

Exam Questions MB-280

Microsoft Dynamics 365 Customer Experience Analyst

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NEW QUESTION 1

- (Topic 1)

You need to ensure the active stage of the business process flow is visible in the view. Which two actions should you perform? Each correct answer presents a complete solution. Choose two. NOTE: Each correct selection is worth one point.

- A. Add a page for the Onboard new pet table to the Sales Professional app.
- B. Add columns from the stable to the Active Onboard new pet view.
- C. Add columns from the Pet table to the All Onboard new pet view.
- D. Create a new column on the Pet table named "Onboarding stage" and add it to the Active pets view.

Answer: BD

Explanation:

? Adding Columns to the Active Onboard New Pet View (Option B):

? Creating and Adding a New "Onboarding Stage" Column (Option D):

? Other Options:

References from Microsoft Documentation:

? For configuring views and columns in Dynamics 365, refer to Create and edit views.

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									
Details	Core Records	Marketing	Sales	Service	Business Management	Service Management	Customization	Missing Entities	Business Process Flows
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 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 5

- (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 Pettable.
- 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, seeAuditing overview for Dynamics 365.

NEW QUESTION 6

HOTSPOT - (Topic 2)

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 Area

Open Northwind Opportunities* ▾										Edit columns	Edit filters	Filter by keyword						
Pipeline value		\$3,975,000.00	Number of deals in pipeline		5	Won amount		N/A ⓘ	Number of won deals		0	Lost amount		N/A ⓘ	Number of lost deals		0	List ▾
<input type="checkbox"/>	Topic* ▾	Potential Customer* ▾	Est. close ... ↑ ▾	Est. revenue ▾	Contact ▾	Account ▾	Proba... ▾	Rating ▾	En									
<input type="checkbox"/>	London Office ✓	Northwind Traders	6/4/2024	\$1,000,000.00	Client Contact1	Northwind Traders	75	Warm										
<input type="checkbox"/>	Toronto Office ✓	Northwind Traders	6/12/2024	\$400,000.00	Client Contact2	Northwind Traders	75	Warm										
<input type="checkbox"/>	Mexico City Office	Northwind Traders	6/18/2024	\$475,000.00	Client Contact1	Northwind Traders	90	Warm										
<input type="checkbox"/>	Seattle Office	Northwind Traders	6/19/2024	\$1,000,000.00	Client Contact2	Northwind Traders	50	Warm										

- A. Mastered
- B. Not Mastered

Answer: A

Explanation:

BDM1 has a reminder setting for close dates that are coming up within the next 21 days, as configured in the system. Given that BDM1 logs in on June 3, 2024, here??s how to determine which opportunities will be highlighted in the "Close date coming soon" reminder cards:

? Calculate the Reminder Period:

? Evaluate Close Dates for Opportunities:

Based on this,London OfficeandToronto Officeare within the specified period and thus will appear as close date reminders for BDM1.

Microsoft Dynamics 365 References:

? Assistant and Insights cards in Dynamics 365 Sales

By applying the specified close date threshold, we can confirm that the reminder cards for opportunities closing on June 4 and June 12 will be displayed to BDM1, which corresponds toLondon OfficeandToronto Office.

NEW QUESTION 7

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: <input type="text" value="50"/>													
Customize close opportunity form Enable custom fields on closing form to get more info on the closed opportunity: <input type="radio"/> Yes <input checked="" type="radio"/> No													
Make price lists optional Allow line item creation without an associated price list Learn more : <input type="radio"/> Yes <input checked="" type="radio"/> 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): <input checked="" type="radio"/> Yes <input type="radio"/> No													
Save business card images Always retain business card images after scanning: <input checked="" type="radio"/> Yes <input type="radio"/> No													
Adding products Enhanced add product experience Learn more : <input type="radio"/> Yes <input checked="" type="radio"/> 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

- 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

The screenshot shows two system setting dropdown menus. The first dropdown, corresponding to requirement #1, lists the following options: 'Quality lead experience' (selected), 'Customize close opportunity form', 'Make price lists optional', 'Save business card images', and 'Adding products'. The second dropdown, corresponding to requirement #2, lists the following options: 'Customize close opportunity form' (selected), 'Make price lists optional', 'Quality lead experience', 'Save business card images', and 'Adding products'.

NEW QUESTION 8

- (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 9

- (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 .00 or .99.

Reference:Microsoft Documentation - Configure Rounding Policies for Price Lists

NEW QUESTION 10

- (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 10

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

⋮ Create a sequence.

⋮ Add tasks to the sequence.

⋮ Connect the existing segment to the sequence.

⋮ Activate the sequence.

- A. Mastered
- B. Not Mastered

Answer: A

Explanation:

A screenshot of a computer Description automatically generated

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 11

- (Topic 3)

A large construction company uses Dynamics 365 Sales to manage their sales pipeline.

All future jobs are logged in the system as opportunities. Depending on the type of work, some opportunities close faster, and others take longer due to dependency on the third-party vendors.

The sales team does NOT currently use the "On hold" option, as it does NOT provide enough details.

When working with open opportunities, the sales manager wants to know whether opportunities are pending permits or require asbestos removal.

You need to ensure that a salesperson can only select the "Pending Permits" or "Asbestos Removal" option when working with their opportunities to indicate the deal is taking longer.

What should you do?

- A. Edit the statuscode column: add "Asbestos Removal" and "Pending Permits" status values to the "Open" status reasons.
- B. Edit the statecode column: rename the "Open" status value to "Asbestos Removal" and add a new "Pending Permits" status value.
- C. Edit the statecode column: rename the "On hold" status to "Asbestos Removal" and add a new "Pending Permits" status value.
- D. Edit the statuscode column: add "Pending Permits" to the "Open" status reason values, and rename "On hold" to "Asbestos Removal."

Answer: A

Explanation:

? Understanding the Statuscode and Statecode Columns:

Reference: Microsoft Documentation - Statecode and Statuscode in Dynamics 365

Modifying Status Reasons for Open Opportunities:

The construction company wants to indicate when opportunities are delayed due to specific external factors. To accommodate this, they need specific status reasons like "Pending Permits" and "Asbestos Removal."

By adding these as status reasons under the "Open" state, you enable sales team members to select these options directly from their current status options.

Reference: Microsoft Documentation - Customize Status Reasons for Opportunity

Steps to Add New Status Reasons to Open Opportunities:

Navigate to Solution: Go to the Dynamics 365 Sales app, then to Settings > Customizations > Customize the System.

Locate the Opportunity Entity: In the default solution, find and expand the "Entities" list, then select "Opportunity."

Edit Statuscode Values: Within the "Opportunity" entity, select "Fields," then find and edit the statuscode field. Here, you can add new options under the "Open" status. Add "Pending Permits" and "Asbestos Removal."

Publish the Changes: After adding and saving the new status reasons, publish the changes so that they are available to users.

Verifying Custom Status Reason Visibility:

Ensure the new options are available on the Opportunity form for selection.

Test by opening an Opportunity and confirming that the "Pending Permits" and "Asbestos Removal" options are available under the Open status reasons.
Reference:Microsoft Documentation - Publishing Customizations in Dynamics 365
By following these steps, the sales team can now use specific status reasons to indicate why certain opportunities are delayed, providing clearer visibility into the sales pipeline's status.

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>Actual End</div> <div>Due</div> <div>Modified On</div> <div>Actual Start</div> <div>Actual End</div>
Rollup field	<div>Actual (integer)</div> <div>Actual (integer)</div> <div>Custom Rollup Field (Integer)</div> <div>In-Progress (Integer)</div>
Source Record Type Status	<div>Completed</div> <div>Made</div> <div>Received</div> <div>Open</div> <div>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 17

- (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 shouldembed 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 21

- (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 23

- (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 26

- (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 27

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.	<div>Modify the Status Reason option set.</div> <div>Modify the Status Reason option set.</div> <div>Modify the Forecast category option set.</div> <div>Create a new Choices column.</div>
Record the loss for forecasting.	<div>Modify the Opportunity Close form.</div> <div>Modify the Opportunity Close form.</div> <div>Modify the Opportunity Sales Process business process flow.</div> <div>Modify the Opportunity Forecast Category Mapping process Dataverse classic workflow.</div>

- A. Mastered
- B. Not Mastered

Answer: A

Explanation:

Answer Area

Requirement	Action
Add the type of loss.	<div>Modify the Status Reason option set.</div> <div>Modify the Status Reason option set.</div> <div>Modify the Forecast category option set.</div> <div>Create a new Choices column.</div>
Record the loss for forecasting.	<div>Modify the Opportunity Close form.</div> <div>Modify the Opportunity Close form.</div> <div>Modify the Opportunity Sales Process business process flow.</div> <div>Modify the Opportunity Forecast Category Mapping process Dataverse classic workflow.</div>

NEW QUESTION 31

HOTSPOT - (Topic 3)

You are a Dynamics 365 Sales administrator. You create a forecast by using the forecast category layout shown in the exhibit:



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

Answer Area

Where should you rename the Omitted column to Cancelled for this forecast?	<div>Layout column settings</div> <div>Forecast Category option set</div> <div>Forecast view</div> <div>Layout column settings</div> <div>Preview grid</div>
Where should you delete the Lost column for this forecast?	<div>Forecast configuration</div> <div>Forecast configuration</div> <div>Forecast configuration filter data</div> <div>Forecast Category option set value</div> <div>Forecast view</div>

- A. Mastered
- B. Not Mastered

Answer: A

Explanation:

? Renaming the Omitted Column to Cancelled:

NEW QUESTION 32

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
⋮ Select Server Profiles.	
⋮ Turn tracking "On."	
⋮ Disable Use tracking token.	
⋮ Access Environment Settings in the Power Platform Admin Center.	
⋮ Select Email Tracking settings.	
⋮ 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 34

- (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 38

- (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 40

- (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:

The Query Assist feature 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 41

- (Topic 3)

Your company wants to enable AI features in their systems and use Copilot for Sales to connect to Dynamics 365 Sales data. You need to ensure that all eligible users have access.

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

- A. Create a policy in Teams to install and pin Copilot for Sales and enable meeting transcripts.
- B. Enable Copilot for Sales in Dynamics 365.
- C. Install Copilot for Sales in Microsoft Outlook.
- D. Verify server-side synchronization is enabled and users have the correct security roles in Dynamics 365.
- E. Assign users the correct privileges to use Copilot for Sales in Teams.

Answer: BDE

Explanation:

? Enable Copilot for Sales in Dynamics 365:
? Verify Server-Side Synchronization and Security Roles:
? Assign Privileges for Copilot in Teams:
Reference: Microsoft Documentation - Configure and Use Copilot for Sales

NEW QUESTION 42

- (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 appropriate field types and name the query. Create a full name and full address columns by merging the appropriate columns if they exist. Select Next and your data is now ready for unification-Does this meet the goal?

- A. Yes
- B. No

Answer: B

Explanation:

This solution also includes transforming headers and defining column types, along with creating merged columns. However, it still does not remove rows with a high proportion of nulls. Addressing null values is important for data quality and ensuring accurate unification. Without removing rows with many nulls, the data may still have integrity issues that could impact the unification process. As a result, this solution does not completely meet the goal.

NEW QUESTION 43

DRAG DROP - (Topic 3)

The sellers at your organization are keen to adopt generative AI capabilities and use them efficiently.

They have been editing Contact records directly in Copilot for Sales and have now provided feedback that they would be more productive if they could also edit Account records directly in Copilot for Sales.

However, the vice president of sales does NOT want the sellers to be able to edit the "Revenue Forecast" field in Copilot for Sales.

You need to enable these requirements.

Which four actions should you perform in sequence? 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
<div><div></div><div>In the Editing records section, select Edit records inside Copilot for Sales.</div></div>	
<div><div></div><div>Hide the column from the Account form in Dynamics 365.</div></div>	
<div><div></div><div>In the Manage fields section, uncheck Required for the "Revenue Forecast" field.</div></div>	
<div><div></div><div>In Copilot for Sales admin settings, select Forms.</div></div>	
<div><div></div><div>In the settings for the <i>Account</i> table, select Forms.</div></div>	
<div><div></div><div>Select the Account record type.</div></div>	
<div><div></div><div>In the Manage fields section, turn off Allow editing for the "Revenue Forecast" field.</div></div>	

- A. Mastered
- B. Not Mastered

Answer: A

Explanation:

The correct order of actions to configure the editing capabilities for the Account records in Copilot for Sales while restricting the "Revenue Forecast" field is as follows:

- ? In Copilot for Sales admin settings, select Forms.
- ? In the settings for the Account table, select Forms.
- ? Select the Account record type.
- ? In the Manage fields section, turn off Allow editing for the "Revenue Forecast" field.

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

- ? In Copilot for Sales Admin Settings, Select Forms:
- ? In the Settings for the Account Table, Select Forms:
- ? Select the Account Record Type:
- ? In the Manage Fields Section, Turn Off Allow Editing for the "Revenue Forecast" Field:

NEW QUESTION 48

- (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 50

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