MB-280 Dumpsgate

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:

1. The user who made the change.

2. The current and previous values of the columns.

3. 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:

1. completing the registrations that the founder started, and

2. registering more Corgis for the upcoming gala.

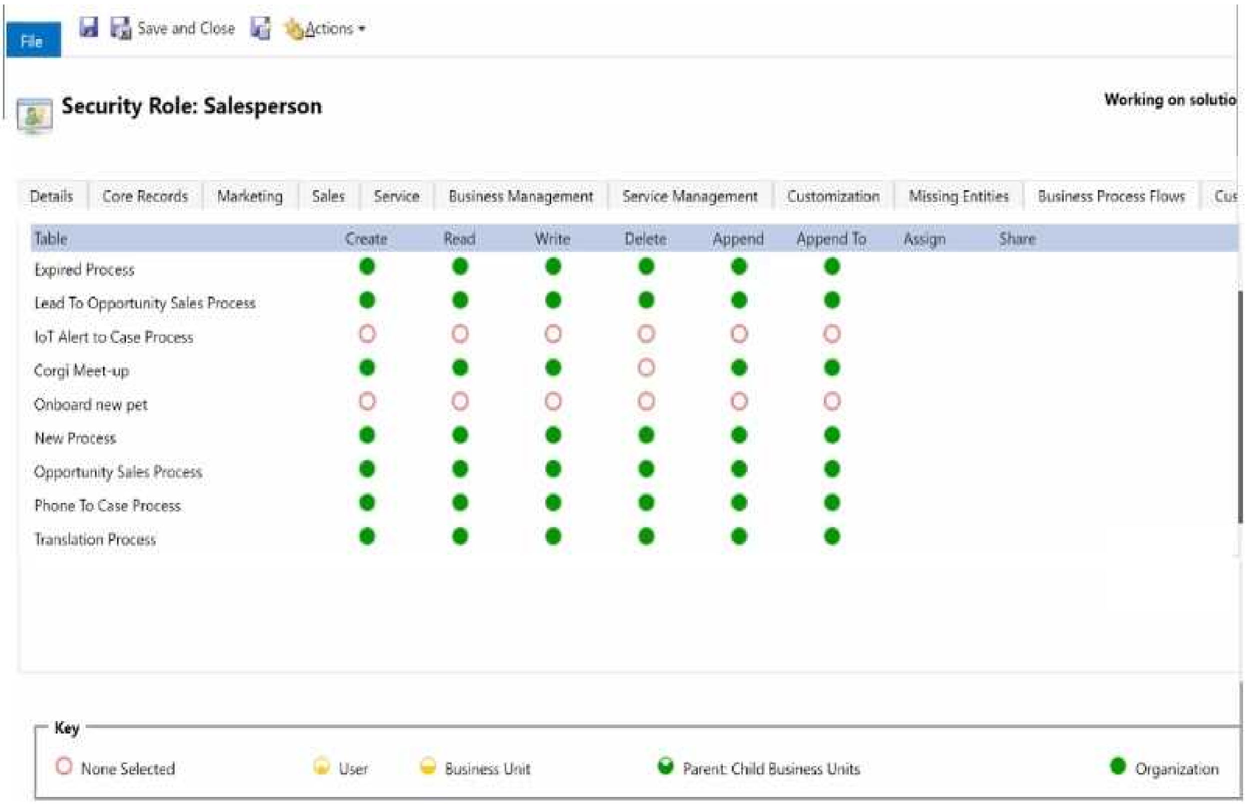
When the carer creates new pet records, the carer is UNABLE to see the Corgi meet-up business process flow.

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.

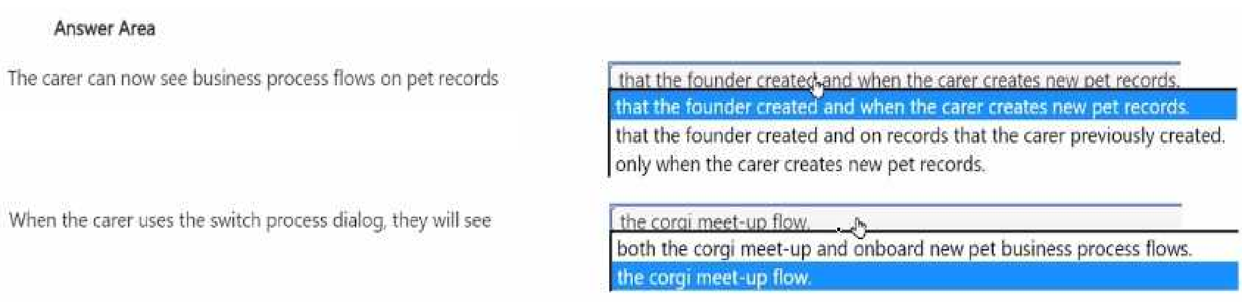
Question: 1

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



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:

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: 2

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 full-text 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: 3

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 Explanation:

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: 4

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: 5

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: 6

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 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: 30

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: 31

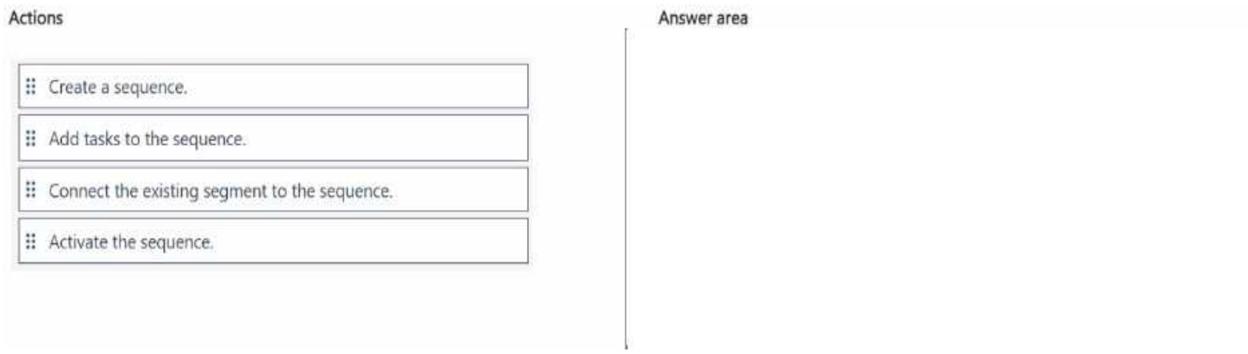
DRAG DROP

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.

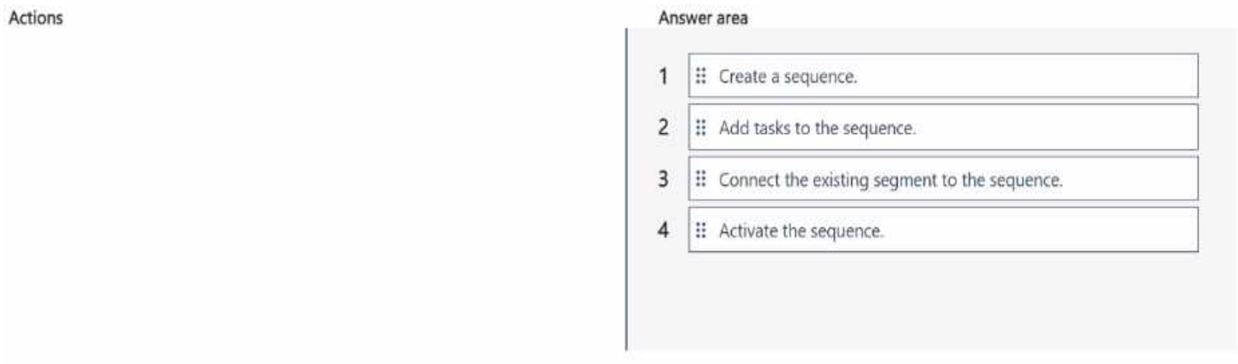
You need to create the tasks and assign the tasks to the lead records.

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.



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: 32

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: 33

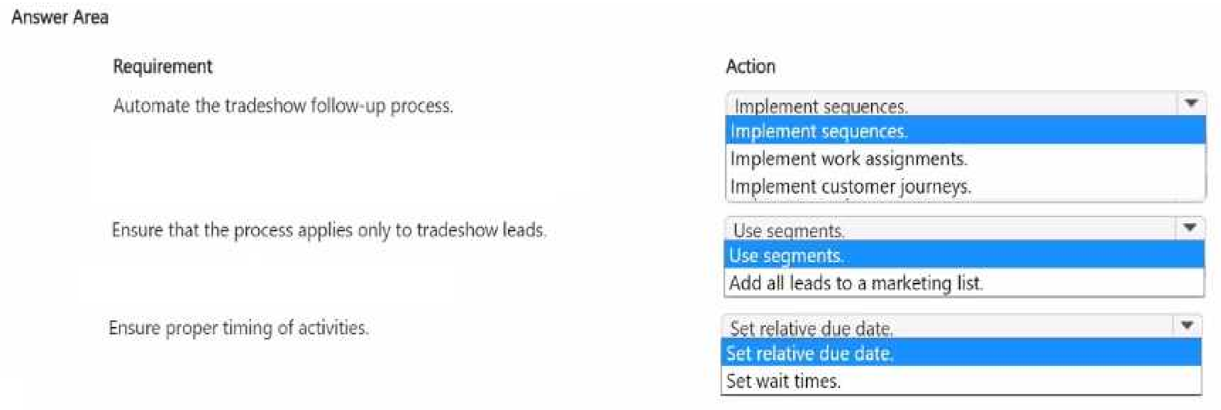
HOTSPOT

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:

Explanation:

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]