

Microsoft

Exam Questions MB-280

Microsoft Dynamics 365 Customer Experience Analyst



NEW QUESTION 1

- (Topic 1)

You need to configure search to ensure the administrators can find all records which reference Corgis. Which action must you perform?

- A. Within system settings, select up to 10 relevant tables.
- B. Within the solution, ensure all relevant tables are indexed.
- C. For all relevant tables, ensure that the Can enable sync to external search index setting is False.
- D. Add columns to be searched to the Lookup view for each relevant table.

Answer: B

Explanation:

? To enable comprehensive search capabilities for administrators to find all records referencing specific terms (such as ??Corgis??), it is essential to ensure that all relevant tables are indexed.

? In Dynamics 365, configuring search functionality for specific tables involves setting up the tables to be searchable, which can be done by indexing them within the solution.

? Indexing relevant tables makes them accessible in the search feature and ensures all fields within those tables can be searched, allowing for quick retrieval of records that reference specific terms.

? System settings (Option A) is limited to selecting up to 10 tables and is more about quick search rather than full indexing. The sync to external search index setting (Option C) is for integration with external search tools and does not directly impact internal search capabilities.

? Adding columns to the Lookup view (Option D) affects how lookups work but does not influence full-text search results.

References from Microsoft Documentation:

? For configuring search indexing, refer to [Configure relevance search in Dynamics 365](#) for more information on indexing tables to enhance search capabilities.

NEW QUESTION 2

- (Topic 1)

You need to identify the duplicate pet records, so they can be manually merged by the carer. What must you create?

- A. Two duplicate detection jobs and two duplicate detection rules
- B. One duplicate detection job and three duplicate detection rules.
- C. Two duplicate detection jobs and three duplicate detection rules.
- D. Three duplicate detection rules only.

Answer: B

Explanation:

? To identify duplicate records, you need to configure both duplicate detection rules and duplicate detection jobs.

? Since Terra Flora requires identifying duplicate pet records across various fields, creating three duplicate detection rules is likely necessary to cover different columns (such as name, breed, and dietary requirements) in the Pet table.

? One duplicate detection job is sufficient to run these rules concurrently, scanning the database for duplicates across the specified columns. This job can be scheduled or run manually.

? Option B is correct as it ensures comprehensive coverage with three rules addressing various fields and one job to manage the duplicate detection process.

References from Microsoft Documentation:

? For guidance on setting up duplicate detection jobs and rules, refer to [Detect duplicate records in Dynamics 365](#).

NEW QUESTION 3

HOTSPOT - (Topic 1)

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

File Save and Close Actions									
Security Role: Salesperson Working on solution									
Table	Create	Read	Write	Delete	Append	Append To	Assign	Share	
Expired Process	●	●	●	●	●	●			
Lead To Opportunity Sales Process	●	●	●	●	●	●			
IoT Alert to Case Process	○	○	○	○	○	○			
Corgi Meet-up	●	●	●	○	●	●			
Onboard new pet	○	○	○	○	○	○			
New Process	●	●	●	●	●	●			
Opportunity Sales Process	●	●	●	●	●	●			
Phone To Case Process	●	●	●	●	●	●			
Translation Process	●	●	●	●	●	●			

Key				
○ None Selected	● User	● Business Unit	● Parent: Child Business Units	● Organization

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 Area

The carer can now see business process flows on pet records

- that the founder created and when the carer creates new pet records.
- that the founder created and when the carer creates new pet records.
- that the founder created and on records that the carer previously created.
- only when the carer creates new pet records.

When the carer uses the switch process dialog, they will see

- the corgi meet-up flow.
- both the corgi meet-up and onboard new pet business process flows.
- the corgi meet-up flow.

- A. Mastered
- B. Not Mastered

Answer: A

Explanation:

The configurations in the Salesperson security role will determine the access and visibility the carer has to the "Corgi meet-up" business process flow. The carer should be able to view and interact with specific business process flows on the Pet records based on the permissions configured by the founder.

? Business Process Flow Access Configuration:

? Visibility of Business Process Flows on Pet Records:

? Switch Process Dialog Visibility:

References from Microsoft Documentation:

? Microsoft's official documentation on configuring Security Roles in Dynamics 365 provides detailed guidance on setting permissions for different entities and processes. More information can be found in the Dynamics 365 security model documentation: Manage security, users, and teams

? For Business Process Flow configurations, including permissions and visibility settings, refer to the guide on Create a business process flow in Dynamics 365.

This setup ensures that the carer has the appropriate level of access to perform their duties, specifically in handling pet records and business processes like the "Corgi meet-up."

If you have further questions or need more details on this configuration, feel free to ask!

NEW QUESTION 4

- (Topic 2)

You need to build a trigger-based journey to send the "Getting started" emails requested by the global sales lead. Which trigger should you use to start the journey?

- A. Dataverse record change trigger
- B. Custom trigger with lead profile data
- C. Custom trigger with contact profile data
- D. Email Link Clicked interaction trigger

Answer: A

Explanation:

To build a trigger-based journey that sends "Getting started" emails when an opportunity is marked as "Won," the appropriate trigger to use is the Dataverse record change trigger. This trigger is specifically designed to initiate actions based on changes in Microsoft Dataverse records, which are integral to Dynamics 365. Here's the detailed reasoning:

- ? Dataverse Record Change Trigger:
- ? Why Not Other Triggers?

Microsoft Dynamics 365 References:

- ? Create and manage trigger-based journeys
- ? Work with Dataverse triggers in journeys

By using the Dataverse record change trigger, you ensure that the journey aligns directly with the sales process and automatically sends the "Getting started" email when an opportunity reaches the "Won" status, as requested by the global sales lead.

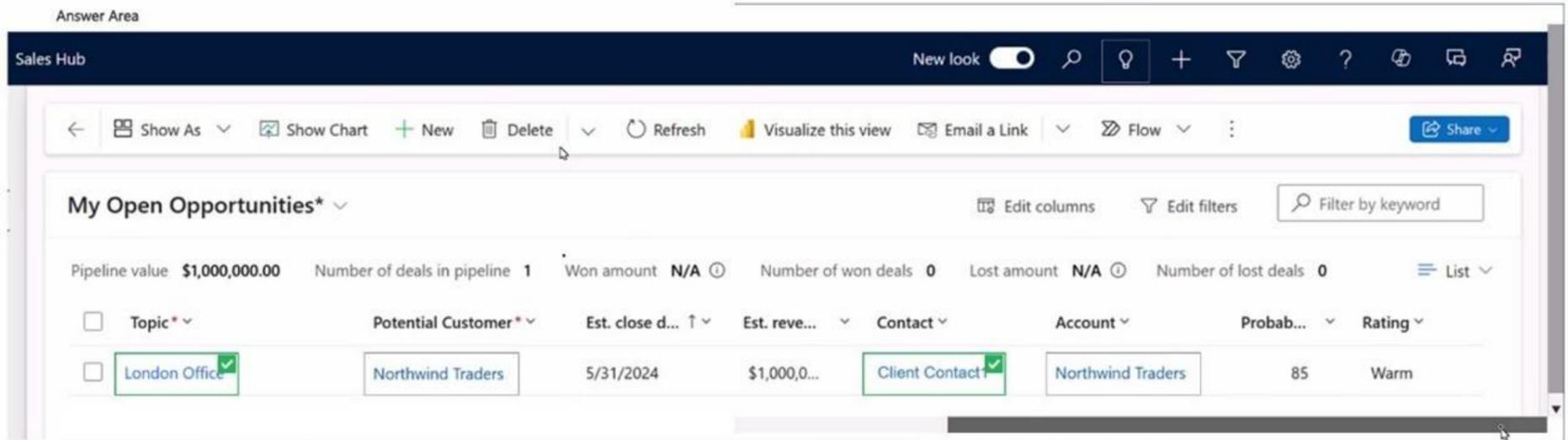
NEW QUESTION 5

HOTSPOT - (Topic 2)

BDM1 has returned from vacation and needs to catch up on their scheduled tasks and activities.

Which two items can BMD1 select to see a reminder card for the meeting BDM2 scheduled in the assistant? To answer, select the appropriate options in the answer area.

NOTE: Each correct selection is worth one point.



- A. Mastered
- B. Not Mastered

Answer: A

Explanation:

? Show As

? Visualize this view

To catch up on scheduled tasks and activities, BDM1 can use specific features in the Dynamics 365 Sales Hub interface. Here's how they work in this scenario:

? Show As:

? Visualize this view:

Microsoft Dynamics 365 References:

? Using assistant cards in Dynamics 365 Sales

? Configuring views and visualizations in Dynamics 365

By selecting these options, BDM1 can effectively access and view the assistant card related to the scheduled meeting, facilitating a quick catch-up on all pending activities.

NEW QUESTION 6

HOTSPOT - (Topic 3)

You are configuring Dynamics 365 Sales as part of a new implementation at your organization. Your organization has Sales Professional licensing.

Your organization sells over 100 different types of products across different divisions. A lot of selling occurs at conferences where sellers meet prospects and gather business cards to create leads.

After reviewing the requirements from your business stakeholders, you identify that:

* 1. Sellers sometimes only want to convert leads gathered at events to contacts before they start tracking any deals with that contact.

* 2. Sellers must be given multiple different options for specifying the final status of deals they have been tracking.

Your current System Settings is as follows:

System Settings

Set system-level settings for Microsoft Dynamics 365.



General | Formats | Auditing | Email | Marketing | Customization | Reporting | Calendar | Goals | Sales | Service | Synchronization | Mobile Client | Previews

Discount calculation method | Line item

Set maximum number of properties allowed for a product or bundle
 Maximum number of properties that are allowed for a product or bundle:

Customize close opportunity form
 Enable custom fields on closing form to get more info on the closed opportunity: Yes No

Make price lists optional
 Allow line item creation without an associated price list [Learn more](#): Yes No

Qualify lead experience
 Create Account, Contact and Opportunity records by default upon qualifying a lead. ("No" prompts users to choose which record types are created): Yes No

Save business card images
 Always retain business card images after scanning: Yes No

Adding products
 Enhanced add product experience [Learn more](#): Yes No

Use the drop-down menus to select the answer choice that answers each question. NOTE: Each correct selection is worth one point.

Answer Area

Requirement from business stakeholders

Which setting should you update to meet requirement #1?

Which setting should you update to meet requirement #2?

System setting

Quality lead experience

Customize close opportunity form

Make price lists optional

Quality lead experience

Save business card images

Adding products

Customize close opportunity form

Customize close opportunity form

Make price lists optional

Quality lead experience

Save business card images

Adding products

- A. Mastered
- B. Not Mastered

Answer: A

Explanation:

Answer Area

Requirement from business stakeholders

Which setting should you update to meet requirement #1?

Which setting should you update to meet requirement #2?

System setting



NEW QUESTION 7

- (Topic 3)

You are creating a pricing list in Dynamics 365 Sales. All prices must end in You need to select the function that establishes this pricing requirement. What should you use?

- A. Rounding Policy
- B. Percentage
- C. Rounding Amount
- D. Pricing Method

Answer: A

Explanation:

In Dynamics 365 Sales, the Rounding Policy feature allows you to control how pricing values are rounded, such as ensuring prices end in specific digits (e.g., nearest whole number or a specified decimal value). The Rounding Policy can be configured to automatically adjust prices to the nearest whole value or any other desired rounding amount, ensuring consistency with pricing requirements. This feature is especially useful for scenarios where pricing must conform to specific formats, such as all prices ending in ??0?? or ??5.??
 Reference: Microsoft Documentation - Configure Rounding Policies for Price Lists

NEW QUESTION 8

- (Topic 3)

A company's IT department has a .CSV file stored on one of their Shared Documents folders within their Microsoft SharePoint sites. The data from the .CSV file is ingested into Dynamics 365 Customer Insights - Data.

The file contains a row header and columns of different types, such as quantities and prices. The file also contains some rows with a high proportion of nulls. You need to clean and transform the data in Customer Insights - Data to be ready for unification.

Solution: Transform the first row to be used as headers, define column types to be the appropriate field types and name the query. Select Next and your data is now ready for unification.

Does this meet the goal?

- A. Yes
- B. No

Answer: B

Explanation:

While transforming the first row to be used as headers and defining column types are necessary steps, the solution does not address removing rows with high proportions of nulls. Rows with significant null values can interfere with the quality of the unification process in Customer Insights - Data. Therefore, this solution does not fully meet the goal as it does not handle data quality issues caused by null values.

NEW QUESTION 9

- (Topic 3)

You need to ensure that a user named User1 can assign salespeople to sales territories. The solution must use the principle of least privilege. To which security role should you assign User1?

- A. System customizer
- B. Sales team member
- C. Vice president of sales
- D. Salesperson

Answer: C

Explanation:

To assign salespeople to sales territories, the user needs permissions to manage territory assignments, which is typically a higher-level responsibility. The Vice president of sales role includes privileges related to managing sales territories, unlike the Sales team member or Salesperson roles, which are more focused on direct sales tasks.

TheSystem customizerrole does not specifically grant territory management permissions and is more focused on customization and configuration tasks.
Reference:Microsoft Documentation - Security Roles and Privileges in Dynamics 365

NEW QUESTION 10

- (Topic 3)

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.

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

Answer: B

Explanation:

For team members to view lead scoring insights, they must have appropriate permissions, specifically theLead Score Viewerrole in Dynamics 365 Customer Insights - Journeys.

Even though the lead scoring models are published and live, without the correct security role, users will not have access to view the insights.

Assigning theLead Score Viewerrole ensures that the users have the necessary access rights to review the lead scoring insights generated by the models.

Reference:Microsoft Documentation - Configure Security Roles for Lead Scoring

NEW QUESTION 10

- (Topic 3)

You are a Dynamics 365 Sales administrator. You are setting up a product catalog. You need to configure the base unit group. Which quantity or measurement should you configure?

- A. the least frequently used to sell the service
- B. the lowest needed to sell the product or service
- C. the most frequently used to sell the service
- D. the highest needed to sell the product or service

Answer: B

Explanation:

? Understanding the Base Unit in Dynamics 365 Sales:

? Selecting the Base Unit - Why the Lowest Quantity?

Reference:Microsoft Documentation - Create Unit Groups and Units

Benefits of Using the Lowest Needed Unit:

Configuring the base unit as the smallest measurable unit enables flexibility and supports various sales scenarios without restrictions. It simplifies the management of units and ensures that other unit variations align correctly in the product catalog.

By setting the base unit to thelowest quantity needed to sell the product or service, you establish a robust foundation for building out the unit group and accommodating different sales quantities in Dynamics 365 Sales.

NEW QUESTION 15

HOTSPOT - (Topic 3)

A sales manager wants to set up goals for all salespeople. The goal measurement is based on the total outgoing calls finished each year. The goals for the fiscal year are based on a calendar year (January - December).

You need to create the rollup query for the goal metrics.

Which option should you select? To answer, select the appropriate options in the answer area.

NOTE: Each correct selection is worth one point.

Answer Area

Parameter	Option
Date field	<div style="border: 1px solid gray; padding: 2px;"> Actual End ▼ Due Modified On Actual Start Actual End </div>
Rollup field	<div style="border: 1px solid gray; padding: 2px;"> Actual (integer) ▼ Actual (integer) Custom Rollup Field (Integer) In-Progress (Integer) </div>
Source Record Type Status	<div style="border: 1px solid gray; padding: 2px;"> Completed ▼ Made Received Open Completed </div>

- A. Mastered
- B. Not Mastered

Answer: A

Explanation:

A white background with black text Description automatically generated
 ? Date Field - Actual End:

NEW QUESTION 20

- (Topic 3)

You are the Dynamics 365 administrator for a group of financial advisors. Advisors must use one business process flow to guide them through the standard lead to invoice process. Each table has the following number of stages and steps:

Table	Number of Stages	Number of Steps per Stage
Lead	10	10
Opportunity	10	10
Quote	10	10
Order	10	10
Invoice	10	10

You need to modify the business process flow to make it valid. What should you reduce?

- A. number of steps per stages
- B. number of tables
- C. total number of steps
- D. total number of stages

Answer: D

Explanation:

In Dynamics 365, business process flows are limited to 30 stages across all entities within a single process. Since each entity here (Lead, Opportunity, Quote, Order, Invoice) has 10 stages, the total would be 50 stages, exceeding the limit. To meet the requirements, you need to reduce the total number of stages to comply with this limitation. Reducing the total number of steps per stage, tables, or steps won't directly address the stage limit issue. Reference: Microsoft Documentation - Business Process Flow Limits

NEW QUESTION 22

- (Topic 3)

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

Answer: D

Explanation:

? Requirement Analysis:

? Solution - Enabling Duplicate Detection:

? Steps to Enable Duplicate Detection for Leads Based on Email:

Reference:Microsoft Documentation - Configure Duplicate Detection Rules in Dynamics 365

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 25

- (Topic 3)

A company uses Microsoft SharePoint document management in Dynamics 365 Sales to store contracts.

The company wants only the contracts team to have access to the documents. The contracts team has a custom security role.

You need to restrict privileges to secure the documents. What should you do?

- A. Create a new security role in Dynamics 365 Sales.
- B. Update the users list in the SharePoint site.
- C. Update privileges in the Dynamics 365 Sales security role of the contract team.
- D. Create a new group in the SharePoint site.

Answer: B

Explanation:

Since the company usesMicrosoft SharePointfor document storage, access to documents is controlled throughSharePoint permissionsrather than Dynamics 365 security roles.

To restrict document access to only the contracts team, you shouldupdate the users list in the SharePoint sitewhere the documents are stored. This involves configuring SharePoint permissions to ensure that only the contracts team (or a specific SharePoint group associated with them) has access to the document library where contracts are stored.

Reference:Microsoft Documentation - Manage SharePoint Permissions for Document Management in Dynamics 365

NEW QUESTION 26

- (Topic 3)

An organization is using Microsoft Power Query when connecting to data sources in Dynamics 365 Customer Insights - Data. 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 must create a separate Power Query data source for each table you wish to ingest.
- B. You can only add additional columns to the dataset in Power Query before the data source is created in Customer Insights - Data.
- C. After you save a Power Query data source, you have to manually trigger the initial refresh process.
- D. You can add additional tables to the data source using Get Data functionality in the Power Query.

Answer: D

Explanation:

In Dynamics 365 Customer Insights - Data, when using Power Query to ingest data, theGet Datafunctionality 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.

Reference:Microsoft Documentation - Use Power Query in Customer Insights

NEW QUESTION 29

- (Topic 3)

You are the Dynamics 365 Sales administrator for an electronics company.

The sales team is having difficulty locating different products in the same category - for instance; all versions of flat screen TV available.

You need to make it easier for the sales team to navigate through products via taxonomy. What should you use?

- A. Product families
- B. Product unit groups
- C. Related products
- D. Product bundles

Answer: A

Explanation:

? Product familiesallow you to group related products under a common category, making it easier for the sales team to navigate and find products within the same category, such as all versions of flat-screen TVs.

? By usingProduct families, you can organize products into a hierarchical structure that reflects their categorization, enabling sales users to browse and select

items more efficiently within Dynamics 365 Sales.

Reference:Microsoft Documentation - Organize Products Using Product Families

Using product families, you can streamline the user experience and improve navigation within the product catalog by grouping similar products together, which simplifies the search process for sales teams.

NEW QUESTION 31

DRAG DROP - (Topic 3)

You have enabled Dynamics 365 App for Outlook for your sales team.

Users report that they are dissatisfied that they must track the emails manually, so you propose folder-level tracking.

You need to enable folder-level tracking in your environment in order for your users to configure the rules.

Which three actions should you perform in sequence before saving your changes? To answer, move the three appropriate actions from the list of actions to the answer area. Arrange the three actions in the correct order.

Actions	Order
<input type="checkbox"/> Select Server Profiles.	
<input type="checkbox"/> Turn tracking "On."	
<input type="checkbox"/> Disable Use tracking token.	
<input type="checkbox"/> Access Environment Settings in the Power Platform Admin Center.	
<input type="checkbox"/> Select Email Tracking settings.	
<input type="checkbox"/> Enable Use folder-level tracking from Exchange folders.	

- A. Mastered
- B. Not Mastered

Answer: A

Explanation:

? Access Environment Settings in the Power Platform Admin Center:

NEW QUESTION 33

HOTSPOT - (Topic 3)

You are a Dynamics 365 administrator. The sales team uses goals to track actual to target opportunity amounts.

A salesperson reviews their goals chart and observes the following:

- An opportunity updated today is not included in the chart.
- The time period for the goal is not accurate. You need to resolve these issues.

What should you do? To answer, select the appropriate options in the answer area. NOTE: Each correct selection is worth one point.

Issue	Action
Opportunity updated today is NOT included in the chart.	<input type="checkbox"/> Update roll-up settings. <input type="checkbox"/> Update goal criteria. <input checked="" type="checkbox"/> Update roll-up settings. <input type="checkbox"/> Update personal options.
Time period for the goal is inaccurate.	<input type="checkbox"/> Have the manager update the goal. <input checked="" type="checkbox"/> Have the salesperson update the goal. <input checked="" type="checkbox"/> Have the manager update the goal.

- A. Mastered
- B. Not Mastered

Answer: A

Explanation:

? Opportunity Updated Today is Not Included in the Chart:Update roll-up settings

NEW QUESTION 37

- (Topic 3)

A company is implementing the Dynamics 365 Sales mobile app.

The company requires setup of several push notifications for sellers who use the app. You need to create the push notifications.

Which feature should you use?

- A. Plug-in

- B. Cloud flow
- C. Classic Dataverse workflow

Answer: B

Explanation:

? Understanding the Requirement:

? Solution - Using Cloud Flows:

Reference:Microsoft Documentation - Set Up Cloud Flows with Power Automate

Steps to Create a Cloud Flow for Push Notifications:

Go toPower Automateand create a new Cloud Flow.

Set up a trigger based on a Dynamics 365 event (e.g., when a record is created or updated).

Add an action to send a push notification to the user??s mobile device.

Customize the notification message and publish the flow to activate the notifications. Using Cloud Flows in Power Automate enables dynamic push notifications for mobile

users, providing timely updates to sales team members based on real-time data changes.

NEW QUESTION 38

- (Topic 3)

You are a marketing automation consultant.

Your customer wants to understand the benefits of using the query assist feature in Dynamics 365 Customer Insights - Journeys. Why might your customer want to use this feature?

- A. Using the natural language feature allows marketers to build segments using simple words to specify what audience they want to target.
- B. When looking at a marketing journey created by another user, the natural language feature makes it easier to understand the logic of the journey and decide whether it meets the campaign goals.
- C. Using the natural language feature allows marketers to search Dataverse to retrieve single records using a right-hand pane on the model-driven app
- D. When looking at a segment created by another user, the natural language feature makes it easier to identify which journeys the segment is used in.

Answer: A

Explanation:

TheQuery Assistfeature in Dynamics 365 Customer Insights - Journeys utilizes natural language processing to help marketers easily build segments.

By using simple language, marketers can describe their target audience without needing to know complex query syntax, making segmentation more accessible.

This feature is designed to streamline segment creation, allowing marketers to quickly define their audience with natural language inputs, which is particularly useful for users who may not be familiar with technical query building.

Reference:Microsoft Documentation - Use Query Assist for Segmentation in Customer Insights

NEW QUESTION 43

DRAG DROP - (Topic 3)

Your organization works with larger customers (accounts) that can have a single holding and then many subsidiaries through different levels in a parent-child relationship.

The chief commercial officer wants the sales team to start creating different account plans for each individual subsidiary.

You need to create a new custom account plan table so that records can have the same parent-child relationships as the account records. The relationships must be able to be visualized in a hierarchy.

Which four actions should you perform in sequence before saving and publishing your changes? To answer, move the four appropriate actions from the list of actions to the answer area. Arrange the four actions in the correct order.

Actions

Order

- ☰ Create a N:N self-referential relationship and mark the relationship as hierarchical.
- ☰ Create a new Card form and select this as the default card.
- ☰ Create a new Quick View form and select this as the default form.
- ☰ Create a new account plan table.
- ☰ Open the advanced Relationship settings.
- ☰ Create a 1:N self-referential relationship and mark the relationship as hierarchical.
- ☰ Go to the Hierarchy Settings grid view.

- A. Mastered
- B. Not Mastered

Answer: A

Explanation:

The correct order of actions to create a new custom account plan table with a hierarchical parent-child relationship visualization is as follows:

? Create a new account plan table.

? Create a 1

self-referential relationship and mark the relationship as hierarchical.

? Open the advanced Relationship settings.

? Go to the Hierarchy Settings grid view.

Step by Step Comprehensive Detailed Explanation with ALL Microsoft Dynamics 365 References:

? Create a New Account Plan Table:

NEW QUESTION 47

- (Topic 3)

You are creating a forecast. You want to include only opportunities that sell You need to configure this within the system. What should you configure?

- A. separate views
- B. additional filters
- C. multiple columns
- D. premium forecasting
- E. advanced features

Answer: B

Explanation:

? Requirement Analysis:

? Solution - Using Additional Filters:

? Steps to Configure Additional Filters in Forecasting:

Reference:Microsoft Documentation - Configure Filters in Forecasts

Benefits of Using Filters:

Filters provide flexibility to customize the forecast view, allowing for detailed segmentation of opportunities based on specific conditions.

This approach ensures that the forecast reflects only the opportunities that are relevant to your defined criteria, which in this case is opportunities that have "sold."

By using additional filters, you can effectively control which opportunities are included in your forecast, aligning it with specific business needs and improving forecast accuracy.

NEW QUESTION 48

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