region.
Which configurations should you use? To answer, select the appropriate options in the answer area.
NOTE: Each correct selection is worth one point.



Answer:

Explanation:



Explanation:
Filter leads for assignment Create a segment to filter the lead source and country/region. Since the company wants to automate lead assignments and use segments, filtering by both lead source and country/region ensures the most refined and effective lead segmentation for assignment.
Assign the country/region to the correct group Assign the country/region to specific sellers.
Since leads must be assigned based on country/region, assigning them to specific sellers ensures that each salesperson is responsible for leads in their designated region.
Distribute leads to salespeople Use load balancing.
Load balancing ensures that each seller never has more than 20 open leads by evenly distributing leads among salespeople, preventing overload and optimizing workload distribution.

NEW QUESTION # 43
Drag and Drop Question
You are implementing Dynamics 365 Sales at a new organization. All users will be using the Sales Hub app.
You need to assign the appropriate out-of-the-box security roles.
Using the principle of least access, which roles should you assign? To answer, move the appropriate roles to the correct users. Each role may be used once, more than once, or not at all.
You may need to move the split bar between panes or scroll to view content.
NOTE: Each correct selection is worth one point.

Answer:

Explanation:

Explanation:
Retail assistant - Salesperson
The retail assistant can create and update accounts and contacts but cannot edit the product catalog. The Salesperson role provides access to manage accounts and contacts but does not include permissions for product catalog management.
Executive - Sales team member
The executive only adds notes to accounts and contacts. The Sales team member role has minimal access and is appropriate for a user who only needs to add notes.
Territory manager - Sales manager
The territory manager is responsible for forecasting and product management, which aligns with the Sales manager role, as it includes permissions for managing forecasts and overseeing sales activities.

NEW QUESTION # 44
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