"Please note that these files may not be up to date. However, the questions will help you understand the exam format and typical question patterns."

Topic 1, 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 Nova with their customizations, resolve issues, and advise on best designs to meet their requirements.

Overall configurations

To better understand their four-legged customers, Terra Flora has created a custom Portable, which is user-owned and related 1 -n with the Contact table, which represents the pets' primary owner.

The Per 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.

"Onboard new pet" business process flow

The founder is creating a business process flow named Onboard new pet to ensure that appropriate information is recorded for all new pets, starting with ensuring the correct litter choices are selected for cats who will be staying at Terra Flora.

When the Onboard new pet business process flow is done, the founder wants to have access to a view that will display all active pets including the Name and Type columns, as well as the current stage on the Onboard new pet business process flow.

Pet table icon

A custom image svg file has been created for the Portable.

Terra Flora wants to ensure this image is displayed alongside the pet page within the app.

Related Pet table activities

Terra Flora wants carers to be able to see their pets' activity history, as well as add new activities related to their pets. They want the following information to appear on their pets' timeline:

- Tasks carers completed or should do,
- E-mails exchanged with pet's owner (customer).
- A record of phone calls.

Other types of activities should NOT appear to users on the Pets forms.

The founder edited the Pet table advanced setting to enable associating Pet records with activities. The founder also added Pet table to the app sitemap that i being used.

Attachments are enabled for the tfeftable, including notes and files. But users should NOT see posts in the pet's activity timeline.

Post configuration is NOT enabled for the Pet table.

Logs

Auditing, log access, and read logs have been enabled in the production environment Auditing has started on the Terra Flora environment and has been enabled for common entities.

Breed galas

To celebrate their upcoming first year in operation, the founder is planning a series of breed galas. The series begins with a Corgi dog breed meet-up gala.

The breed of an owner's pet may be mentioned in many places within the system, including:

1. Emails (subject or body)
2. Notes (including Word documents exports of PDFs uploaded as attachments)
3. Single or multiple lines of text columns on any standard table (including lead, contact and opportunity at minimum)
4. On the Pet table in either the Description or in the Breed columns.

Additionally, the breed may be referenced in several ways including singular, multiple, shorthand (for example: corgi, corgis, or corgs), and may have been misspelled.

Corgi meet-up gala

The carer needs to be assigned ownership of several Contact records (representing customers that own Corgis) that live nearby so that event flyers can be delivered personally. When the carer is delivering flyers, they need to quickly check the owner and related pet information on their phone. When the Contact records are assigned to carer, any pets that are related to these contacts via the primary owner relationship should also be assigned to the carer.

The founder has created a business process flow on the Portable named Corgi meet-up to allow Corgis to be registered as attending the gala. This business process flow is second in the default order on the Pet table. If the carer has a conversation with the owners, the carer is required to add notes to the timeline and complete the first stage of the business process flow.

Issues

Before the creation of the Pet table, information regarding pets was either added to the owner's Contact record in the form of notes or created as Contact records themselves.

These Contact records used the name of the pet in the Last Name column and the owner's address in the first set of Address columns.

When these pet Contact records are identified, they are deactivated.

No duplicate detection rules have been published and duplicate pet records are currently present across both the Contact and Pet tables.

Auditing

When a pet's dietary requirements or a Contact's email address is updated, Terra Flora requires the following information to be logged:

5. The user who made the change.
6. The current and previous values of the columns.

7. The time and dale of the changes.

Terra Flora also needs to track any exports of records to Microsoft Excel within the compliance center.

Relationship behavior

Recently, a pet owner informed Terra Flora that their pet cat has been rehomed.

After receiving this information, the carer deleted the owner's Contact record from the system, which in turn deleted the Pet record.

Shortly after, the new pet owner contacted Terra Flora to book their cat for a stay and was frustrated that Terra Flora had NOT retained a record of their cat's dietary requirements or any of the previous carer notes about the cat.

In such situations. Terra Flora now requires that the owner's Contact record should NOT be allowed to be deleted if any Pet records are related to it via the primary owner look-up column.

Users should be required to update the look-up column to new owner's Contact record or remove the current value first before they can delete the Pet record. If the new owner's Contact record is selected on a pet any active bookings against the pet should also be updated to the new owner, but previous inactive bookings should NOT be updated.

Business process flows and the Corgi meet-up gala

The founder has recently made an update to the Onboard new pet business flow but now CANNOT activate it. For the Corgi gala, the founder has asked the carer for help in:

8. completing the registrations that the founder started, and
9. registering more Corgis for the upcoming gala.

When the carer creates new pet records, the carer is UNABLE to see the Corgi meet-up business process flow.

Currently, when the carer checks the owner's record on their phone, the related pet information is difficult to view as they must scroll down to review the information.

Question: 1

You need to ensure the active stage of the business process flow is visible in a view on the Pet table that you share with the founder.

Which two actions should you perform to meet the founder's requirements? Each correct answer presents a complete solution. (Choose two.)

NOTE: Each correct selection is worth one point.

A. Create a new column on the Pet table and use a cloud flow to write the active stage from the Onboard new pet table to the new column

B. Create a new column on the Onboard new pet table and use a cloud flow to write the active stage from the Pet table to the new column.

C. Using the Active Pets view, edit the columns to add the new columns, save the edited view as a new view, and then share the view with the owner.

D. Using the My Pets view, edit the columns to add the new columns, save the edited view as a new view, and then share the view with the owner.

Answer: AC

Explanation:

To display the active stage of the business process flow (BPF) in the Pet table view, the active stage must be stored in a column within the Pet table. Since the Onboard new pet BPF is linked to the Pet table, a cloud flow can be used to fetch the active stage from the BPF and write it into a newly created column on the Pet table.

Once the data is available in the Pet table, the next step is to modify an existing view. Since the Active Pets view is already being used in the system, modifying this view by adding the newly created column ensures that the relevant data is visible. Saving the edited view as a new one and sharing it with the founder completes the requirement.

Question: 2

You need to satisfy the founder's requirements for displaying the custom image within the app.

Where should you upload the image?

A. An image column
B. A file column
C. An icon control
D. A web resource

Answer: D

Explanation:

To display a custom image (such as an .svg file) as an icon for a table in a model-driven app, the image should be uploaded as a web resource in Dynamics 365. Web resources are used to store images, scripts, and other assets that can be referenced within the application.

Once uploaded as a web resource, the image can be set as the table icon in the customization

settings of the Pet table.

Question: 3

HOTSPOT

You are updating the current relationship behavior of the primary owner (Contact) to pet relationship.

You need to ensure the case study requirements are met.

Which two options must be changed? To answer, select the appropriate options in the answer area.

NOTE: Each correct selection is worth one point.

Answer Area

Many-to-one

Choose the **Related table** to which to create your relationship lookup. Learn more

Display area *

Details

Display order *

10000

Relationship behavior

Type of behavior *

Custom

Delete *

Cascade All

Assign *

Cascade All

Share *

Cascade All

Unshare *

Cascade All

Reparent *

Cascade All

Answer:

Explanation:

Delete: Currently set to "Cascade All," which is causing the issue of deleting the pet records when the Contact record is deleted. This should be changed to "Restrict" to prevent deletion if related Pet records exist.

Reparent: Since any active bookings should be updated when the Pet's primary owner is reassigned, the Reparent option should be set to "Cascade Active" instead of "Cascade All" to ensure that only active bookings are updated, not inactive ones.

Question: 4

HOTSPOT

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

Fie d n Save and Close 4J ^ctcins •

& Security Role: Salesperson

Working on volu no

Details Cot? Records Meeting Sales Service Business Management Service Management Customization Missing Entities Business Process Flows Cus

Table	Create	Prod	Write	Delete	Append	Append To	Assign	Share
Lxpired Process	•	•	•	•	•	•		
Lead To Opportun ty Sales Process	•	•	•	•	•	•		
lot Alen to Case Process								
Corgi Mert up	•	•	•		•	•		
Onboard new pet		0				0		
New Process	•	•	•	•	•	•		
Opportunity Sales Process	•	•	•	•	•	•		
Phone To Case Precess	•	•	•	•	•	•		
Translation Proems	•	•	•	•	•	•		

Key

_ None Selected User Business Unit V Parent Chid Business Units V 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 createAand when the carer creates new oet 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

- toe corgi meet-un flow . >
- both the corgi meet-up and onboard new pet business process Hows
- the corgi meet-up flow.

Answer:

Explanation:

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.

When the carer uses the switch process dialog, they will see the corgi meet-up flow.

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:

The image shows that the "Salesperson" security role has the "Create," "Read," "Write," "Delete," "Append," and "Append To" permissions set for the "Corgi meet-up" process.

The green circle indicates permissions at the Organization level, meaning the carer can access all records associated with the "Corgi meet-up" business process flow across the entire organization.

Visibility of Business Process Flows on Pet Records:

Since the carer has these permissions at the Organization level, they will be able to see all business process flows related to pet records that have been set up by the founder.

In this case, the answer provided in the image indicates that the carer will be able to see business process flows that were created by both the founder and new flows initiated by the carer themselves on the Pet records.

Switch Process Dialog Visibility:

The switch process dialog will allow the carer to select from multiple business process flows that are applicable to a given record.

According to the selection options provided, if both the "Corgi meet-up" and the "Onboard new pet" flows are available, and they are configured to be accessible by the Salesperson role, the carer should be able to see both flows when using the switch process dialog. This aligns with the provided answer choices, which indicate that both flows are visible when switching.

Reference 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!

Question: 5

You need to configure search to ensure the administrators can find all records which reference Corgis. Which action must you perform?

A. Within system settings, select up to 10 relevant tables.
B. Within the solution, ensure all relevant tables are indexed.
C. For all relevant tables, ensure that the Can enable sync to external search index setting is False.
D. Add columns to be searched to the Lookup view for each relevant table.

Answer: B

Explanation:

To enable comprehensive search capabilities for administrators to find all records referencing specific terms (such as "Corgis"), it is essential to ensure that all relevant tables are indexed.

In Dynamics 365, configuring search functionality for specific tables involves setting up the tables to be searchable, which can be done by indexing them within the solution.

Indexing relevant tables makes them accessible in the search feature and ensures all fields within those tables can be searched, allowing for quick retrieval of records that reference specific terms. System settings (Option A) is limited to selecting up to 10 tables and is more about quick search rather than full indexing. The sync to external search index setting (Option C) is for integration with external search tools and does not directly impact internal search capabilities.

Adding columns to the Lookup view (Option D) affects how lookups work but does not influence fulltext search results.

Reference from Microsoft Documentation:

For configuring search indexing, refer to [Configure relevance search in Dynamics 365] for more information on indexing tables to enhance search capabilities.

Question: 6

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 Flor

a. 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. Email and Phone Call.

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

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

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

Answer: B, C

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):

According to Terra Flora's requirements, only Tasks, Emails, and Phone Calls should appear in the timeline for Pet records. Therefore, removing all other activity types ensures that only the relevant activities are shown. This customization is achieved in the timeline settings by unchecking unnecessary activity types.

Unchecking the Posts Option (Option C):

Since Terra Flora specified that posts should not appear on the timeline, you should uncheck the Posts option under the Record types settings in the timeline configuration. This action removes posts from the view, aligning with Terra Flora's requirement to exclude posts from the Pet records timeline. Other Options

Unchecking Notes (Option A) would prevent users from adding or viewing notes, which Terra Flora requires.

Unchecking the Activities Option (Option D) would disable all activities on the timeline, which does not meet Terra Flora's needs as they require Task, Email, and Phone Call activities.

Option E deals with the display format of notes but does not restrict their visibility, which does not align with the requirement to exclude posts specifically.

Reference 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.

Question: 7

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.

Reference from Microsoft Documentation:

For guidance on setting up duplicate detection jobs and rules, refer to Detect duplicate records in Dynamics 365.

Question: 8

You need to configure the required audit settings.

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

A. Enable auditing on the Dietary requirements column.
B. Enable auditing on the Pet table.
C. Enable auditing on the Contact tab\e.
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: A, B

Explanation:

Enable Auditing on Columns (Options A and D):

Enabling auditing on specific columns like Dietary requirements and Email address ensures that any changes to these fields are tracked. This meets Terra Flora's requirement to log changes to these fields along with details of who made the changes and the timestamp.

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

By enabling auditing at the table level for Pet and Contact, you ensure that any updates to these tables, including changes to all associated columns, are recorded. This broad setting ensures full coverage of auditing for both tables.

Enable Audit User Access (Option F):

This option is recommended to track when users access certain data, which can help with compliance and monitoring user interactions with sensitive data.

Option E (Start Read Auditing):

Read auditing tracks when records are read. If compliance requires monitoring every time a record is accessed, enabling this could be necessary; however, the primary focus is on modifications rather than access alone.

Reference from Microsoft Documentation:

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

Question: 9

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):
To display the current active stage of the "Onboard new pet" business process flow, you need to ensure that the Active Onboard new pet view includes relevant columns from the Pet table, specifically those tracking process flow stages.
Creating and Adding a New "Onboarding Stage" Column (Option D):
Creating a column such as "Onboarding stage" on the Pet table helps track the active stage of the onboarding process directly within the view. This allows users to see at a glance which stage each pet is in without navigating away from the main view.
Other Options:
Option A (Adding a page) refers to modifying the app's navigation, which doesn't directly impact the visibility of the business process flow stage.
Option C (All Onboard New Pet View) may not be as relevant if you only need to focus on active onboarding records rather than all records.
Reference from Microsoft Documentation:
For configuring views and columns in Dynamics 365, refer to Create and edit views.

Question: 10

An organization is using Microsoft Power Query when connecting to data sources in Dynamics 365 Customer Insights - Dat
a. You need to load contacts to Customer Insights - Data using Power Query. Which is an appropriate action to take when using Power Query to ingest data?
A. You must create a separate Power Query data source for each table you wish to ingest.
B. You can only add additional columns to the dataset in Power Query before the data source is created in Customer Insights - Data.
C. After you save a Power Query data source, you have to manually trigger the initial refresh process.
D. You can add additional tables to the data source using Get Data functionality in the Power Query.

Answer: D

Explanation:
In Dynamics 365 Customer Insights - Data, when using Power Query to ingest data, the Get Data functionality allows users to add multiple tables from various data sources.

This flexibility enables users to enrich the dataset by pulling in additional tables that may be related or necessary for the data unification process.

Power Query in Customer Insights supports creating robust data flows by allowing multiple tables to be added within a single data source setup, providing a comprehensive data modeling environment. Reference: [Microsoft Documentation - Use Power Query in Customer Insights]

Question: 11

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]

Question: 12

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 to add 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]

Question: 13

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]

Question: 14

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 families allow 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 flatscreen TVs.
By using Product 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.

Question: 15

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:
In Dynamics 365 Sales, the base unit represents the smallest quantity or measurement used to sell a product or service. It serves as the foundational unit within a unit group, which allows you to define how a product can be measured and sold in various quantities.
All other units within the unit group are defined in relation to this base unit. Therefore, it should represent the smallest quantity possible, ensuring flexibility in defining larger units or multiples based on this standard.
Selecting the Base Unit - Why the Lowest Quantity?
Choosing the lowest needed unit ensures that any other units, whether they are multiples or larger groupings, can be accurately calculated in relation to the base unit. This approach allows you to accommodate various selling quantities and ensures precise calculations across different unit types. For example, if the lowest unit is a single item, you can then configure units such as a dozen, box, or case based on this base unit. This provides consistency and accuracy in pricing and inventory management.
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.

Question: 16

HOTSPOT
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	Action
Add a new flavor to the product catalog	Create a product property. Create a unit. Create a price list item. Create a product family Create a product property
An existing opportunity wants to change an order to one of the new bread flavors.	Select the new bread flavor in the opportunity product Update the pnce list. Modify and publish the product. Delete the opportunity product and readd the item. Select the new bread flavor in the opportunity product

Answer:

Explanation:

Answer Area

Scenario	Action
Add a new flavor to the product catalog	Create a product property.
An existing opportunity wants to change an order to one of the new bread flavors.	Select the new bread flavor in the opportunity product.

Scenario 1: Adding a New Flavor to the Product Catalog

The bakery develops new bread flavors regularly, and these flavors are variations of an existing product (bread). In Dynamics 365, product properties are used to define characteristics or options of a product, such as flavors, sizes, or colors. Since the bread flavors are variations, they can be treated as product properties rather than separate products.

By creating a product property, you can add new flavors as options under the existing bread product, allowing flexibility without altering the core product structure.

Reference: Microsoft Documentation - Define Product Properties in Dynamics 365

Steps to Create a Product Property:

Go to Sales > Product Catalog > Products.

Open the existing product (bread) and navigate to Product Properties.

Add a new property (flavor) and define the possible values (e.g., new flavors).

Save and publish the product with the updated properties.

Scenario 2: Changing an Order to a New Bread Flavor in an Opportunity

When a customer wants to change their order to a new flavor within an existing opportunity, the selected product in the opportunity can be updated to reflect the new flavor.

Since flavors are configured as product properties, you can select the specific flavor for the opportunity product directly without needing to recreate or delete the product from the opportunity. This approach leverages product properties, ensuring that the change is streamlined and does not require re-adding or modifying the core product.

Reference: Microsoft Documentation - Configure Products in Opportunities in Dynamics 365

Steps to Select a New Flavor in the Opportunity Product:

Open the specific opportunity record in Dynamics 365.

Navigate to the product line items and select the bread product.

In the product properties, update the flavor to the new option as required.

Save the changes to ensure the opportunity reflects the new flavor selection.

These actions allow the bakery to manage new flavors flexibly within their product catalog and seamlessly adjust opportunities to accommodate flavor changes, enhancing customer satisfaction and operational efficiency.

Question: 17

DRAG DROP

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 are a. Arrange the four actions in the correct order.

Actions | Order

.. 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 UN self-referential relationship and mark the " relationship as hierarchical.

:: Go to the Hierarchy Settings grid view

Answer:

Explanation:
The correct order of actions to create a new custom account plan table with a hierarchical parentchild 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 Reference: Create a New Account Plan Table:

To model account plans for subsidiaries and manage the parent-child relationships, start by creating a new table (entity) named "Account Plan."

This table will store information related to the account plans, and you can define custom fields and settings as needed.

Reference: [Microsoft Documentation - Create Custom Tables in Dynamics 365]
Create a 1
Self-Referential Relationship and Mark It as Hierarchical:

Establish a self-referential relationship within the Account Plan table where one record can be linked to another within the same table. Choose a 1
relationship type, where one parent account plan can have multiple subsidiary account plans.
Mark this relationship as hierarchical to enable visual representation of the hierarchy. This is essential for tracking parent-subsidiary structures in a hierarchical view.
Reference: [Microsoft Documentation - Configure Self-Referential and Hierarchical Relationships]
Open the Advanced Relationship Settings:
After setting up the hierarchical relationship, go to the Advanced Relationship Settings. This allows you to fine-tune options related to cascading behavior, which will control how changes in parent records impact related child records.

Reference: [Microsoft Documentation - Configure Advanced Relationship Settings]

Go to the Hierarchy Settings Grid View:

Finally, navigate to the Hierarchy Settings to configure the visualization settings for this relationship. The Hierarchy Settings will enable you to define how the hierarchy is displayed, allowing users to see the parent-child relationships clearly.

Once configured, publish the changes so that users can access the hierarchical view within the system.

Reference: [Microsoft Documentation - Configure and Use Hierarchy Settings]

By following these steps, you will have configured the new custom account plan table with hierarchical visualization, meeting the requirements to manage and display complex parent-child relationships within your Dynamics 365 system.

Question: 18

DRAG DROP

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 are a. Arrange the five actions in the correct order.

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

Actions Order

:: in the Forms area, create a quick create form with the required columns

:: In the Forms area, create a card form with the required columns.

:: Select Tables > Lead

.. In the Forms area, create a quick view form witn the required [" columns.

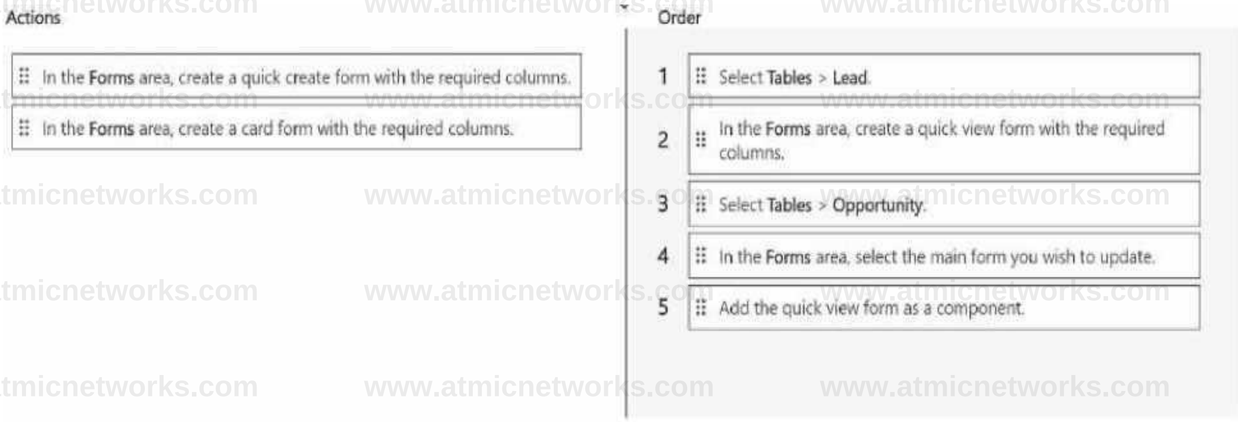
|i: Select Tables > Opportunity

lln the Forms area, select the mam form you wish to u pdate

:: Add th? quick view form as a component

Answer:

Explanation:



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 Reference: Select Tables > Lead:
Begin by selecting the Lead table, as the attributes that need to be displayed in the Opportunity form originate from the Lead record. This step ensures that you are working with the correct table that holds the data you need.
Reference: Microsoft Documentation - Access and Customize Tables in Dynamics 365
In the Forms Area, Create a Quick View Form with the Required Columns:
Within the Lead table, go to the Forms section and create a Quick View form. The Quick View form will be designed to include the necessary custom attributes from the Lead table.
This step is crucial as the Quick View form will later be embedded in the Opportunity form to provide context about the originating lead.
Reference: Microsoft Documentation - Create Quick View Forms
Select Tables > Opportunity:
After configuring the Quick View form in the Lead table, navigate to the Opportunity table where you will embed this Quick View form.
In the Forms Area, Select the Main Form You Wish to Update:
Within the Opportunity table, go to the Forms area, and select the Main Form that sales users will use. This is where you will add the Quick View form created from the Lead table.
Reference: Microsoft Documentation - Customize Main Forms in Dynamics 365
Add the Quick View Form as a Component:
Finally, add the previously created Quick View form as a component on the Opportunity Main Form. This will enable the embedded display of lead information, allowing users to view lead data directly within the Opportunity form.
Once added, save and publish the form to make the changes effective.
Reference: Microsoft Documentation - Add Quick View Forms to Other Forms
By following these steps, sales users can access lead information within the Opportunity form itself, streamlining their workflow by removing the need to navigate to the Lead record.

New

Question: 19

DRAG DROP

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 are

a. Arrange the three actions in the correct order.

Actions

^^^^^^^^^^__^^^^^^^^^^__O^^^^^^^^^__
^^^^^^^^^__

Answer Area

Open the Main View,

Expand the Opportunity entity.

Delete the filter criteria Status "Equals Open."

Change the filter criteria to Status "Does Not Equal Open."

5 Open the Quick Find View.

Answer:

Explanation:

Actions	Answer Area
Open the Main View.	Open the Quick Find View.
Expand the Opportunity entity.	Delete the filter criteria Status "Equals Open."
Delete the filter criteria Status "Equals Open."	Change the filter criteria to Status "Does Not Equal Open."
Change the filter criteria to Status "Does Not Equal Open."	
Open the Quick Find View.	

Question: 20

You are running Dynamics 365 Sales for a pharmaceutical company. The hospitals are set up as accounts. The nurses are set up as contacts under each hospital name.

A nurse works for HospitalA and HospitalB part time. You add the nurse as a contact for Hospital A. You realize you can add the nurse as a contact to only one hospital.

You need to ensure that the nurse is associated with both hospitals in the system.

What should you do?

A. Create business units for HospitalA and HospitalB. Open the contact record for the nurse and assign it to a user in HospitalB.

B. Create an access team that has the nurse as owner. Open the HospitalA account record and assign it to the new team account. Repeat this process for HospitalB.
C. Open the HospitalB record and assign the nurse to a task activity.
D. Open the contact record for the nurse and create a connection to HospitalB.

Answer: D

Explanation:

In Dynamics 365 Sales, a Contact can only have one parent Account by default. Since the nurse works for both HospitalA and HospitalB, you need to associate the nurse with the second hospital without changing the primary account. The best way to achieve this is by creating a connection between the nurse's contact record and HospitalB.

Connections in Dataverse allow you to relate records without changing ownership or structure. You can define a connection role, such as "Works for," to indicate the nurse’s relationship with HospitalB while maintaining the existing link with HospitalA.

Question: 21

HOTSPOT
You are creating a business process flow named "Onboard new pet" to support onboarding of new clients for a pet care business.
A partially completed business process flow is shown in the following exhibit.
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

To enable the business process flow to pass validation, you should ensure that

- the column used to evaluate the condition is added to the preceding stage.
- the false side of the condition is connected to a stage.
- the stages on each side of the condition are on different tables.

After the flow has been updated to pass validation, when a user starts creating a new pet record, the user will see

- one stage.
- two stages.
- three stages.

Answer:

Explanation:

Answer Area

To enable the business process flow to pass validation, you show ld ensure that

- the column used to evaluate the condition is added to the preceding stage.
- the false side of the condition is connected to a stage.
- the stages on each side of the condition are on different tables.

After the flow has been updated to pass validation, when a user starts creating a new pet record, the user will see

- one stage.
- two stages.
- three stages.

Question: 23

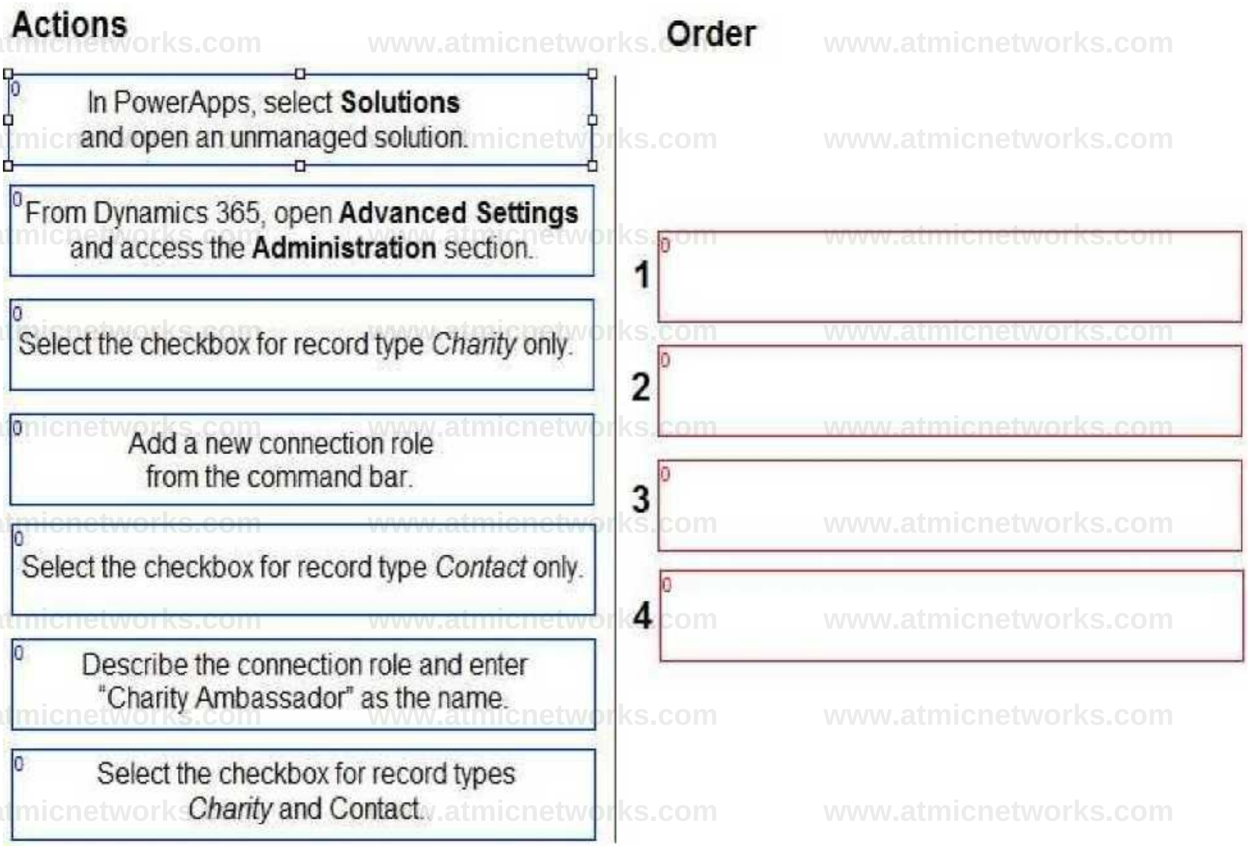
DRAG DROP

Within your non-profit organization you have set up your different charities in a custom table to store charity records.

In the Contact table, you have various famous people who can be special charity ambassadors.

You need to set up the charity ambassador connection role so that charity managers can link the charity through a connection from the contact

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



Answer:

Explanation:

Actions

From Dynamics 365, open **Advanced Settings** and access the **Administration** section.

Select the checkbox for record type *Charity* only.

Select the checkbox for record type *Contact* only.

Order

1. In PowerApps, select **Solutions** and open an unmanaged solution.
2. Add a new connection role from the command bar.
3. Describe the connection role and enter "Charity Ambassador" as the name.
4. Select the checkbox for record types *Charity* and Contact.

Question: 24

DRAG DROP

The sales team wants to see a timeline of related activities and notes on a custom Dynamics 365 Sales form.

You need to add a timeline control to the form,

Which five actions should you perform in sequence? To answer, move the five appropriate actions from the list of actions to the answer are

a. Arrange the five actions in the correct order.

Actions

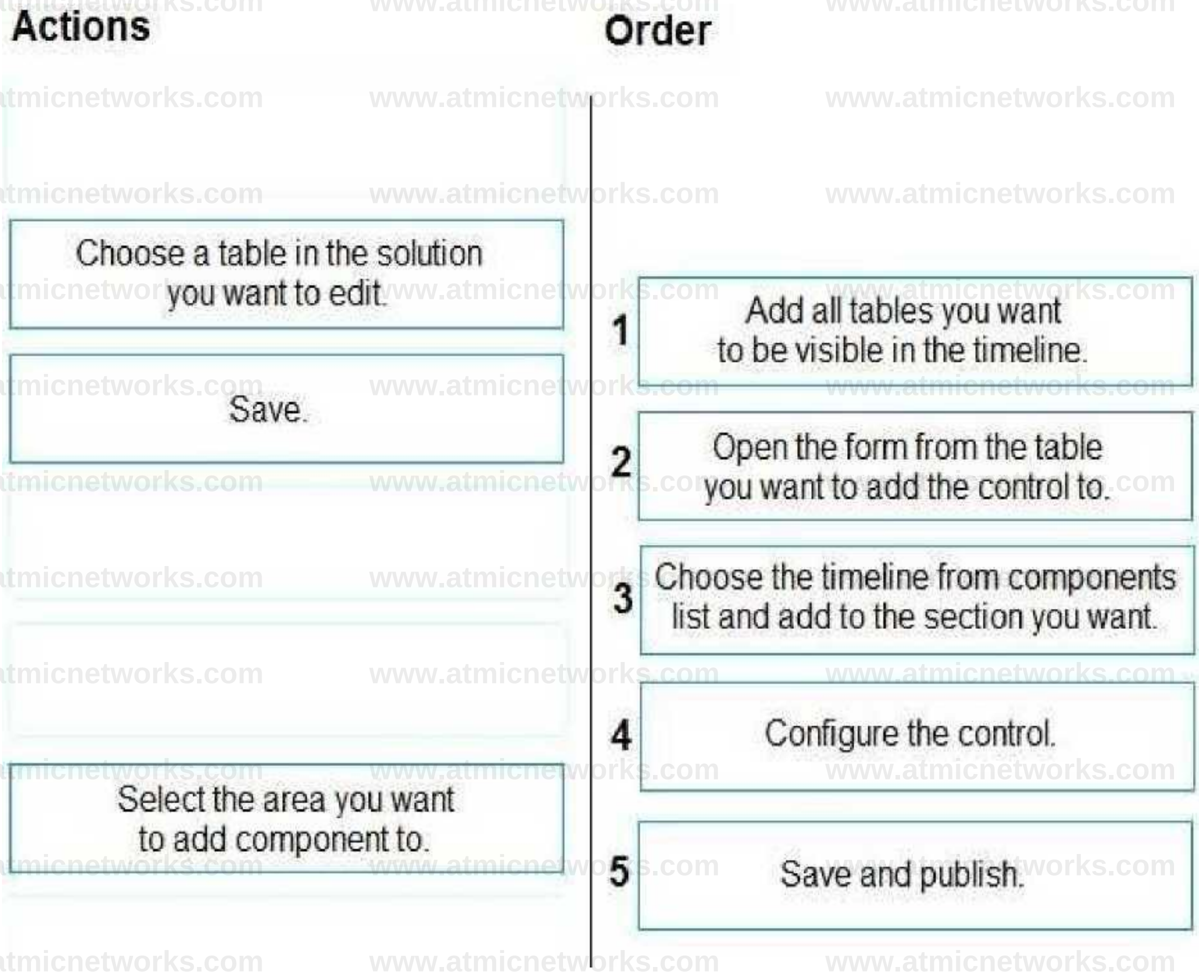
- Add all tables you want to be visible in the timeline.
- Choose a table in the solution you want to edit.
- Save.
- Open the form from the table you want to add the control to.
- Configure the control.
- Select the area you want to add component to.
- Choose the timeline from components list and add to the section you want.
- Save and publish.

Order

1
2
3
4
5

Answer:

Explanation:



Question: 25

Your organization has customized Dynamics 365 Sales to allow sales users to create account plans on existing accounts. The Account table has a one-to-many relationship with the Custom Account Plan table.

To comply with privacy laws, your organization needs to delete inactive account records after two (2) years. Some account managers noticed that when they delete accounts, linked account plans are also deleted. Account managers want to be able to use these account plans as references.

You need to ensure that when accounts are deleted, the accounts plans are NOT deleted.

Which type of behavior should you set on the delete action in the relationship between accounts and account plans?

A. Cascade All
B. Cascade Active
C. Remove Link
D. Restrict

Answer: D

Explanation:

Configure table relationship cascading behavior

The CascadeConfiguration class or CascadeConfiguration complex type) contains the properties representing actions that may be performed on the referenced table in the one-to-many relationship. Each property can be assigned one of the values of the CascadeType enum type.

- Restrict

Prevent the Referenced table record from being deleted when referencing tables exist. Incorrect:

- Cascade All

Perform the action on all referencing table records associated with the referenced table record.

- Cascade Active

Perform the action on all active referencing table records associated with the referenced table record.

- Remove Link

Remove the value of the referencing column for all referencing table records associated with the referenced table record.

Reference:

https://learn.microsoft.com/en-us/power-apps/developer/data-platform/configure-entity- relationship-cascading-behavior

Question: 26

An organization is using Microsoft Power Query when connecting to data sources in Dynamics 365 Customer Insights - Data.

You need to load contacts to Customer Insights - Data using Power Query.

Which is an appropriate action to take when using Power Query to ingest data?

A. You must create a separate Power Query data source for each table you wish to ingest.

B. You can only add additional columns to the dataset in Power Query before the data source is created in Customer Insights - Data.

C. After you save a Power Query data source, you have to manually trigger the initial refresh process. D. You must select Power Query as an import method when creating the data source.

Answer: C

Explanation:

Correct:

- After you save a Power Query data source, you have to manually trigger the initial refresh process.
- You can add additional tables to the data source using Get Data functionality in the Power Query.

Incorrect:

- After you save a Power Query data source, you have to manually trigger the initial refresh process.
- You can only add additional columns to the dataset in Power Query before the data source is created in Customer Insights - Data.
- You must create a separate Power Query data source for each table you wish to ingest.

Note:

- After you save a Power Query data source, you have to manually trigger the initial refresh process. For Power BI users, refreshing data typically means importing data from the original data sources into a semantic model, either based on a refresh schedule or on demand. You can perform multiple semantic model refreshes daily, which might be necessary if the underlying source data changes frequently.

- You can add additional tables to the data source using Get Data functionality in the Power Query. When using Power Query in Dynamics 365 Customer Insights - Data, you have the flexibility to add additional tables to your data source through the Get Data functionality. This allows you to manage multiple tables and sources efficiently within a single Power Query environment.

Reference:
https://learn.microsoft.com/en-us/power-bi/connect-data/refresh-data

Question: 27

HOTSPOT

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 are

a. NOTE: Each correct selection is worth one point.

Answer:

Explanation:

Start Auditing:

Enabling Start Auditing is the primary step to activate auditing for Dynamics 365. This setting ensures that changes to data, including field updates on records, are tracked and logged.

Without enabling this checkbox, no data changes will be recorded, as it is the fundamental requirement for auditing across all entities and fields.

Reference: Microsoft Documentation - Enable and Configure Auditing in Dynamics 365

Audit User Access:

The Audit User Access checkbox ensures that user activities related to accessing records are tracked. This is essential for identifying when specific users accessed records, which could correlate with field changes observed.

Enabling this option provides insights into who accessed which records and when, which is useful in understanding user behavior and any unusual access patterns.

Reference: [Microsoft Documentation - Configure User Access Auditing]

Additional Steps for Table-specific Auditing (if needed):

After enabling auditing at the system level, specific tables (entities) need to have auditing enabled if they are not covered under common, sales, marketing, or customer service entities.

Go to Settings > Customizations > Customize the System, select the custom table, and ensure that Auditing is enabled on the desired fields within the table.

By enabling both Start Auditing and Audit User Access, you ensure that both data changes and access patterns are recorded, providing a comprehensive audit trail for monitoring and troubleshooting field changes on records.

Question: 28

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.

The Vice president of sales role includes privileges related to managing sales territories, unlike the Sales team member or Salesperson roles, which are more focused on direct sales tasks.

The System customizer role 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]

Question: 29

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 o(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 statuscodecolumn: 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:

In Dynamics 365 Sales, opportunities have two primary columns related to their status: statecode and statuscode.

The statecode defines the primary state of an opportunity (e.g., Open, Won, Lost).

The statuscode provides more granular reasons associated with each primary state. For example, within the "Open" state, you can have various reasons such as "In Progress," "On Hold," etc. 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.

Question: 30

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:

The organization is collecting lead data from two sources: a web form created in Customer Insights - Journeys and manual entries by sales users. This setup could lead to duplicate entries if a lead is submitted through the web form and then entered manually by a sales user afterward.

To ensure data integrity and avoid duplication, it is essential to implement a mechanism that identifies and manages duplicates automatically.

Solution - Enabling Duplicate Detection:

In Dynamics 365, duplicate detection can be configured to alert users or prevent the creation of records that already exist based on certain criteria (such as email).

By enabling duplicate detection based on email addresses, the system will compare incoming lead data with existing records and prompt users if a duplicate is identified. This feature will ensure that leads collected from different sources are not duplicated unnecessarily.

Steps to Enable Duplicate Detection for Leads Based on Email:

Navigate to Settings > Data Management > Duplicate Detection Rules in Dynamics 365.

Create a new Duplicate Detection Rule for the Lead entity. Specify that the system should check for duplicate records based on the email field.

Publish the rule and ensure it is activated.

After activation, this rule will prompt users whenever a duplicate email is detected, either from the Customer Insights - Journeys web form or manual entry by sales users.

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.

Question: 31

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:
The goal is to include only specific opportunities—those that "sell"—in the forecast. This requires the ability to selectively include opportunities that meet specific criteria, such as the status, stage, or type of sale.
Solution - Using Additional Filters:
In Dynamics 365 Sales, additional filters can be applied within the forecast configuration to refine the opportunities included. Filters allow you to specify criteria such as opportunity status, probability, estimated revenue, or any custom field that signifies the opportunity has "sold."
By setting up filters, you can ensure that only opportunities matching the desired criteria are included in the forecast, providing a targeted and accurate view of expected sales.
Steps to Configure Additional Filters in Forecasting:
Go to Sales > Forecasts, and select or create a new forecast.
In the forecast settings, navigate to Filters and add conditions that define which opportunities are included. For example, you can filter based on status (e.g., only include opportunities marked as "Won").
Save and apply the filter settings to ensure only the relevant opportunities appear in the forecast.
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.

Question: 32

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

Question: 33

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

Question: 34

You use business process flows for all Dynamics 365 opportunities. Some opportunities are closed before business process flow durations are calculated. You need to ensure that business process flow duration values are calculated.
Solution: Change the opportunity to an inactive state. Does this meet the goal?

A. Yes
B. No

Answer: A

Explanation:

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

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

Question: 35

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.

Question: 36

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 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.

Question: 37

HOTSPOT

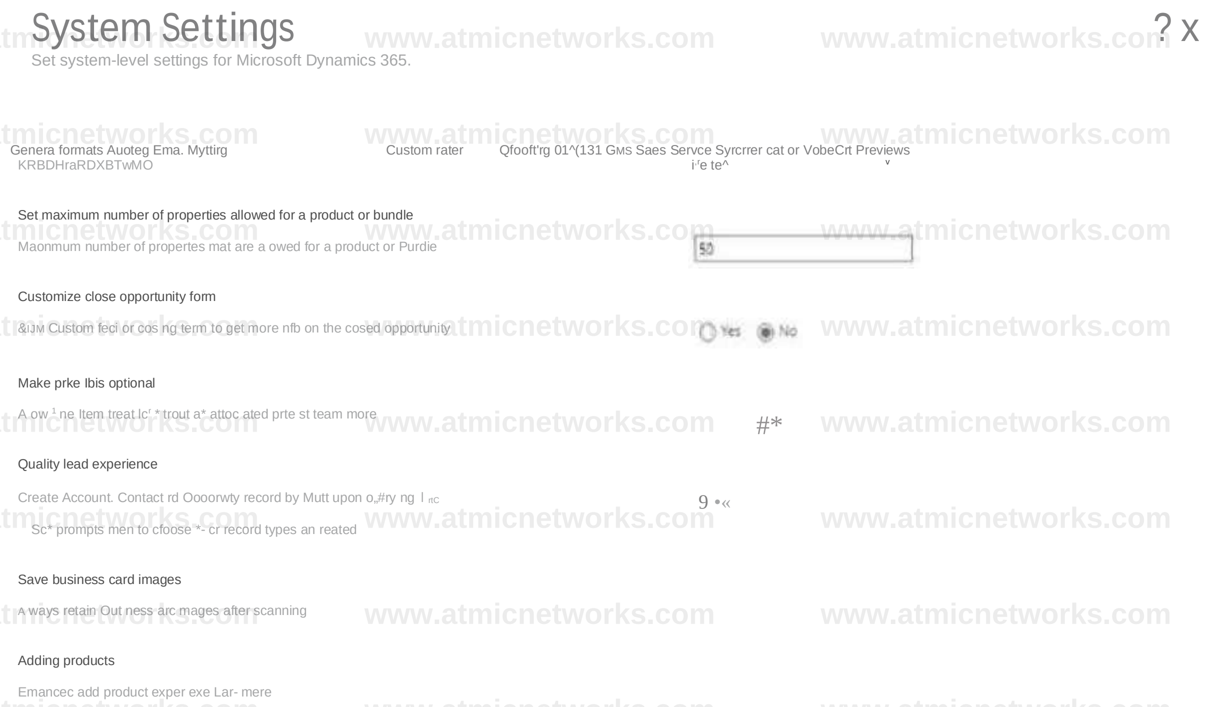
You are configuring Dynamics 365 Sales as part of a new implementation at your organization. Your organization has Sales Professional licensing.

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:



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

System setting

Which setting should you update to meet requirement HP

Quality lead experience
Customize close opportunity form
Make price lists optional
Save business card images
Adding products

Which setting should you update to meet requirement *2?

Make price lists optional
Quality lead experience Save business card images
Adding products

Answer:

Explanation:

Answer Area

Requirement from business stakeholders	System setting
Which setting should you update to meet requirement *1?	Quality lead experience
Which setting should you update to meet requirement #2?	Customize close opportunity form

Requirement #1

The requirement specifies that sellers want to convert leads gathered at events directly to contacts without necessarily creating opportunities initially.

The Quality lead experience setting in Dynamics 365 allows users to choose which records (Account, Contact, or Opportunity) to create when qualifying a lead.

By enabling this option, users can convert leads to contacts without automatically creating opportunities, aligning with the requirement.

Reference: [Microsoft Documentation - Configure Lead Qualification Settings in Dynamics 365]

Steps to Configure the Quality Lead Experience Setting:

Navigate to Settings > Administration > System Settings.

Go to the Sales tab.

Set Qualify lead experience to "Yes" to allow flexibility in lead conversion.

Requirement #2

The requirement states that sellers need different options for specifying the final status of deals.

The Customize close opportunity form setting allows customization of the form where users specify the status reason when closing an opportunity.

By enabling this, you can provide multiple status options, helping sellers specify various outcomes for closed deals (e.g., different statuses for won or lost deals).

Reference: [Microsoft Documentation - Customize Opportunity Close Experience in Dynamics 365]

Steps to Configure the Customize Close Opportunity Form Setting:

Navigate to Settings > Administration > System Settings.

Go to the Sales tab.

Set Customize close opportunity form to "Yes" to allow adding specific status options when an opportunity is closed.

By setting these configurations, Dynamics 365 Sales will support both the need for flexible lead qualification and provide detailed status options for opportunity closures, aligning with the organization's requirements.

Question: 38

HOTSPOT

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

Answer:

Explanation: Answer Area

Requirement	Action
Add the type of loss.	Modify the Status Reason option set
Record the loss for forecasting.	Modify the Opportunity Close form

Requirement: Add the Type of Loss

To track reasons for lost opportunities, including specifics like losses to competitors, you need to provide additional details on why an opportunity was closed as lost.

The Status Reason field can be customized to include specific reasons for the loss. This field is used within the context of the Opportunity entity and allows the addition of options to detail specific loss types.

By modifying the Status Reason option set, you can add various reasons (like "Lost to Competitor") which will appear as options when closing an opportunity as lost.

Reference: [Microsoft Documentation - Customize Status Reasons for Opportunities]

Steps to Modify the Status Reason Option Set:

Go to Settings > Customizations > Customize the System.

Locate the Opportunity entity and open its Fields section.

Find and select the statuscode (Status Reason) field.

Add new options to represent specific loss types and save the changes.

Publish the customization to make the new Status Reason options available for users.

Requirement: Record the Loss for Forecasting

Sales managers need to include lost opportunities and their reasons in forecasting. To ensure that this information is captured accurately, modifying the Opportunity Close form will allow users to specify details when marking an opportunity as closed (won or lost).

By customizing the Opportunity Close form, you can include fields that capture detailed information required for forecasting, such as the type of loss and any competitor information. This ensures that loss details are available for analysis and forecasting without needing custom code.

Reference: [Microsoft Documentation - Customize Opportunity Close Experience in Dynamics 365]()

Steps to Modify the Opportunity Close Form:

In the Sales Hub, navigate to App Settings > Close Opportunity Experience.

Customize the Opportunity Close form to include fields that are relevant to capturing loss information, such as adding fields for competitors or reasons.

Save and publish the form to reflect the changes.

By modifying the Status Reason option set and customizing the Opportunity Close form, you enable the sales team to record detailed reasons for lost opportunities, which will support accurate forecasting and analysis, all without using custom code.

New

Question: 39

DRAG DROP

You are implementing Dynamics 365 Sales at a new organization. All users will be using the Sales Hub app.

You need to assign the appropriate out-of-the-box security roles.

Using the principle of least access, which roles should you assign? To answer, move the appropriate roles to the correct users. Each role may be used once, more than once, or not at all. You may need to move the split bar between panes or scroll to view content.

NOTE: Each correct selection is worth one point.

Roles

- Salesperson
- Sales manager
- Sales team member
- Vice president of sales

Answer Area

User	Role
Retail assistant - Creates and updates accounts and contacts, but cannot edit the product catalog.	
Executive - Adds notes to accounts and contacts.	
Territory manager - Conducts forecasting and oversees product management.	

Answer:

Explanation:

User	Role
Retail assistant - Creates and updates accounts and contacts, but cannot edit the product catalog.	Salesperson
Executive - Adds notes to accounts and contacts.	sales tearr memoer
Territory manager - Conducts forecasting and oversees product management.	sales manager

Retail assistant - Salesperson

The retail assistant can create and update accounts and contacts but cannot edit the product catalog. The Salesperson role provides access to manage accounts and contacts but does not include permissions for product catalog management.

Executive - Sales team member

The executive only adds notes to accounts and contacts. The Sales team member role has minimal access and is appropriate for a user who only needs to add notes.

Territory manager - Sales manager

The territory manager is responsible for forecasting and product management, which aligns with the Sales manager role, as it includes permissions for managing forecasts and overseeing sales activities.

Question: 40

Your sales team lacks important information on the Opportunity Close form.

You need to update the form.

Which out-of-the-box role must you have?

A. Global administrator
B. System administrator
C. Sales manager
D. System customizer

Answer: B

Explanation:

To update the Opportunity Close form in Dynamics 365 Sales, you need a role that allows modification of system entities, including the Opportunity entity and its associated forms. The System administrator role provides full access to all customization features in Dynamics 365, including modifying forms, fields, and layouts.

Question: 41

HOTSPOT

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:

Explanation:

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

Question: 42

A company has two departments. Each department uses only custom forms and views designed for each department. Currently, all users can view all forms and views.

The company wants to improve usability for its users.

You need to limit users to only individual department forms and views.

What should you do?

A. Create a model-driven app for each department.

B. Use a hierarchy security model.

C. Use security roles.

D. Add an area for each department within the site map

Answer: C

Explanation:

In Dynamics 365 Sales, security roles control access to different forms, views, and records. To ensure that each department can only access their respective custom forms and views, you should assign security roles to the forms and views. This allows you to restrict users based on their department so they only see the forms and views relevant to them.

How it works:

Edit the form properties → Assign the form to specific security roles.

Edit the view properties → Restrict views based on security roles.

Ensure users have the correct security roles → Users in Department A will only see their assigned forms and views, and the same applies to Department B.

Question: 43

A company uses Dynamics 365 Sales Professional.

A new enterprise sales owner team must be created. The sales manager will be responsible for adding members and removing members from the team; a developer is available to assist.

You need to create the new team.

Which two values must you configure? Each correct answer presents part of the solution. (Choose two.)

NOTE: Each correct selection is worth one point.

A. Business unit name

B. Team channel name

C. Team administrator

D. Team description

E. Team name

Answer: C, E

Explanation:

Create an owner team

1. Make sure that you have the System Administrator, Sales Manager, Vice President of Sales, Vice President of Marketing, or CEO-Business Manager security role or equivalent permissions.

1. Go to Settings > Security. In Microsoft Dynamics 365 for Outlook, go to Settings > System > Security.
2. Select Teams.
3. On the Actions toolbar, select New button.

5. Enter a team name.

6. Select a business unit. [Only for Dynamics 365 Sales Enterprise].
7. Enter an administrator.
8. Select Owner in Team Type.
9. Complete other required fields, and then select Save.

If you don't select the business unit to which the team will belong, by default, the root business unit is selected. The root business unit is the first business unit created for an organization. [Only for Dynamics 365 Sales Enterprise]

Reference:

https://learn.microsoft.com/en-us/dynamics365/customerengagement/on- premises/admin/manage-teams

Question: 44

You manage a Dynamics 365 Sales environment where users can only view and edit their own records.
User2 is assisting with User1's opportunities while User1 is on vacation. User1 remains the owner of User1's opportunities.
User2 has reported that they CANNOT update User1's opportunities.
You need to diagnose the issue.
What should you do?

A. Ensure User2 is added to an Access team.
B. Ensure User2 is added to the Sales team.
C. Ensure the record is assigned to User2.
D. Ensure User2 is added to the Owner team.

Answer: A

Explanation:

Dynamics 365 Sales uses the Opportunity Sales Access Team template to provide access to the opportunity record to all the users connected under the Sales team connection role category. A salesperson who might not have access to a given opportunity record by their assigned security role privileges can still get access when added as a sales team member from this subgrid. This allows the sales team member users to access and work with the opportunity record in Dynamics 365 on a perrecord basis. Similarly, when an existing sales team member is deleted from the subgrid, the access to the opportunity record granted via the access team template is also removed.

Note: Use access teams and owner teams to collaborate and share information

When to use access teams
The teams are dynamically formed and dissolved. This typically happens if the clear criteria for defining the teams, such as established territory, product, or volume aren't provided.

The team members require different access rights on the records. You can share a record with several access teams, each team providing different access rights on the record. For example, one team is granted the Read access right on the account and another team, the Read, Write and Share access rights on the same account.

A unique set of users requires access to a single record without having an ownership of the record.

Reference:
https://learn.microsoft.com/en-us/dynamics365/sales/stakeholders-sales-team-members
https://learn.microsoft.com/en-us/dynamics365/customerengagement/on-premises/developer/use- access-teams-owner-teams-collaborate-share-information

Question: 45

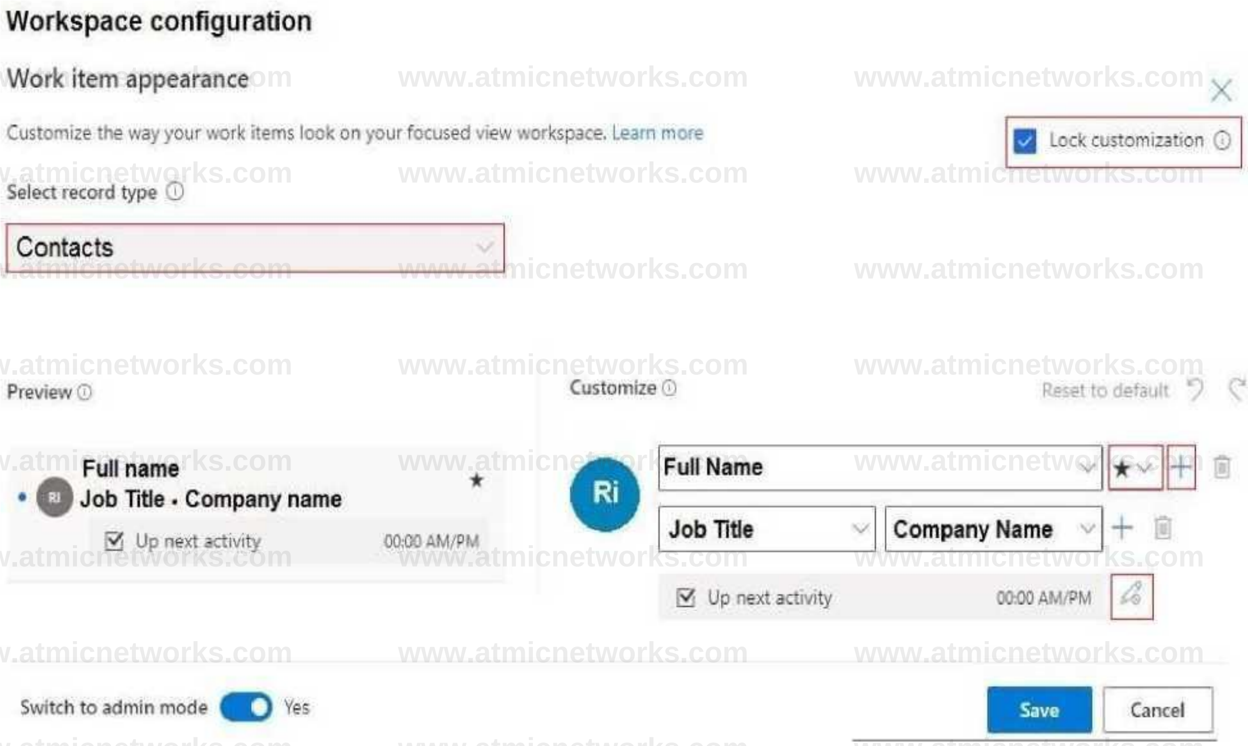
HOTSPOT
You are customizing a workspace in the sales accelerator.
The workspace must display the industry of a company.

You need to configure the work item appearance for a company.

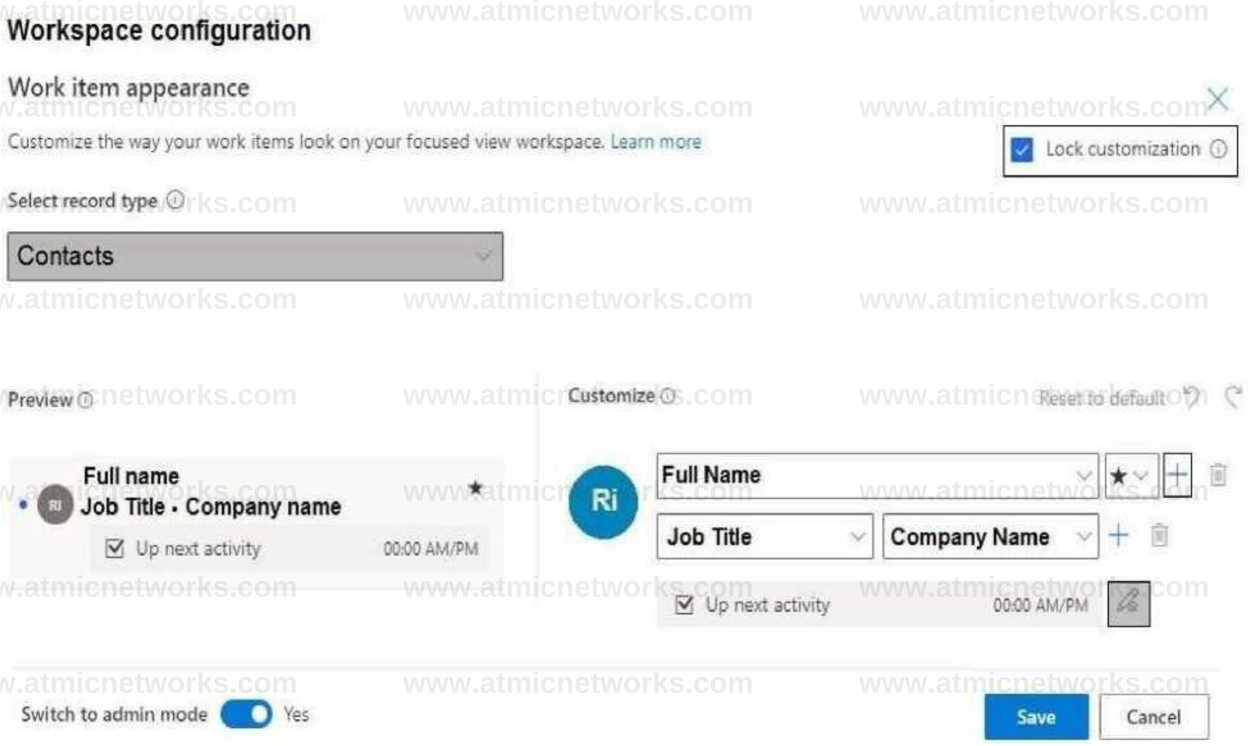
Which two settings should you modify? To answer, select the appropriate UI element in the answer area.

NOTE: Each correct selection is worth one point.

Answer:



Explanation:



Topic 2, 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.

Copilot in Dynamics 365 Sales settings

The following screenshots show the configured fields for opportunity settings summaries and recent changes in Copilot.

Opportunity settings

Help «e<|m stay iheid with summaries of key info ano went change! Ybu can choose whim MtK wdl be th own m summaries or cheeked tar went change! team more

Summary Recent changes

Record Type © Field $

• Opportunity (4)

bl revenue

Cuitonx* Need

proposed Sok ton

Eat close date

Account (Account) (2)

Annual Revenue

Primary Contact

Contact (Contact) (1)

JObT.de

Opportunity Product (Opportunity) 111

Product name

Competitor U)

Strength

Name

Opportunity settings

Help sellers slay ahead with summaries of key into and recent chantjo. Yau can choose wh«h fields will be shown in sumnuna or checked lor recent changes Lam HIVE

Summary **Recent changes**

Record Type 0 Held O

Opportunity ,4) tst revenue Customer Need Proposed Sctuton fd dose dale

Account .Account) (fl

Annual Revenue

ternary Contact

Contact (Contact! (1)

Job Tide

Opportunity Product i Opportunity) (I) Product name

Competitor 12)

Srmngth

Name

Business development managers

Contoso Ltd. has 30 business development managers (BDMs) across its sales teams. Each BDM is responsible for selling janitorial services to new and existing clients. All BDMs are assigned the sales manager security role in Dynamics 365 Sales.

Any 8DM can own an opportunity, even if a different BDM owns the client account record. Any other BDMs assigned to work on the opportunity will be included in the opportunity record's sales team. Opportunity records owned by a BDM will never include any additional client stakeholders other than the named contact for the opportunity.

The BDMs have been told to document all client communications in Dynamics 365, but they frequently exchange emails with client contacts through Microsoft Exchange WITHOUT tracking them in Dynamics 365.

Digital sales team

Contoso Ltd. has a digital sales team that comprises 10 junior sales resources who focus on lead qualification and conversion to opportunities. Members of this team are assigned a single custom security role named Digital seller that is a copy of the standard Salesperson role. View audit history and view audit summary permissions are disabled.

The team currently receives leads from an online form on Contoso Ltd.'s website. Many online lead submissions end up being duplicates, and the team manually reconciles the duplicates by comparing last name, email address, and phone number for all submitted leads.

Clients

Contoso Ltd. has a digital sales team that comprises 10 junior sales resources who focus on lead qualification and conversion to opportunities. Members of this team are assigned a single custom security role named Digital seller that is a copy of the standard Salesperson role. View audit history and view audit summary permissions are disabled.

The team currently receives leads from an online form on Contoso Ltd.'s website. Many online lead submissions end up being duplicates, and the team manually reconciles the duplicates by comparing last name, email address, and phone number for all submitted leads.

Client tiers

Clients are grouped into tiers based on annual revenue as calculated in a system outside Dynamics 365 Sales. Clients receive different levels of ongoing service and support based on their tier assignment

Annual revenue values for accounts and corresponding tier values are written to Dynamics 365 through a nightly batch process. Client tier values are only updated when they change, and tier value will always be blank for accounts with no calculated annual revenue.

The tier structure is:

- Tier A - annual revenue greater than or equal to $10,000,000 USD
- Tier B - annual revenue greater than $5,000,000 USD and less than $10,000,000 USD
- Tier C - annual revenue greater than $0 USD and less than or equal to $5,000,000 USD

The tier label is stored in a custom text field named Client tier(contoso_dienttiei) that contains only a single letter or is blank.

Northwind Traders account

There are three BDMs who frequently work together on large opportunities.

- BDM1 is the account owner for Northwind Traders, a multinational client.
- BDM1 owns all Northwind Traders opportunities with estimated revenue greater than or equal to 51.000,000.
- BMD2 and BDM3 are assisting BDM1 with several opportunities for Northwind Traders in different cities.
- BDM3 owns all other Northwind Traders opportunities. BDM3 is NOT a sales team member for any of the opportunities BDM1 owns, o BDM2 is a sales team member for all Northwind Traders opportunities.

Client Contact1 is the primary contact for the Northwind Traders' account. There are two other client contacts with whom the Northwind account team regularly engages - Client Contacts and Client Contact3.

BDM1 and the Northwind Traders account

BDM1 has been on vacation for two weeks. During vacation, BDM1 did NOT log into Dynamics 365, and BDM2 made the following updates to several open Northwind Traders opportunities.

Updated field	Opportunities	When the updates were made
Estimated close date	New York City office. London office, Toronto office	Two days before BDMVs return
Forecast category	Mexico City office	Five days before BDMVs return
Proposed solution	Seattle office	Nine days before BDMVs return

BMD2 also scheduled an internal meeting with BMD1 for the day they return to discuss a request from the primary contact for the account The meeting has the "London office' opportunity as its regarding value.

Desired enhancements

The global sales lead requests the following enhancements:

1. A "Welcome' email should be sent to the primary contact (or an account when the account first enters any client tier. This email should only be sent to the primary contact once.
2. Account owners should receive immediate notifications in the assistant in Dynamics 365 Sales when accounts change tiers. The notifications should include the account name and current tier.
3. A "Getting started" email should be sent to the main contact associated with an opportunity when the opportunity status is set to "Won."
4. The email should include a link to a custom onboarding form where the contact can supply information required to start the janitorial services for a given location.
5. If the contact does NOT click any links in the email, a follow-up email should be sent

4. All emails between BDMs and client contacts should be available for relationship analytics KPIs. Emails sent by other users outside of Dynamics 365 should NOT be included in the KPIs.

The digital sales team lead requests the following enhancements:

6. The ability for team members to use Copilot to summarize changes to lead records.
7. Replace the current online form used by their team to capture new leads. The new form should automatically handle duplicates using the rules the team currently applies manually.

Question: 46

DRAG DROP

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.

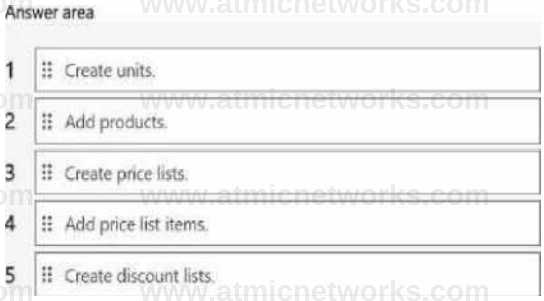
NOTE: More than one order of answer choices is correct. You will receive credit for any of the correct orders you select.

Actions

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

Answer:

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:

Start by defining units (e.g., each, box, dozen) for your products. Units specify how products are measured and sold, which is essential for setting pricing and discounts.

This step ensures that all products have consistent units of measure before adding them to the catalog.

Reference: Microsoft Documentation - Set Up Units in Dynamics 365 Sales

Add Products:

After units are created, add products to the catalog. Each product will have an associated unit and a description that defines it within the catalog.

Ensure products are added with complete details to enable proper pricing and discounting later. Reference: Microsoft Documentation - Create and Manage Products Create Price Lists:

Next, create price lists that define the pricing for products. Price lists can be specific to regions, customer types, or other criteria and are essential for associating products with prices.

A price list is necessary for assigning product prices, enabling you to link prices with discount lists in the subsequent steps.

Reference: Microsoft Documentation - Set Up Price Lists

Add Price List Items:

Add price list items to assign specific products to price lists and set their prices. This links each product with its pricing based on the price list created earlier.

It allows flexibility to have different pricing structures for the same product across multiple price lists if needed.

Reference: Microsoft Documentation - Add Price List Items

Create Discount Lists:

Finally, create discount lists to apply quantity discounts on products. Discount lists define percentage or flat rate discounts based on purchase quantities, which can then be applied when products are added to sales orders or quotes.

This step ensures that sellers can apply quantity-based discounts, meeting the requirement for the product catalog setup.

Reference: Microsoft Documentation - Create and Configure Discount Lists

By following these steps in the specified order, you can set up a product catalog that includes units, products, price lists, price list items, and discount lists, allowing sellers to manage product pricing and apply quantity discounts effectively.

Question: 47

HOTSPOT

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 Layout column settinqs for this forecast?

- 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

Answer:

Explanation:

Answer Area

Where should you rename the Omitted column to Cancelled Layout column settinqs for this forecast?

Where should you delete the Lost column for this forecast? Forecast configuration

Renaming the Omitted Column to Cancelled:

To rename a column in the forecast layout, such as changing Omitted to Cancelled, you should go to Layout column settings. This setting allows you to customize how columns appear in the forecast view, including renaming columns to better match your business terminology.

Renaming within Layout column settings will directly change how this column is labeled in the user interface for clarity and consistency with business terms.

Reference: [Microsoft Documentation - Configure Forecast Layout and Column Settings]

Deleting the Lost Column from the Forecast:

To remove a column entirely, such as the Lost column, you should adjust the Forecast configuration. This configuration setting allows you to add or remove columns from the forecast grid.

Modifying Forecast configuration affects the structural aspects of the forecast, such as which columns are included, based on what is necessary for reporting and analysis.

Reference: [Microsoft Documentation - Configure and Manage Forecasts]

By utilizing the Layout column settings for renaming columns and the Forecast configuration for adding or removing columns, you can tailor the forecast layout to meet specific business requirements, ensuring the forecast view is both relevant and easy for users to interpret.

Question: 48

HOTSPOT

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	512.50	Optional
Soda	53	$1.00	55000	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 are a. NOTE: Each correct selection is worth one point.

Answer Area

Scenario

Action

Determine the price of the product bundle

I Use the lunch bundle Drice.

Use the lunch bundle price

Add the prices of the sandwiches, napkins, and sodas.

Add the lunch bundle price and the prices of the napkins and sodas. Subtract the prices of the napkins and sodas from the lunch bundle price. Add another line item for sandwiches with the default price.

Increase the quantity of sodas in the line item.

Increase the quantity of sodas in the line item.

Increase the number of sodas at no additional charge.

Add a new line item for sodas and override the price Add a new line item for sodas with the default price.

Delete the soda line item from the bundle and add a new line item for all the sodas with the default price.

increase the number of sandwiches and charge the price list price for Add another line item far sandwkhgs with the default price each additional sandwich. [increase the quantity of sandwich

I Add another line item for sandwiches and override the price.

Add another line hem for sandwiches with the default price

Delete the sandwich line item from the bundle and add a new line item for all the sandwiches with the default price.|

Answer:

Explanation:

Answer Area

Scenario	Action
Determine the price of the product bundle	Use the lunch bundle price
Increase the number of sodas at no additional charge	Increase the quantity of sodas in the line item.
increase the number of sandwiches and charge the price list price for each additional sandwich.	Add another line rtem for sandwiches with the default price

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

Since the lunch bundle is predefined at $200.00, the price for the bundle should be set using the lunch bundle price. This ensures that any associated products (Sandwich, Napkins, and Soda) are automatically included in this price, simplifying the process for the sales staff.

Reference: [Microsoft Documentation - Product Bundles and Pricing]

Increase the Number of Sodas at No Additional Charge: Increase the quantity of sodas in the line item

To add sodas without impacting the price, sales staff can simply increase the quantity of sodas in the line item. This approach allows flexibility within the bundle without altering the overall bundle cost, which remains fixed.

Reference: [Microsoft Documentation - Manage Product Bundle Components]

Increase the Number of Sandwiches and Charge the Price List Price for Each Additional Sandwich:

Add another line item for sandwiches with the default price

To charge extra for additional sandwiches, the staff should add another line item for sandwiches. This line item would use the default price from the price list, ensuring that any additional sandwiches beyond the initial bundle are charged accordingly.

This allows the base bundle to remain consistent while additional items are billed separately based on the standard price list.

Reference: [Microsoft Documentation - Working with Product Prices in Opportunities]

By following these guidelines, the sales staff can effectively manage the product bundle within opportunities, maintaining pricing consistency while allowing flexibility for additional items as required by the client.

Question: 49

HOTSPOT

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	Action
Opportunity updated today is NOT included in the chart	Update goal criteria. Update roll-up settings. Update personal options.
Time period for the goal is inaccurate.	Rave the manager update the goal ____ Have the salesperson update the goal. Have the manager update the goal

Explanation:

Answer:

Answer Area

Issue	Action
Opportunity updated today is NOT included in the chart	Update roll-up settings.
Time penod for the goal is inaccurate.	Have the manager update the goal.

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

The roll-up settings control how frequently the data is aggregated and included in the goal metrics. If an opportunity updated today is not appearing, it likely indicates that the roll-up process has not yet captured the recent data change.

By updating the roll-up settings, you can adjust the frequency or manually trigger an update, ensuring that all recent updates are reflected in the chart.

Reference: [Microsoft Documentation - Configure Roll-Up Fields for Goals]

Time Period for the Goal is Inaccurate: Have the manager update the goal

If the goal's time period is incorrect, the data might not align with the expected reporting period. To correct this, you need to have the manager update the goal to ensure that the time period accurately reflects the intended tracking duration.

Managers typically have the required permissions to adjust goal settings, including the start and end dates, which directly affect how goals are calculated and displayed.

Reference: [Microsoft Documentation - Update Goal Time Period and Settings]

By updating the roll-up settings and ensuring the goal's time period is correct, you can address these issues, ensuring that the goal chart reflects accurate and up-to-date information for the sales team.

Question: 50

HOTSPOT

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

Answer:

Explanation:

Answer Area

Parameter	Option
Date field	Actual End
Rollup field	Actual (integer)
Source Record Type Status	

Date Field - Actual End:

The Actual End date field is typically used to mark when an activity, such as an outgoing call, is completed. Since the sales manager wants to measure completed outgoing calls, using Actual End ensures that only calls finished within the fiscal year are included in the goal measurement.

This setting will align with the requirement to track activities finished within a specific time frame (January - December).

Reference: Microsoft Documentation - Configure Goal Metrics and Rollup Fields

Rollup Field - Actual (integer):

The Actual (integer) rollup field is suitable for counting the total number of completed outgoing calls. This setting ensures that each completed call is tallied accurately, providing a straightforward measure of the sales team's activity in terms of call volume.

Using an integer type for the rollup field is appropriate for count-based metrics like this.

Reference: Microsoft Documentation - Define Rollup Fields for Goals

Source Record Type Status - Completed:

The Completed status ensures that only calls marked as completed are counted towards the goal. This is crucial for measuring finished activities, as it excludes calls that may still be in progress or have other statuses.

Setting the source record type status to Completed aligns with the requirement to measure only outgoing calls that have been fully executed.

Reference: Microsoft Documentation - Goal Management with Status Filtering

By selecting Actual End as the date field, Actual (integer) for the rollup field, and Completed for the source record type status, you ensure that the goal measurement accurately reflects completed outgoing calls within the specified calendar year timeframe.

Question: 51

DRAG DROP

You need to create and start a new customer journey to send "Welcome" emails to new customers.

Which three actions should you perform in sequence before you publish the journey? To answer, move the three appropriate actions from the list of actions to the answer are

a. Arrange the three actions in the correct order.

Actions	Order
Select the frequency as a one-time journey where newly added members can start at any time.	
Create a segment-based journey for a segment that includes the primary contacts from accounts where the *contoso_clienttier field* contains data.	
Create a trigger-based journey that triggers on changes to the *contoso_clienttier field.*	
Add the journey steps.	
Set the frequency to repeat every day.	
Select the frequency as a one-time journey with a static audience.	

Answer:

Explanation:

Create a trigger-based journey that triggers on changes to the *contoso_clienttier* field.

Select the frequency as a **one-time** journey where **newly added members can start at any time.**

Add the journey steps.

1. Create a trigger-based journey that triggers on changes to the contoso_clienttier field.
   Since the "Welcome" email should be sent when an account first enters any client tier, a triggerbased journey is required. The trigger should activate when the contoso_clienttier field is updated with a value.

I. Select the frequency as a one-time journey where newly added members can start at any time. A one-time journey with newly added members ensures that each new primary contact will enter the journey when their account first gets assigned a tier.

J. Add the journey steps.
   After defining the journey type and trigger, the necessary email steps (sending the "Welcome" email) must be added before publishing.

Question: 52

DRAG DROP

You need to create a custom insight card to display tier change notifications per the global sales lead's request.

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

Actions	Order
Create a Power Automate flow with a Dataverse When a row is added, modified or deleted trigger.	
Set the table and column conditions for the triggering event.	
Enable premium Sales Insights features.	
Create a recurring Power Automate flow that runs every day.	
Save and test the flow by manually performing an update.	
Update the insight card item to select the flow.	
Add a step to create a Power Automate notification.	
Add a step to call the Create card for assistant action.	

Answer:

Explanation:

K. Create a Power Automate flow with a Dataverse "When a row is added, modified or deleted" trigger.
This ensures that the flow is triggered when an account's client tier changes.

L. Set the table and column conditions for the triggering event.
The trigger should monitor changes to the contoso_clienttier field in the Accounts table.

M. Add a step to call the "Create card for assistant" action.
This step ensures that a custom insight card is created for the assistant in Dynamics 365 Sales.

N. Save and test the flow by manually performing an update.
This verifies that the Power Automate flow is correctly detecting tier changes and triggering the insight card.

O. Update the insight card item to select the flow.
This ensures that the newly created insight card is linked to the correct Power Automate flow.

Question: 53

HOTSPOT

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 13375,000.00 Number of deals in pipeline 5 Won amount N/A © Number of won deals 0 Lost amount N/A © Number of lost deals 0

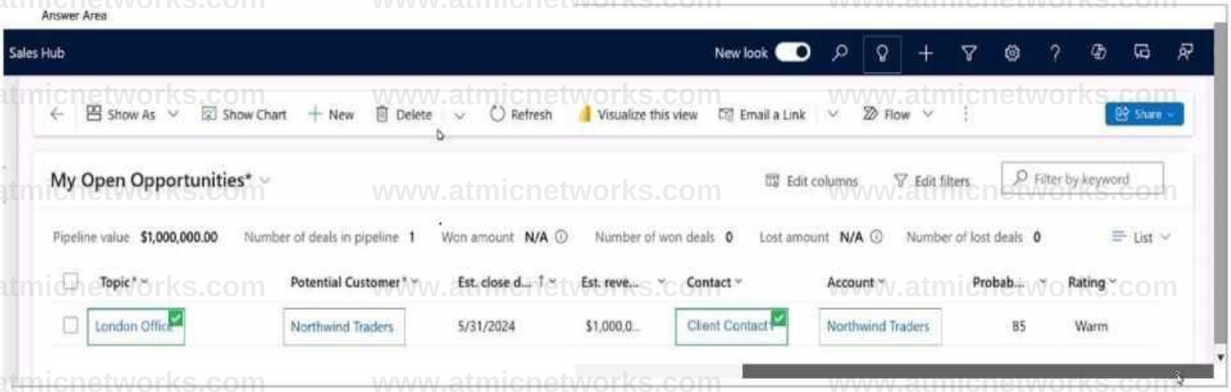
Topic' *	Potential Customer ' *	Est, close ... T *	Est. revenue M	Contact	Account ^	Proba...	Rating	En
London Office	Northwind Traders	6/4/2024	51.000,000 00	Client Contact,	Northwind Traders	75	Warm	
Toronto Office	Northwind Traders	6/12/2024	$400,000 00	Client Contacts	Northwind Traders	75	Warm	
Mexico City Office	Northwind Traders	6/13/2024	$475,000,00	Client Conlactl	Northwind Traders	90	Warm	
Seattle Office	Northwind Traders	6/19/2024	51.000,000.00	Client Contacts	Northwind Traders	50	Warm	

Answer:

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:
With a 21-day notification period, any opportunities with close dates on or before June 24, 2024 (21 days from June 3), will trigger a reminder card in the assistant.
Evaluate Close Dates for Opportunities:
London Office: Scheduled to close on June 4, 2024, which is within 21 days from June 3.
Toronto Office: Scheduled to close on June 12, 2024, which also falls within the 21-day reminder period.
Mexico City Office: Scheduled to close on June 18, 2024, within the 21-day reminder period.
Seattle Office: Scheduled to close on June 19, 2024, also within the 21-day period.
Based on this, London Office and Toronto Office are within the specified period and thus will appear as close date reminders for BDM1.
Microsoft Dynamics 365 Reference:
[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 to London Office and Toronto Office.

Question: 54

HOTSPOT
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:

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:

The "Show As" option allows users to change the view of their current page. BDM1 can use this feature to switch to a timeline or agenda view, which can help display upcoming activities, tasks, and reminders in a format that may highlight pending actions, like the meeting scheduled by BDM2. When in the appropriate view, reminder cards for tasks and meetings can surface based on relevance and priority.

Visualize this view:

The "Visualize this view" option helps BDM1 to see an overview of upcoming tasks, scheduled meetings, and associated records in a graphical format.

This visualization can be particularly useful for identifying key upcoming events like the meeting BDM2 scheduled, as it provides a clear summary of upcoming activities, aiding in prioritization and catch-up efforts.

Microsoft Dynamics 365 Reference:

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.

Question: 55

HOTSPOT

BDM3 is reviewing relationship analytics for several Northwind Traders opportunities.

You need to help BDM3 understand which internal and external contacts are considered contacts of interest for relationship analytics KPI calculations for the two opportunities shown in the following exhibit.

Topic *	Potential Customer *	Est. close... T	Est. revenue *	Contact *	Account
London Office	Northwind Traders	6/4/2024	$1,000,000.00	Client Contactl	Northwind Traders
Toronto Office	Northwind Traders	6/12/2024	$400,000,00	Client Contact2	Northwind Traders

Use the drop-down menus to select the answer choice that completes each statement.

NOTE: Each correct selection is worth one point.

BDM2 is a contact of interest for

the London Office opportunity, the Toronto Office Opportunity, both the London Office and Toronto Office opportunities.

BDM3 is a contact of interest for

the London Office opportunity, the Toronto Office Opportunity, both the London Office and Toronto Office opportunities.

Client Contact? is a contact of interest for

the London Office opportunity, the Toronto Office Opportunity, both the London Office and Toronto Office opportunities.

Client Contactl is a contact of interest for

the London Office opportunity, the Toronto Office Opportunity, both the London Office and Toronto Office opportunities.

Answer:

Explanation:

BDM2 is a contact of interest for

the London Office opportunity, the Toronto Office Opportunity.

both the London Office and Toronto Office opportunities.

BDM3 is a contact of interest for

the London Office opportunity, the Toronto Office Opportunity, both the London Office and Toronto Office opportunities.

Client Contact? is a contact of interest for

the London Office opportunity, the Toronto Office Opportunity, both the London Office and Toronto Office opportunities.

Client Contactl is a contact of interest for

the London Office opportunity, the Toronto Office Opportunity, both the London Office and Toronto Office opportunities.

BDM2 is a contact of interest for → both the London Office and Toronto Office opportunities.

BDM2 is a sales team member for all Northwind Traders opportunities, meaning they are involved in both the London Office and Toronto Office opportunities.

BDM3 is a contact of interest for → the Toronto Office opportunity.

BDM3 owns all Northwind Traders opportunities except those owned by BDM1. Since BDM1 owns the London Office opportunity, BDM3 is only involved in the Toronto Office opportunity.

Client Contact2 is a contact of interest for → the Toronto Office opportunity.

The Toronto Office opportunity lists Client Contact2 as the primary contact, making them a contact of interest for that opportunity.

Client Contact1 is a contact of interest for → the London Office opportunity.

The London Office opportunity lists Client Contact1 as the primary contact, making them a contact of interest for that opportunity.

Topic 3, Misc Questions

Question: 56

HOTSPOT

You use opportunities in Dynamics 365 Sales.

Opportunities that were closed as lost frequently come back and are eventually won.

You need to be able to track these occurrences and have insight into the process.

What happens during the reopen and close process? To answer, select the appropriate options in the answer area.

NOTE: Each correct selection is worth one point.

Answer Area

Scenario	Result
A lost opportunity is reopened.	The Opportunity Close record is deleted. The Opportunity Close record changes status to Inactive. The Opportunity Close record changes status to In Progress.
The same opportunity is closed as won.	The current Opportunity Close record updates with the new close details and status of completed. A new Opportunity Close record is created with the new close details and status of completed.

Answer:

Explanation:

Answer Area

Scenario	Result
A lost opportunity is reopened.	The Opportunity Close record is deleted. The Opportunity Close record changes status to Inactive. The Opportunity Close record changes status to In Progress.
The same opportunity is closed as won.	The current Opportunity Close record updates with the new close details and status of completed. A new Opportunity Close record is created with the new close details and status of completed.

Question: 57

DRAG DROP

You are implementing Dynamics 365 Sales for a beverage company.

The company sells drinks by individual cans, by the dozen, or by the case of 48 cans as follows: There are three flavors: strawberry, vanilla, and chocolate.

Each can costs $5.00.

A dozen cans cost $55.00.

Each case has four dozen cans and costs $200.00.

A combination case includes a dozen cans of each flavor and costs $160.00.

Purchases of four or more cases receive an extra 10 percent off the price.

You need to set up the product catalog.

Which components should you use? To answer, move the appropriate components to the correct entry descriptions. You may use each component once, more than once, or not at all. You may need to move the split bar between panes or scroll to view content.

NOTE: Each correct selection is worth one point.

Components

- i Products
- Price Lists
- °Discount Lists
- 0, . Unit Groups

Answer Area

Entry description	Component
Drink flavors list	0
Four or more cases	0
Combination case	0
One can	0

Answer:

Explanation:

Components

- Products
- Price Lists
- Discount Lists
- Unit Groups

Answer Area

Entry description	Component
Drink flavors list	Products
Four or more cases	Discount Lists
Combination case	Price Lists
One can	Unit Groups

Question: 58

HOTSPOT

A company sells telephones. The company has a list of telephone colors that customers can choose.

For one month, the company wants to sell a red phone at a special price.

You need to set up the red phone for the sales team.

How should you configure the product and price list items? To answer, select the appropriate options in the answer area.

NOTE: Each correct selection is worth one point.

Answer Area

Requirement	Configuration
Allow the sales team to select the red phone.	Create a red telephone product. Revise the telephone product. Override the properties of the telephone. Overwrite the properties of the telephone.
Allow the sales team to select special pricing for the red phone.	Create a price list item for the telephone. Create a price list item for the red phone product. Update the existing price list item for the telephone. Update the telephone default price list to a price list that lasts one month.

Answer:

Explanation:

Answer Area

Requirement	Configuration
Allow the sales team to select the red phone.	Create a red telephone product. Revise the telephone product. Override the properties of the telephone. Overwrite the properties of the telephone.
Allow the sales team to select special pricing for the red phone.	Create a price list item for the telephone. Create a price list item for the red phone product. Update the existing price list item for the telephone. Update the telephone default price list to a price list that lasts one month.

Question: 59

A company manufactures widgets. Widgets can be sold in the following ways:

Unit	Base unit	Description
Box		Contains 2 widgets
Case	Box	Contains 12 boxes
Pallet	Case	Contains 12 cases

The company discovers that customers want to buy widgets individually.

You need to add a unit named Each.

What should you do?

A. Create the unit Each with Box as the base unit.
B. Set Each as the primary unit.
C. Update the unit Box with Each as the base unit
D. Make Each the base unit for all units.

Answer: D

Explanation:

In Dynamics 365 Sales, unit groups define how products are sold in different quantities. The base unit is the smallest unit of measure in a unit group. Since customers now want to buy widgets individually, the smallest unit (Each) should be set as the base unit for all other units (Box, Case, and Pallet).

Question: 60

HOTSPOT

You are setting up a product catalog.

The product catalog must be set up with the following parameters:

- $100.00 off if a customer buys more than 10 cases
- $10.00 less if a customer buys two different products together instead of individually
- Single product sold in quantities of 1, 6, and 12; price per unit decreases as quantities increase

You need to set up the parameters.

What should you configure? To answer, select the appropriate options in the answer area.

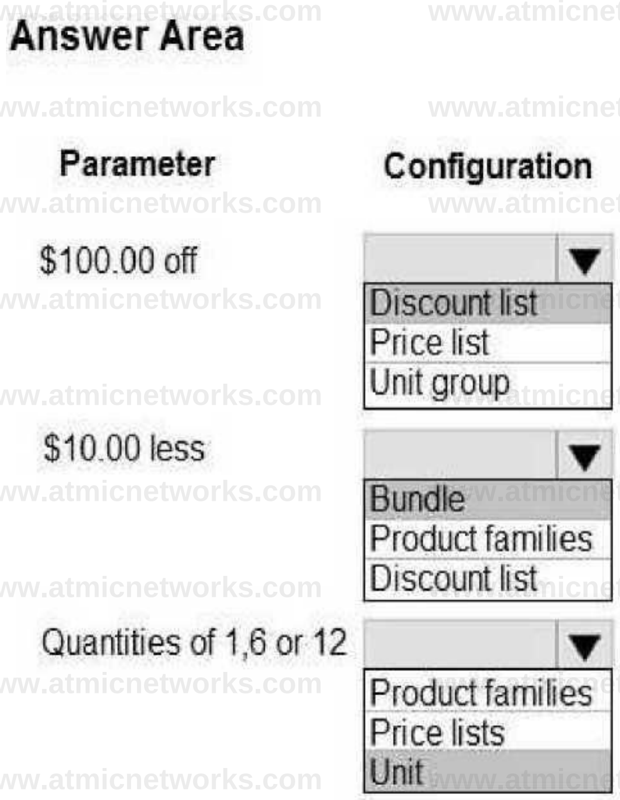
NOTE: Each correct selection is worth one point.

Answer Area

Parameter	Configuration
$100.00 off	Discount list Price list Unit group
$10.00 less	Bundle Product families Discount list
Quantities of 1,6 or 12	Product families Price lists Unit

Answer:

Explanation:



Question: 61

A company has three business units. User privileges are set to ensure that users can only see records owned by their own business units.

If a contact is needed for all business units, one contact record must be created for each business unit. A contact is considered a duplicate if the First Name, Last Name, Email or Preferred Phone, and Business Unit columns match.

You must ensure that duplicate records are NOT created for contacts.

You need to create the duplicate detection rules.

Which two filters should you configure? Each correct answer is part of the complete solution.

(Choose two.)

NOTE: Each correct selection is worth one point.

A. First Name and Last Name and Preferred Phone and Business Unit
B. First Name and Last Name and Email and Business Unit
C. First Name and Last Name and Preferred Phone
D. First Name and Last Name and Owner
E. First Name and Last Name and Email

Answer: A, B

Explanation:

First Name, Last Name, and Business Unit must be match in both filter.
Additionally Preferred Phone in one of the filters.
Also Email in the other filter.

Question: 62

DRAG DROP

The product development team for a toy company creates a new remote-control toy.

You need to create the necessary records and record relationships to sell the product for a newly deployed Dynamics 365 Sales system.

Which five records and/or components should you configure in sequence? To answer, move the five appropriate records and/or components from the list of records and components to the answer are a. Arrange the five records and/or components 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.

Recordsand Answer Area
Components

^roductjamilies 5

Records and Components		Answer Area
IJ unit groups	1	
,J discount lists	2	0
units	3	0
products	4	0
11 price lists	5	0
0 price list items		

Answer:

Explanation:

Question: 63

A company implements Dynamics 365 Sales.

The company has the following requirements:

- Employees must have quarterly goals. The goals must calculate all deals won by quarter for each goal.
- Managers must be able to look at the goals and calculations at any time. The solution must use goal features WITHOUT customization.

You need to create the calculation.

What should you configure?

A. Drill-down table

B. Rollup table

C. Rollup query

D. Goal metric

Answer: C

Explanation:

Dynamics 365 Sales, Define and track your sales goals

Define rollup queries

Rollup queries are used to define the records that should be included in the goal rollup. Rollup queries are created for each goal rollup field. For example, you could create a goal metric that measures all invoices closed within a specific period. You could then create a rollup query to show invoices that are owned by a person, or raised for customers in a territory.

Goals roll up from the bottom of the goal hierarchy to the top, with Dynamics 365 rolling child goal totals into their parent goal totals. Goals at the top of a hierarchy reflect a summation of all the goals in the organization.

You can only query one entity type in a query, but the query builder helps you make a query as simple or as complex as you need. As you fine-tune your query, you can test the results. Incorrect:

Not B: Define rollup fields

Rollup fields are used to calculate the actual and in-progress values for a goal metric.

Not D: Set goal metrics

Goal metrics let you define how a goal will be measured. For example, a sales team's performance can be measured based on the number of leads they get or the revenue amount.

Reference:

https://learn.microsoft.com/en-us/dynamics365/sales/goals-overview

Question: 64

You are using a forecast template.

You must configure the forecast by territory.

You need to configure the forecast parameters.

Which parameter should you configure?

A. Hierarchy table
B. Top of hierarchy
C. Hierarchy relationship
D. Rollup table

Answer: C

Explanation:

Define a forecast model

Define the entities that must be used to generate the forecast.

1. In the General step of the Forecast configuration page, define the fields that should be used for the forecast.

[Steps 2 to 6 omitted]

7. Select a Rollup to hierarchy relationship.

This step establishes a relationship between the rollup and hierarchy entities. Each forecast template starts with a default rollup to hierarchy relationship:

Template	Rollup to hierarchy relationship	Description
Org chart forecast	Opportunity > Owner (User) > User	The forecast hierarchy is defined based on the organizational hierarchy.
Product forecast	Opportunity Product > Existing Product (Product) > Product	The forecast hierarchy is defined based on the product hierarchy.
Territory forecast	Opportunity > Account (Account) > Territory (Territory) > Territory	The forecast hierarchy is defined based on the territory hierarchy.

Choose different values to support your organization's specific requirements if needed.

Note: Select a template

The fastest way to create a forecast is to use a template. The template that you select defines how the forecast groups data.

On the Forecast configurations page, select one of the following templates:

Org chart forecast: Rollup columns and projections are based on your organization's reporting structure. This template uses the Manager field of the User entity for the hierarchy.

Product forecast: Rollup columns and projections are based on the product hierarchy.

• -> Territory forecast: Rollup columns and projections are based on the sales territory hierarchy. Reference:

https://learn.microsoft.com/en-us/dynamics365/sales/define-general-properties-scheduling- forecast

Question: 65

HOTSPOT

A sales manager needs to set up goals in Dynamics 365 Sales for salespeople.

The measurement of goals must be based on the total deal amount upon closing an opportunity.

The fiscal year for the goals must be based on the calendar year.

You need to create the rollup query for the goal metrics.

Which options 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
Entity	Lead Quote Opportunity Invoice
Date field	Actual Close Date Created on Date Final Decision Date
Revenue field	Total Amount Budget Amount Actual Revenue

Answer:

Explanation:

Answer Area

Parameter	**Option**
Entity	Lead Quote Opportunity Invoice
Date field	V Actual Close Date Created on Date Final Decision Date

Revenue field 1 Total Amount Budget Amount Actual Revenue

Question: 66

A company manually assigns leads to salespeople.
The sales manager requires automated lead assignment rules. An administrator enables the feature.
However, you are unable to access the Assignment rules area.
You need to request access from the administrator.
Which security role should you request?

A. Sales Manager
B. Playbook Manager
C. Vice President of Sales
D. Sequence Manager

Answer: D

Explanation:

Dynamics 365 Sales, Create and activate assignment rules

You can create and manage sequences and assignment rules through navigating to 'Personal Settings' area if users have sequence manager role.

Sequence Manager	Sales manager or an equivalent role who creates and manages sequences,	Sales Enterprise and Sales	Create, edit, delete, and deactivate the following features in the sales

segments, and assignment rules for the organization.	Premium	accelerator • Sequences • Segments • Assignment rules

Reference:
https://community.dynamics.com/forums/thread/details/?threadid=36a7818d-0ff5-48c8-a9ea- f9b25d8d9e7e

Question: 67

Note: This question is part of a series of questions that present the same scenario. Each question in the series contains a unique solution. Determine whether the solution meets 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.

You configure forecasts for a clothing manufacturer.

A salesperson updates an opportunity and wants to refresh the forecast

You need to show the salesperson how to refresh the forecast.

Solution: Recalculate the opportunity.

Does this meet the goal?

A. Yes
B. No

Answer: B

Explanation:

Correct:
- Recalculate the forecast

Incorrect:
- Recalculate the opportunity.
- Update the Opportunity Forecast Category Mapping process.

Note:
Example of forecast recalculation methods

Let's understand the different methods with an example. Consider a scenario where you have a forecast with 4 quarterly periods and an annual period. Assume that you're currently in Q4. The following table shows when and how the forecast data is updated for different scenarios and periods.

Scenario	Current quarter (Q4)	Past quarters
You updated the estimated revenue of an underlying opportunity from 100,000 to 200,000 on the Forecasts page.	Updated immediately	Updated immediatf
You updated the estimated revenue of an underlying opportunity from 100,000 to 200,000 on the Opportunities page.	Updated at the end of the day	Updated only after manual recalculatio
You updated the forecast hierarchy.	Updated at the end of the day	Updated only after manual recalculatio
You adjusted the forecast value for Q4	Updated immediately	Updated immediatf

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Dynamics 365 Sales, Recalculate forecasts manually

You want the forecast data to be up-to-date to make informed decisions. Forecast data is automatically recalculated at regular intervals. However, you can trigger a manual recalculation when you want to recalculate the forecast data immediately. You can also trigger a manual recalculation for past and future periods as they aren't automatically recalculated.

Recalculate and refresh forecast data manually

1. Open the forecast. Verify the Last updated timestamp on the command bar to know when the forecast was last recalculated successfully.

2. Select Recalculate data.

Kenny's Org FY 2020 Forecast v end

% Drill dom b/ Non*

User	Quota	Won		Prediction 0	Committed 1	<xe.	Committed	Best can
Q Kp-rny Smith	SI 5W0C0.GC-	S1G42,665.K —	7 a %	$13M 4UA25 -- W5	$1,64 2,66 5.00		5WOM0.M	5401.345'
^ Kenny Smith	iwoaoa	5u2.CCC.CO ——	a?S	083.287.62 —^— at*	5229,000.00	80%	$57-500 00	551000-0
Q ^icoMt Fnrre*1	51:3 CttCC	S7632OM —	5t *	552.239.05 -------------- 62*	$151.3'000	■ 101 *	5'5 O00M	5 23.033 0
Q Oustin Och«	53WMO®	$121,50100 —	41 *	5225 683.5? ■ ■ 19 S	5'56,588 00	46%	5135,000.00	5165.000.'
SpmugF $Vcm	S7C0CCCCC	$3110X100 ——	7>%	ssceww —— ^%	$645 500.00	92%	StMKO.OO	$79.9450
O Stuart Shas	MS.Q0MO	$191345.® —	k	5347 44110	S356.34S.ro	70%	5155,530.00	565.0010

A notification appears at the top of the screen, confirming the recalculation. Recalculation happens in the background, and you can continue to work while recalculation is in progress.

3. After the application recalculates the forecast data, a notification appears to refresh the data. On the notification, select Refresh page.

Reference:
https://learn.microsoft.com/en-us/dynamics365/sales/keep-forecast-data-up-to-date
https://learn.microsoft.com/en-us/dynamics365/sales/forecast-recalculation-methods

Question: 68

Note: This question is part of a series of questions that present the same scenario. Each question in the series contains a unique solution. Determine whether the solution meets 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.

You configure forecasts for a clothing manufacturer.

A salesperson updates an opportunity and wants to refresh the forecast

You need to show the salesperson how to refresh the forecast.

Solution: Recalculate the forest.

Does this meet the goal?

A. Yes

B. No

Answer: A

Explanation:

Correct:

• Recalculate the forecast

Incorrect:

- Recalculate the opportunity.
- Update the Opportunity Forecast Category Mapping process.

Note:

Example of forecast recalculation methods

Let's understand the different methods with an example. Consider a scenario where you have a forecast with 4 quarterly periods and an annual period. Assume that you're currently in Q4. The following table shows when and how the forecast data is updated for different scenarios and periods.

Scenario	Current quarter (Q4)	Past quarters	Annual

You updated the estimated revenue of an underlying opportunity from 100,000 to 200,000 on the Forecasts page.	Updated immediately	Updated immediately	Updated immediately
You updated the estimated revenue of an underlying opportunity from 100,000 to 200,000 on the Opportunities page.	Updated at the end of the day	Updated only after a manual recalculation	Updated at the end of the month.
You updated the forecast hierarchy.	Updated at the end of the day	Updated only after a manual recalculation	Updated at the end of the month
You adjusted the forecast value for Q4	Updated immediately	Updated immediately	Updated immediately

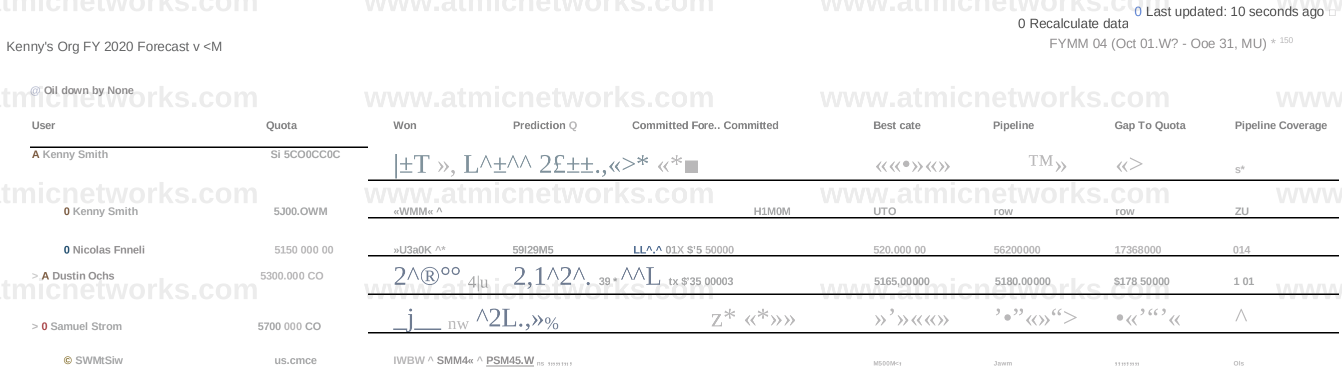
Dynamics 365 Sales, Recalculate forecasts manually

You want the forecast data to be up-to-date to make informed decisions. Forecast data is automatically recalculated at regular intervals. However, you can trigger a manual recalculation when you want to recalculate the forecast data immediately. You can also trigger a manual recalculation for past and future periods as they aren't automatically recalculated.

Recalculate and refresh forecast data manually

1. Open the forecast. Verify the Last updated timestamp on the command bar to know when the forecast was last recalculated successfully.

2. Select Recalculate data.



A notification appears at the top of the screen, confirming the recalculation. Recalculation happens in the background, and you can continue to work while recalculation is in progress.

3. After the application recalculates the forecast data, a notification appears to refresh the data. On the notification, select Refresh page.

Reference:
https://learn.microsoft.com/en-us/dynamics365/sales/keep-forecast-data-up-to-date
https://learn.microsoft.com/en-us/dynamics365/sales/forecast-recalculation-methods

Question: 69

Note: This question is part of a series of questions that present the same scenario. Each question in the series contains a unique solution. Determine whether the solution meets 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.

You configure forecasts for a clothing manufacturer.

A salesperson updates an opportunity and wants to refresh the forecast

You need to show the salesperson how to refresh the forecast.

Solution: Update the Opportunity Forecast Category Mapping process.

Does this meet the goal?

A. Yes
B. No

Answer: B

Explanation:

Correct:
- Recalculate the forecast

Incorrect:
- Recalculate the opportunity.

- Update the Opportunity Forecast Category Mapping process.

Open the Opportunity Forecast Category Mapping Process workflow. You can customize or deactivate the workflow according to your organization's requirements.

Note:

Example of forecast recalculation methods

Let's understand the different methods with an example. Consider a scenario where you have a forecast with 4 quarterly periods and an annual period. Assume that you're currently in Q4. The following table shows when and how the forecast data is updated for different scenarios and periods.

Scenario	Current quarter (Q4)	Past quarters	Annual
You updated the estimated revenue of an underlying opportunity from 100,000 to 200,000 on the Forecasts page.	Updated immediately	Updated immediately	Updated immediately
You updated the estimated revenue of an underlying opportunity from 100,000 to 200,000 on the Opportunities page.	Updated at the end of the day	Updated only after a manual recalculation	Updated at the end of the month.
You updated the forecast hierarchy.	Updated at the end of the day	Updated only after a manual recalculation	Updated at the end of the month
You adjusted the forecast value for Q4	Updated immediately	Updated immediately	Updated immediately

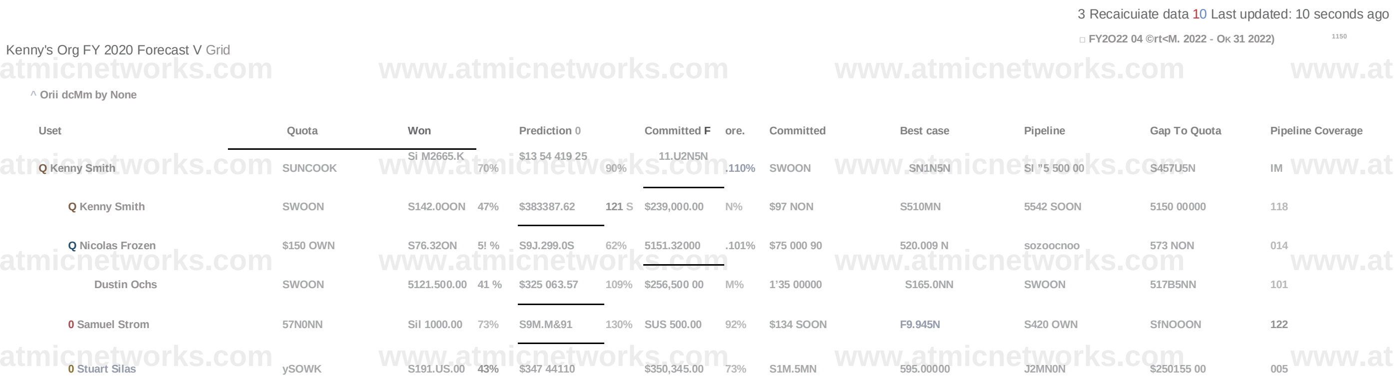
Dynamics 365 Sales, Recalculate forecasts manually

You want the forecast data to be up-to-date to make informed decisions. Forecast data is automatically recalculated at regular intervals. However, you can trigger a manual recalculation when you want to recalculate the forecast data immediately. You can also trigger a manual recalculation for past and future periods as they aren't automatically recalculated.

Recalculate and refresh forecast data manually

1. Open the forecast. Verify the Last updated timestamp on the command bar to know when the forecast was last recalculated successfully.

2. Select Recalculate data.



A notification appears at the top of the screen, confirming the recalculation. Recalculation happens in the background, and you can continue to work while recalculation is in progress.

3. After the application recalculates the forecast data, a notification appears to refresh the data. On the notification, select Refresh page.

Reference:
https://learn.microsoft.com/en-us/dynamics365/sales/keep-forecast-data-up-to-date
https://learn.microsoft.com/en-us/dynamics365/sales/forecast-recalculation-methods
https://learn.microsoft.com/en-us/dynamics365/sales/configure-forecast

Question: 70

DRAG DROP

Your sales team has now managed to get all the email communication in place and want to take it a step further by implementing SMS channel.

You need to configure an SMS provider.

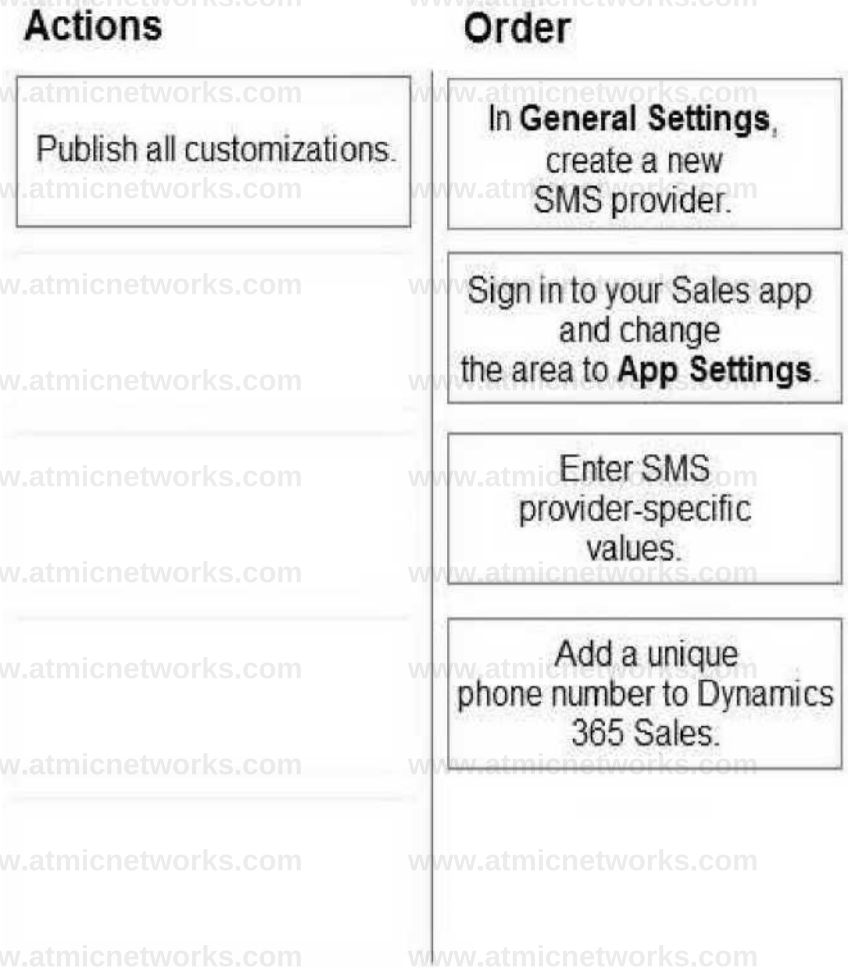
Which four actions should you perform in sequence? To answer, move the four appropriate actions from the list of actions to the answer are

a. Arrange the four actions in the correct order.

Actions	Order
0 Publish all customizations.	0
0 In General Settings, create a new SMS provider	0
0 AJJ Add a unique phone number to Dynamics 365 Sales	0
Enter SMS provider-specific values.	0
' Sign in to your Sales app and change the area to App Settings	

Answer:

Explanation:



Question: 71

In the weeks leading up to the holiday season, the marketing department sets up a new segmentbased journey. The journey sends a marketing email to all wine enthusiasts who meet the following requirements:

1. The wine enthusiasts have a recorded wine order against their contact record.
2. The wine enthusiasts live in Europe.

You need to ensure that newly added wine enthusiasts also receive this email automatically.

How should you set up the segment?

A. Create a segment and add a group through Behavioral data.
B. Create a segment using refresh rate: Automatic Refresh.
C. Create a segment and add contacts through an included members group.
D. Create a segment and set the refresh rate to Static Snapshot.

Answer: B

Explanation:

To ensure that newly added wine enthusiasts automatically receive the marketing email, the segment must dynamically update based on contact data. Using Automatic Refresh, the system continuously updates the segment whenever new contacts meet the specified criteria (wine order history and location in Europe). This ensures that all qualifying contacts, including those added after the segment was initially created, are included in the marketing journey.

Question: 72

DRAG DROP

You are implementing a new Dynamics 365 Customer Insights - Data environment for your organization.

You complete ingesting the data you need to unify and navigate to the correct page in the Customer Insights - Data application to begin the unification process.

You need to complete the first part of the unification process following best practices.

Which five actions should you perform in sequence? To answer, move the five appropriate actions from the list of actions to the answer are

a. Arrange the five actions in the correct order.

Actions	Order
Ensure that fie ds you wish to combine ^ om different tables have a different Type, then save rhe unified customer "elds	
Select Get started under Customer data.	
Ensure diat atuiojtesyou wish to combine from different tables have the same Type, then select Save source fields	
identify the primary key for each table	
Navigate to Insights and create a measure using count aggregation.	
Select the tables and attributes contain rc tne data you reed for the unification process	
Confirm the Type for each attrin.ee	

Answer:

Explanation:

Actions	Order
Ensure that fields you wish to combine from different tables have a different **Type**, then save the unified customer fields.	Select **Get started** under **Customer data**.
Select **Get started** under **Customer data**.	Select the tables and attributes containing the data you need for the unification process.
Ensure that attributes you wish to combine from different tables have the same **Type**, then select **Save source fields**.	Identify the primary key for each table.
Identify the primary key for each table.	Ensure that attributes you wish to combine from different tables have the same **Type**, then select **Save source fields**.
Navigate to Insights and create a measure using count aggregation.	Confirm the **Type** for each attribute.
Select the tables and attributes containing the data you need for the unification process.	
Confirm the **Type** for each attribute.	

Question: 73

HOTSPOT

The marketing team at your organization generates leads using form submissions in Dynamics 365 Customer Insights - Journeys.

The marketing team then nurtures the leads to hand-off to the sales team. If accepted, sellers will work the leads using Dynamics 365 Sales.

Leads are considered to be stale if they are NOT ready to be accepted after six (6) months.

You need to create a bulk deletion job to delete stale leads as long as they have a Parent Contact. You used a saved view to start the query but need to complete the criteria.

What should you configure? To answer, select the appropriate operator or value to be added for each search criteria.

NOTE: Each correct selection is worth one point.

Answer Area

Define Search Criteria

V Help

Select search criteria to identify records to delete.

Look for: Leads

Use Saved View: Leads: Older Than 6 Months

5 Clear [•] Group

AND X Gr0JP UK

Created On

Oider Than X Months

£

Lead source type

AND

Equals
Dees net equal
Contains cats
Dues nut cunloin data

MarkEtinc
Sales
Tdd|KUSpiKI

NO

Sales ready

Equals
Dees net equal
Contains cats
Dues net contain dais

Parent Contact for lead

I qals
Decs net equal
Contains cats
Dees net contain data

Answer:

Explanation:

Answer Area

Define Search Criteria

w Help

Select search criteria to identify records to delete.

Look for: Leads

Use Saved View: Leads: Older Than 6 Months

^j Clear [•' Group AND ■ Group OR

Created On — Older Than X Months — 6

vAND

Lead source type — Equals / Does not equal / Contains data / Does not contain data — Marketing / Sales / Teleprospect — No

Sales ready — Equals / Does not equal / Contains data / Does not contain data

Parent Contact for lead — Equals / Does not equal / Contains data / Does not contain data

Question: 74

DRAG DROP

Your organization introduced a new loyalty solution that exposes the loyalty profile and related point transactions in an Azure SQL Database.

You need to ensure the new loyalty data is imported from the Azure SQL Database into Dynamics 365 Customer Insights – Data and refreshed incrementally.

Which five actions should you perform in sequence within Customer Insights – Data before selecting Save to complete the creation? To answer, move the five appropriate actions from the list of actions to the answer are

a. Arrange the five actions in the correct order.

Actions	Order
Create a new data source based on Azure Synapse Analytics.	1
Create a new data source based on Microsoft Power Query.	2
Select the data source and tables to ingest.	3
Complete the transformation steps and select **Next**.	4
In the **Set up incremental refresh** dialog box, select **Set up** to open the Incremental refresh settings.	5
Select the tables and provide the required incremental refresh details.	

Answer:

Explanation:

Actions	Order
Create a new data source based on Azure Synapse Analytics.	1 Create a new data source based on Microsoft Power Query.
	2 Select the data source and tables to ingest.
	3 Complete the transformation steps and select **Next**.
	4 In the **Set up incremental refresh** dialog box, select **Set up** to open the Incremental refresh settings.
	5 Select the tables and provide the required incremental refresh details.

Question: 75

A marketing user wants to target two groups of customers:

1. All customers that live in Paris.
2. All customers that have made more than ten online purchases.

You decide to meet this requirement by making quick segments.

Which two options should you use as the base in the quick segments? Each correct answer presents part of the solution. (Choose two.)

NOTE: Each correct selection is worth one point.

A. Measures
B. Insights
C. Data tables
D. Enrichments
E. Profiles

Answer: A, E

Explanation:

- All customers that live in Paris.

Customer profile data has address information.

- All customers that have made more than ten online purchases.

Incorrect:

Not Data tables [Not available for Quick Segments]

Not Enrichments [Not available for Quick Segments]

Note:

Quick segments let you build simple segments with a single operator quickly for faster insights. Quick segments are only supported in environments for individual customers.

Create a new segment with quick segments

1. Go to Insights > Segments.

2. Select New > Create from.

Select the Profiles option to build a segment that is based on the unified customer table.

Select the Measures option to build a segment around measures you have previously created.

Select the Insights option to build a segment around one of the output tables you generated using either the Predictions or Custom Models capabilities.

3. In the New quick segment dialog box, select an attribute from the Field dropdown.

Etc.

Reference:

https://learn.microsoft.com/en-us/dynamics365/customer-insights/data/enrichment-hub
https://learn.microsoft.com/en-us/dynamics365/customer-insights/data/segment-quick

Question: 76

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: Remove any rows where the primary key is missing, delete any leading or trailing zeros on the primary key, 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:

Correct:

- Transform the first row to be used as headers. Define column types to be the 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.

The proposed solution effectively prepares the data for unification in Dynamics 365 Customer Insights - Data. Here's how each step contributes to meeting the goal:

Transform the first row to be used as headers: This step is necessary to define the column names, which is critical for accurate data interpretation.

Define column types to be the appropriate field types: Specifying the correct data types for each column ensures that the data will be processed correctly during unification, maintaining data integrity.

Create a full name and full address columns by merging the appropriate columns if they exist: This step enhances the dataset by consolidating relevant information into single columns, which can simplify data usage and improve data quality. Merging columns helps ensure that users can easily access essential information without navigating through multiple fields.

Select Next: This indicates that the data transformation steps are completed and the dataset is ready for the unification process.

Incorrect:

- 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 not address the problem with null values.

- Remove any rows where the primary key is missing, delete any leading or trailing zeros on the primary key, and name the query. Select Next and your data is now ready for unification.

Problem not related to the primary key.

- Transform the first row to be used as headers, and remove any special characters or spaces from header row. Remove rows with missing primary keys and name the query. Select Next and your data is now ready for unification.

Does not address the problem with null values.

- 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.

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.

- 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.

While the solution includes transforming the first row to be used as headers and naming the query, the step of removing rows that contain null values is problematic.

Removing all rows with null values can lead to significant data loss, particularly if those rows contain relevant information.

Question: 77

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.

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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, and remove any special characters or spaces from header row. Remove rows with missing primary keys 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:

Correct:

- Transform the first row to be used as headers. Define column types to be the 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.

The proposed solution effectively prepares the data for unification in Dynamics 365 Customer Insights - Data. Here's how each step contributes to meeting the goal:

Transform the first row to be used as headers: This step is necessary to define the column names, which is critical for accurate data interpretation.

Define column types to be the appropriate field types: Specifying the correct data types for each column ensures that the data will be processed correctly during unification, maintaining data integrity.

Create a full name and full address columns by merging the appropriate columns if they exist: This step enhances the dataset by consolidating relevant information into single columns, which can simplify data usage and improve data quality. Merging columns helps ensure that users can easily access essential information without navigating through multiple fields.

Select Next: This indicates that the data transformation steps are completed and the dataset is ready for the unification process.

Incorrect:

- 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 not address the problem with null values.

- Remove any rows where the primary key is missing, delete any leading or trailing zeros on the primary key, and name the query. Select Next and your data is now ready for unification.

Problem not related to the primary key.

- Transform the first row to be used as headers, and remove any special characters or spaces from header row. Remove rows with missing primary keys and name the query. Select Next and your data is now ready for unification.

Does not address the problem with null values.

- 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.

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.

- 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.

While the solution includes transforming the first row to be used as headers and naming the query, the step of removing rows that contain null values is problematic.

Removing all rows with null values can lead to significant data loss, particularly if those rows contain relevant information.

Question: 78

You need to create a Trend chart.

Which two types of columns can you add to the Trend chart? Each correct answer presents a complete solution. (Choose two.)

NOTE: Each correct selection is worth one point.

A. Calculated
B. Simple

C. Hierarchy related
D. Rollup

Answer: A, D

Explanation:

Only Roll up and Calculated type columns have the checkbox option for “Show in Trend Chart”, for other types of columns (e.g. Quota column which has Simple type) this checkbox option is hidden as shown below:

Note:

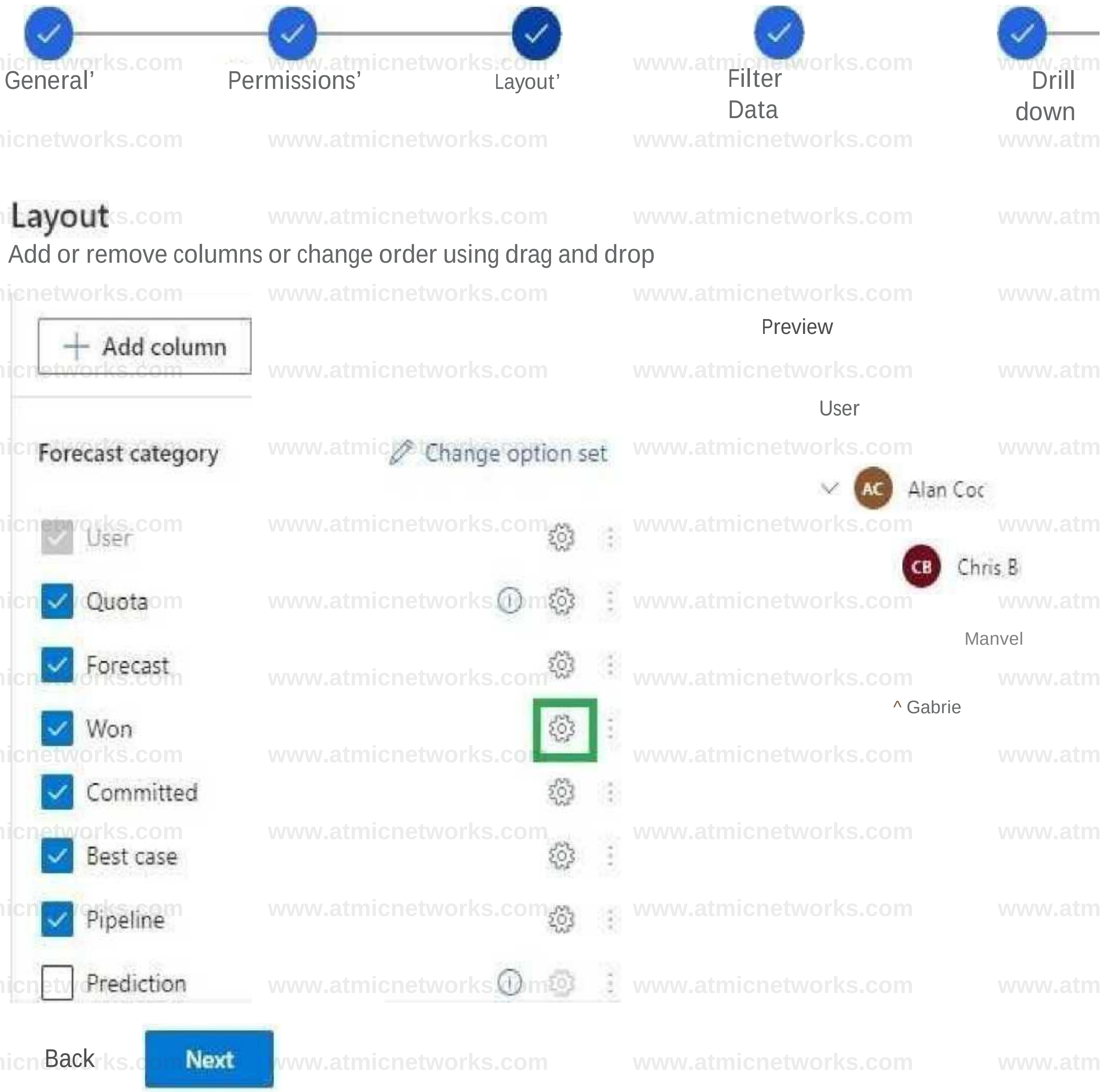
Enhanced configuration is available for the Trend chart and Flow chart within Microsoft Dynamics 365 Sales Insights.

Enable Trend chart using the “Show in Trend Chart” checkbox setting:

The Trend chart is now available as a part of the Predictive forecasting feature.

You need to select/deselect the “Show in Trend Chart” checkbox at the time of configuring the specific column inside the forecast configuration.

Navigate to App settings > under Forecast configurations > Open the appropriate “Forecast configuration” record > navigate to the “Layout” step > under the appropriate column (e.g. Won column) > click on the setting icon as highlighted below:



Only Roll up and Calculated type columns have the checkbox option for "Show in Trend Chart", for other types of columns (e.g. Quota column which has Simple type) this checkbox option is hidden as shown below:

Reference:
https://www.inogic.com/blog/2022/10/enhanced-trend-and-flow-chart-in-sales-forecasting-within-dynamics-365-crm/

Question: 79

DRAG DROP
A company has implemented Dynamics 365 Sales Enterprise. The salespeople often travel to meet customers and require mobile-friendly solutions to various scenarios.
You need to provide a solution for the traveling salespeople.
Which apps should you recommend in each scenario? To answer, move the appropriate apps to the correct scenarios. You may use each app once, more than once, or not at all. You may need to move the split bar between panes or scroll to view content.

NOTE: Each correct match is worth one point.

Apps

- Dynamics 365 Sales on the web
- Dynamics 355 Sales mobile app
- Dynamics 355 [or phones and tablets app

Answer Area

Scenario	App
Receive push notifications about newly assigned leads.	
View Outlook meetings and appointments.	
Generate SSRS quotes.	

Answer:

Explanation:

Apps

- Dynamics 365 Sales on the web
- Dynamics 365 Sales mobile app
- Dynamics 365 for phones and tablets app

Answer Area

Scenario	App
Receive push notifications about newly assigned leads.	Dynamics 365 Sales mobile app
View Outlook meetings and appointments.	Dynamics 365 for phones and tablets app
Generate SSRS quotes.	Dynamics 365 Sales on the web

Question: 80

Your organization is using Dynamics 365 Sales to track its sales pipeline, and you have implemented sales forecasting using the out-of-the-box sample forecast configuration.

The vice president of sales wants the forecast to categorize lost deals using the more detailed opportunity status code reasons of "Cancelled" and "Outsold."

You need to enable the detailed categorization requested by the vice president of sales.

Which two actions should you take? Each answer presents part of a solution. (Choose two.)

NOTE: Each correct selection is worth one point.

A. Add the detailed lost reasons to the opportunity forecast category option set.
B. Create a new cloud flow to map opportunity state code to forecast category.
C. Add the detailed lost reasons to the msdyn_forecastinstance status code option set.
D. Update the field mappings in the Opportunity Forecast Category Mapping Process workflow.

Answer: A, D

Explanation:

To ensure that the sales forecast categorizes lost deals using more detailed reasons like "Cancelled" and "Outsold," you need to modify how the opportunity status codes are mapped to the forecast categories.

Add the detailed lost reasons to the opportunity forecast category option set
This ensures that the system can recognize and categorize opportunities as "Cancelled" or "Outsold" within the forecast. The forecast category option set must be updated to accommodate the new lost reasons.

Update the field mappings in the Opportunity Forecast Category Mapping Process workflow
This workflow determines how opportunity status codes map to forecast categories. Updating the

field mappings ensures that opportunities with "Cancelled" or "Outsold" reasons are correctly classified within the forecast.

Question: 81

You are creating an email for an upcoming campaign. You collect all the information necessary for the email from the email marketing team.

You need to ensure the email marketing team have the minimum required information to set up the email.

Which two fields do you need to complete to save the email? Each correct answer presents part of the solution. (Choose two.)

NOTE: Each correct selection is worth one point.

A. Preview Text
B. From Address
C. Subject
D. Email From Name

Answer: B, C

Explanation:

In Dynamics 365 Marketing, when creating an email for a campaign, certain required fields must be completed before the email can be saved. The From Address is essential because it specifies the sender of the email, which is necessary for email configuration. The Subject is also required, as it defines the email's purpose and is a mandatory field for email setup.

Question: 82

HOTSPOT

A company generates leads from a webform. Salespeople manage leads by country/region. All salespeople are part of the same Dynamics 365 Sales team.

The sales manager requires the following functionality:

Automate lead assignments.

Ensure each seller can never have more than 20 open leads.

You create a country/region attribute for the process. You must simplify the process. You plan to use segments when possible.

You need to create a lead assignment rule for each country/region.

Which configurations should you use? To answer, select the appropriate options in the answer area.

NOTE: Each correct selection is worth one point.

Answer Area

Requirement

Configuration

Filter leads for assignment.

- Create a segment to filter the lead source and country/region.
- Create a segment to filter the lead source. Add country/region as an additional condition.
- Create a segment to filter the country/region. Add the lead source as an additional condition.

Assign the country/region to the correct group.

- Assign the country/region to any seller.
- Assign the country/region to specific teams.
- Assign the country/region to specific sellers.
- Assign the country/region to sellers with matching attributes.

Distribute leads to salespeople.

- Use load balancing.
- Use round-robin distribution.

Explanation:

Answer Area

Requirement

Filter leads for assignment.

Answer

Assign the country/region to the correct group.

Configuration

Create a segment to filter the lead source and country/region.
Create a segment to filter the lead source. Add country/region as an additional condition.
Create a segment to filter the country/region. Add the lead source as an additional condition.

Distribute leads to salespeople.

Assign the country/region to any seller.
Assign the country/region to specific teams.
Assign the country/region to specific sellers.
Assign the country/region to sellers with matching attributes.

Use load balancing.
Use round-robin distribution.

Question: 83

DRAG DROP

A company must decide whether to use push notifications or assistant cards in the Dynamics 365 Sales mobile app.

You need to recommend which functionality the company should use based on its scenarios.

Functionalities

^Insight cards

Push notifications

Answer Area

Requirement	Functionality
Must be able to specify individual recipients.	
Supported by both the Sales mobile app and Sales hub.	

Which functionalities should you recommend? To answer, move the appropriate functionalities to the correct requirements. Each functionality may be used once, more than once, or not at all. You may need to move the split bar between panes or scroll to view content.

NOTE: Each correct selection is worth one point.

Functionalities

Insight cards

Push notifications

Answer Area

Requirement	Functionality
Must be able to specify individual recipients.	Push notifications
Supported by both the Sales mobile app and Sales hub.	Insight cards

Question: 84

HOTSPOT

You are a Dynamics 365 Sales administrator. You set the fiscal year to begin in January.

A sales manager needs a monthly forecast for the next three years that starts in August of the next year.

You need to configure the forecast using the fewest number of forecasts.

How should you configure each requirement? To answer, select the appropriate options in the answer area.

NOTE: Each correct selection is worth one point.

Answer Area

Requirement	Configuration
How many forecasts are needed?	4 5
What is the starting period foi the forecast?	current year next year last year of the forecast last open year
How many periods are needed?	12 36 48 60

Answer:

Explanation:

Answer Area

Requirement	Configuration
How many forecasts are needed?	1 3 4 5
What is the starting period for the forecast?	current year next year last year of the forecast last open year
How many periods are needed?	12 36 48 60

Question: 85

You use document management in Dynamics 365 Sales. You use a single, parent SharePoint site collection with several child site records configured for each geographical region.

You make a change on SharePoint to rename one of the child sites.

You need to ensure the document management capabilities continue to function for all associated records.

What should you do?

A. Create a new document location.

B. Update the relative URL.

C. Create a new site record.

D. Update the absolute URL.

Answer: B

Explanation:

Since a child site within the existing SharePoint site collection has been renamed, the best approach is to update the relative URL in Dynamics 365 Sales. The relative URL defines the path within the parent site and must match the new name to ensure document management continues to function correctly.

Question: 86

You are working in Dynamics 365 Sales. You turn on the visibility of the Dynamics 365 Sales records in the channel.

A user working with leads is unable to pin the view into Microsoft Teams.

You need to identify the issue.

What should you do?

A. Disable the Turn on the linking of Dynamics 365 records to Microsoft Teams channels option.
B. Enable the Turn on Enhanced Microsoft Teams Integration option.
C. Enable the External links within Teams option.
D. Add users to the Teams channel.
E. Add users to the correct security role.

Answer: B

Explanation:

For users to pin views of Dynamics 365 Sales records in Microsoft Teams, Enhanced Microsoft Teams Integration must be enabled. This feature allows users to seamlessly work with Dynamics 365 records within Teams and ensures proper synchronization between the two platforms.

Question: 87

You use the Dynamics 365 Sales mobile app.

Users must receive a push notification when they are assigned to a lead record.

You need to create the push notification.

Which tool should you use?

A. Microsoft Power Automate
B. Microsoft Dynamics 365 App for Outlook
C. Business process flow
D. Assistant for Microsoft Dynamics 365 Sales

Answer: A

Explanation:

Question: 88

HOTSPOT

A Company uses Exchange Online. Users require their appointments and tasks to automatically synchronize with those available in Outlook.

You need to set up the default mailbox configuration.

What should you select for each field? To answer, select the appropriate options in the answer area.

NOTE: Each correct selection is worth one point.

Answer Area

Synchronization methods

The selected settings will be applied to mailboxes of all newly treated users and queues

Server Profile

Microsoft Exchange On ine

Incoming Email

None
Forward Mailbox
Microsoft Dynam ics Irb for Outlook
Server-Side Synchronization cr Email Router

Outgoing Email

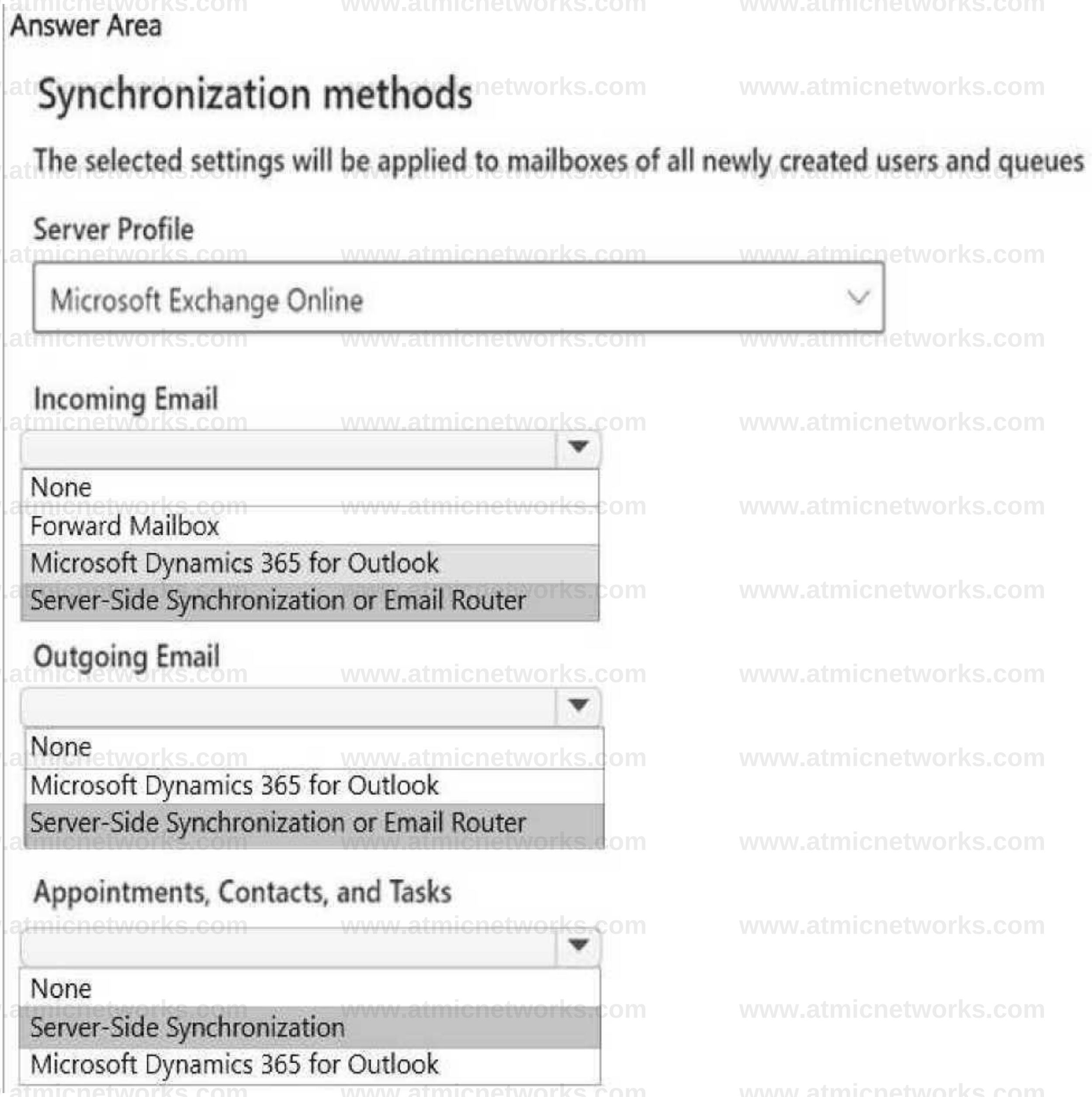
None
Microsoft Dynamics 3G5 tor Outlook
Server-Side Synchronization ci Email Router

Appointments, Contacts, and Tasks

None
Server-Side Synchronization
Microsoft Dynamics 365 for Outlook

Answer:

Explanation:



Question: 89

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: 90

A company deploys Dynamics 365 Sales.

You are deploying Dynamics 365 App for Outlook to all users in the environment. You complete the following steps of the deployment:

- Assign all users the required security privileges.
- Enable and test all mailboxes.

Users report that the app is NOT visible within their Outlook client.

You need to make Dynamics 365 App for Outlook available to all users.

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 the app for all users.

B. Share the app with all users.

C. Assign the Dynamics 365 App for Outlook User security role to all users.

D. Instruct users to install the app.

E. Provide the app URL to the users.

Answer: A, D

Explanation:

Deploy and install Dynamics 365 App for Outlook

Step 1: Set the default synchronization method [Assume done]

Step 2: Test email configuration and enable mailboxes [Done]

Step 3: Provide security role access [Done]

The security role Dynamics 365 App for Outlook User is available from build 9.1.0.4206 or later. If a user doesn't have this security role or its underlying privileges, they'll receive the following error: You haven't been authorized to use this app. Check with your system administrator to update your settings. You must add users to this role so they can use Dynamics 365 App for Outlook. This will ensure that the users have the basic privileges needed to access App for Outlook.

Step 4: Install App for Outlook

Follow these steps to push Dynamics 365 App for Outlook to selected users, all users, or have users install it themselves as needed.

Step 4.1: Push the app to your users

1. To push the app to your users, from your app, go to Settings > Advanced Settings.

1. Go Settings > Dynamics 365 App for Outlook.

1. The Getting Started with Microsoft Dynamics 365 App for Outlook page lists all eligible users that can use App

for Outlook. You have several different options on how you can deploy the app to your users.

2. Etc.

Or

Step 4.2: Have users install App for Outlook themselves

3. From your app, go to Settings > Advanced Settings.

4. Select the Settings button Settings button., again and then select Apps for Dynamics 365 apps.

5. In the Apps for Dynamics 365 apps screen, under Dynamics 365 App for Outlook, users select Add app to Outlook.

Reference:
https://learn.microsoft.com/en-us/dynamics365/outlook-app/deploy-dynamics-365-app-for-outlook

Question: 91

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,

You recently implemented Dynamics 365 Sales within your organization's sales team. Based on the initial evaluation, adoption is limited as most sales users prefer to work from Microsoft Outlook.

You decide to enable the Dynamics 365 App for Outlook.

You need to perform the various actions required. Each correct action is part of the solution but does NOT solve the problem completely.

Action: Within the system settings and email configuration, you set Process Email Using to Dynamics 365 for Outlook.

Does this meet the goal?

A. Yes

B. NO

Answer: B

Explanation:

Correct:

• : From the email settings in the Advanced settings, you migrate email router data from server-side synchronization to Dynamics 365 app for Outlook. [See step 1 below. Use Server-side synchronization]

• You test the email configuration and enable the mailboxes for the Dynamics 365 App for Outlook designated users. [Yes, see step 2 below]

Incorrect:

- Within the system settings and email configuration, you set Process Email Using to Dynamics 365 for Outlook. [No, set this to Server-side synchronization. See step 1 below]

Note:

Deploy and install Dynamics 365 App for Outlook

Step 1: Set the default synchronization method

To use Dynamics 365 App for Outlook, you need to set server-side synchronization for your email processing.

1. From your app, go to Settings > Advanced Settings.
2. Go Settings > Administration and then select System Settings.
3. Select the Email tab, and set Process Email Using to Server-Side Synchronization.

Step 2: Test email configuration and enable mailboxes

Enable and test your user mailboxes so they can use Dynamics 365 App for Outlook.

Reference:

https://learn.microsoft.com/en-us/dynamics365/outlook-app/deploy-dynamics-365-app-for-outlook

Question: 92

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You decide to enable the Dynamics 365 App for Outlook.

You need to perform the various actions required. Each correct action is part of the solution but does NOT solve the problem completely.

Action: From the email settings in the Advanced settings, you migrate email router data from serverside synchronization to Dynamics 365 app for Outlook.

Does this meet the goal?

A. Yes

B. No

Answer: A

Explanation:

Correct:

- : From the email settings in the Advanced settings, you migrate email router data from server-side synchronization to Dynamics 365 app for Outlook. [See step 1 below. Use Server-side synchronization]
- You test the email configuration and enable the mailboxes for the Dynamics 365 App for Outlook designated users. [Yes, see step 2 below]

Incorrect:

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Note:

Deploy and install Dynamics 365 App for Outlook

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You decide to enable the Dynamics 365 App for Outlook.

You need to perform the various actions required. Each correct action is part of the solution but does NOT solve the problem completely.

Action: You test the email configuration and enable the mailboxes for the Dynamics 365 App for Outlook designated users.

Does this meet the goal?

A. Yes

B. No

Answer: A

Explanation:

Correct:

- : From the email settings in the Advanced settings, you migrate email router data from server-side synchronization to Dynamics 365 app for Outlook. [See step 1 below. Use Server-side synchronization]
- You test the email configuration and enable the mailboxes for the Dynamics 365 App for Outlook designated users. [Yes, see step 2 below]

Incorrect:

- Within the system settings and email configuration, you set Process Email Using to Dynamics 365 for Outlook. [No, set this to Server-side synchronization. See step 1 below]

Note:

Deploy and install Dynamics 365 App for Outlook

Step 1: Set the default synchronization method

To use Dynamics 365 App for Outlook, you need to set server-side synchronization for your email processing.

1. From your app, go to Settings > Advanced Settings.
2. Go Settings > Administration and then select System Settings.
3. Select the Email tab, and set Process Email Using to Server-Side Synchronization.

Step 2: Test email configuration and enable mailboxes

Enable and test your user mailboxes so they can use Dynamics 365 App for Outlook.

Reference:

https://learn.microsoft.com/en-us/dynamics365/outlook-app/deploy-dynamics-365-app-for-outlook

Question: 94

You need to update the role configuration for the digital sales team to enable the capability requested. What two actions should you perform? Each correct answer presents part of the solution. Choose two. NOTE: Each correct selection is worth one point.

A. Grant View Audit Summary permissions to the Digital seller security role.
B. Assign the Sales Copilot user role to the members of the digital sales team.
C. Grant View Audit History permissions to the Digital seller security role.
D. Grant View Audit Partitions permissions to the Digital seller security role.

Answer: B, C

Explanation:

To enable the digital sales team's request to use Copilot for summarizing changes to lead records, you need to ensure that they have the necessary permissions and access to the required features. Here's how to proceed:

Assign the Sales Copilot User Role:

Dynamics 365 Copilot in Sales is a feature that assists users by providing insights and summaries based on data within the system.

To allow the digital sales team to access and utilize Copilot's capabilities, they must have the Sales Copilot user role assigned. This role enables users to interact with Copilot and benefit from its AIdriven functionalities such as summarizing changes and insights in records.

Microsoft Documentation Reference: Dynamics 365 Sales Copilot Setup

Grant View Audit History Permissions:

The View Audit History permission is essential for team members to access audit logs, which is necessary for reviewing and summarizing changes made to lead records.

Enabling this permission will allow the digital sales team to view a history of modifications in lead records, thus allowing them to generate summaries based on this audit trail.

The View Audit Summary permission specifically lets them see summaries of audit data, which complements Copilot's functionality by allowing Copilot to access detailed change history for summarization.

Microsoft Documentation Reference: Security Roles and Privileges

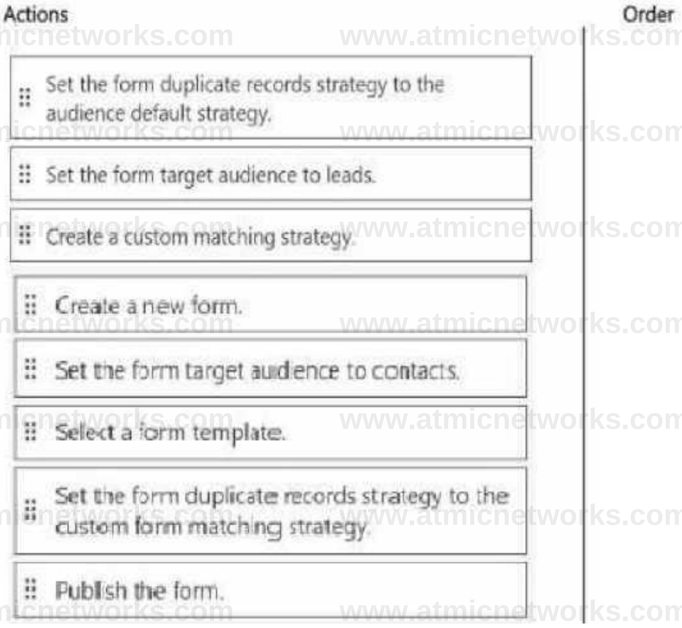
By implementing these two actions, the digital sales team will have both the necessary access to Copilot features and the required permissions to audit lead record changes, enabling them to leverage Copilot for summarizing changes to leads effectively.

Question: 95

DRAG DROP

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 are
a. Arrange the five actions in the correct order.



Answer:

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 Reference:

Set up a Customer Insights - Journeys form

Duplicate Detection Rules in Dynamics 365

Question: 96

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 the Dataverse 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:

The Dataverse record change trigger is used to initiate journeys when there is a change in a record within Dataverse, such as an opportunity's status.

Since the requirement is to send a "Getting started" email once an opportunity status changes to "Won," this trigger can detect the status update in real-time.

Using this trigger, you can specify the criteria for the journey to start, such as filtering for opportunities with a status of "Won," thus automating the email sending based on this condition. Why Not Other Triggers?

Custom trigger with lead profile data and Custom trigger with contact profile data: These are generally used for initiating journeys based on custom events or data points outside of standard Dataverse records, which isn't applicable here as the journey is triggered by an opportunity status change, a native Dataverse record.

Email Link Clicked Interaction Trigger: This trigger is used to follow up after an email link is clicked, which does not align with the scenario. The journey must start based on an opportunity status change, not email interaction.

Microsoft Dynamics 365 Reference:

[Create and manage trigger-based journeys]

[Work with Dataverse triggers in journeys]

By using the Dataverse 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.

Question: 97

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

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

A. Integer
B. Whole Number
C. String
D. Boolean
E. GUID

Answer: B, C, E

Explanation:

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

Whole Number and GUID are commonly used data types for primary keys because they can uniquely identify records and are natively supported for primary keys in databases.

String can also be used as a primary key if it uniquely identifies each record (e.g., an email address). Integer and Boolean are generally not used as primary keys in Customer Insights because they may not provide unique identifiers suitable for all scenarios.

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

Question: 98

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: A, C

Explanation:
When determining the primary table in Customer Insights during the unification process, the goal is to choose the table that provides the most robust and accurate customer profile information.

Criterion A is crucial because having complete and reliable customer profile data ensures that the unified profile is accurate and comprehensive.

Criterion C is recommended by Microsoft when using Dynamics 365 data, as the contact table often serves as the primary source of customer information within the Dynamics 365 ecosystem.

While tables with many related tables or common attributes with other tables may provide supplementary information, they do not necessarily constitute the primary source for reliable customer data.

Reference: [Microsoft Documentation - Data Unification Process in Customer Insights]

Question: 99

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]

Question: 100

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 the Lead Score Viewer role 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 the Lead Score Viewer role 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]

Question: 101

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.

Question: 102

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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.

Question: 103

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

C. 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.

Question: 104

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.

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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: 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:

Correct:

- Transform the first row to be used as headers. Define column types to be the 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.

The proposed solution effectively prepares the data for unification in Dynamics 365 Customer Insights - Data. Here's how each step contributes to meeting the goal:

Transform the first row to be used as headers: This step is necessary to define the column names, which is critical for accurate data interpretation.

Define column types to be the appropriate field types: Specifying the correct data types for each column ensures that the data will be processed correctly during unification, maintaining data integrity.

Create a full name and full address columns by merging the appropriate columns if they exist: This step enhances the dataset by consolidating relevant information into single columns, which can simplify data usage and improve data quality. Merging columns helps ensure that users can easily access essential information without navigating through multiple fields.

Select Next: This indicates that the data transformation steps are completed and the dataset is ready for the unification process.

Incorrect:

- 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 not address the problem with null values.

- Remove any rows where the primary key is missing, delete any leading or trailing zeros on the primary key, and name the query.

Select Next and your data is now ready for unification.

Problem not related to the primary key.

- Transform the first row to be used as headers, and remove any special characters or spaces from header row. Remove rows with missing primary keys and name the query. Select Next and your data is now ready for unification.

Does not address the problem with null values.

- 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.

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.

- 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.

While the solution includes transforming the first row to be used as headers and naming the query, the step of removing rows that contain null values is problematic.

Removing all rows with null values can lead to significant data loss, particularly if those rows contain relevant information.

Question: 105

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]

Question: 106

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:

The company needs to apply a separate flat rate discount for preferred customers on specific products. This discount varies depending on the customer's country or region.

A Discount List in Dynamics 365 Sales is used to apply specific discounts on products under defined conditions.

Solution - Creating a Discount List:

A Discount List can be tailored to preferred customers and configured to apply discounts based on specific products and customer attributes, such as their country or region.

Using a Discount List ensures flexibility and control over the discount structure, allowing the organization to manage regional variations in pricing for preferred customers.

Reference: [Microsoft Documentation - Configure Discount Lists in Dynamics 365]

Steps to Create a Discount List for Preferred Customers:

Navigate to Settings > 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.

Question: 107

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:

The company wants to send push notifications to sellers using the Dynamics 365 Sales mobile app.

This requires setting up automated notifications triggered by certain events or conditions.

Solution - Using Cloud Flows:

Cloud flows in Power Automate are ideal for creating automated workflows that can trigger push notifications based on events in Dynamics 365.

Power Automate provides connectors for Dynamics 365 Sales and mobile notifications, enabling the setup of push notifications without requiring custom code or plugins.

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.

Question: 108

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 "0" or "5."

Reference: [Microsoft Documentation - Configure Rounding Policies for Price Lists]

Question: 109

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

A. Edit the existing forecast and update the Amount column in the layout.
B. Edit the existing forecast, remove the Lost column, and add a new calculated column.
C. Create a new forecast and update the Amount column in the layout.
D. Create a new forecast, remove the Lost column, and add a new calculated column.

Answer: A

Explanation:

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

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

Reference: [Microsoft Documentation - Configure Forecasts in Dynamics 365 Sales]()

Question: 110

Your company wants to enable AI features in their systems and use Copilot for Sales to connect to Dynamics 365 Sales dat a. 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: B, D, E

Explanation:

Enable Copilot for Sales in Dynamics 365:

To make Copilot features available, you must enable Copilot for Sales within Dynamics 365. This involves setting up the environment so that Copilot can access and utilize the sales data effectively.

Verify Server-Side Synchronization and Security Roles:

Copilot for Sales relies on server-side synchronization to ensure data flow between Dynamics 365 and other services, such as Teams. Ensure that server-side synchronization is enabled and that users have the necessary security roles in Dynamics 365 to access and use Copilot.

Assign Privileges for Copilot in Teams:

Ensure that users have the correct privileges within Teams to access Copilot. This might involve configuring access policies and permissions so that eligible users can utilize Copilot features during their interactions within Teams.

Reference: [Microsoft Documentation - Configure and Use Copilot for Sales]()

Question: 111

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: A, C, D

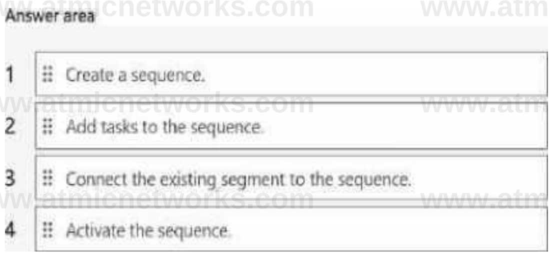
Explanation:
Manager on System User Record:
Suggested contacts in Teams can include users directly linked to the individual starting the chat. The manager assigned on the user's system record can be a suggested contact, as this is a common relationship that suggests frequent communication.
Record Owner of the Initiating Record:
The owner of the record being discussed or acted upon is also likely to be a suggested contact. This is because the owner has primary responsibility for the record and would commonly need to be consulted or informed about actions related to it.
Created By of the Initiating Record:
If the user is the Created By for a record, they are associated with its initial setup or creation. As a result, they may be suggested when actions on that record are taken since they are familiar with its origins.
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.

Question: 112
DRAG DROP
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.	

Answer:

Explanation:



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:

Start by creating a sequence in Dynamics 365 Sales. A sequence is a defined set of steps (tasks) that are applied to records in a systematic manner. It helps automate the task creation process based on predefined criteria.

Reference: [Microsoft Documentation - Create and Manage Sequences]

Add Tasks to the Sequence:

After creating the sequence, add the specific tasks that need to be automatically generated and assigned to the leads. These tasks can be calls, follow-ups, emails, etc., that need to be completed as part of the sales process.

Reference: [Microsoft Documentation - Add Activities to a Sequence]

Connect the Existing Segment to the Sequence:

Once the tasks are added, connect the sequence to the existing segment that filters the lead records based on assignment rules. This ensures that only leads within this specific segment are targeted by the sequence.

The segment is a subset of leads that meet certain criteria, and connecting it to the sequence allows for automated task assignment according to the segment's filtering rules.

Reference: [Microsoft Documentation - Use Segments with Sequences]()

Activate the Sequence:

Finally, activate the sequence to begin the automated assignment of tasks to lead records that meet the segment criteri a. Activation makes the sequence live, enabling the automated process to assign tasks to each lead as per the sequence setup.

Reference: [Microsoft Documentation - Activate Sequences]()

By following these steps, the sales manager can ensure that tasks are automatically generated and assigned to leads according to the same criteria used by the assignment rules, streamlining task management for the sales team.

Question: 113

HOTSPOT

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	Action
Automate the tradeshow follow up process.	Imolement seouences Implement sequences. Implement work assignments. Implement customer journeys.
Ensure that the process applies only to tradeshow leads	Use segments. Use segments. Add all leads to a marketing list.
Ensure proper timing of activities	Set relative due date. Set relative due date. Set wait times.

Answer:

Explanation:

Answer Area

Requirement	Action
Automate the tradeshow follow-up process.	Implement sequences
Ensure that the process applies only to tradeshow leads	Use segments.
Ensure proper timing of activities.	Set relative due date.

Automate the Tradeshow Follow-up Process: Implement sequences

Using sequences in Dynamics 365 allows for automating a series of tasks or activities for lead follow-up. Sequences enable you to standardize and automate follow-up tasks, like sending emails and scheduling calls, ensuring salespeople adhere to a consistent process without manual intervention. Implementing sequences is ideal for the follow-up process as it automates the steps and reduces the reliance on salespeople to manually manage each task.

Reference: [Microsoft Documentation - Create and Manage Sequences]()

Ensure That the Process Applies Only to Tradeshow Leads: Use segments

Segments are used to filter leads based on specific criteria. By using segments, you can ensure that the automated sequence is triggered only for leads generated from trade shows.

This action targets the automation specifically at the tradeshow leads, ensuring that other leads are not inadvertently included in this process.

Reference: [Microsoft Documentation - Use Segments in Dynamics 365]

Ensure Proper Timing of Activities: Set relative due date

Setting a relative due date allows you to define a timeframe between actions in the sequence. For example, the follow-up call task can be scheduled for one week after the initial email.

This ensures that tasks are executed with the correct timing, aligning with the desired schedule of following up with potential customers one week after the first contact.

Reference: [Microsoft Documentation - Schedule Activities with Relative Due Dates]

By implementing sequences to automate follow-ups, using segments to filter for tradeshow-specific leads, and setting relative due dates for timely task execution, the company can optimize its posttradeshow follow-up process and enhance the likelihood of successful customer engagement.

Question: 114

DRAG DROP

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 are

a. Arrange the four actions in the correct order.

Actions

Order

In the Editing records section, select Edit records inside Copilot for Sales

Hide the column from the Account form in Dynamics 365.

In the Manage fields section, uncheck Required for the "Revenue Forecast' field.

;; In Copilot for Sales admin settings, select Forms

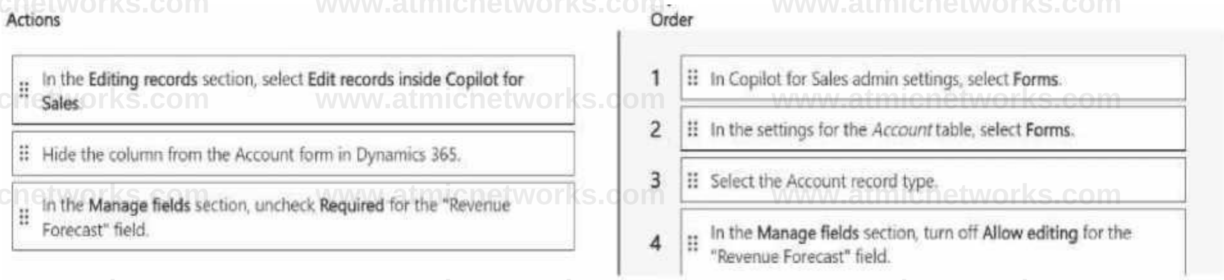
In the settings for the *Actount* table, select Forms

:: Select the Account record type.

In the Manage fields section, turn off Allow editing for rhe "Revenue Forecast" field

Answer:

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 Reference:

In Copilot for Sales Admin Settings, Select Forms:

Start by accessing the admin settings for Copilot for Sales. This is where configuration changes for form accessibility and editing settings are managed. Selecting Forms will allow you to configure specific form-related options for Copilot usage.

In the Settings for the Account Table, Select Forms:

Navigate to the settings for the Account table within Copilot. Selecting Forms at this level allows you to specify which parts of the Account table are editable and visible in Copilot, which directly impacts how users interact with the Account records.

Select the Account Record Type:

Once in the form settings, choose the Account record type that needs to be modified. This is essential for enabling edits to the Account records in Copilot and ensuring that the correct fields are accessible.

In the Manage Fields Section, Turn Off Allow Editing for the "Revenue Forecast" Field:

Finally, within the Manage fields section, disable the Allow editing option specifically for the "Revenue Forecast" field. This action ensures that while Account records can be edited in Copilot, the "Revenue Forecast" field remains read-only, satisfying the requirement from the vice president of sales.

Reference: [Microsoft Documentation - Configure Field-Level Permissions and Editing in Copilot]

By following these steps, you enable the sellers to edit Account records in Copilot for Sales while restricting access to the "Revenue Forecast" field, ensuring both productivity and compliance with organizational policies.

Question: 115

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:

The organization is collecting lead data from two sources: a web form created in Customer Insights - Journeys and manual entries by sales users. This setup could lead to duplicate entries if a lead is submitted through the web form and then entered manually by a sales user afterward.

To ensure data integrity and avoid duplication, it is essential to implement a mechanism that identifies and manages duplicates automatically.

Solution - Enabling Duplicate Detection:

In Dynamics 365, duplicate detection can be configured to alert users or prevent the creation of records that already exist based on certain criteria (such as email).

By enabling duplicate detection based on email addresses, the system will compare incoming lead data with existing records and prompt users if a duplicate is identified. This feature will ensure that leads collected from different sources are not duplicated unnecessarily.

Steps to Enable Duplicate Detection for Leads Based on Email:

Navigate to Settings > Data Management > Duplicate Detection Rules in Dynamics 365.

Create a new Duplicate Detection Rule for the Lead entity. Specify that the system should check for duplicate records based on the email field.

Publish the rule and ensure it is activated.

After activation, this rule will prompt users whenever a duplicate email is detected, either from the Customer Insights - Journeys web form or manual entry by sales users.

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.

Question: 116

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:

The company needs to apply a separate flat rate discount for preferred customers on specific products. This discount varies depending on the customer's country or region.

A Discount List in Dynamics 365 Sales is used to apply specific discounts on products under defined conditions.

Solution - Creating a Discount List:

A Discount List can be tailored to preferred customers and configured to apply discounts based on specific products and customer attributes, such as their country or region.

Using a Discount List ensures flexibility and control over the discount structure, allowing the organization to manage regional variations in pricing for preferred customers.

Reference: Microsoft Documentation - Configure Discount Lists in Dynamics 365

Steps to Create a Discount List for Preferred Customers:

Navigate to Settings > 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.

Question: 117

DRAG DROP

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 are a. Arrange the three actions in the correct order.

Actions

Order

Add a new forward mailbox lor each relevant user.

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

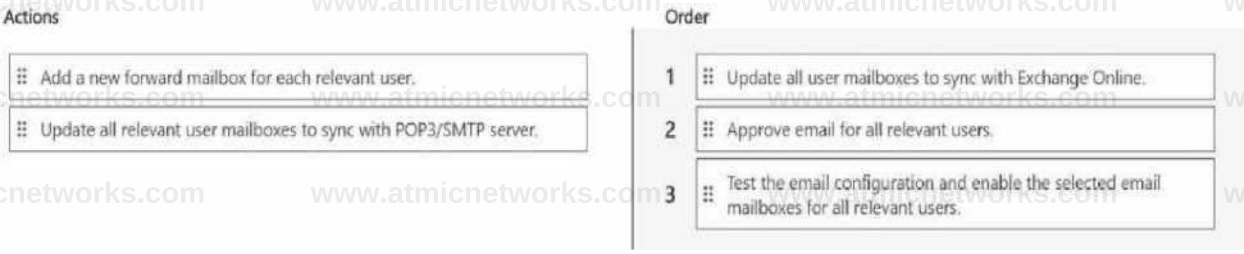
Update all user mail boxes to sync with Exchange Online.

Approve email for all relevant users

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

Answer:

Explanation:



Update All User Mailboxes to Sync with Exchange Online:

Since your organization has moved from Gmail to Exchange Online, the first step is to update the mailbox settings for each user to enable synchronization with Exchange Online. This change in configuration aligns with the new email server settings, allowing Dynamics 365 to handle email via Microsoft Exchange Online instead of Gmail.

This step ensures that user mailboxes are correctly configured to communicate with the new Exchange environment.

Reference: [Microsoft Documentation - Set Up Server-Side Synchronization with Exchange Online]

Approve Email for All Relevant Users:

After updating the mailbox configurations, it's necessary to approve email for all relevant users. This step confirms that the email addresses are verified and allowed to send and receive emails through Dynamics 365.

This approval step is required to ensure that Dynamics 365 has permissions to access and synchronize with each user's mailbox in Exchange Online.

Reference: [Microsoft Documentation - Approve User Email for Server-Side Synchronization]

Test the Email Configuration and Enable the Selected Email Mailboxes for All Relevant Users: Finally, testing the email configuration ensures that server-side synchronization is functioning correctly with Exchange Online. Once the test is successful, enabling the email mailboxes activates the synchronization for all users.

This step verifies that the settings are correct and that emails can be processed as expected, finalizing the setup.

Reference: [Microsoft Documentation - Test and Enable Mailboxes]

By updating the mailbox settings to Exchange Online, approving email access, and testing and enabling the configuration, you ensure a smooth transition from Gmail to Exchange Online for server-side synchronization, enabling efficient email communication through Dynamics 365.

Question: 118

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: A, C

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]

Question: 119

DRAG DROP

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 are a. Arrange the three actions int he correct order.

Actions

Order

Select Server Profiles

Turn tracking "On.[11]

Disable Use tracking token

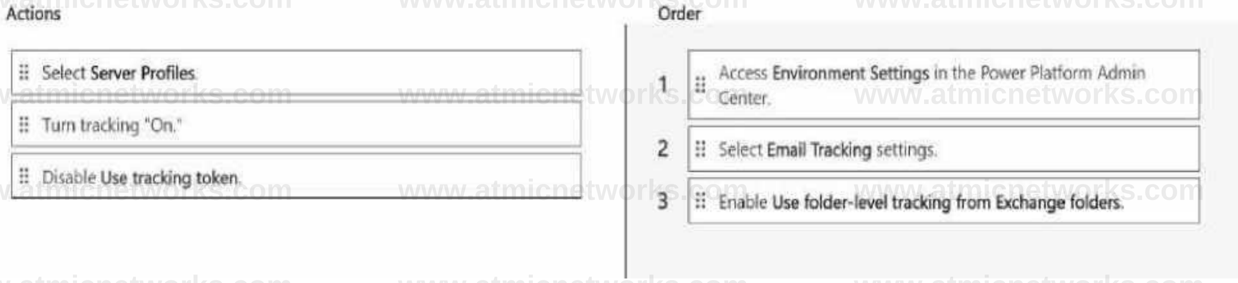
Access Environment Settings in tine Peever Platform Attain **Center**

Select Email Tracking settings

Enable Use folder-level tracking tom Exchange folders

Answer:

Explanation:



Access Environment Settings in the Power Platform Admin Center:

Start by navigating to the Power Platform Admin Center where environment-specific settings are managed. This is the control center for configuring tracking and other settings for Dynamics 365 instances.

Reference: [Microsoft Documentation - Accessing Environment Settings]

Select Email Tracking Settings:

Within the environment settings, go to Email Tracking settings. This area contains the configuration options for email tracking, including methods for tracking emails automatically or manually, and where folder-level tracking can be configured.

Reference: [Microsoft Documentation - Configure Email Tracking in Dynamics 365]

Enable Use Folder-Level Tracking from Exchange Folders:

Once in the Email Tracking settings, enable the Use folder-level tracking from Exchange folders option. This feature allows users to automatically track emails by moving them into designated folders in their mailbox. It removes the need for manual tracking, as moving an email to a tracked folder automatically links it to Dynamics 365.

After enabling this setting, save the changes to activate folder-level tracking across the environment. Reference: [Microsoft Documentation - Enable Folder-Level Tracking in Dynamics 365]

By following these steps, folder-level tracking will be enabled, allowing users to configure tracking rules based on specific folders in their Exchange mailboxes, streamlining the email tracking process within Dynamics 365.

Question: 120

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

The salespeople want to know when their emails will be synced.
You need to describe the server-side synchronization frequency for the salespeople.
How should you describe the frequency?

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

Answer: C

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

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

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

Question: 121

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 in Dynamics 365 from a delegated mailbox, the primary mailbox owner is set as the owner of

the tracked email. This means that if an assistant sends or tracks an email on behalf of another user, the email's ownership will reflect the primary mailbox owner rather than the delegate.

This behavior ensures that activities are correctly associated with the user who owns the mailbox, aligning with the ownership structure in Dynamics 365.

Reference: [Microsoft Documentation - Delegate Access and Email Tracking in Dynamics 365]