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Microsoft Dynamics 365 Customer Experience Analyst Sample Questions (Q127-Q132):

NEW QUESTION # 127
You manage a Dynamics 365 Sales environment where users can only view and edit their own records.
User2 is assisting with User1's opportunities while User1 is on vacation. User1 remains the owner of User1's opportunities.
User2 has reported that they CANNOT update User1's opportunities.
You need to diagnose the issue.
What should you do?

- A. Instruct User2 to follow the record.
- B. Ensure User2 is granted the Stakeholder role.
- C. Ensure User2 is added to the Sales team.
- D. Ensure the record is shared with User2.

Answer: C

Explanation:
Correct:
* Ensure User2 is added to the Sales team.
In Dynamics 365 Sales, a user within the Sales team can update another user's opportunities, but it depends on their security roles and privileges. If a user has the necessary permissions, they can edit and update opportunities owned by other users.
Incorrect:

* Ensure the record is assigned to User2.
* Ensure the record is shared with User2.
* Ensure User2 is added to an Access team.
* Ensure User2 is added to the Owner team.
* Ensure User2 is granted the Stakeholder role.
A user with the Stakeholder role in Dynamics 365 Sales cannot directly update another user's opportunities, even if they are the owner of those opportunities. The Stakeholder role primarily defines a relationship with an opportunity (e.g., influencing it, providing expertise), not the ability to manage its core record data. To update another user's opportunities, the user would need a security role that grants write access to the Opportunity entity, and potentially also the ability to work with records owned by other users.
* Instruct User2 to follow the record.
Reference:
https://learn.microsoft.com/en-us/dynamics365/sales/security-roles-for-sales

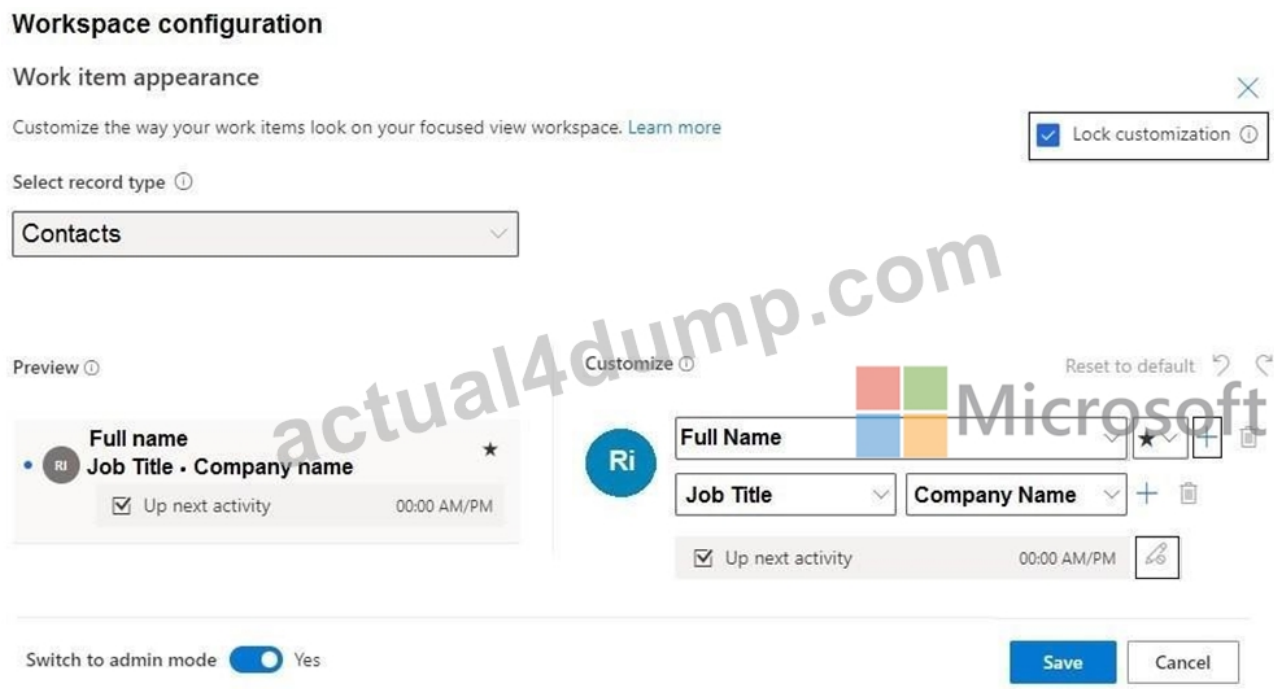
NEW QUESTION # 128
You are implementing Dynamics 365 Customer Insights - Data as the company's Customer Data Platform. You set up the data sources and start the unification process. You need to identify the primary table within the Matching conditions page.
Which two criteria should you use to determine the primary table? Each correct answer presents a complete solution. Choose two.
NOTE: Each correct selection is worth one point.

- A. Choose the table that has several attributes in common with other tables.
- B. Choose the Dynamics 365 contact\ab\e when this is available as the data source.
- C. Choose the table with the most complete and reliable profile data about your customers.
- D. Choose the table that has the most related tables.

Answer: B,C

Explanation:
When determining the primary table in Customer Insights during the unification process, the goal is to choose the table that provides the most robust and accurate customer profile information.
Criterion A is crucial because having complete and reliable customer profile data ensures that the unified profile is accurate and comprehensive.
Criterion C is recommended by Microsoft when using Dynamics 365 data, as the contact table often serves as the primary source of customer information within the Dynamics 365 ecosystem.
While tables with many related tables or common attributes with other tables may provide supplementary information, they do not necessarily constitute the primary source for reliable customer data.

NEW QUESTION # 129
Hotspot Question
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.



Answer:

Explanation:

Explanation:

Box 1: Select record type: Contacts [With the intent to change to Company] Change the record type from Contacts to Company.

Dynamics 365 Sales, Customize the appearance of work items

In the Select record type list, select the record type you're customizing work items for.

Box 2: The Pencil icon

Under the Customize section, use the following options to customize:

To change the icon that appears on a work item, select the pencil icon, and then choose one of the following options:

Record image: A photo of the contact, if one is available

Record initials: The contact's first and last initials

Record type: The icon associated with the record type

Activity type: The icon associated with the current activity on the record

NEW QUESTION # 130

BDM1 logs into the Sales Hub on June 3. 2024. BDM1 opens the assistant from the navigation bar.
Which two open opportunities will BDM1 see mentioned in the close date coming soon reminder cards? To answer, select the appropriate options in the answer area.
NOTE: Each correct selection is worth one point.

Answer:

Explanation:

Topic 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 Nova with their customizations, resolve issues, and advise on best designs to meet their requirements.
Overall configurations
To better understand their four-legged customers, Terra Flora has created a custom Portable, which is user-owned and related 1 -n with the Contact table, which represents the pets' primary owner.
The Per 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

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 Name and Type columns, as well as the current stage on the Onboard new pet business process flow.
Pet table icon

A custom image svg file has been created for the Portable.
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 i being used.
Attachments are enabled for the tfeftable, 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.
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 Portable 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
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 Contact records themselves.
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 dale 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.

NEW QUESTION # 131
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.
Solution: 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.

NEW QUESTION # 132
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