LEAD2PASS
First Test, First Pass!

Vendor: Microsoft

Exam Code: MB-280

Exam Name: Microsoft Dynamics 365 Customer Experience Analyst

Version: DEMO

QUESTION 1
Case Study 1 - Contoso Ltd

Background information
Contoso Ltd. has started a new division that provides janitorial services to businesses.

The sales teams for this division are using a dedicated instance of Dynamics 365 Sales.

Contoso Ltd.'s sellers are becoming accustomed to Copilot in Sales and Sales Insights features. They have identified several desired enhancements.

System configuration
The base currency for all opportunities in the system is US dollars (USD). The administrator has NOT enabled installed premium Sales Insights features. All users have Premium licenses. Contoso Ltd. uses Exchange Online for email.

Only three default insights cards are turned on:

1. Close date coming soon
2. Meeting today
3. Upcoming meeting

The system administrator has set the following days before notifying me value for the Close date coming soon card to 21 days. Contoso Ltd. has also just set up Dynamics 365 Customer Insights - Journeys for marketing automation. No segments or customer journeys have been defined yet. Dynamics 365 Sales and Customer Insights - Journeys both share the same instance of Microsoft Dataverse.

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:
Dataverse record change trigger: This trigger is ideal for monitoring changes to records in Dynamics 365, such as when the opportunity status is updated to "Won." By using this trigger, you can initiate the journey to send the "Getting started" email when the specific condition of the opportunity being marked as won is met.

QUESTION 2
Case Study 2 - Terra Flora

Background information
Terra Flora, Incorporated is a boutique pet hotel that has been in business for six (6) months. The hotel guests include both dogs and cats.
The founder created the Dynamics 365 Sales Professional environment to grow their network and pipeline. They started out using out-of-the-box capabilities only and using the Sales Professional app only. Only one environment (production) is in use.

The pet hotel is gaining in popularity and the number of bookings is growing. The founder has shifted their focus to customizing their environment to record the information they need to delight their customers by tailoring the experience to their unique pets.

Terra Flora has recently hired a part-time carer for the resident pets. The carer has been granted the Salesperson security role to allow them to record new leads and update customer information.
You are a Dynamics 365 Customer Experience consultant who has been hired to assist Terra Flora with their customizations, resolve issues, and advise on best designs to meet their requirements.

Configurations
Overall configurations
To better understand their four-legged customers, Terra Flora has created a custom Pet table, which is user-owned and related 1-n with the Contact table, which represents the pets' primary owner.
The Pet table has been added to the Sales Professional app sitemap. The table has the following columns, each created WITHOUT making any changes to the advanced options.

Column name	Type	Required
Name	Single line of text	Business required
Type	Choice	Business required
Dietary requirements	Multiple lines of text	Optional
Litter type	Choice	Optional
Breed	Single line of text	Optional
Description	Multiple lines of text	Optional

A pet sub-grid has been added to the Contact main form, using the Active Pets view.
Additionally, Read, Write, and Update, Append, Append To, and Assign access to the Pet table has been added to the Salesperson security role.

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: C
Explanation:
You need two duplicate detection jobs to address both the Contact and Pet tables separately.
Since duplicate records are present in both tables, two jobs are necessary.
You will need three duplicate detection rules to capture duplicates based on key criteria, such as the Last Name, Email Address, and Owner's Address for Contact and Pet records. These rules will identify duplicates in different contexts across both tables.

QUESTION 3
Accompany 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: D
Explanation:
In Dynamics 365 Sales, the frequency of synchronization using server-side synchronization is dependent on volume. This means that the synchronization process will run based on the volume of emails, tasks, and appointments being processed. If there is a higher volume of items to sync, the frequency of synchronization may increase, while lower volumes may result in less frequent syncs.

QUESTION 4
The assistant to the sales leader has some questions on how delegation works when using the Dynamics 365 App for Outlook. They want to know how columns are populated when an email is tracked.

You need to explain the behavior of the tracked email messages, in particular, what is set as the owner of the tracked email from a delegated mailbox.

What should you convey?

A. The delegate user.
B. System (as it is promoted by server-side synchronization).
C. The owner of the linked contact that sent the email.
D. The primary mailbox owner.

Answer: D
Explanation:
When an email is tracked from a delegated mailbox using the Dynamics 365 App for Outlook, the owner of the tracked email is set to the primary mailbox owner. This means that regardless of which delegate is tracking the email, the email will be associated with the primary mailbox owner in Dynamics 365.
This behavior ensures that the email is correctly attributed to the user who owns the mailbox, providing clarity on ownership and ensuring that the right person is credited for the correspondence.

QUESTION 5
You are working in a manufacturing company that is struggling to get their sales department to input all relevant information into Dynamics 365 for Sales.

You need to deploy the Dynamics 365 App for Outlook for all eligible users as efficiently as possible.

What should you do?

A. Enable the setting to push the app to users in the general environment Settings.
B. Select the checkbox to automatically add App for Outlook to all eligible users in Settings.

C. Notify every eligible user to enable it in their personal app Settings.
D. Grant the Systems Admin security role to the active directory group containing all eligible users.

Answer: B
Explanation:
To efficiently deploy the Dynamics 365 App for Outlook to all eligible users, the best approach is to enable the automatic deployment setting in Dynamics 365 Settings. This option allows automatic installation for all users whose mailboxes are configured correctly, eliminating the need for manual activation by each user.

QUESTION 6
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: D
Explanation:
The principle of least privilege means granting the user only the minimum permissions necessary to perform their tasks. In this case, to allow User1 to assign salespeople to sales territories, the Salesperson role typically includes privileges related to managing sales processes, such as territories, while limiting access to broader system functions like those available to a Vice President of Sales or System Customizer.
The System Customizer and Vice President of Sales roles would grant more permissions than necessary, which would violate the principle of least privilege. The Sales Team Member role is typically too limited for assigning salespeople to sales territories, which requires more specific access.

QUESTION 7
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:
Statuscode in Dynamics 365 Sales refers to the reason or sub-status of the current state (like Open, Closed, etc.). The best approach is to add new values to the "Open" status reason (statuscode), such as "Pending Permits" and "Asbestos Removal," which gives the salesperson more granular detail about why the opportunity is taking longer without changing the core workflow of the sales process.
Statecode controls the overall state (e.g., Open, Won, Lost) and is not suitable for such detailed tracking. Renaming or adding values to the statecode column (as suggested in other options) would not provide the desired level of detail, as the statecode should stay consistent with the standard open/ closed statuses.

QUESTION 9
Note: This question is part of a series of questions that present the same scenario. Each question in the series contains a unique solution that might meet the stated goals. Some question sets might have more than one correct solution, while others might not have a correct solution.

After you answer a question in this section, you will NOT be able to return to it. As a result, these questions will not appear in the review screen.

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:
Solution removes all rows with null values, which can lead to significant data loss, especially if those rows contain important information.
It may compromise data quality by eliminating rows, which can impact analysis and insights.

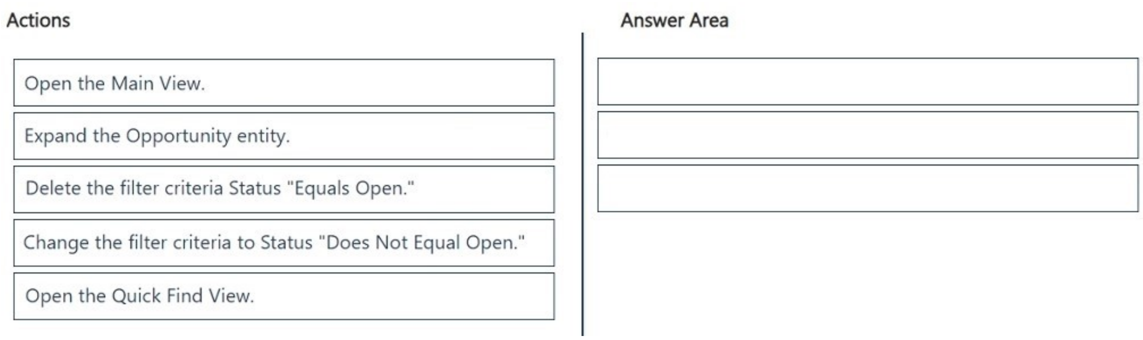
QUESTION 9
Drag and Drop Question

You are a Dynamics 365 Sales system customizer.

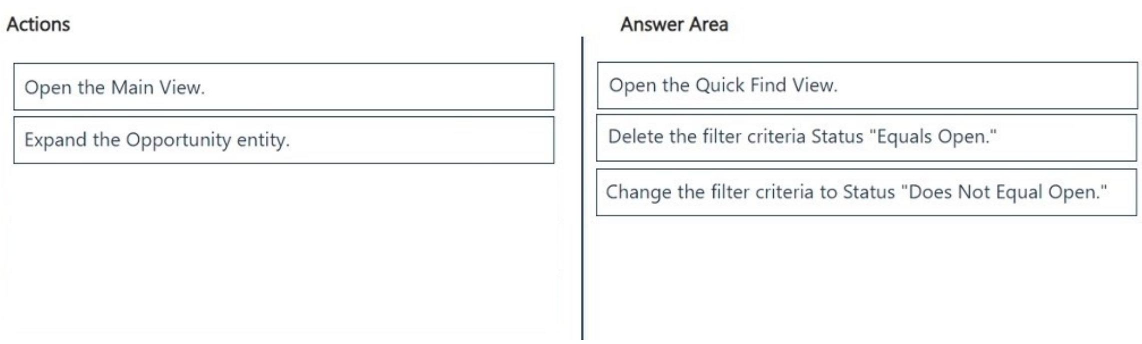
Salespeople report that they cannot search for open and closed opportunities using the search tool in the Quick Find View.

You need to configure the search tool to show the open and closed opportunities in the Customize the System area.

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



Answer:



Explanation:
1. Open the Quick Find View.
The Quick Find View controls what records are shown when users search for opportunities.

2. Delete the filter criteria Status "Equals Open."
The current filter is restricting search results to only open opportunities.

3. Change the filter criteria to Status "Does Not Equal Open."
This ensures that both open and closed opportunities are included in search results.

QUESTION 10
Hotspot Question

You are working a list of leads in Dynamics 365 Sales.

You have a custom security role that contains the following privileges:

`- create and edit user-level privileges on the lead and note entities.`

```
- business unit-level append, append to, and assign privileges on the
lead and note entities.
- organization-level share privileges on the lead and note entities.
```

You need to perform the following actions on leads:

```
- add notes to leads.
- assign leads to other users.
```

How should you manage leads? To answer, select the appropriate options in the answer area.

NOTE: Each correct selection is worth one point.

Answer Area

Scenario	Privilege
Add notes to leads	Leads owned by people in your business unit only Leads owned by you only Leads owned by anyone in your organization
Assign leads to other users	Leads owned by your business unit and its child business units only Leads owned by people in your business unit only Leads owned by anyone in your organization

Answer:

Answer Area

Scenario	Privilege
Add notes to leads	Leads owned by people in your business unit only **Leads owned by you only** Leads owned by anyone in your organization
Assign leads to other users	**Leads owned by your business unit and its child business units only** Leads owned by people in your business unit only Leads owned by anyone in your organization

Explanation:
Add notes to leads - "Leads owned by you only"
The role has user-level create and edit privileges on the lead and note entities, meaning the user can only create and edit records that they personally own.

Assign leads to other users - "Leads owned by your business unit and its child business units only"
The role has business unit-level assign privileges, which allows the user to assign leads within their own business unit and its child business units but not across the entire organization.