



Microsoft

Exam Questions MB-280

Microsoft Dynamics 365 Customer Experience Analyst

NEW QUESTION 1

- (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 2

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

The screenshot shows the 'Security Role: Salesperson' configuration page. The 'Business Process Flows' tab is selected. A table lists various process flows and their permissions (Create, Read, Write, Delete, Append, Append To, Assign, Share). The 'Corgi Meet-up' flow has 'Create', 'Read', 'Write', 'Append', and 'Append To' permissions selected (indicated by green circles), while 'Assign' and 'Share' are not selected (indicated by red circles). Other flows like 'Expired Process', 'Lead To Opportunity Sales Process', 'IoT Alert to Case Process', 'Onboard new pet', 'New Process', 'Opportunity Sales Process', 'Phone To Case Process', and 'Translation Process' have all permissions selected.

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 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 3

- (Topic 1)

You have added the timeline control to the Pet main form, then saved and published your changes. You need to configure the timeline to display related Pet activities as required by Terra Flora. Which two actions should you perform? Each correct answer presents a complete solution. Choose two, NOTE: Each correct selection is worth one point.

A. In the Record types of the timeline settings, uncheck the Notes option.

B. In the Activity area of the timeline settings, remove all activity types, except for Task

C. Email and Phone Call.

D. In the Record types of the timeline settings, uncheck the Posts option.

E. In the Record types of the timeline settings, uncheck the Activities option.

F. In the Notes area of the timeline settings, uncheck the Remove notes title when authoring option.

Answer: BC

Explanation:

? The timeline control in Dynamics 365 allows users to view and interact with activities, notes, and posts associated with a record. To meet Terra Flora's requirements for displaying specific activities, you need to customize the timeline to show only certain activity types.

? Removing All Other Activity Types Except Task, Email, and Phone Call (Option B):

? Unchecking the Posts Option (Option C):

? Other Options Explanation:

References from Microsoft Documentation:

? For configuring and customizing the timeline control, refer to Customize a timeline control in Dynamics 365 documentation for detailed steps on modifying timeline settings and activity visibility.

NEW QUESTION 4

- (Topic 1)

You need to configure the required audit settings.

Which two actions should you perform? Each correct answer presents part of the solution. Choose two. NOTE: Each correct selection is worth one point.

A. Enable auditing on the Dietary requirements column.

B. Enable auditing on the Pet table.

C. Enable auditing on the Contact table.

D. Enable auditing on the Email address column.

E. Enable Start read auditing in system settings.

F. Enable Audit user access in system settings.

Answer: AB

Explanation:

? Enable Auditing on Columns (Options A and D):

? Enable Auditing on Pet and Contact Tables (Options B and C):

? Enable Audit User Access (Option F):

? Option E (Start Read Auditing):

References from Microsoft Documentation:

? For setting up auditing, see Auditing overview for Dynamics 365.

NEW QUESTION 5

DRAG DROP - (Topic 2)

You need to configure a new Customer Insights - Journeys form to satisfy the digital sales team lead's request.

Which five required actions should you perform in sequence? To answer, move the five appropriate actions from the list of actions to the answer area. Arrange the five actions in the correct order.

Actions

- ☰ Set the form duplicate records strategy to the audience default strategy.
- ☰ Set the form target audience to leads.
- ☰ Create a custom matching strategy.
- ☰ Create a new form.
- ☰ Set the form target audience to contacts.
- ☰ Select a form template.
- ☰ Set the form duplicate records strategy to the custom form matching strategy.
- ☰ Publish the form.

Order

- A. Mastered
- B. Not Mastered

Answer: A

Explanation:

Here??s the correct sequence to configure a new Customer Insights - Journeys form to handle lead duplicates automatically, as per the requirements:

Create a new form:

Start by creating a new form within Customer Insights - Journeys. This is the initial step to set up a form that will capture new leads.

Select a form template:

Choose a template that best fits the purpose of the form. This provides a structure for the form fields and layout, streamlining the setup process.

Set the form target audience to leads:

Since the form will be capturing lead information, specify that the form??s target audience is ??leads.?? This will ensure that the data is processed and stored as lead records.

Set the form duplicate records strategy to the audience default strategy:

Define how duplicate records are managed. First, apply the default duplicate record strategy for leads. This sets an initial strategy for managing duplicates.

Publish the form:

After completing the setup and configuring the necessary options, publish the form to make it available for use.

Additional Context:

The Create a custom matching strategy and Set the form duplicate records strategy to the custom form matching strategy steps are optional and can be used for further refinement if the default strategy does not meet specific requirements for matching leads based on certain criteria.

By following these steps, you ensure the form is configured for capturing leads and manages duplicates effectively based on the default duplicate record strategy.

Microsoft Dynamics 365 References:

Set up a Customer Insights - Journeys form Duplicate Detection Rules in Dynamics 365

NEW QUESTION 6

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.

Answer Area

Topic	Potential Customer	Est. close d...	Est. reve...	Contact	Account	Probab...	Rating
<input checked="" type="checkbox"/> London Office	Northwind Traders	5/31/2024	\$1,000,0...	<input checked="" type="checkbox"/> Client Contact	Northwind Traders	85	Warm

- 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 7

- (Topic 3)

One of the data sources being ingested into Dynamics 365 Customer Insights - Data is Microsoft Dataverse. During the unification process, you need to identify the primary key.

Which three data types can you use as a primary key attribute? Each correct answer presents a complete solution. Choose three. NOTE: Each correct selection is worth one point.

A. Integer

B. Whole Number

C. String

D. Boolean

E. GUID

Answer: BCE

Explanation:

In Dynamics 365 Customer Insights - Data, primary key attributes must uniquely identify records and be consistent across the data source.

Whole Number and GUID are commonly used data types for primary keys because they can uniquely identify records and are natively supported for primary keys in databases. String can also be used as a primary key if it uniquely identifies each record (e.g., an email address).

Integer and Boolean are generally not used as primary keys in Customer Insights because they may not provide unique identifiers suitable for all scenarios.

Reference: Microsoft Documentation - Configure Primary Key in Dynamics 365 Customer Insights

NEW QUESTION 8

- (Topic 3)

The remote sales workforce of your organization has been using the integrated Teams chat to collaborate internally. To save time, you indicate to the sales leader that suggested contacts can be displayed when a seller starts a new connected chat.

The sales leader asked you to configure the ability to use suggested contacts.

Which three users can you use as a rule for suggesting contacts? Each correct answer presents a complete solution. Choose three.

NOTE: Each correct selection is worth one point.

A. The user assigned as your manager on your system user record.

B. The Record Owner of your linked business unit.

C. The Record Owner of the initiating record.

D. The Created By of the initiating record.

E. The Last Modified By of the initiating record.

F. The system user who updated a timeline activity on the initiating record.

Answer: ACD

Explanation:

? Manager on System User Record:

? Record Owner of the Initiating Record:

? Created By of the Initiating Record:

Reference: Microsoft Documentation - Configure Suggested Contacts for Dynamics 365 and Teams

These selections align with the rules typically used for suggesting contacts in integrated Teams chats, ensuring relevant parties are automatically suggested based on record associations and user relationships.

NEW QUESTION 9

HOTSPOT - (Topic 3)

Your organization has been noticing some peculiar field changes on certain records and wants to know what is causing this. You need to audit user access and updates for several custom tables.

Which two boxes must be checked as prerequisites steps? To answer, select the appropriate check boxes in the answer area. NOTE: Each correct selection is worth one point.

Answer Area

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

Audit Settings

- Start Auditing
- Audit user access
- Start Read Auditing View these logs in the Office 365 Security & Compliance Center. [Learn more](#)

Enable Auditing in the following areas

- Common Entities
- Sales Entities
- Marketing Entities
- Customer Service Entities

For a complete list of Entities and their Audit states visit [Entity and Field Audit Settings](#).

OK Cancel

- A. Mastered
- B. Not Mastered

Answer: A

Explanation:
 ? Start Auditing:

NEW QUESTION 10

DRAG DROP - (Topic 3)

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

- In the **Forms** area, create a quick create form with the required columns.
- In the **Forms** area, create a card form with the required columns.
- Select **Tables > Lead**.
- In the **Forms** area, create a quick view form with the required columns.
- Select **Tables > Opportunity**.
- In the **Forms** area, select the main form you wish to update.
- Add the quick view form as a component.

- A. Mastered
- B. Not Mastered

Answer: A

Explanation:

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The correct order of actions to enable sales users to view information from custom attributes on leads directly within opportunity records, without navigating to the lead record, is as follows:

? Select Tables > Lead.

? In the Forms area, create a quick view form with the required columns.

? Select Tables > Opportunity.

? In the Forms area, select the main form you wish to update.

? Add the quick view form as a component.

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

? Select Tables > Lead:

NEW QUESTION 10

- (Topic 3)

You need to enable the Dynamics 365 App for Outlook for the sales team.

You need to perform the prerequisite actions before you can add the app for all users. Which two actions should you perform? Each correct answer presents part of the solution.

Choose two.

NOTE: Each correct selection is worth one point.

A. Enable mailboxes.

B. Add the Dynamics 365 App to Outlook desktop app.

C. Add the Dynamics 365 App for Outlook security role.

D. Enable sending on behalf of other users setting.

Answer: AC

Explanation:

Enable Mailboxes:

? To use the Dynamics 365 App for Outlook, each user's mailbox must be enabled for server-side synchronization. This ensures that emails, appointments, and tasks can sync between Outlook and Dynamics 365.

? Without enabling the mailboxes, the synchronization won't be functional, making it a critical prerequisite.

Reference:Microsoft Documentation - Enable Mailboxes for Dynamics 365

Add the Dynamics 365 App for Outlook Security Role:

Users need to be assigned the Dynamics 365 App for Outlook security role to access the app. This role grants the necessary permissions to interact with Dynamics 365 through Outlook.

Assigning this role ensures that users have the correct access rights to use the app within their Outlook environment.

Reference:Microsoft Documentation - Security Roles for Dynamics 365 App for Outlook

NEW QUESTION 11

- (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 15

- (Topic 3)

You are a Dynamics 365 Sales administrator. You configure a forecast template that uses the Forecast category as a starting point for a layout for the sales team. The sales manager wants the value of the Lost column to come from the Total Detail Amount instead of the default value because the revenue is always driven by the items. You need to make the change. What should you do?

A. Edit the existing forecast and update the Amount column in the layout.

B. Edit the existing forecast, remove the Lost column, and add a new calculated column.

C. Create a new forecast and update the Amount column in the layout.

D. Create a new forecast, remove the Lost column, and add a new calculated column.

Answer: A

Explanation:

Since the sales manager wants the Lost column in the forecast to reflect the Total Detail Amount, which is item-driven, you should update the Amount column in the existing forecast layout.

By editing the existing forecast and changing the source for the Amount column to the Total Detail Amount, you can ensure the forecast accurately reflects item-based revenue calculations without needing to create a new forecast or add calculated columns. Reference:Microsoft Documentation - Configure Forecasts in

Dynamics 365 Sales

NEW QUESTION 17

DRAG DROP - (Topic 3)

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.

Actions	Answer area
<div style="border: 1px solid gray; padding: 2px; margin-bottom: 2px;"> ☰ Create a sequence. </div> <div style="border: 1px solid gray; padding: 2px; margin-bottom: 2px;"> ☰ Add tasks to the sequence. </div> <div style="border: 1px solid gray; padding: 2px; margin-bottom: 2px;"> ☰ Connect the existing segment to the sequence. </div> <div style="border: 1px solid gray; padding: 2px;"> ☰ Activate the sequence. </div>	

- A. Mastered
- B. Not Mastered

Answer: A

Explanation:

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The correct order of actions to create a sequence of tasks and assign them to lead records based on the same criteria as assignment rules is as follows:

- ? Create a sequence.
- ? Add tasks to the sequence.
- ? Connect the existing segment to the sequence.
- ? Activate the sequence.
- ? Create a Sequence:

NEW QUESTION 22

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:

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? Date Field - Actual End:

NEW QUESTION 26

- (Topic 3)

The analytics team at your organization has created Power BI reports that enrich data about your accounts from Dynamics 365 Sales with data NOT contained in Dynamics 365 Sales. The Power BI reports are referenced by your executive leadership as the primary source of truth about account success metrics. Sales leadership has requested that sales users can see these insights about the accounts they have access to within Dynamics 365 Sales. You need to enable the insights to be available to sales users in Dynamics 365 Sales. What should you do?

- A. Provide a link to the Power BI report in the ribbon on the account form.
- B. Create a dashboard in Dynamics 365 Sales that contains account data.
- C. Embed the Power BI Dashboard as a dashboard in the Dynamics 365 Sales application.
- D. Embed the Power BI report using contextual filtering for accounts.

Answer: D

Explanation:

To make Power BI insights available within Dynamics 365 Sales, specifically contextualized for accounts, you should embed the Power BI report with contextual filtering. This ensures that the report dynamically adjusts based on the specific account record a user is viewing. Embedding with contextual filtering enables sales users to see account-specific insights directly within the Dynamics 365 interface, improving accessibility and relevance. Reference: Microsoft Documentation - Embed Power BI Reports in Dynamics 365 Sales

NEW QUESTION 29

- (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 33

- (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 uses Microsoft SharePoint for document storage, access to documents is controlled through SharePoint permissions rather than Dynamics 365 security roles.

To restrict document access to only the contracts team, you should update the users list in the SharePoint site where 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 34

- (Topic 3)

You use business process flows for all Dynamics 365 opportunities.

Some opportunities are closed before business process flow durations are calculated. You need to ensure that business process flow duration values are calculated. Solution: Create a flow to update the Status Reason of the business process flow table

record to "Finished" and the Status to "Inactive" when the opportunity is won. Does the solution meet the goal?

- A. Yes
- B. No

Answer: A

Explanation:

Creating a flow to update the Status Reason of the business process flow table record to "Finished" and the Status to "Inactive" upon opportunity closure ensures that the business process flow is marked as complete. This triggers the calculation of duration values. This solution explicitly handles the process completion state, which guarantees that the business process flow duration is recorded even if the opportunity is won prematurely.

NEW QUESTION 36

HOTSPOT - (Topic 3)

A company is using Dynamics 365 Sales to track their sales pipeline.

Sales managers require their forecasting to include reasons why opportunities were lost, including losses to competitors.

You need to configure the sales process WITHOUT using custom code.

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

Answer Area

Requirement	Action
Add the type of loss.	<ul style="list-style-type: none"> Modify the Status Reason option set. Modify the Status Reason option set. Modify the Forecast category option set. Create a new Choices column.
Record the loss for forecasting.	<ul style="list-style-type: none"> Modify the Opportunity Close form. Modify the Opportunity Close form. Modify the Opportunity Sales Process business process flow. Modify the Opportunity Forecast Category Mapping process Dataverse classic workflow.

- A. Mastered
- B. Not Mastered

Answer: A

Explanation:

Answer Area

Requirement	Action
Add the type of loss.	<ul style="list-style-type: none"> Modify the Status Reason option set. Modify the Status Reason option set. Modify the Forecast category option set. Create a new Choices column.
Record the loss for forecasting.	<ul style="list-style-type: none"> Modify the Opportunity Close form. Modify the Opportunity Close form. Modify the Opportunity Sales Process business process flow. Modify the Opportunity Forecast Category Mapping process Dataverse classic workflow.

NEW QUESTION 39

- (Topic 3)

A company plans to use server-side synchronization to synchronize emails, tasks, and appointments between Microsoft Exchange and Dynamics 365 Sales.

The salespeople want to know when their emails will be synced.

You need to describe the server-side synchronization frequency for the salespeople.

How should you describe the frequency?

- A. user-defined
- B. constant
- C. equal intervals
- D. dependent on volume

Answer: C

Explanation:

Server-side synchronization typically syncs at equal intervals, which can be configured in Dynamics 365. These intervals determine how often data is synchronized between Microsoft Exchange and Dynamics 365 Sales, affecting emails, tasks, and appointments.

The synchronization frequency can be adjusted by the administrator but operates at consistent, regular intervals by default.

Reference: Microsoft Documentation - Server-Side Synchronization and Sync Intervals

NEW QUESTION 41

DRAG DROP - (Topic 3)

A company uses Dynamics 365 Sales to manage product lines.

You need to set up the product catalog, including the ability for sellers to apply quantity discounts.

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.

NOTE: More than one order of answer choices is correct. You will receive credit for any of the correct orders you select.

Actions

Answer area

- ☰ Create units.
- ☰ Add products.
- ☰ Create price lists.
- ☰ Add price list items.
- ☰ Create discount lists.

- A. Mastered
- B. Not Mastered

Answer: A

Explanation:

The correct order of actions to set up a product catalog, including the ability for sellers to apply quantity discounts, is as follows:

- ? Create units.
- ? Add products.
- ? Create price lists.
- ? Add price list items.
- ? Create discount lists.
- ? Create Units:

NEW QUESTION 46

- (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, remove rows that contain null values, and name the query. Select Next and your data is now ready for unification.

Does this meet the goal?

- A. Yes
- B. No

Answer: A

Explanation:

Transforming the first row to be used as headers, removing rows with null values, and naming the query prepares the data appropriately for unification in Customer Insights - Data.

By setting the headers and removing rows with high proportions of nulls, the data becomes cleaner and more structured, which is essential for successful unification in Customer Insights. Therefore, this solution meets the goal of preparing the data for unification.

NEW QUESTION 47

- (Topic 3)

You use business process flows for all Dynamics 365 opportunities. Some opportunities are closed before business process flow durations are calculated. You need to ensure that business process flow duration values are calculated.

Solution: Change the opportunity to an inactive state. Does this meet the goal?

- A. Yes
- B. No

Answer: A

Explanation:

Changing the opportunity to an inactive state allows for the calculation of business process flow duration values, as this state transition prompts the system to finalize any duration metrics associated with the process flow.

Business process flows calculate duration upon completion or transition of the process, so marking the opportunity as inactive triggers the system to calculate these durations.

NEW QUESTION 48

- (Topic 3)

A battery manufacturer wants to sell their batteries in boxes of 12 and cases of 24 boxes. You need to set up a unit group so that the manufacturer can sell different quantities. What should you create first?

- A. primary unit
- B. related unit
- C. base unit

Answer: C

Explanation:

In Dynamics 365 Sales, when setting up a unit group, you must first define the base unit. This is the fundamental unit of measurement for a product and serves as the foundation for defining related units within the group. For the battery manufacturer, defining a base unit (such as a single battery) is necessary before configuring related units for boxes of 12 and cases of 24 boxes, as these will be multiples or related units derived from the base unit. Reference: Microsoft Documentation - Create Unit Groups and Units

NEW QUESTION 51

HOTSPOT - (Topic 3)

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.

Answer Area

Scenario	Action
Determine the price of the product bundle.	<ul style="list-style-type: none"> Use the lunch bundle price. 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. Add another line item for sandwiches with the default price.
Increase the number of sodas at no additional charge.	<ul style="list-style-type: none"> Increase the quantity of sodas in the line item. 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.
Increase the number of sandwiches and charge the price list price for each additional sandwich.	<ul style="list-style-type: none"> 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. Add another line item for sandwiches with the default price. Delete the sandwich line item from the bundle and add a new line item for all the sandwiches with the default price.

- A. Mastered
- B. Not Mastered

Answer: A

Explanation:

? Determine the Price of the Product Bundle: Use the lunch bundle price

NEW QUESTION 54

- (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 to Power Automate and 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 59

- (Topic 3)

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

Answer: AC

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 contactable 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.

Reference: Microsoft Documentation - Data Unification Process in Customer Insights

NEW QUESTION 64

- (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 65

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