

MB-280 Dumps

Microsoft Dynamics 365 Customer Experience Analyst

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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 bothduplicate detection rulesandduplicate detection jobs.
? Since Terra Flora requires identifying duplicate pet records across various fields, creatingthree duplicate detection rulesis likely necessary to cover different columns (such as name, breed, and dietary requirements) in the Pet table.
? One duplicate detection jobis sufficient to run these rules concurrently, scanning the database for duplicates across the specified columns. This job can be scheduled or run manually.
? Option Bis 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 toDetect duplicate records in Dynamics 365.

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

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 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.

Answer Area

- 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.

Answer Area

Scenario

Add a new flavor to the product catalog.

An existing opportunity wants to change an order to one of the new bread flavors.

Action

Create a product property.

Create a unit.

Create a price list item.

Create a product family.

Create a product property.

Select the new bread flavor in the opportunity product.

Update the price list.

Modify and publish the product.

Delete the opportunity product and readd the item.

Select the new bread flavor in the opportunity product.

- 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

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

? X

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 7

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

- 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 8

- (Topic 3)

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

The file contains a row header and columns of different types, such as quantities and prices. The file also contains some rows with a high proportion of nulls.

You need to clean and transform the data in Customer Insights - Data to be ready for unification.

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

Does this meet the goal?

- A. Yes
- B. No

Answer: B

Explanation:

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

Therefore, this solution doesnot fully meetthe goal as it does not handle data quality issues caused by null values.

NEW QUESTION 9

- (Topic 3)

You have opportunities that have values in multiple currencies. You manually update currency exchange rates once per month. You need to ensure that currency values are accurately reported. When is the new currency exchange rate applied to the opportunity records?

- A. When an opportunity changes the status reason.
- B. When the calculate rollup field system job for the msdyn_projectteam table runs.
- C. When the calculate rollup field system job for the account table runs.
- D. When an opportunity changes the status.

Answer: A

Explanation:

In Dynamics 365 Sales, currency exchange rates are applied to opportunity records when specific triggers occur. These exchange rates are updated manually on a periodic basis (e.g., once a month) to reflect current currency values.

Exchange rates are recalculated for an opportunity when there is a change in the status reason(e.g., from open to won or lost). This trigger ensures that the most recent exchange rate is used when key changes occur in the opportunity lifecycle, maintaining accurate currency reporting.

Reference:Microsoft Documentation - Currency Management in Dynamics 365

NEW QUESTION 10

- (Topic 3)

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

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

Answer: B

Explanation:

? Understanding the Base Unit in Dynamics 365 Sales:

? Selecting the Base Unit - Why the Lowest Quantity?

Reference:Microsoft Documentation - Create Unit Groups and Units

Benefits of Using the Lowest Needed Unit:

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

By setting the base unit to the lowest 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 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:

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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 12

- (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: 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 the Close as Won dialog without completing the business process flow does not ensure that 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 16

- (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 19

- (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 21

DRAG DROP - (Topic 3)

Your organization used Gmail previously and had only one Gmail server profile.

You recently moved to Exchange Online and you need to complete the set up for server-side sync with Exchange Online and ensure all mailboxes are working.

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

- ⋮

Add a new forward mailbox for each relevant user.
- ⋮

Update all relevant user mailboxes to sync with POP3/SMTP server.
- ⋮

Update all user mailboxes to sync with Exchange Online.
- ⋮

Approve email for all relevant users.
- ⋮

Test the email configuration and enable the selected email mailboxes for all relevant users.

- A. Mastered
- B. Not Mastered

Answer: A

Explanation:

A screenshot of a computer Description automatically generated
? Update All User Mailboxes to Sync with Exchange Online:

NEW QUESTION 25

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?

Layout column settings

Forecast Category option set

Forecast view

Layout column settings

Preview grid

Where should you delete the Lost column for this forecast?

Forecast configuration

Forecast configuration

Forecast configuration filter data

Forecast Category option set value

Forecast view

- A. Mastered
- B. Not Mastered

Answer: A

Explanation:

? Renaming the Omitted Column to Cancelled:

NEW QUESTION 26

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

Create units.

Add products.

Create price lists.

Add price list items.

Create discount lists.

Answer area

- 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 30

- (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 33

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

- A. Mastered
- B. Not Mastered

Answer: A

Explanation:

? Access Environment Settings in the Power Platform Admin Center:

NEW QUESTION 38

HOTSPOT - (Topic 3)

A company sends its salespeople to trade shows to meet potential customers. One day after the trade shows, the salespeople currently send a follow-up email manually to the potential customers they met. They would like a task to remind them to call the potential customers a week after that.

You need to increase the follow-up rate for salespeople after a tradeshow.

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

NOTE: Each correct selection is worth one point.

Answer Area

Requirement

Automate the tradeshow follow-up process.

Ensure that the process applies only to tradeshow leads.

Ensure proper timing of activities.

Action

Implement sequences.

Implement sequences.

Implement work assignments.

Implement customer journeys.

Use segments.

Use segments.

Add all leads to a marketing list.

Set relative due date.

Set relative due date.

Set wait times.

- A. Mastered
B. Not Mastered

Answer: A

Explanation:
? Automate the Tradeshow Follow-up Process:Implement sequences

NEW QUESTION 42

HOTSPOT - (Topic 3)
You are a Dynamics 365 administrator. The sales team uses goals to track actual to target opportunity amounts. A salesperson reviews their goals chart and observes the following:

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

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

Answer Area

Issue

Opportunity updated today is NOT included in the chart.

Time period for the goal is inaccurate.

Action

Update roll-up settings.

Update goal criteria.

Update roll-up settings.

Update personal options.

Have the manager update the goal.

Have the salesperson update the goal.

Have the manager update the goal.

- A. Mastered
B. Not Mastered

Answer: A

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

NEW QUESTION 46

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.	<div><div>Use the lunch bundle price.</div><div>Use the lunch bundle price.</div><div>Add the prices of the sandwiches, napkins, and sodas.</div><div>Add the lunch bundle price and the prices of the napkins and sodas.</div><div>Subtract the prices of the napkins and sodas from the lunch bundle price.</div><div>Add another line item for sandwiches with the default price.</div></div>
Increase the number of sodas at no additional charge.	<div><div>Increase the quantity of sodas in the line item.</div><div>Increase the quantity of sodas in the line item.</div><div>Add a new line item for sodas and override the price.</div><div>Add a new line item for sodas with the default price.</div><div>Delete the soda line item from the bundle and add a new line item for all the sodas with the default price.</div></div>
Increase the number of sandwiches and charge the price list price for each additional sandwich.	<div><div>Add another line item for sandwiches with the default price.</div><div>Increase the quantity of sandwiches in the line item.</div><div>Add another line item for sandwiches and override the price.</div><div>Add another line item for sandwiches with the default price.</div><div>Delete the sandwich line item from the bundle and add a new line item for all the sandwiches with the default price.</div></div>

- A. Mastered
B. Not Mastered

Answer: A

Explanation:

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

NEW QUESTION 49

- (Topic 3)

A company created a new table named Locations.

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

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

Answer: D

Explanation:

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

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

Reference:Microsoft Documentation - Configure Apps Using App Designer in Dynamics

365

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 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 57

- (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 58

DRAG DROP - (Topic 3)

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

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

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

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

Actions

Create a N:N self-referential relationship and mark the relationship as hierarchical.

Create a new Card form and select this as the default card.

Create a new Quick View form and select this as the default form.

Create a new account plan table.

Open the advanced Relationship settings.

Create a 1:N self-referential relationship and mark the relationship as hierarchical.

Go to the Hierarchy Settings grid view.

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 59

- (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, itstill 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 doesnot completely meetthe goal.

NEW QUESTION 62

- (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 67

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