MB-280 Dumps

Microsoft Dynamics 365 Customer Experience Analyst

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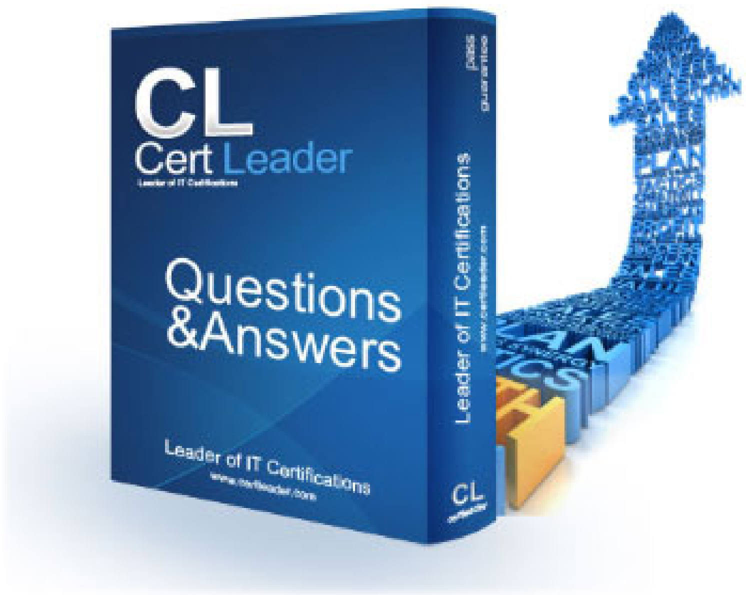


NEW QUESTION 1
- (Topic 1)
You need to ensure the active stage of the business process flow is visible in the view. Which two actions should you perform? Each correct answer presents a complete solution. Choose two. NOTE: Each correct selection is worth one point.

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 toCreate and edit views.

NEW QUESTION 2
- (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 Tas
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 toCustomize a timeline controlin Dynamics 365 documentation for detailed steps on modifying timeline settings and activity visibility.

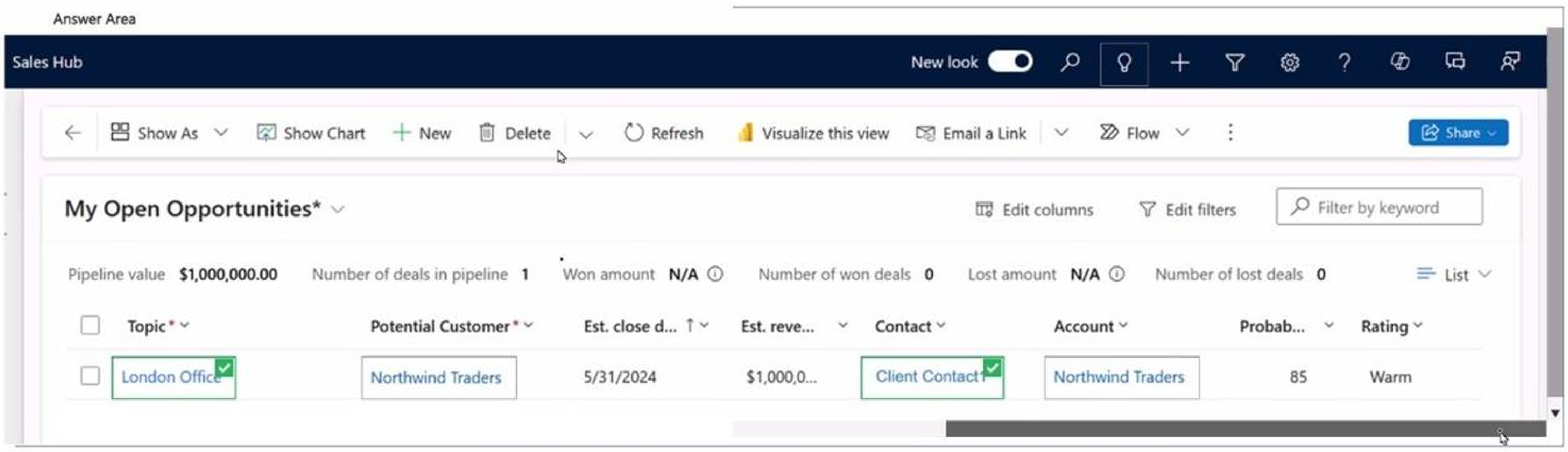
NEW QUESTION 3
- (Topic 2)
You need to build a trigger-based journey to send the "Getting started" emails requested by the global sales lead. Which trigger should you use to start the journey?

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 theDataverse 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 theDataverse 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 4
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.

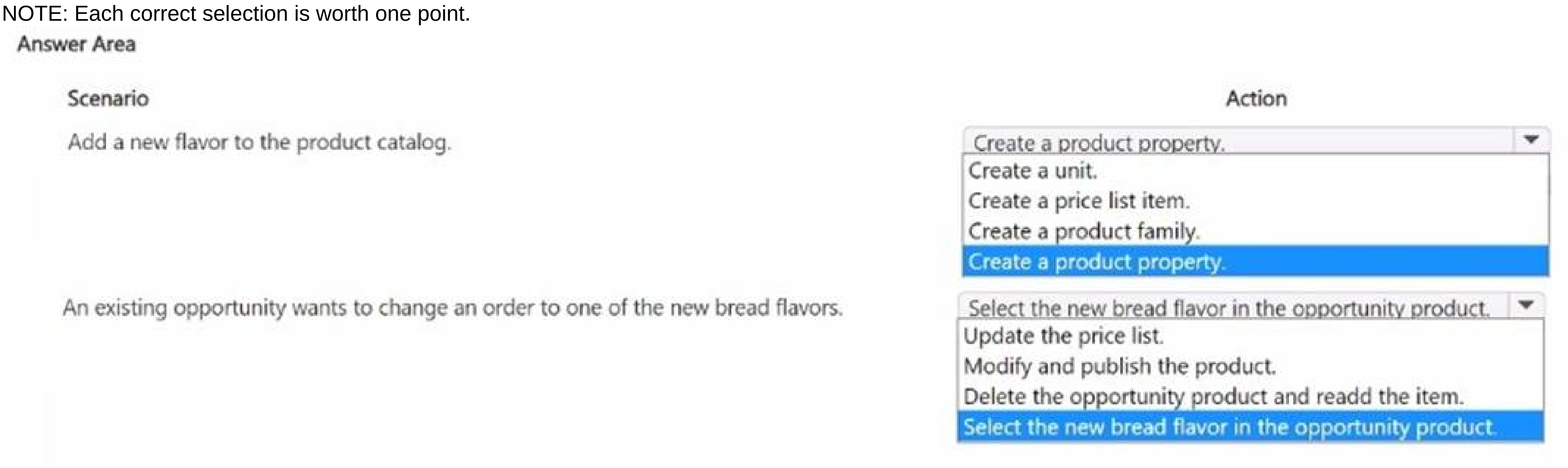


A. Mastered
B. Not Mastered

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 5
HOTSPOT - (Topic 3)
A bakery uses Dynamics 365 Sales. All loaves of bread sold at the bakery are priced the same. Special bread flavors are developed regularly.
You need to add a new flavor to the product catalog.
What should you do for each scenario? 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:
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? Scenario 1: Adding a New Flavor to the Product Catalog

NEW QUESTION 6
- (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 7
- (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 theDynamics 365 App for Outlook security roleto 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 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 addressremoving 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 doesnot fully meetthe goal as it does not handle data quality issues caused by null values.

NEW QUESTION 9
- (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 theLost columnin 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 theAmount columnto 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 10
- (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.
TheVice president of salesrole 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 lo 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 14
- (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 17
- (Topic 3)
A company is using Dynamics 365 Sales to provide quotes to their customers.
Preferred customers must be granted a separate flat rate discount on specific products, depending on their countries or regions. What should you create?

A. A discount list for Preferred Customers.
B. A sequence command step.
C. A product bundle for each country/region.
D. A price list for the currency of each country/region.

Answer: A

Explanation:
? Understanding the Requirement:
? Solution - Creating a Discount List:

Reference:Microsoft Documentation - Configure Discount Lists in Dynamics 365
Steps to Create a Discount List for Preferred Customers:
Navigate toSettings>Product Catalog>Discount Lists.
Create a new Discount List and specify criteria for preferred customers.
Add discount values for the specific products and set conditions based on regions or countries as needed.
Save and publish the Discount List for it to be available for quotes.
By using a Discount List, the company can apply specific discounts to preferred customers while taking into account regional pricing variations, providing a tailored and efficient solution for quote management.

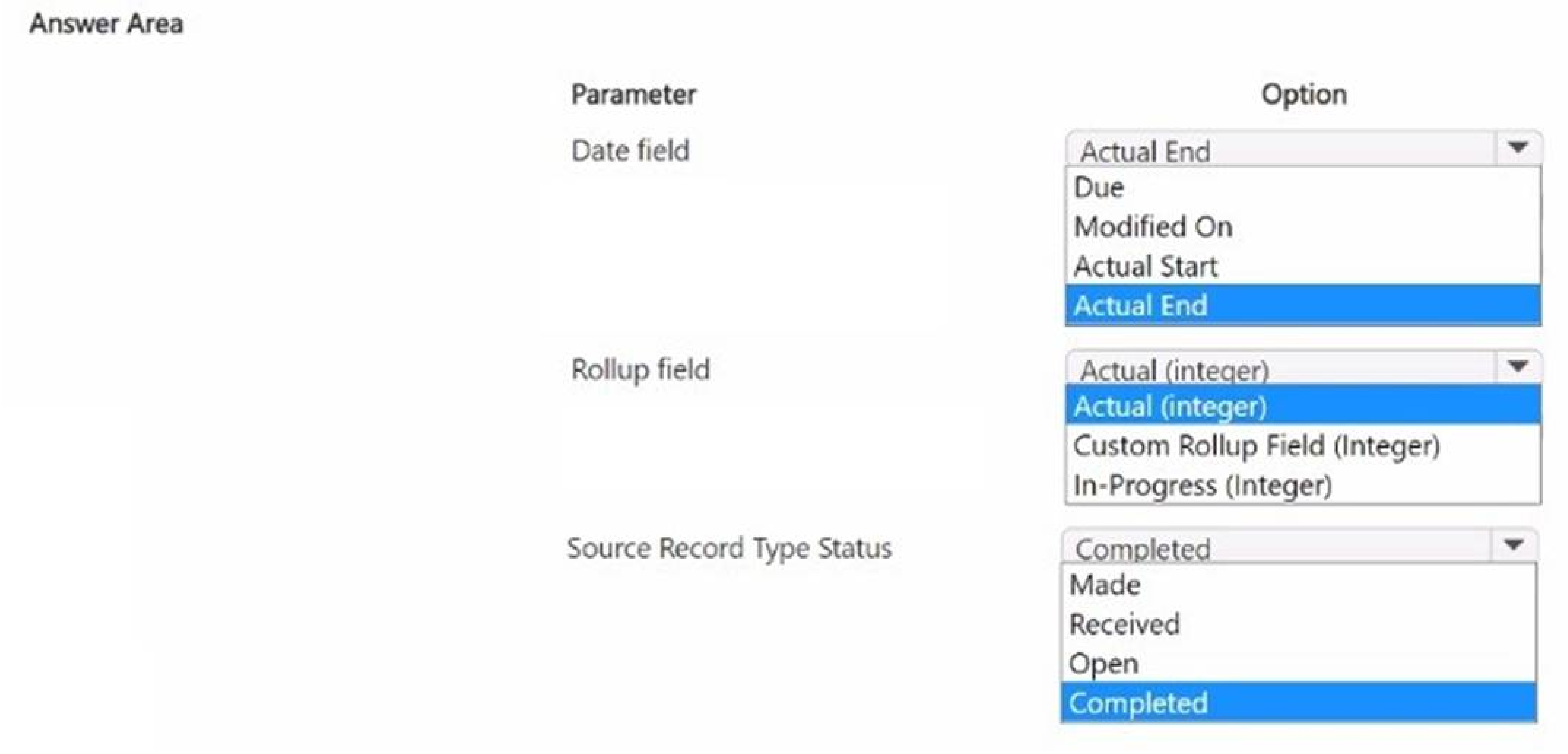
NEW QUESTION 18
- (Topic 3)
You use business process flows for all Dynamics 365 opportunities. Some opportunities are closed before business process flow durations are calculated. You need lo ensure that business process flow duration values are calculated.
Solution: When closing an opportunity, use the close as won dialog without completing the business process flow. Does this meet the goal?

A. Yes
B. No

Answer: B

Explanation:
Using theClose as Wondialog without completing the business process flow doesnot ensurethat the business process flow duration is calculated. The process flow needs to be marked as completed or transitioned to an inactive state for duration values to be captured.
Simply closing an opportunity as won without completing the flow may bypass the finalization of process flow metrics, hence the goal is not met in this case.

NEW QUESTION 23
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.



A. Mastered
B. Not Mastered

Answer: A

Explanation:
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? Date Field - Actual End:

NEW QUESTION 28
- (Topic 3)
The analytics team at your organization has created Power Bl reports that enrich data about your accounts from Dynamics 365 Sales with data NOT contained in Dynamics 365 Sales. The Power Bl 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 Bl report in the ribbon on the account form.
B. Create a dashboard in Dynamics 365 Sales that contains account data.

C. Embed the Power Bl Dashboard as a dashboard in the Dynamics 365 Sales application.
D. Embed the Power Bl 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 32
- (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 to30 stagesacross all entities within a single process. Since each entity here (Lead, Opportunity, Quote, Order, Invoice) has10 stages, the total would be50 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 34
- (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

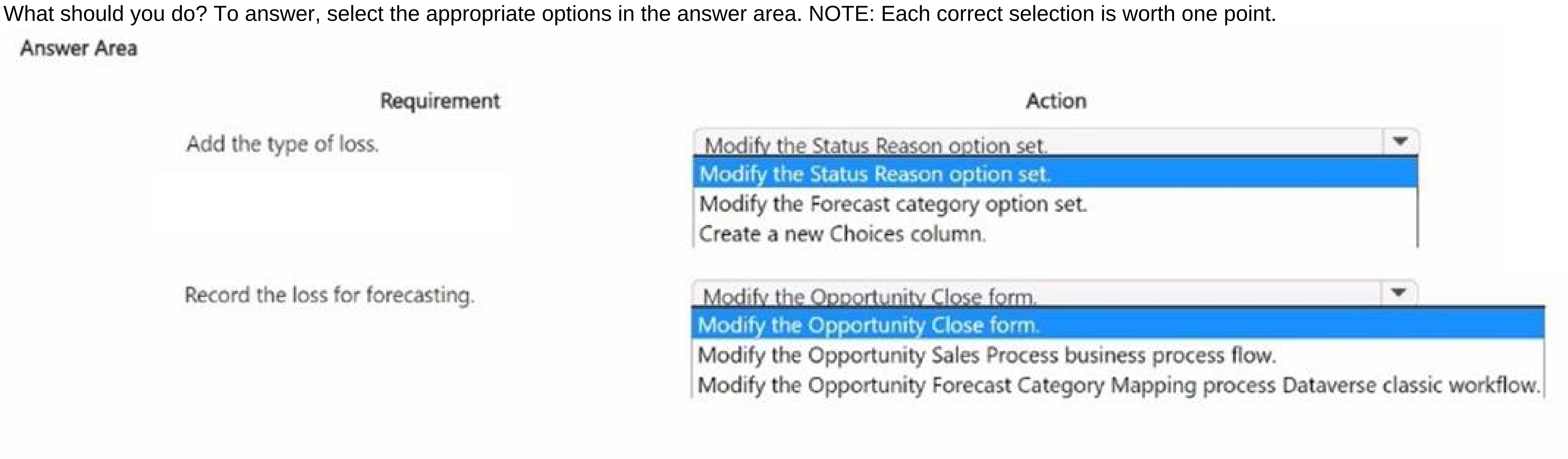
NEW QUESTION 35
- (Topic 3)
You are the Dynamics 365 Sales administrator for an electronics company.
The sales team is having difficulty locating different products in the same category - for instance; all versions of flat screen TV available.
You need to make it easier for the sales team to navigate 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 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.



A. Mastered
B. Not Mastered

Answer: A

Explanation:

NEW QUESTION 37
- (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?

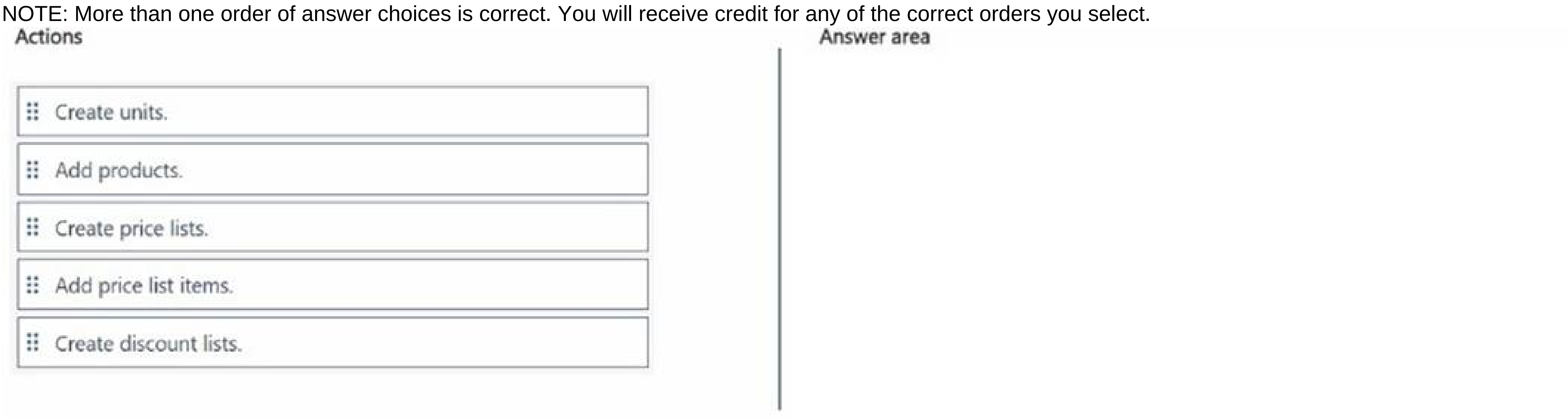
A. user-defined
B. constant
C. equal intervals
D. dependent on volume

Answer: C

Explanation:
Server-side synchronizationtypically syncs atequal 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 42
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.



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 47
- (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

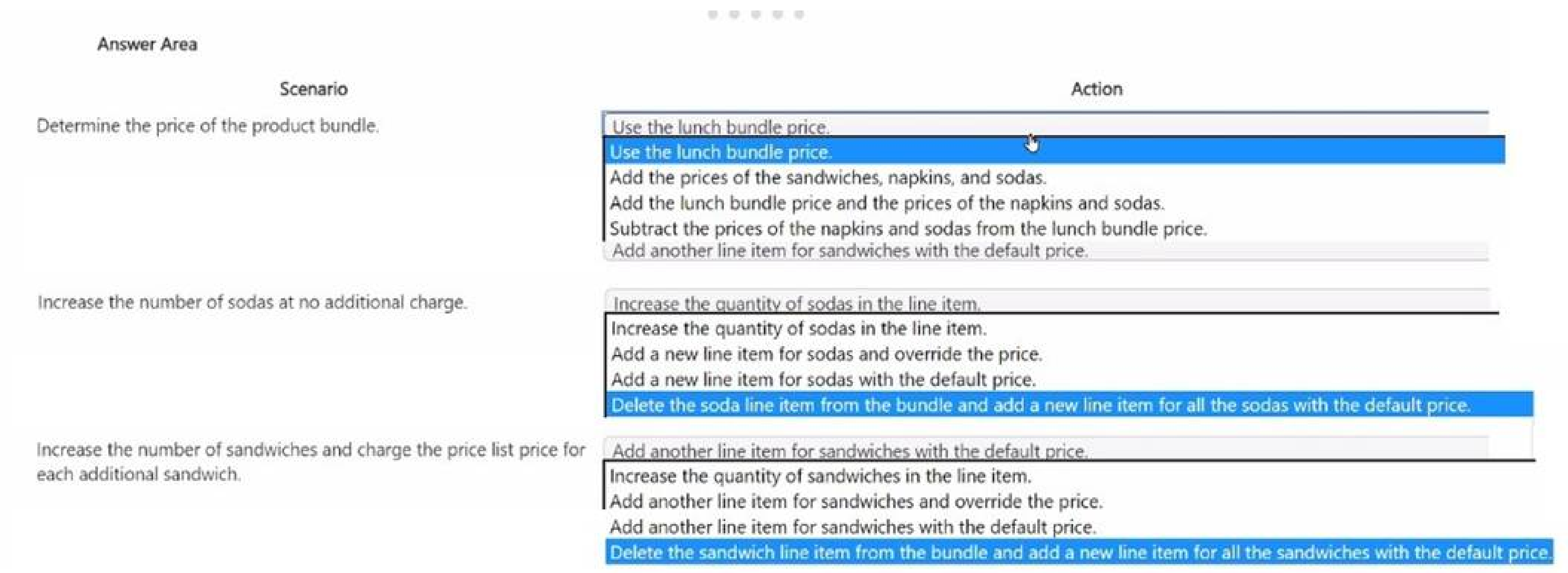
Answer: C

Explanation:
In Dynamics 365 Sales, when setting up aunit group, you must first define thebase 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 abase 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.



A. Mastered
B. Not Mastered

Answer: A

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

NEW QUESTION 52
- (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 54
- (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 contact\ab\e 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 theprimary tablein Customer Insights during the unification process, the goal is to choose the table that provides the most robust and accurate customer profile information.
Criterion Ais crucial because having complete and reliable customer profile data ensures that the unified profile is accurate and comprehensive.
Criterion Cis recommended by Microsoft when using Dynamics 365 data, as thecontact tableoften 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

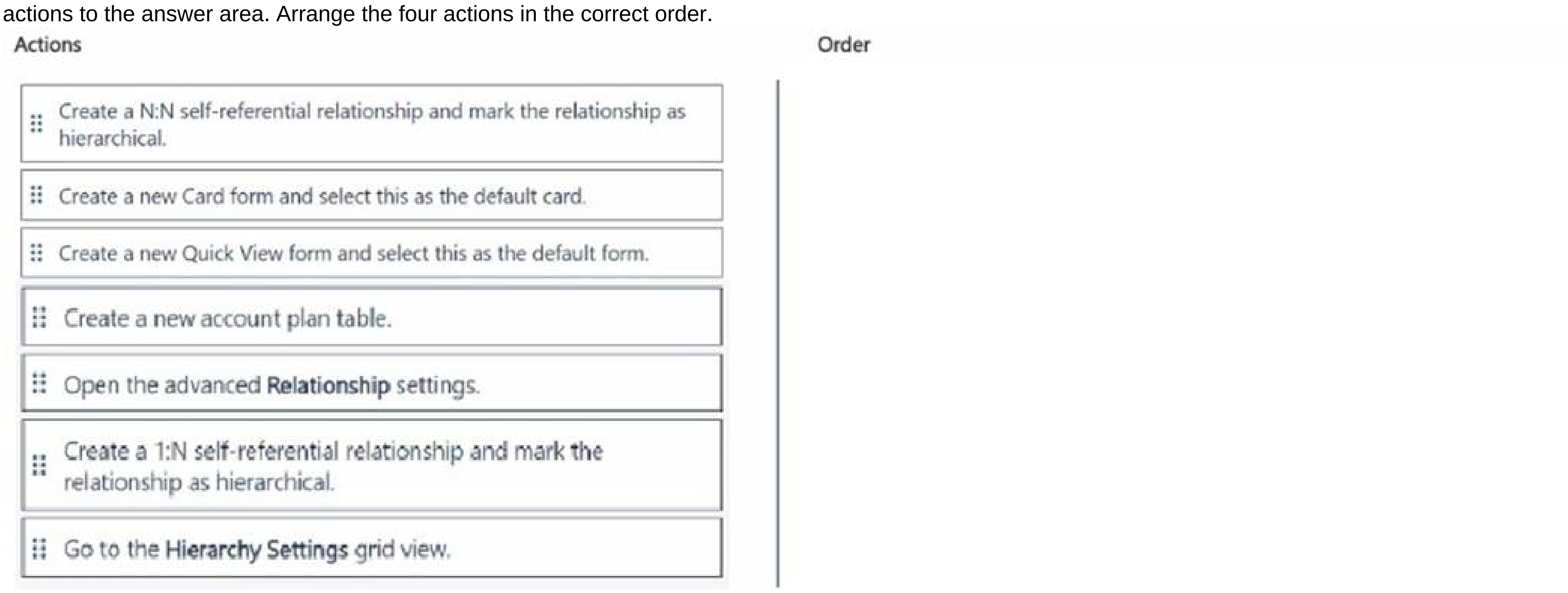
NEW QUESTION 58
- (Topic 3)
You are a marketing automation consultant.
Your customer wants to understand the benefits of using the query assist feature in Dynamics 365 Customer Insights - Journeys. Why might your customer want to use this feature?

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 59
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.



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 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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Thank You for Trying Our Product