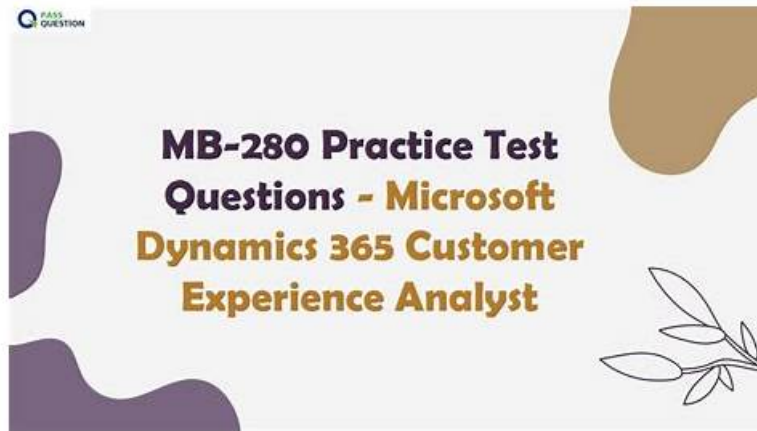


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Microsoft Dynamics 365 Customer Experience Analyst Sample Questions (Q52-Q57):

NEW QUESTION # 52

You are the Dynamics 365 administrator at an organization that uses both Dynamics 365 Customer Insights - Journeys and Dynamics 365 Sales.

You have configured Customer Insights - Journeys to create leads from web form submissions. You also allow your sales users to create leads using the user interface.

Your organization has recently hosted an event at a conference.

* You have a Customer Insights - Journeys web form to capture leads immediately at the conference.

* You expect sales users to enter lead information for prospects they meet at the event in the week after the conference.

You need to keep your data clean while also capturing all the valid leads from the event. What should you do?

- A. Go to the form in Customer Insights - Journeys and update the form so that it can either create new leads or update existing leads.
- **B. Go to business management settings and enable duplicate detection on leads based on email.**
- C. Go to The settings area in Customer Insights - Journeys and ensure the default form matching strategy is selected.
- D. Go to the classic editor and remove Create permissions from the security group for sales users.

Answer: B

Explanation:

Requirement Analysis:

The organization is collecting lead data from two sources: a web form created in Customer Insights - Journeys and manual entries by sales users. This setup could lead to duplicate entries if a lead is submitted through the web form and then entered manually by a sales user afterward.

To ensure data integrity and avoid duplication, it is essential to implement a mechanism that identifies and manages duplicates automatically.

Solution - Enabling Duplicate Detection:

In Dynamics 365, duplicate detection can be configured to alert users or prevent the creation of records that already exist based on certain criteria (such as email).

By enabling duplicate detection based on email addresses, the system will compare incoming lead data with existing records and prompt users if a duplicate is identified. This feature will ensure that leads collected from different sources are not duplicated unnecessarily.

Steps to Enable Duplicate Detection for Leads Based on Email:

Navigate to Settings > Data Management > Duplicate Detection Rules in Dynamics 365.

Create a new Duplicate Detection Rule for the Lead entity. Specify that the system should check for duplicate records based on the email field.

Publish the rule and ensure it is activated.

After activation, this rule will prompt users whenever a duplicate email is detected, either from the Customer Insights - Journeys web form or manual entry by sales users.

Reference:

Benefits of Using Duplicate Detection:

This approach does not restrict users from creating leads but ensures that duplicate entries are flagged, allowing users to review and decide whether to proceed.

It maintains data cleanliness by preventing unnecessary duplicates while ensuring all valid leads are captured from different sources.

By implementing this solution, the organization can effectively manage potential duplicate leads, keeping the data clean and accurate across both Customer Insights - Journeys and Dynamics 365 Sales.

NEW QUESTION # 53

Note: This question is part of a series of questions that present the same scenario. Each question in the series contains a unique solution. Determine whether the solution meets 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 configure forecasts for a clothing manufacturer.

A salesperson updates an opportunity and wants to refresh the forecast.

You need to show the salesperson how to refresh the forecast.

Solution: Update the Opportunity Forecast Category Mapping process.

Does this meet the goal?

- A. Yes
- B. No

Answer: B

Explanation:

Correct:

* Recalculate the forecast

Incorrect:

* Recalculate the opportunity.

* Update the Opportunity Forecast Category Mapping process.

Open the Opportunity Forecast Category Mapping Process workflow. You can customize or deactivate the workflow according to your organization's requirements.

Note:

Example of forecast recalculation methods

Let's understand the different methods with an example. Consider a scenario where you have a forecast with 4 quarterly periods and an annual period.

Assume that you're currently in Q4. The following table shows when and how the forecast data is updated for different scenarios and periods.

--

Dynamics 365 Sales, Recalculate forecasts manually

You want the forecast data to be up-to-date to make informed decisions. Forecast data is automatically recalculated at regular intervals. However, you can trigger a manual recalculation when you want to recalculate the forecast data immediately. You can also trigger a manual recalculation for past and future periods as they aren't automatically recalculated.

Recalculate and refresh forecast data manually

1. Open the forecast. Verify the Last updated timestamp on the command bar to know when the forecast was last recalculated successfully.
2. Select Recalculate data.

A notification appears at the top of the screen, confirming the recalculation. Recalculation happens in the background, and you can continue to work while recalculation is in progress.

3. After the application recalculates the forecast data, a notification appears to refresh the data.

On the notification, select Refresh page.

NEW QUESTION # 54

Hotspot Question

You are a Dynamics 365 Sales consultant for a food service company. The company caters meals for client companies.

The company wants to set up a product bundle so that the sales staff does not forget items when they create an opportunity.

The lunch bundle is created at \$200.00. It will include the following.

Product	Quantity	Unit Cost	Amount	Configuration
Sandwich	50	\$5.00	\$250.00	Required
Napkins	50	\$0.25	\$12.50	Optional
Soda	50	\$1.00	\$50.00	Optional

You need to explain how the sales staff should manage the product bundle in the opportunity.

What should they do for each scenario? To answer, select the appropriate options in the answer area.

NOTE: Each correct selection is worth one point.

Action

Use the lunch bundle price.

Add the prices of the sandwiches, napkins, and sodas.

Add the lunch bundle price and the prices of the napkins and sodas.

Subtract the prices of the napkins and sodas from the lunch bundle price.

Increase the quantity of sodas in the line item.

Add a new line item for sodas and override the price.

Add a new line item for sodas with the default price.

Delete the soda line item from the bundle and add a new line item for all the sodas with the default price.

Add another line item for sandwiches with the default price.

Increase the quantity of sandwiches in the line item.

Add another line item for sandwiches and override the price.

Delete the sandwich line item from the bundle and add a new line item for all the sandwiches with the default price.

Answer:

Explanation:

Action

Use the lunch bundle price.
Add the prices of the sandwiches, napkins, and sodas.
Add the lunch bundle price and the prices of the napkins and sodas.
Subtract the prices of the napkins and sodas from the lunch bundle price.

Increase the quantity of sodas in the line item.
Add a new line item for sodas and override the price.
Add a new line item for sodas with the default price.
Delete the soda line item from the bundle and add a new line item for all the sodas with the default price.

Add another line item for sandwiches with the default price.
Increase the quantity of sandwiches in the line item.
Add another line item for sandwiches and override the price.
Delete the sandwich line item from the bundle and add a new line item for all the sandwiches with the default price.

Explanation:

Determine the price of the product bundle: Add the prices of sandwiches, napkins, and sodas.

Increase the number of sodas at no additional charge: Increase the quantity of sodas in the line item.

Increase the number of sandwiches and charge the price list price for each additional sandwich:

Increase the quantity of sandwiches in the line item.

NEW QUESTION # 55

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. Yes
- B. No

Answer: B

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 # 56

A company created a new table named Locations.

The sales team needs your help to make the Locations table visible in the Sales Hub. What should you do?

- A. Create a Location Sub Area.
- **B. Add Location to the App Designer.**
- C. Add Location as an Area.
- D. Create a Location Group.

Answer: B

Explanation:

* To make a new table, like Locations, visible within the Sales Hub, you need to add it to the App Designer. This involves updating the Sales Hub app module to include the Locations table as a new entity that users can access.

* By adding the table in the App Designer, you ensure it becomes part of the navigation and is available within the Sales Hub application.

NEW QUESTION # 57

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