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NEW QUESTION: 1
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 (LEAVE A REPLY)
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

NEW QUESTION: 2
You are working with your customer to configure duplicate detection across Leads and Accounts.
The rule must:
* find possible Contacts in the system that match the Lead that you are creating based on an exact match of both first and last name.
* exclude Inactive Contacts when presenting potential duplicates.
You need to create a new duplicate detection rule based on these requirements.
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. Configure the setting to Exclude inactive matching records.
B. Add a filter to the rule criteria to check for Status equals " Active. "
C. Add two (2) rows to the rule Criteria for first name exact match and last name exact match.
D. Set the Base Record Type to " Contact " and Matching Record Type to " Lead. "
E. Set the Base Record Type to " Lead " and Matching Record Type to " Contact. "
Answer: (SHOW ANSWER)

NEW QUESTION: 3
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:

Answer Area

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the column used to evaluate the condition is added to the preceding stage.
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Explanation:

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.

NEW QUESTION: 4

You need to store documents related to different Dataverse records. The storage configuration must meet the following requirements:

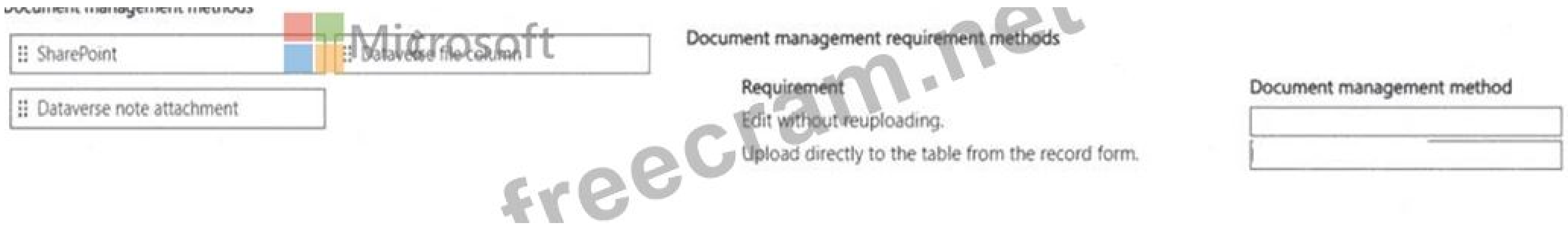
* Table A must relate to multiple documents that allow editing without reuploading the document.

* Table B must relate to a single file that is stored in the table and uploaded from the record form.

You need to configure the system for the storage requirements.

Which document management method should you use? To answer, move the appropriate document management methods to the correct requirements. You may use each document management method once more than once 01 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.



Answer:

Explanation:

NEW QUESTION: 5

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: (SHOW ANSWER)

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

NEW QUESTION: 6

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: (SHOW ANSWER)
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.

NEW QUESTION: 7
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: (SHOW ANSWER)
* Transforming the first row to be used as headers, removing rows with null values, and naming the query prepares the data appropriately for unification in Customer Insights - Data.
* By setting the headers and removing rows with high proportions of nulls, the data becomes cleaner and more structured, which is essential for successful unification in Customer Insights. Therefore, this solution meets the goal of preparing the data for unification.

NEW QUESTION: 8
You have added the timeline control to the Pet main form, then saved and published your changes. You need to configure the timeline to display related Pet activities as required by Terra Flora. Which two actions should you perform? Each correct answer presents a complete solution. Choose two, NOTE: Each correct selection is worth one point.
A. In the Record types of the timeline settings, uncheck the Notes option.
B. In the Activity area of the timeline settings, remove all activity types, except for 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: (SHOW ANSWER)
* 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.
References 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.

NEW QUESTION: 9
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 (LEAVE A REPLY)
* 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.

NEW QUESTION: 10
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.
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.

Answer:

Explanation:

NEW QUESTION: 11

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: (SHOW ANSWER)

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.

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

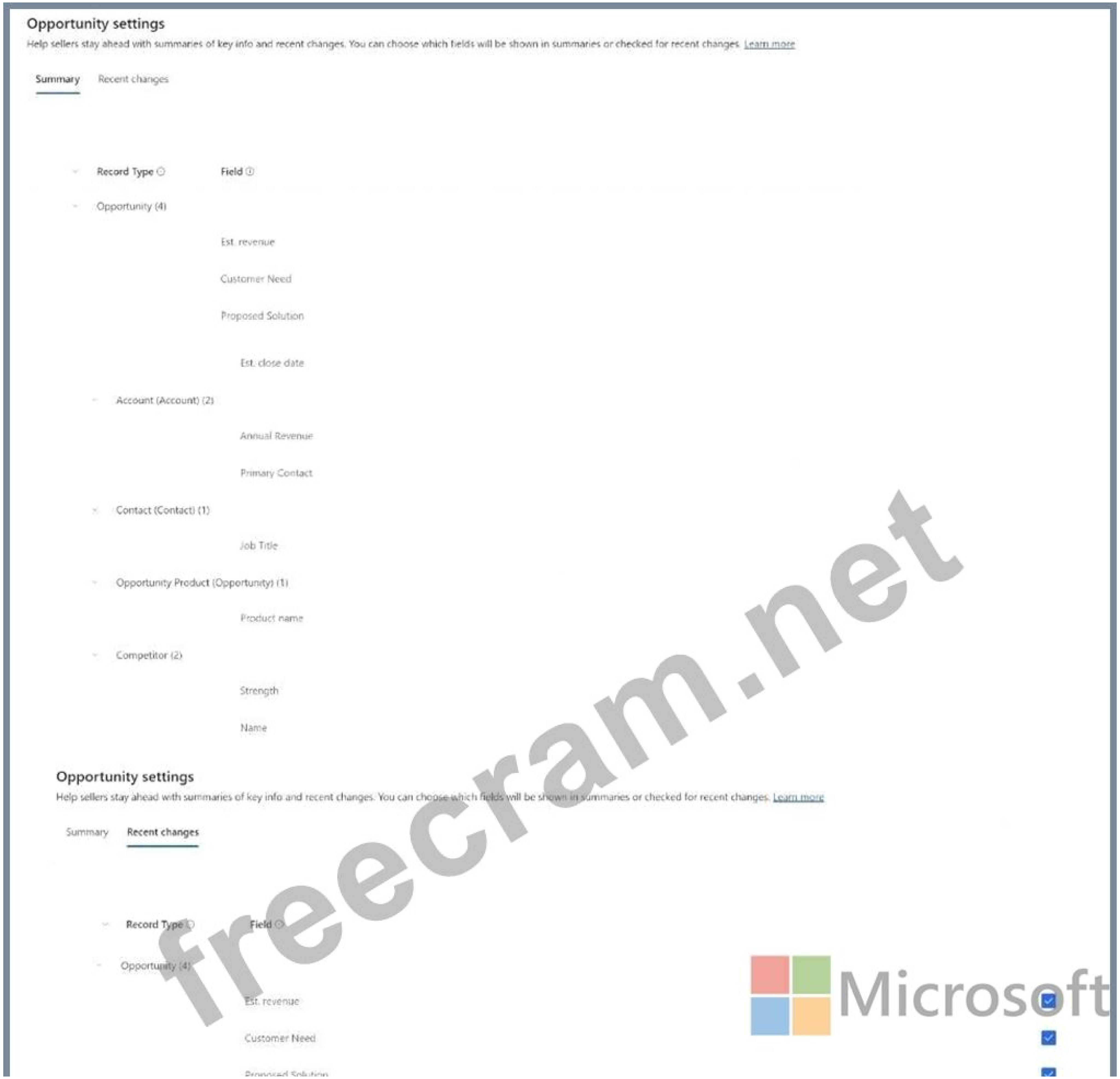
3. Upcoming meeting

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 sellers stay ahead with summaries of key info and recent changes. You can choose which fields will be shown in summaries or checked for recent changes. Learn more
Summary
Recent changes
Record Type
Field
Opportunity (4)
Est. revenue
Customer Need
Proposed Solution
Est. close date
Account (Account) (2)
Annual Revenue
Primary Contact
Contact (Contact) (1)
Job Title
Opportunity Product (Opportunity) (1)
Product name
Competitor (2)
Strength
Name
Opportunity settings
Help sellers stay ahead with summaries of key info and recent changes. You can choose which fields will be shown in summaries or checked for recent changes. Learn more
Summary
Recent changes
Record Type
Field
Opportunity (4)
Est. revenue
Customer Need
Proposed Solution

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:

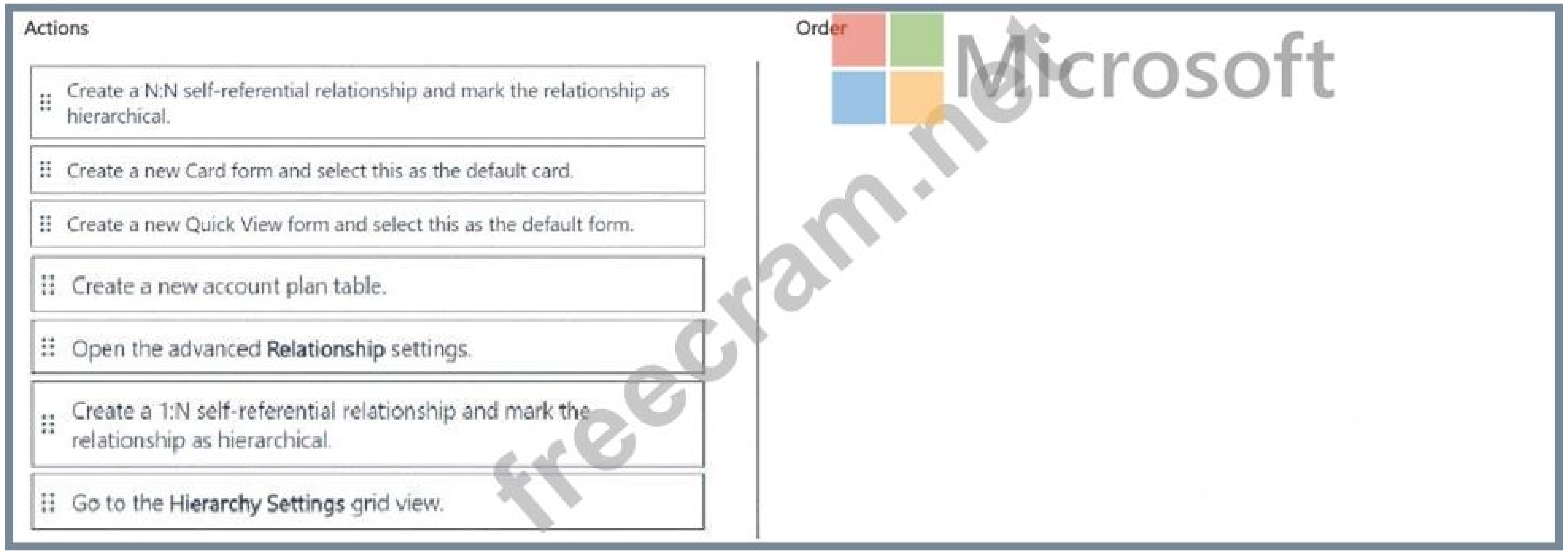
* Tier A - annual revenue greater than or equal to $10,000,000 USD
* Tier B - annual revenue greater than $5,000,000 USD and less than $10,000,000 USD

* 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.
o 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.
o 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.

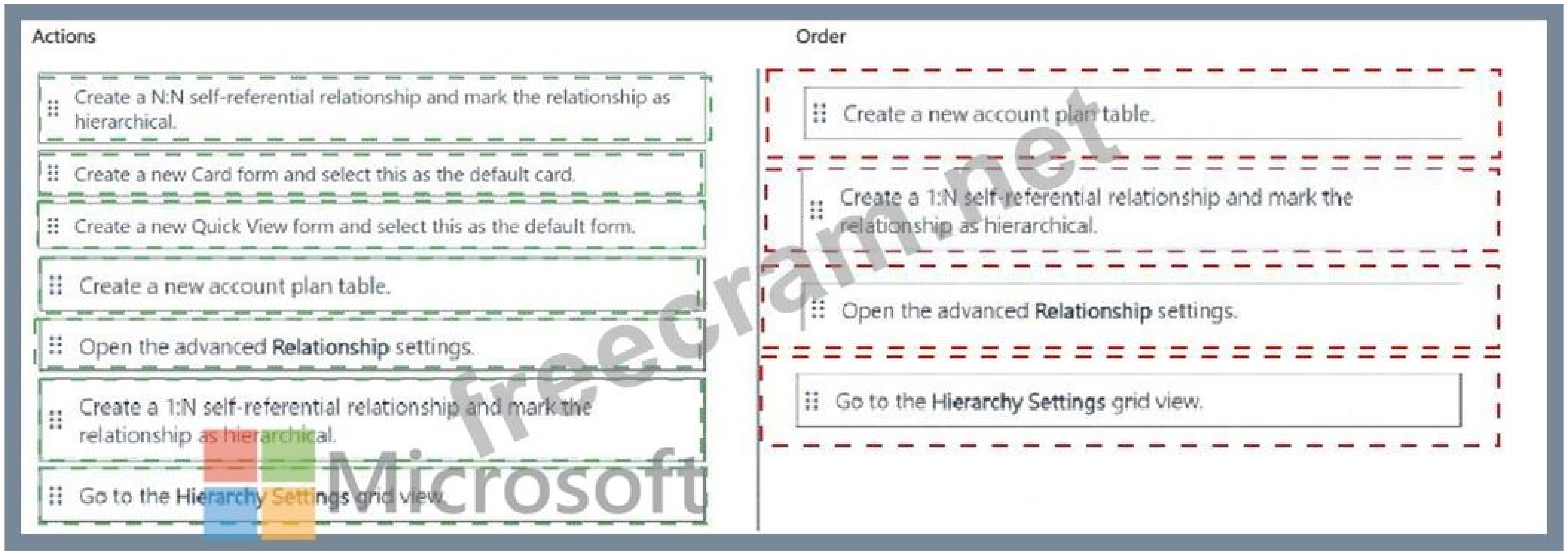
Updated field	Opportunities	When the updates were made
Estimated close date	New York City office, London office, Toronto office	Two days before BDM1's return
Forecast category	Mexico City office	Five days before BDM1's return
Proposed solution	Seattle office	Nine days before BDM1's return

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. "
1. 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.
2. 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:
1. The ability for team members to use Copilot to summarize changes to lead records.
2. 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.

NEW QUESTION: 12
Your organization works with larger customers (accounts) that can have a single holding and then many subsidiaries through different levels in a parent-child relationship.
The chief commercial officer wants the sales team to start creating different account plans for each individual subsidiary.
You need to create a new custom account plan table so that records can have the same parent-child relationships as the account records. The relationships must be able to be visualized in a hierarchy.
Which four actions should you perform in sequence before saving and publishing your changes ' To answer, move the four appropriate actions from the list of actions to the answer area. Arrange the four actions in the correct order.



Answer:



Explanation:

The correct order of actions to create a new custom account plan table with a hierarchical parent-child relationship visualization is as follows:

* Create a new account plan table.

* Create a 1

self-referential relationship and mark the relationship as hierarchical.

* Open the advanced Relationship settings.

* Go to the Hierarchy Settings grid view.

Step by Step Comprehensive Detailed Explanation with ALL Microsoft Dynamics 365 References:

* Create a New Account Plan Table:

* 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.

NEW QUESTION: 13
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 that has the most related tables.
B. Choose the Dynamics 365 contact\ab\e when this is available as the data source.
C. Choose the table that has several attributes in common with other tables.
D. Choose the table with the most complete and reliable profile data about your customers.
Answer: (SHOW ANSWER)

NEW QUESTION: 14
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 can add additional tables to the data source using Get Data functionality in the Power Query.
Answer: (SHOW ANSWER)
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

NEW QUESTION: 15
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: From the email settings in the Advanced settings, you migrate email router data from server-side synchronization to Dynamics 365 app for Outlook.
Does this meet the goal?

A. Yes

B. No

Answer: (SHOW ANSWER)

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

NEW QUESTION: 16
You are working with the Contact table in Dynamics 365 Sales.
The sellers want to add additional information from the Account table to the existing read-only columns visible on the Contact form.
You need to identify which form to update.
Which type of form should you look for in the available options for the Account table?

A. Quick view form

B. Card form

C. Main form

D. Quick create form

Answer: (SHOW ANSWER)

NEW QUESTION: 17

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: (SHOW ANSWER)

* 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.

NEW QUESTION: 18

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: (SHOW ANSWER)

* Understanding the Statuscode and Statecode Columns:

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

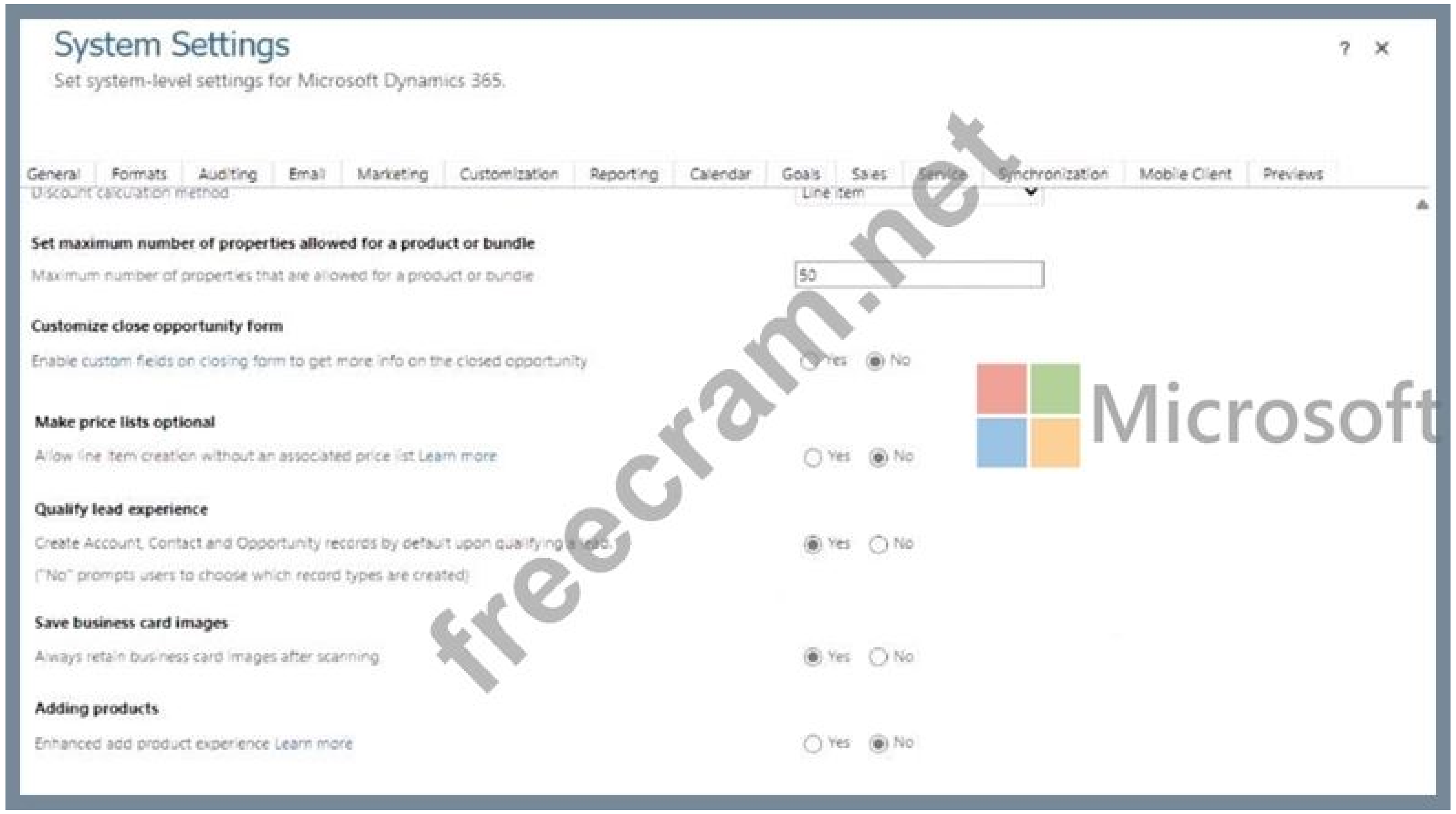
* The statecode defines the primary state of an opportunity (e.g., Open, Won, Lost).

* 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.

NEW QUESTION: 19
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:

Explanation:

* Requirement #1 Explanation:

* 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.

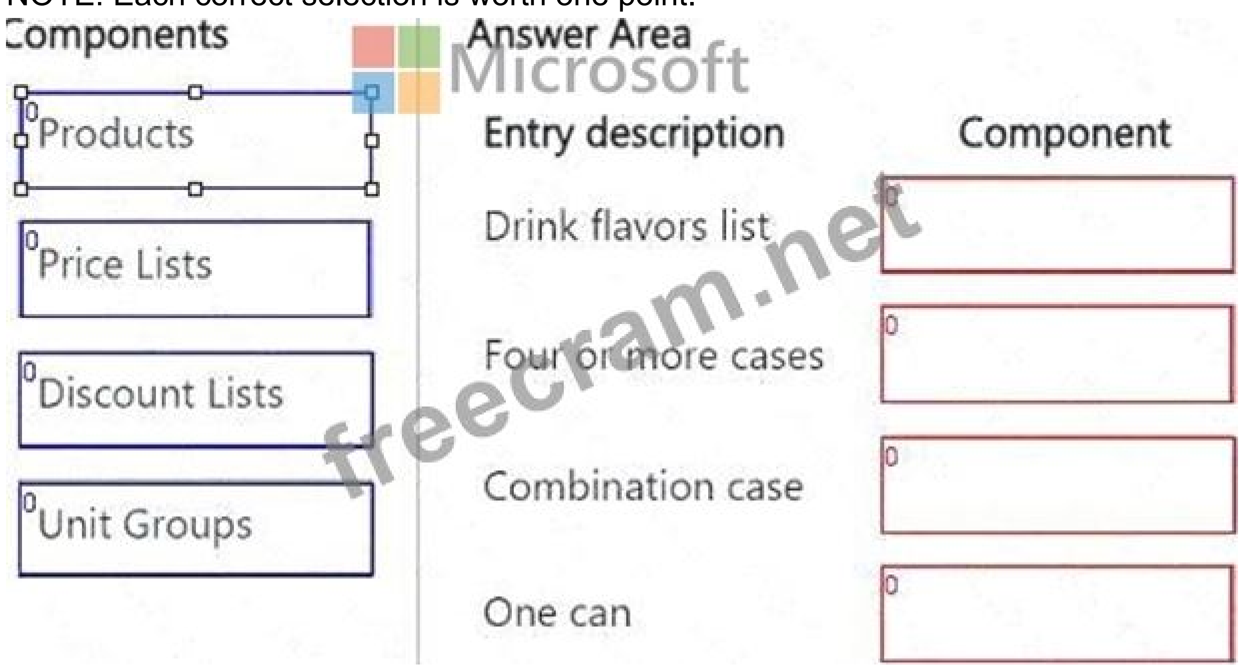
Requirement #2 Explanation:

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

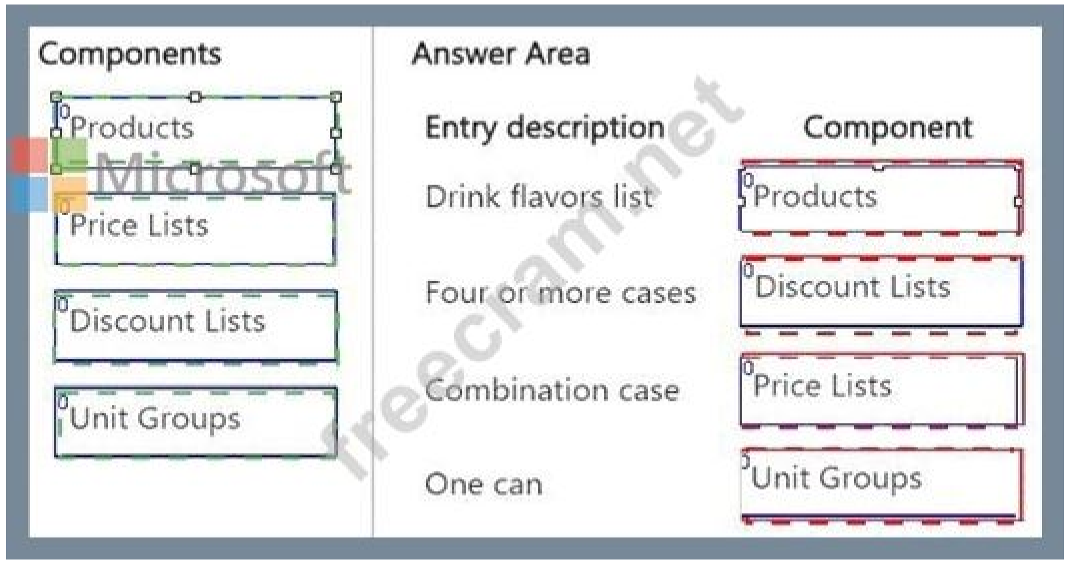
The Customize close opportunity form setting allows customization of the form where users specify the status reason when closing an opportunity.

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.

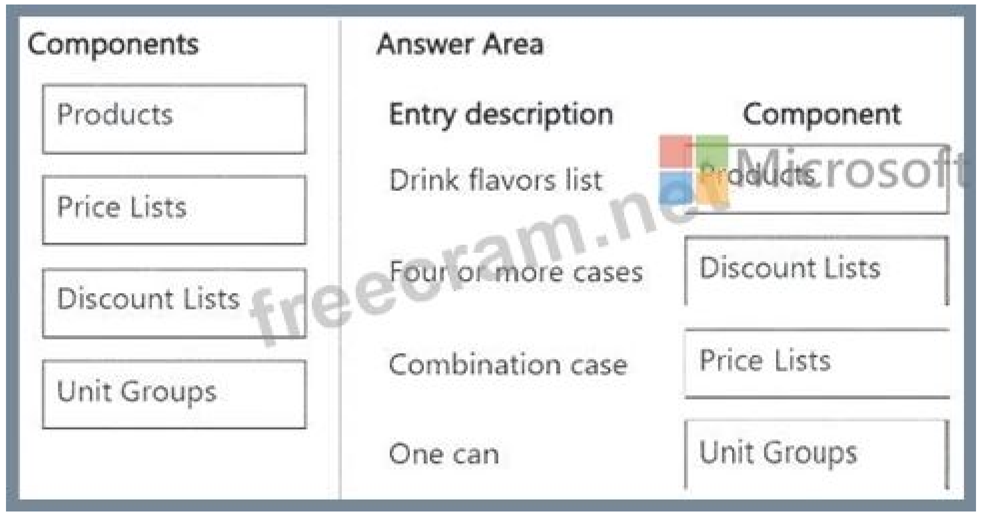
NEW QUESTION: 20
DRAG DROP
You are implementing Dynamics 365 Sales for a beverage company.
The company sells drinks by individual cans, by the dozen, or by the case of 48 cans as follows:
There are three flavors: strawberry, vanilla, and chocolate.
Each can costs $5.00.
A dozen cans cost $55.00.
Each 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.



Answer:



Explanation:



NEW QUESTION: 21

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: (SHOW ANSWER)

* 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 flat-screen 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.

NEW QUESTION: 22

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

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

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

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

Does this meet the goal?

A. Yes

B. No

Answer: (SHOW ANSWER)

* 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.

NEW QUESTION: 23

Your company wants to enable AI features in their systems and use Copilot for Sales to connect to Dynamics 365 Sales data. You need to ensure that all eligible users have access.

Which three actions should you perform? Each correct answer presents part of the solution. Choose three.

NOTE: Each correct selection is worth one point.

A. Create a policy in Teams to install and pin Copilot for Sales and enable meeting transcripts.

B. Enable Copilot for Sales in Dynamics 365.

C. Install Copilot for Sales in Microsoft Outlook.

D. Verify server-side synchronization is enabled and users have the correct security roles in Dynamics 365.

E. Assign users the correct privileges to use Copilot for Sales in Teams.

Answer: (SHOW ANSWER)

* 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

NEW QUESTION: 24

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: (SHOW ANSWER)

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

NEW QUESTION: 25

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

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

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

Solution: Transform the first row to be used as headers. Define column types to be appropriate field types and name the query. Create a full name and full address columns by merging the appropriate columns if they exist. Select Next and your data is now ready for unification.

Does this meet the goal?

A. Yes

B. No

Answer: B (LEAVE A REPLY)

* 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.

NEW QUESTION: 26

HOTSPOT

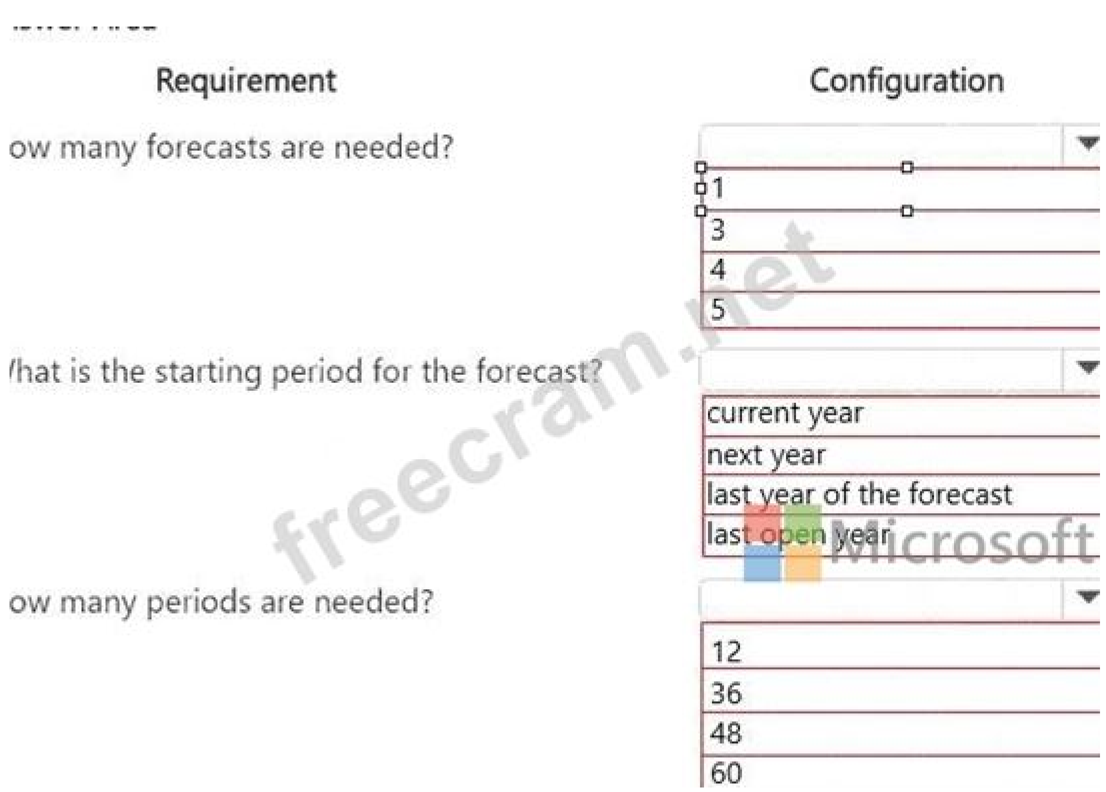
You are a Dynamics 365 Sales administrator. You set the fiscal year to begin in January.

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

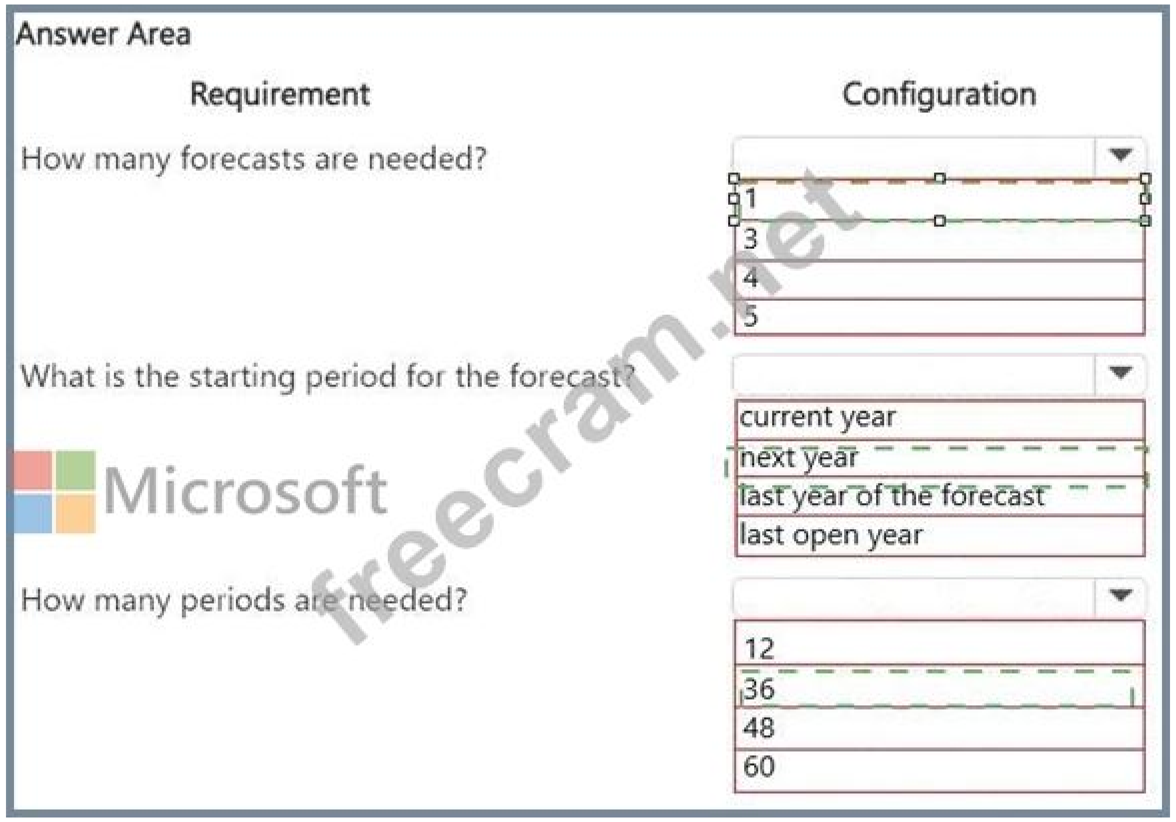
You need to configure the forecast using the fewest number of forecasts.

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

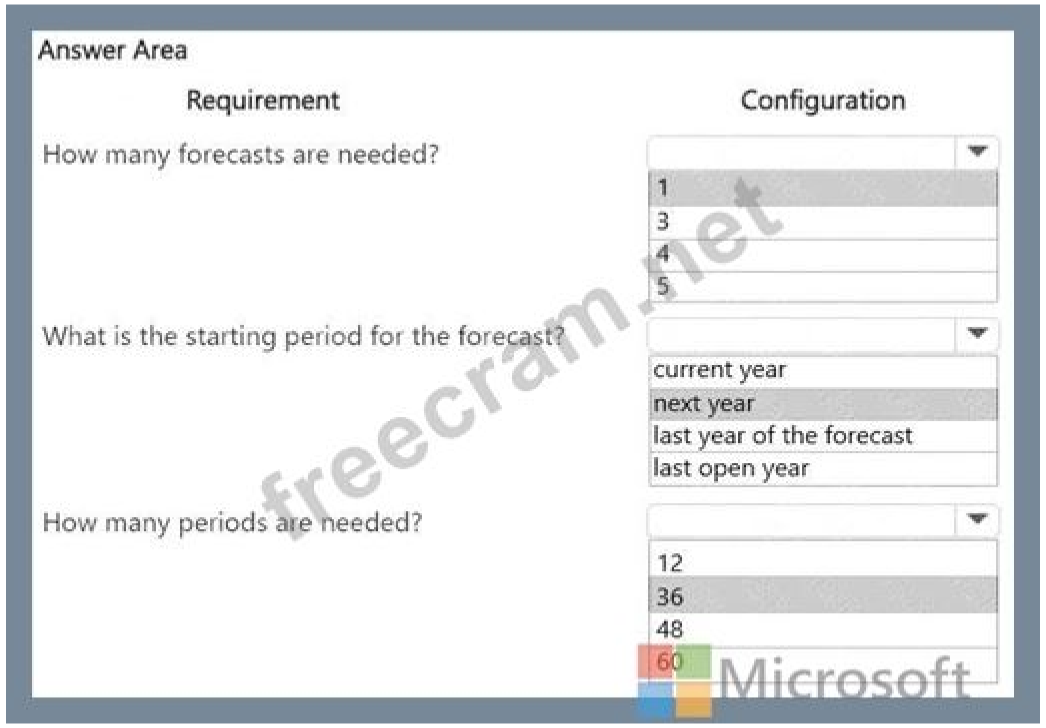
NOTE: Each correct selection is worth one point.



Answer:



Explanation:



NEW QUESTION: 27

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: (SHOW ANSWER)

* Using the Close as Won dialog without completing the business process flow does not ensure that the business process flow duration is calculated. The process flow needs to be marked as completed or transitioned to an inactive state for duration values to be captured.

* Simply closing an opportunity as won without completing the flow may bypass the finalization of process flow metrics, hence the goal is not met in this case.

NEW QUESTION: 28

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: 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

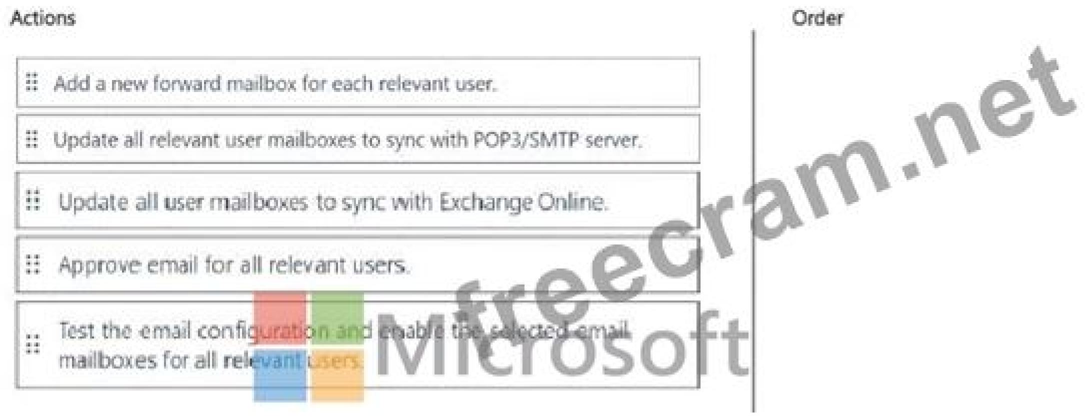
Answer: B (LEAVE A REPLY)

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.

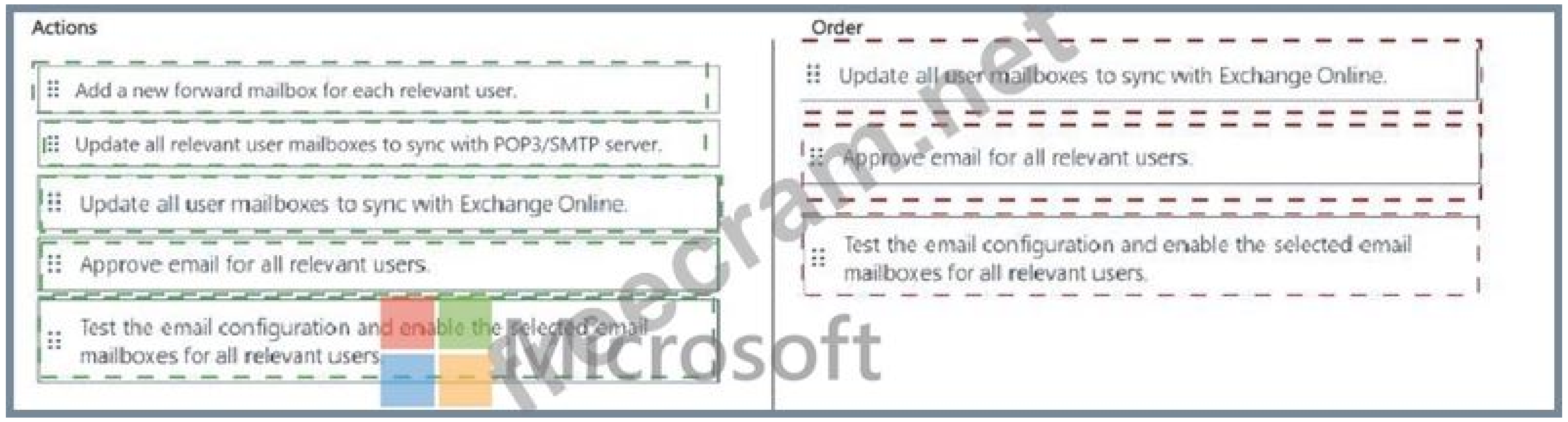
NEW QUESTION: 29
An entertainment company is using Dynamics 365 Sales.
Ticket sales are tracked using opportunities and goals. Managers require total sales per salesperson to be available prior to their monthly check-in meetings. The running total of ticket sales must NOT be available prior to the monthly meeting.
You need to make the appropriate change to the system to ensure that statistics are correct in time for each of these monthly meetings.
What should you do?
A. In the Business Management section of Settings, configure Goal Metrics.
B. In the Goals Settings section of App Settings, select Rollup recurrence.
C. In the Goals section of App Settings, select Actuals.
D. Create a workflow for the Goals table.
Answer: ([SHOW ANSWER]())

NEW QUESTION: 30

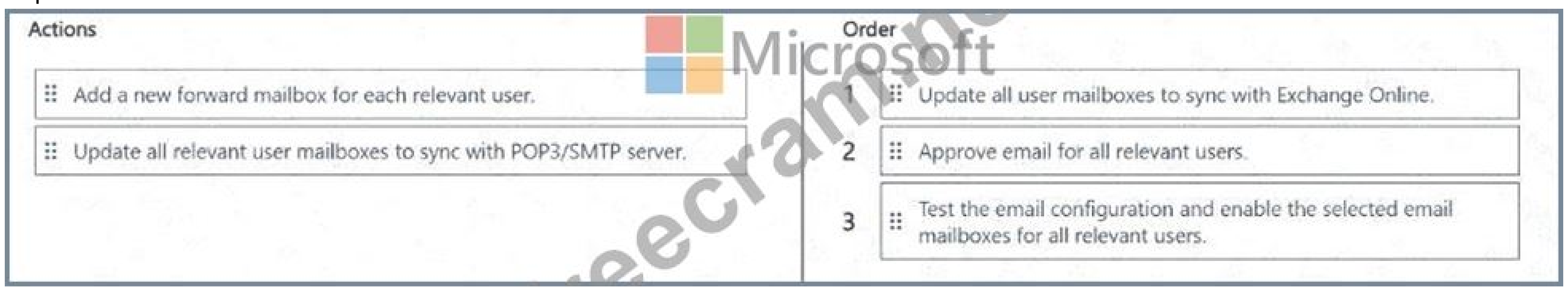
Your organization used Gmail previously and had only one Gmail server profile.
You recently moved to Exchange Online and you need to complete the set up for server-side sync with Exchange Online and ensure all mailboxes are working.
Which three actions should you perform in sequence before saving your changes? To answer, move the three appropriate actions from the list of actions to the answer area. Arrange the three actions in the correct order.



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.

NEW QUESTION: 31
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: (SHOW ANSWER)
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.
2. Go Settings > Dynamics 365 App for Outlook.
3. 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.
4. Etc.
Or
Step 4.2: Have users install App for Outlook themselves
1. From your app, go to Settings > Advanced Settings.
2. Select the Settings button Settings button., again and then select Apps for Dynamics 365 apps.
3. 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

NEW QUESTION: 32

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: (SHOW ANSWER)

* 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.

References 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.

NEW QUESTION: 33

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: (SHOW ANSWER)

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

NEW QUESTION: 34

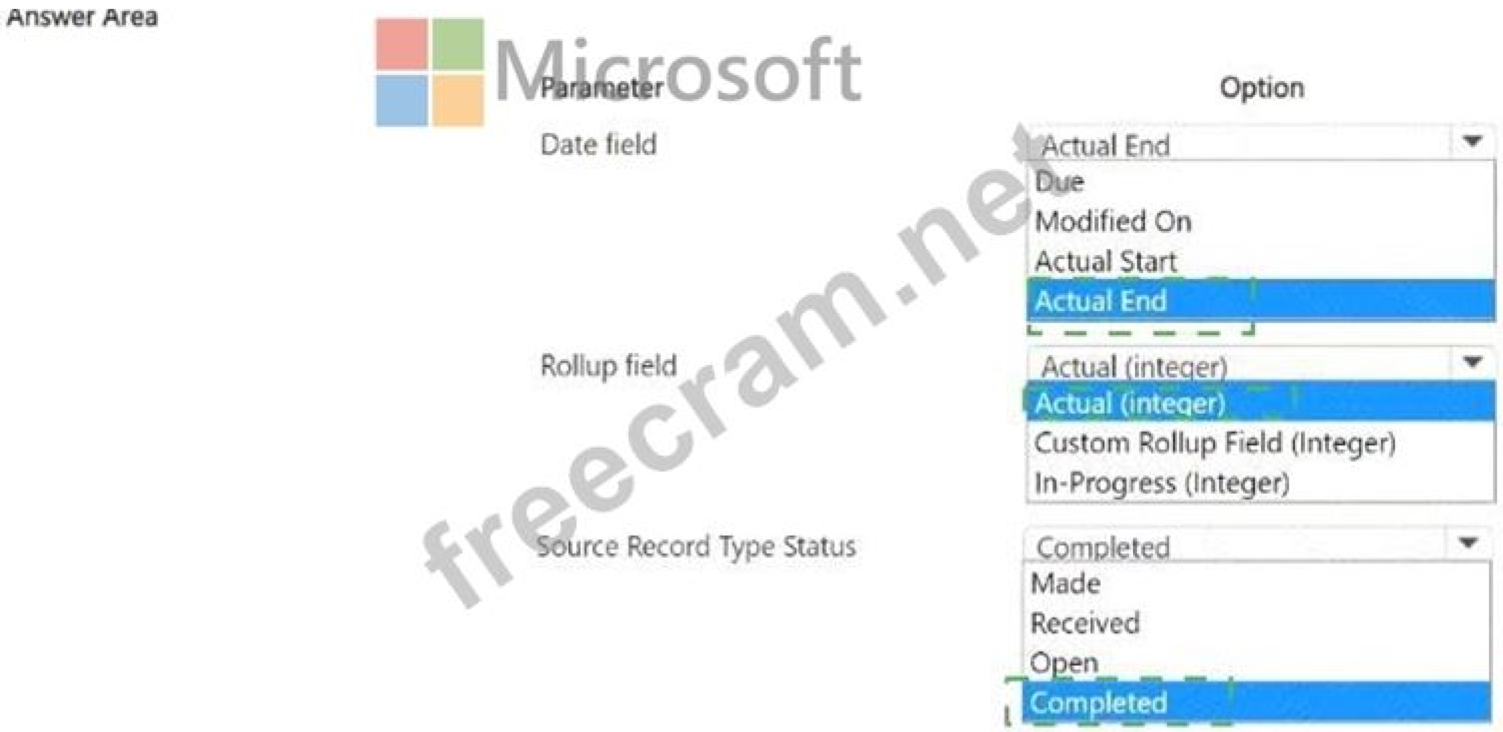
A sales manager wants to set up goals for all salespeople. The goal measurement is based on the total outgoing calls finished each year. The goals for the fiscal year are based on a calendar year (January - December).

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:



Explanation:

* 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.

NEW QUESTION: 35

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:

Explanation:

NEW QUESTION: 36

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:

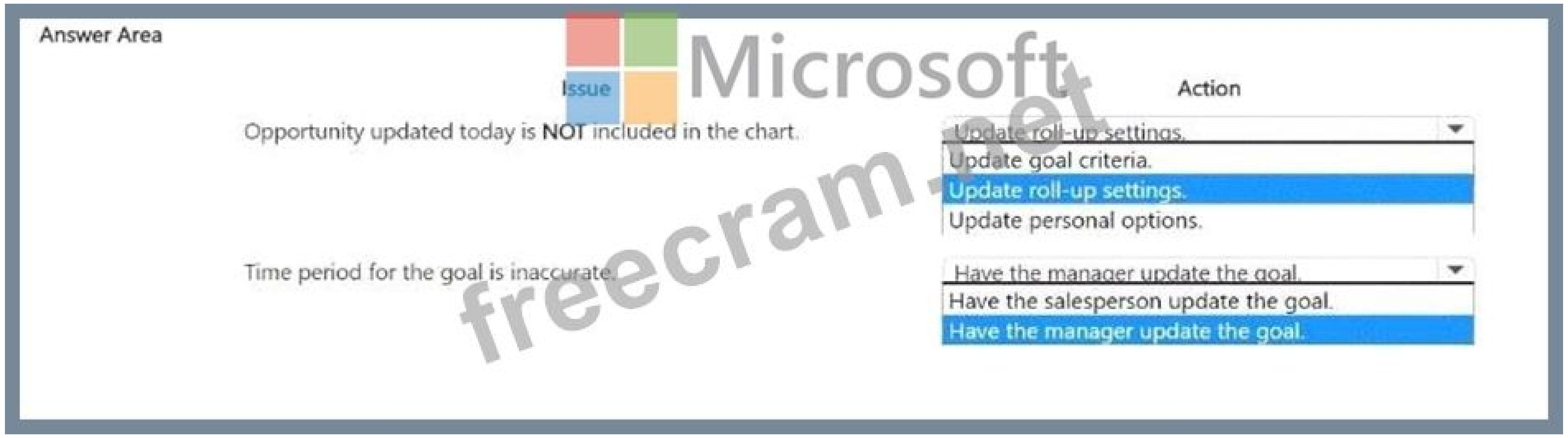
* An opportunity updated today is not included in the chart.

* The time period for the goal is not accurate.

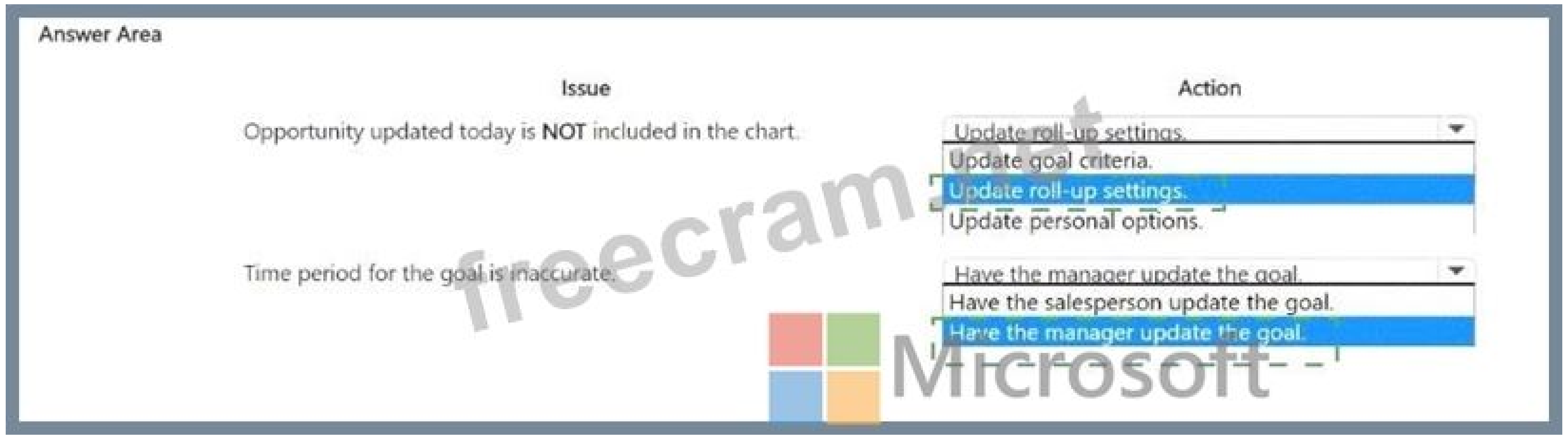
You need to resolve these issues.

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

NOTE: Each correct selection is worth one point.



Answer:



Explanation:

* 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.

NEW QUESTION: 37

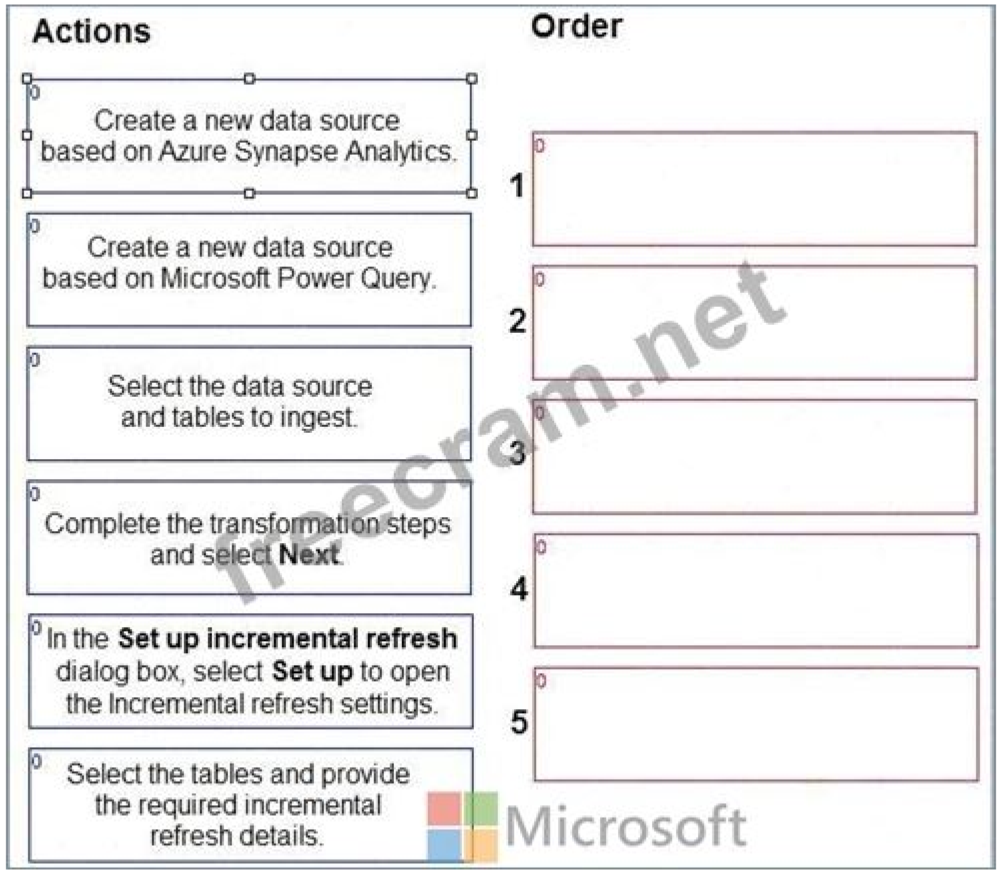
You are a Dynamics 365 Sales administrator. You are setting up a product catalog. You need to configure the base unit group. Which quantity or measurement should you configure?

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: (SHOW ANSWER)
* 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.

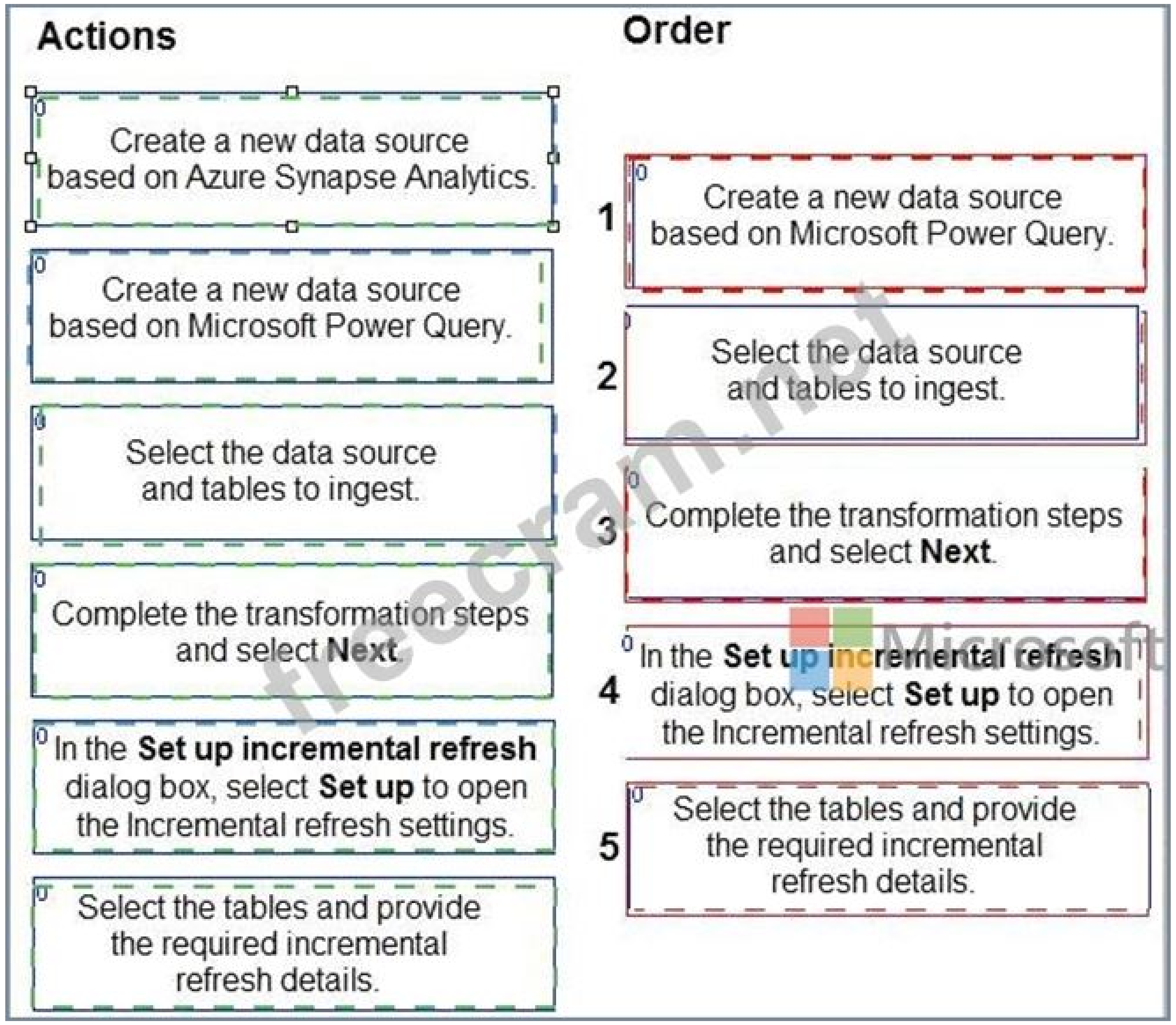
NEW QUESTION: 38
Your organization is using Dynamics 365 Sales to track its sales pipeline, and you have implemented sales forecasting using the out-of-the-box sample forecast configuration.
The vice president of sales wants the forecast to categorize lost deals using the more detailed opportunity status 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: (SHOW ANSWER)
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.

NEW QUESTION: 39
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 area. Arrange the five actions in the correct order.



Answer:



Explanation:

Actions

- Create a new data source based on Azure Synapse Analytics.

Order

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.

NEW QUESTION: 40

DRAG DROP

You need to configure a new Customer Insights - Journeys form to satisfy the digital sales team lead ' s request.

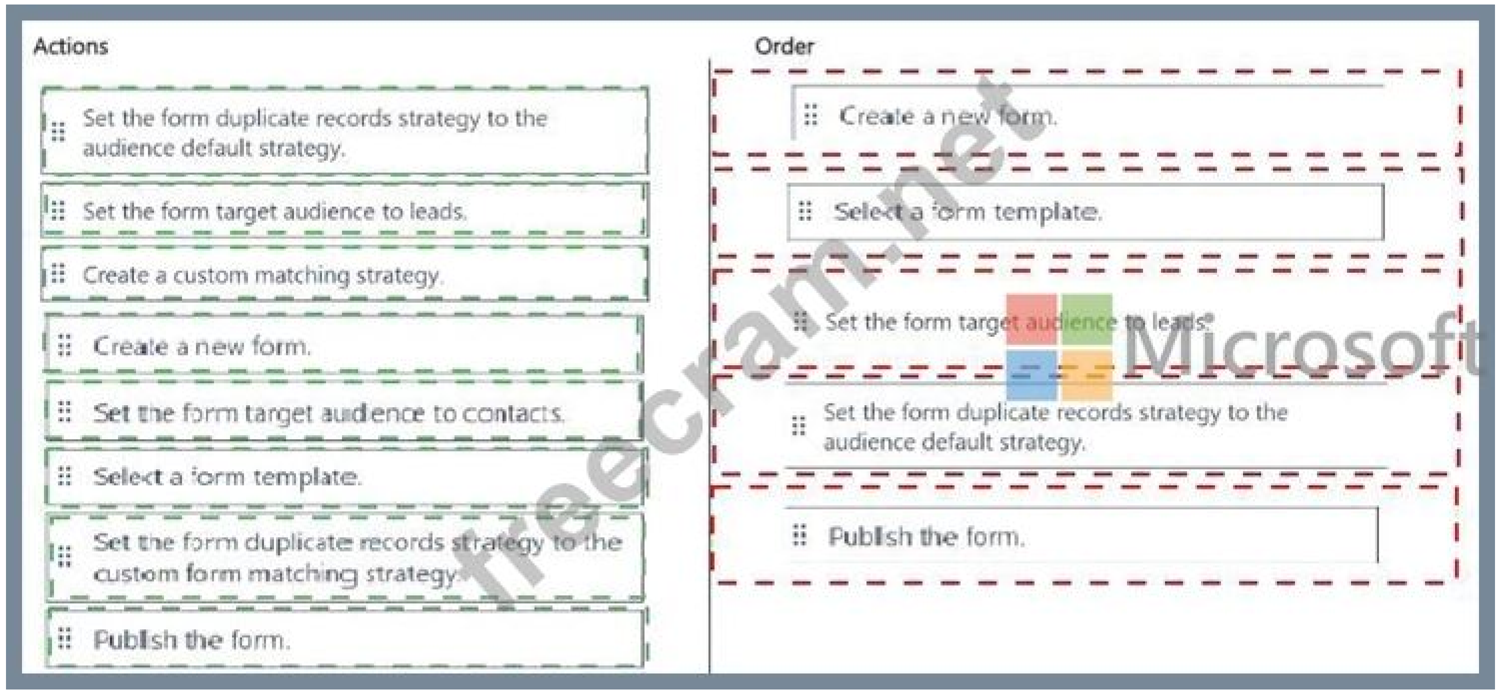
Which five required actions should you perform in sequence? To answer, move the five appropriate actions from the list of actions to the answer area. Arrange the five actions in the correct order.

Actions

- Set the form duplicate records strategy to the audience default strategy.
- Set the form target audience to leads.
- Create a custom matching strategy.
- Create a new form.
- Set the form target audience to contacts.
- Select a form template.
- Set the form duplicate records strategy to the custom form matching strategy.
- Publish the form.

Order

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 References:

Set up a Customer Insights - Journeys form

Duplicate Detection Rules in Dynamics 365

NEW QUESTION: 41

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

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

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

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

You need to clean and transform the data in Customer Insights - Data to be ready for unification.
Solution: Transform the first row to be used as headers, 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: (SHOW ANSWER)

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.

NEW QUESTION: 42

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: (SHOW ANSWER)
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

NEW QUESTION: 43
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: On the last stage of the business process flow, select Finish.
Does this meet the goal?
A. Yes
B. No
Answer: B (LEAVE A REPLY)

NEW QUESTION: 44
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 roll-up recurrence frequency.
Does this meet the goal?
A. Yes
B. No
Answer: (SHOW ANSWER)

NEW QUESTION: 45

HOTSPOT

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

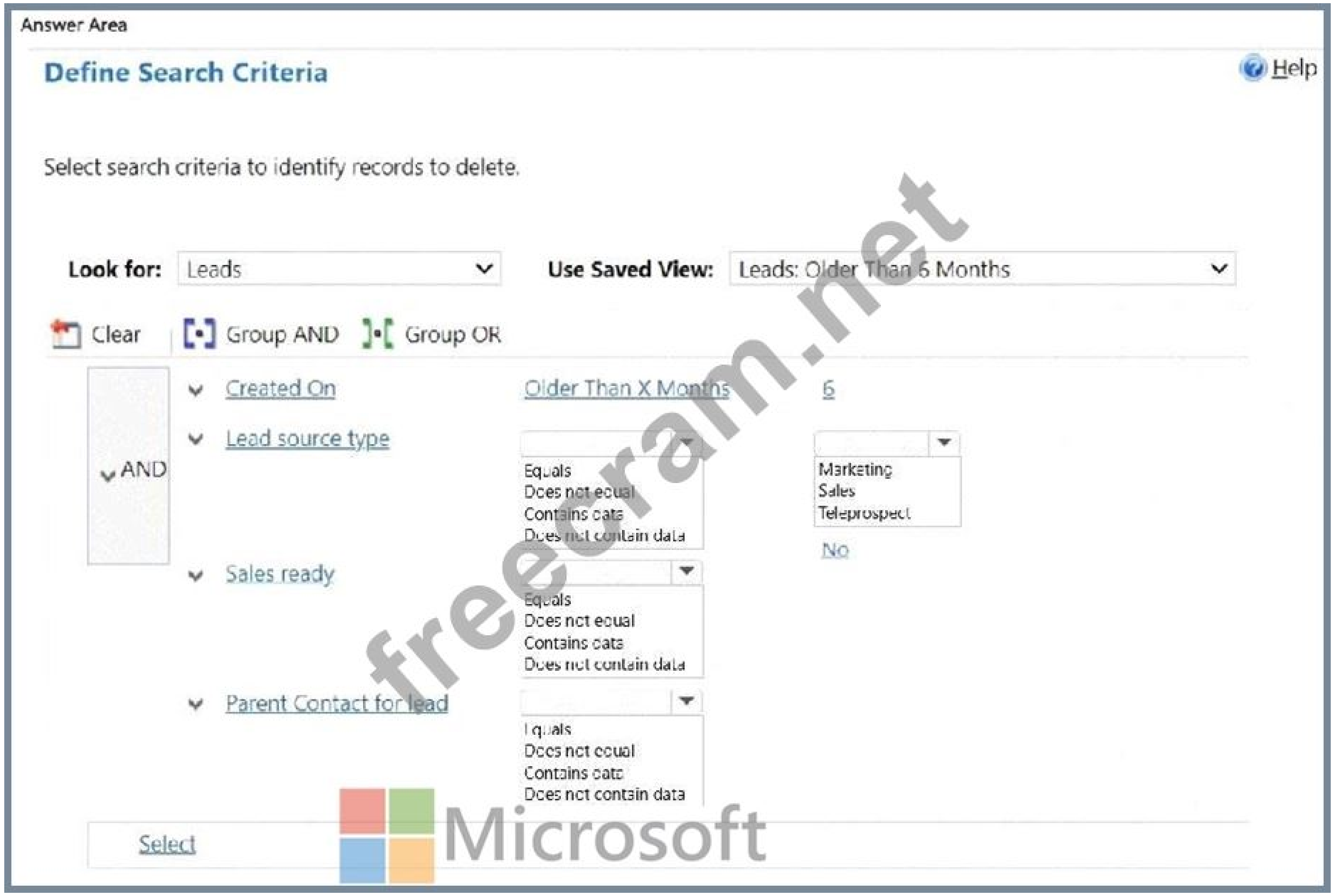
The marketing team then nurtures the leads to hand-off to the sales team. If accepted, sellers will work the leads using Dynamics 365 Sales.

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

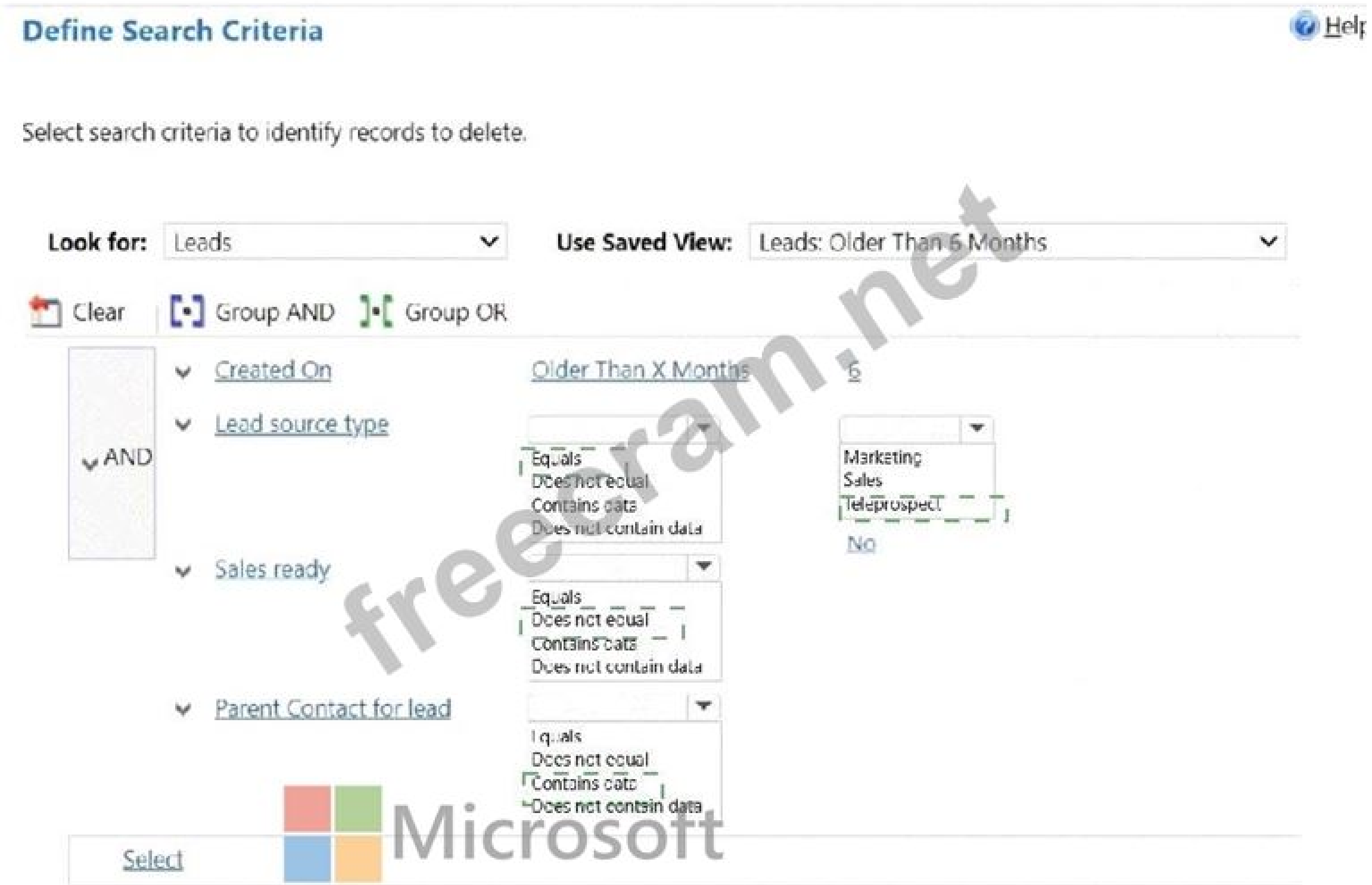
You need to create a bulk deletion job to delete stale leads as long as they have a Parent Contact. You used a saved view to start the query but need to complete the criteria.

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

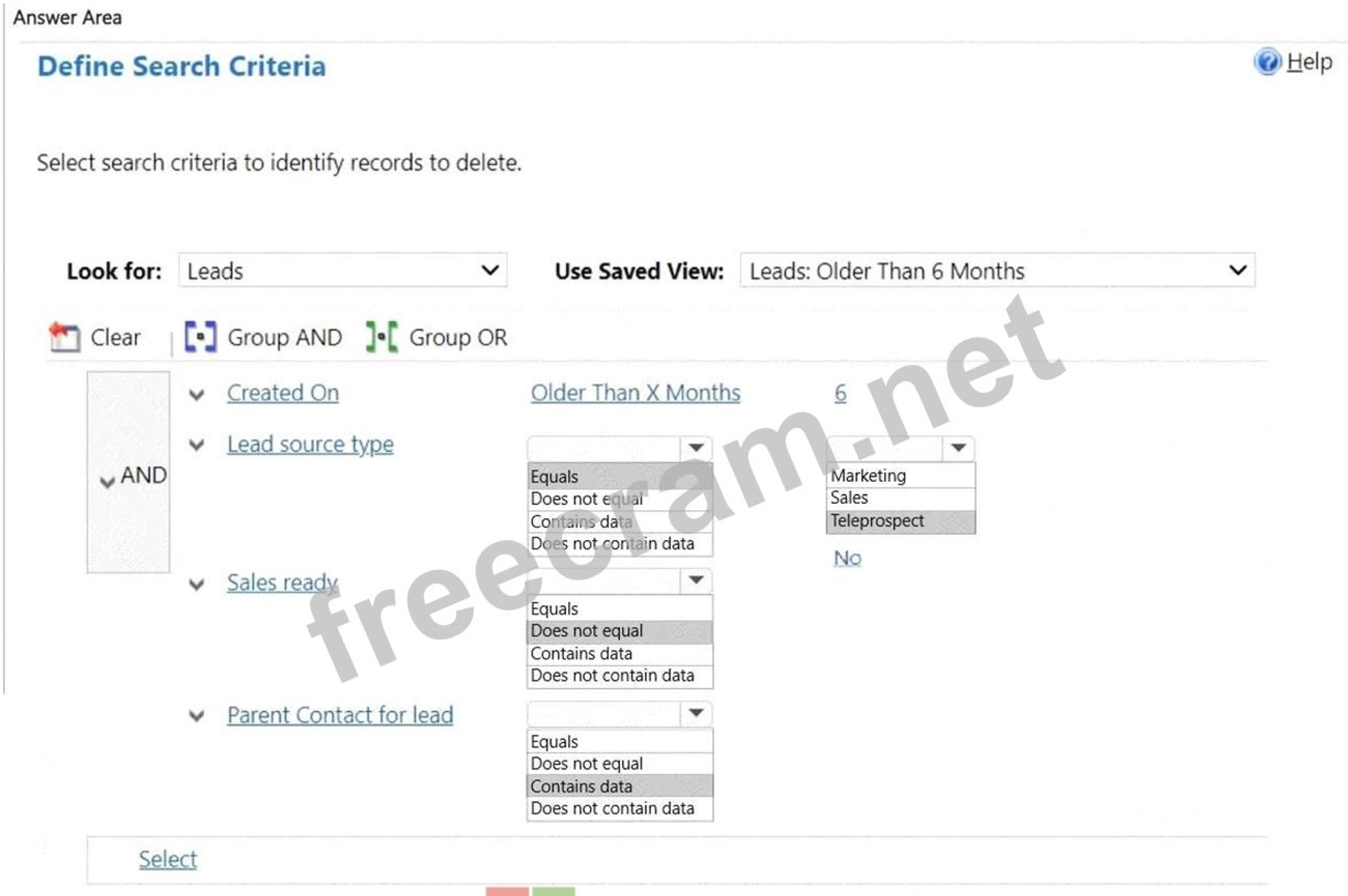
NOTE: Each correct selection is worth one point.



Answer Area



Explanation:



NEW QUESTION: 46

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 Pet table.
B. Enable auditing on the Email address column.
C. Enable auditing on the Contact tab\e.
D. Enable Start read auditing in system settings.
E. Enable auditing on the Dietary requirements column.
F. Enable Audit user access in system settings.
Answer: (SHOW ANSWER)

NEW QUESTION: 47
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: (SHOW ANSWER)
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
Exam Topic Breakdown
Exam Topic Number of Questions
Topic 1 : Terra Flora 44
Topic 2 : Contoso Ltd.Background information 10
Topic 3 : Misc Questions 80
TOTAL 134
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.

NEW QUESTION: 48

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: (SHOW ANSWER)

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.

NEW QUESTION: 49

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: (SHOW ANSWER)

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

NEW QUESTION: 50

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.

Answer:

Explanation:

NEW QUESTION: 51

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 ...	Est. revenue	Contact	Account
London Office	Northwind Traders	6/4/2024	$1,000,000.00	Client Contact1	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 Contact2 is a contact of interest for	the London Office opportunity, the Toronto Office Opportunity. both the London Office and Toronto Office opportunities.
Client Contact1 is a contact of interest for	the London Office opportunity, the Toronto Office Opportunity. both the London Office and Toronto Office opportunities.

Answer:

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.

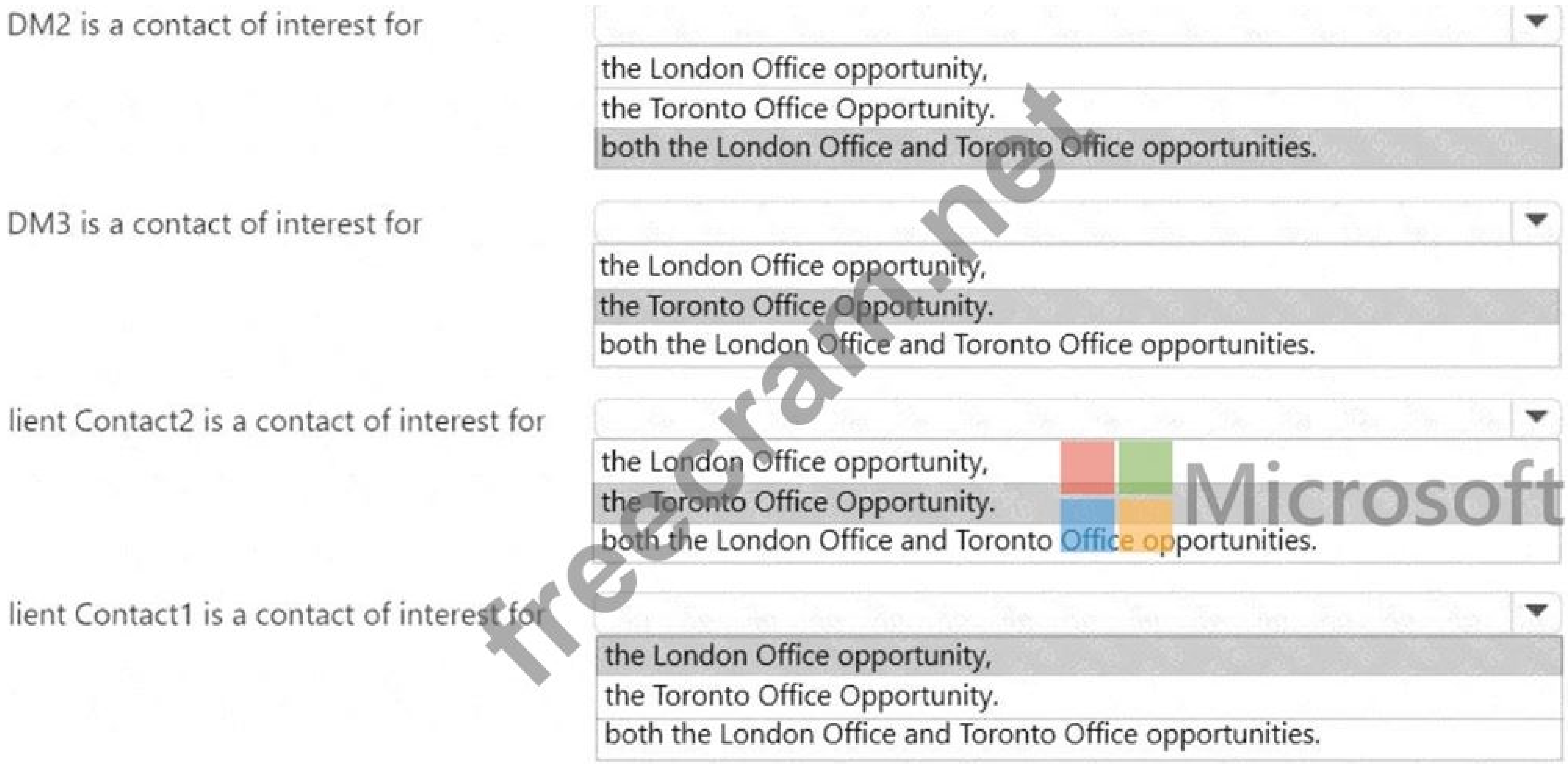
Client Contact2 is a contact of interest for

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

Client Contact1 is a contact of interest for

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

Explanation:



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.

NEW QUESTION: 52

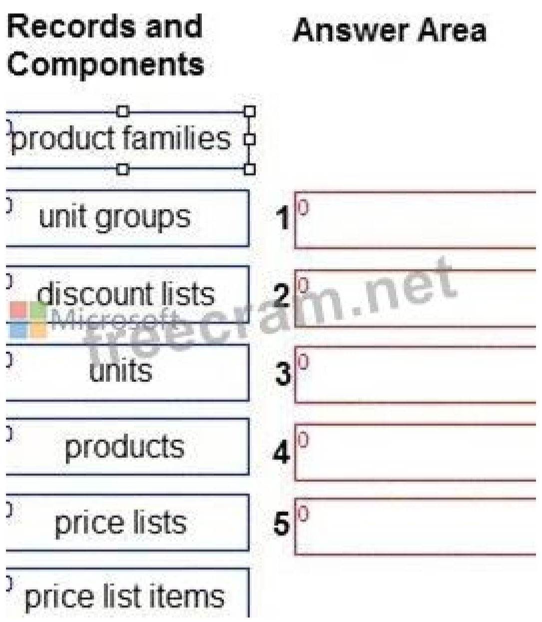
DRAG DROP

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

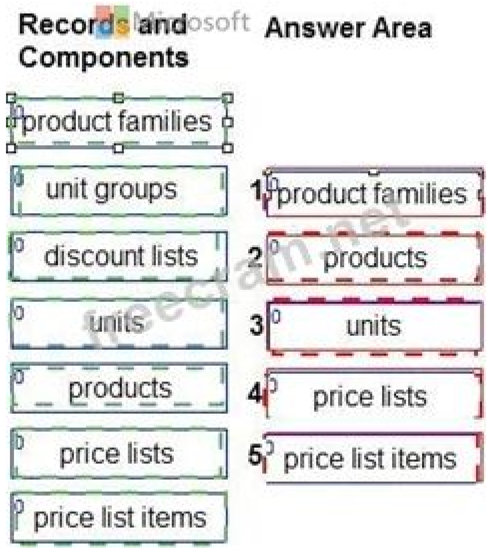
You need to create the necessary records and record relationships to sell the product for a newly deployed Dynamics 365 Sales system.

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 area. 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.



Answer:



Explanation:

NEW QUESTION: 53

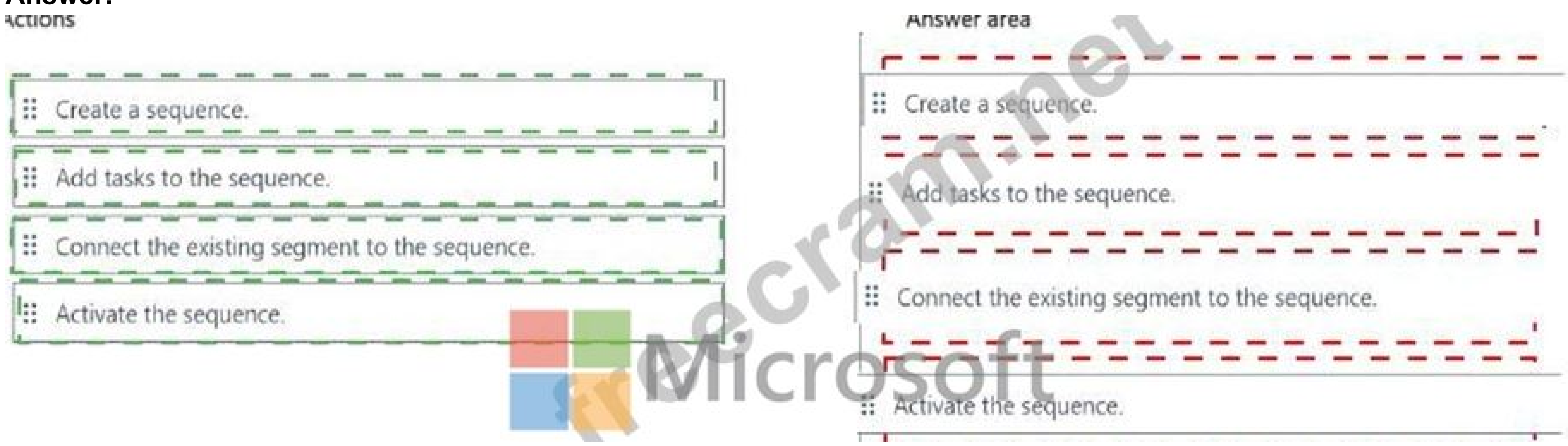
A company created a new table named Locations.

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

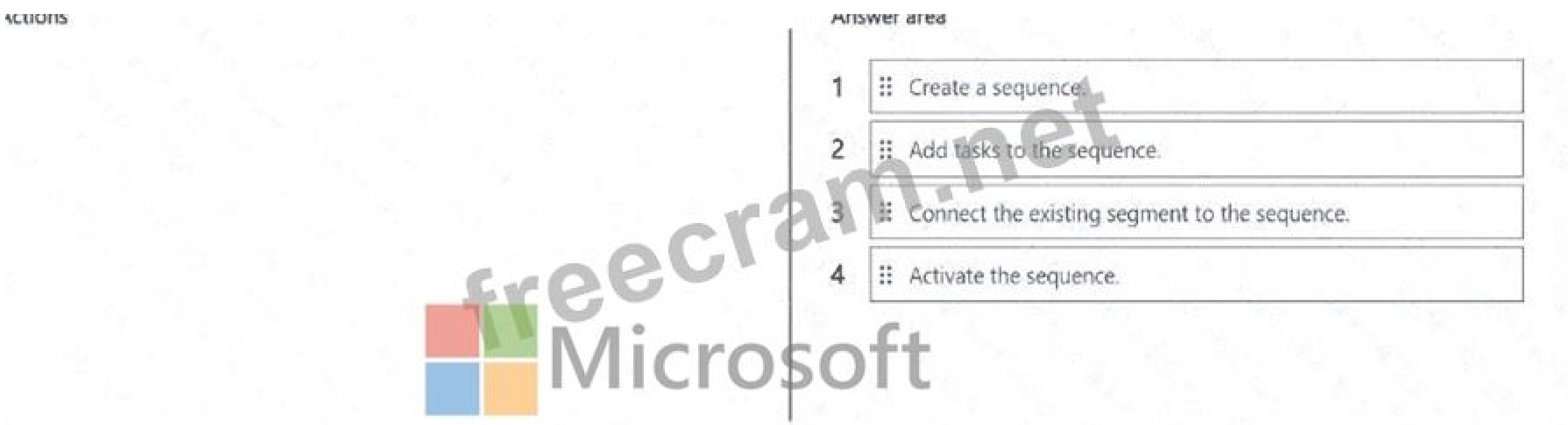
A. Create a Location Sub Area.
B. Add Location as an Area.
C. Create a Location Group.
D. Add Location to the App Designer.
Answer: (SHOW ANSWER)
To make a new table, like Locations, visible within the Sales Hub, you need to add it to the App Designer.
This involves updating the Sales Hub app module 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

NEW QUESTION: 54
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:



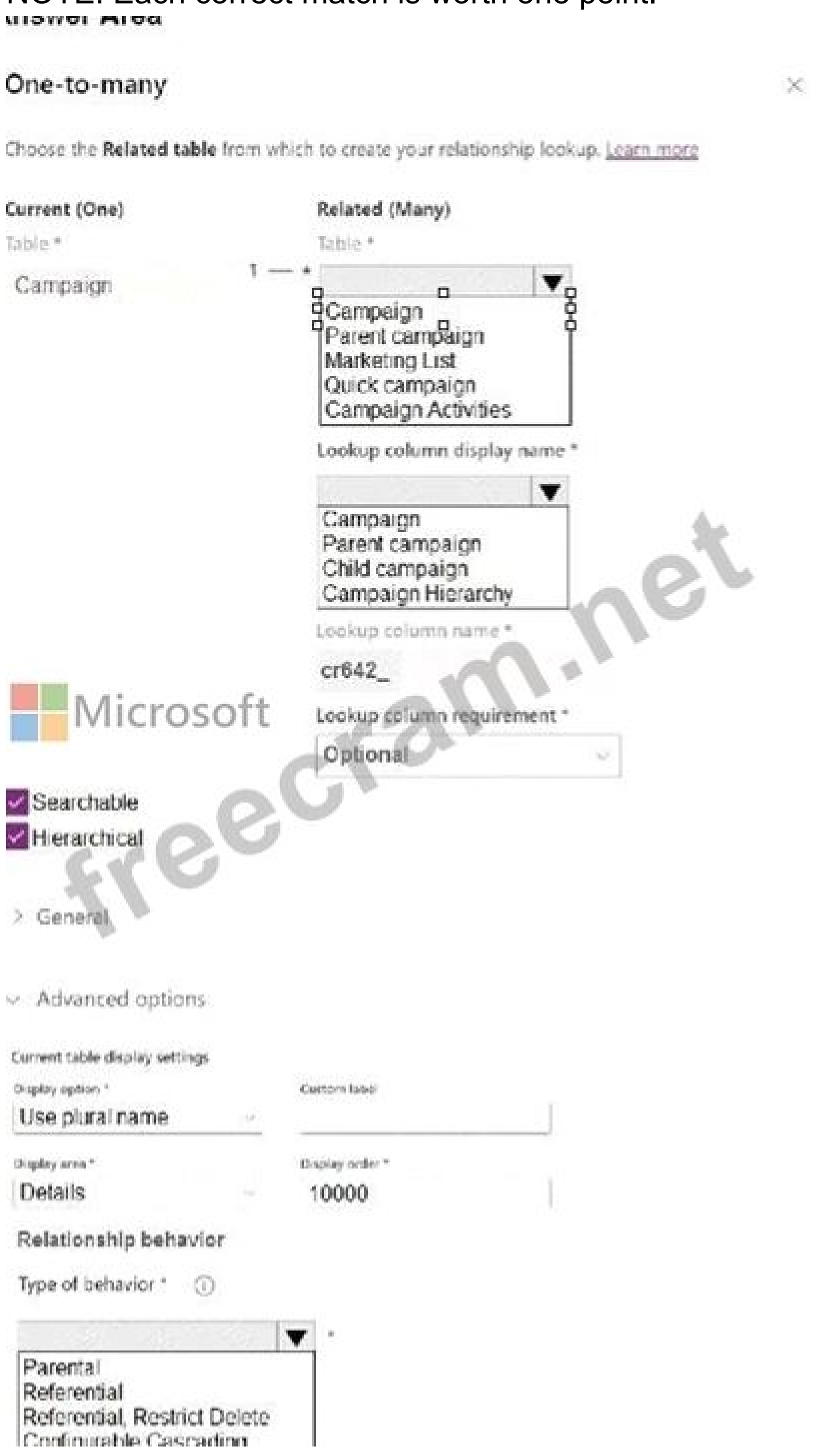
Explanation:



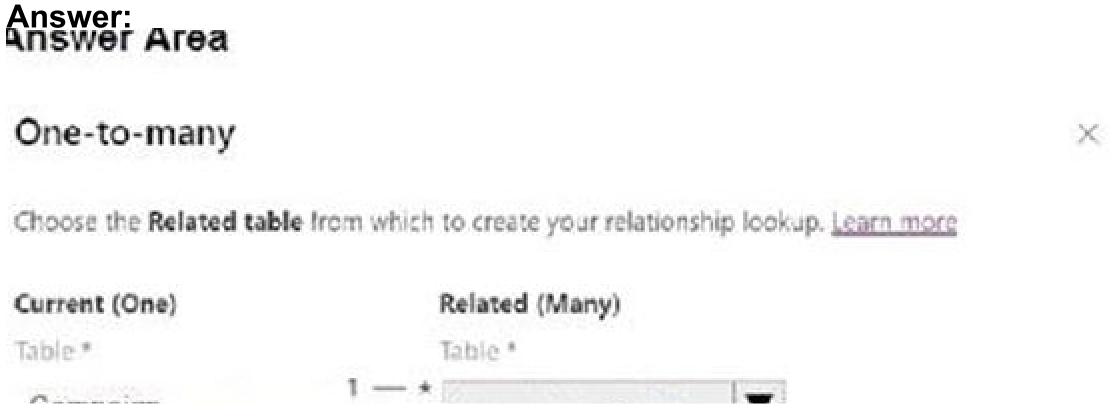
The correct order of actions to create a sequence of tasks and assign them to lead records based on the same criteria as assignment rules is as follows:
* Create a sequence.
* Add tasks to the sequence.
* Connect the existing segment to the sequence.
* Activate the sequence.
* Create a Sequence:
* Start 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 criteria. 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.

NEW QUESTION: 55
HOTSPOT
Both your sales and marketing teams use Dynamics 365 applications to conduct campaigns with customers.
Leadership has asked for sales and marketing campaigns to have parent campaigns applied so the combined success of sales and marketing efforts can be measured, along with each division's own success. They want the campaign hierarchy to be clear to users so they can see a "Parent Campaign" relationship. Any actions taken on parent records should automatically be taken on child records.

You need to update table relationships to enable the requirements using the minimum amount of configuration steps.
What should you configure? To answer, select the appropriate options in the answer area.
NOTE: Each correct match is worth one point.



Answer:



Campaign

Campaign
Parent campaign
Marketing List
Quick campaign
Campaign Activities

Lookup column display name *

Campaign
Parent campaign
Child campaign
Campaign Hierarchy

Lookup column name *

cr642_

Microsoft

Lookup column requirement *

Optional

Searchable

Hierarchical

General

Advanced options

Current table display settings

Display option *

Use plural name

Custom label

Display area *

Details

Display order *

10000

Relationship behavior

Type of behavior *

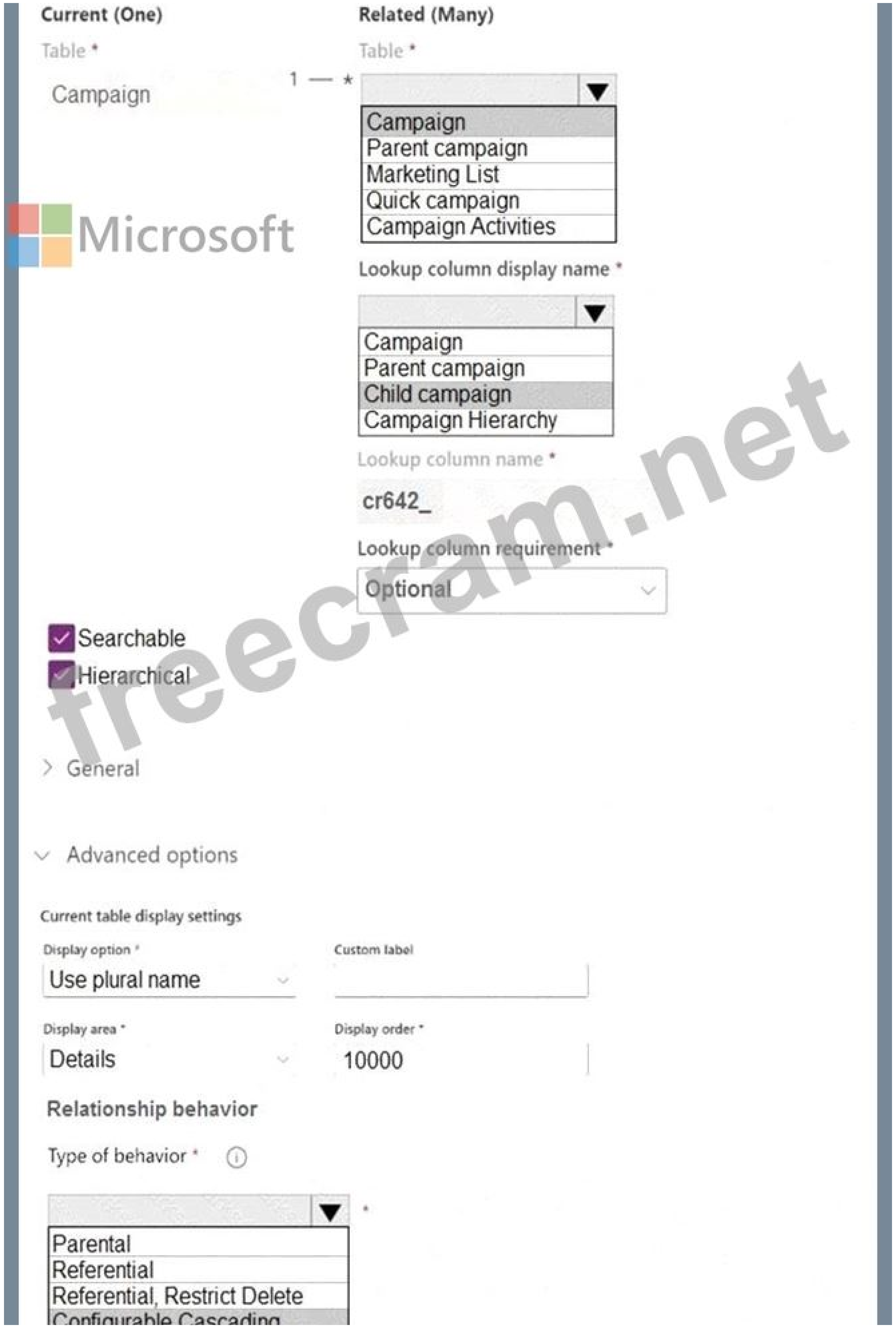
Parental
Referential
Referential, Restrict Delete
Configurable Cascading

Explanation:

Answer Area

One-to-many

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


Current (One)
Table *
Campaign
1 — *
Related (Many)
Table *
Campaign
Parent campaign
Marketing List
Quick campaign
Campaign Activities
Microsoft
Lookup column display name *
Campaign
Parent campaign
Child campaign
Campaign Hierarchy
Lookup column name *
cr642_
Lookup column requirement *
Optional
Searchable
Hierarchical
General
Advanced options
Current table display settings
Display option *
Use plural name
Custom label
Display area *
Details
Display order *
10000
Relationship behavior
Type of behavior *
Parental
Referential
Referential, Restrict Delete
freecram.net

NEW QUESTION: 56

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: (SHOW ANSWER)

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).

NEW QUESTION: 57

HOTSPOT

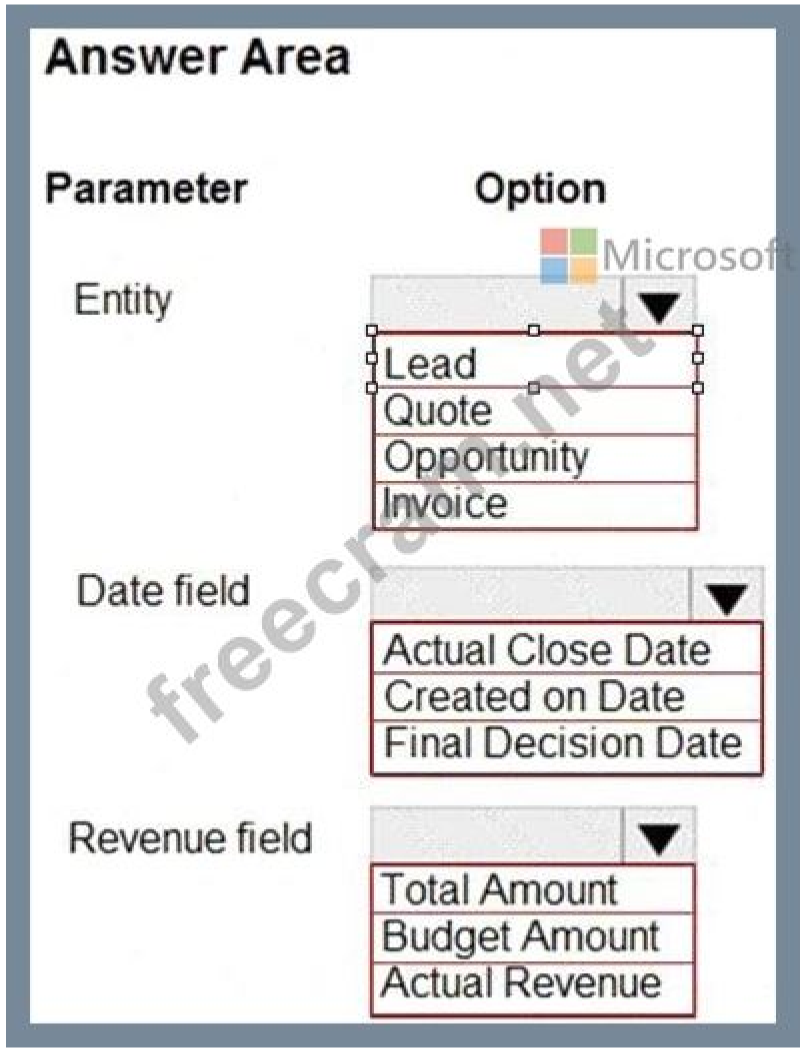
A sales manager needs to set up goals in Dynamics 365 Sales for salespeople.

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

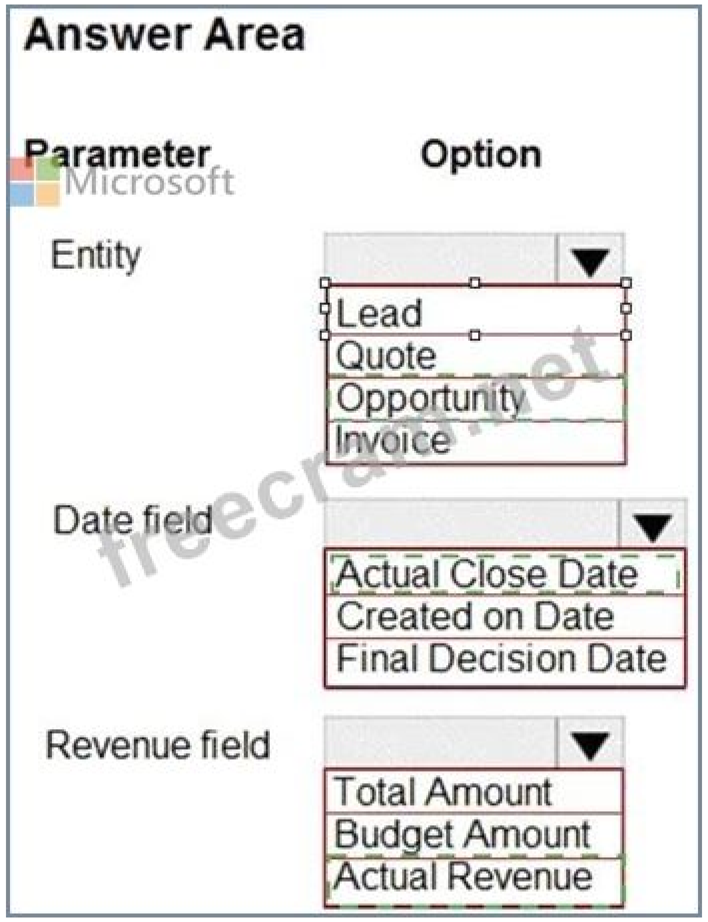
The fiscal year for the goals must be based on the calendar year.

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

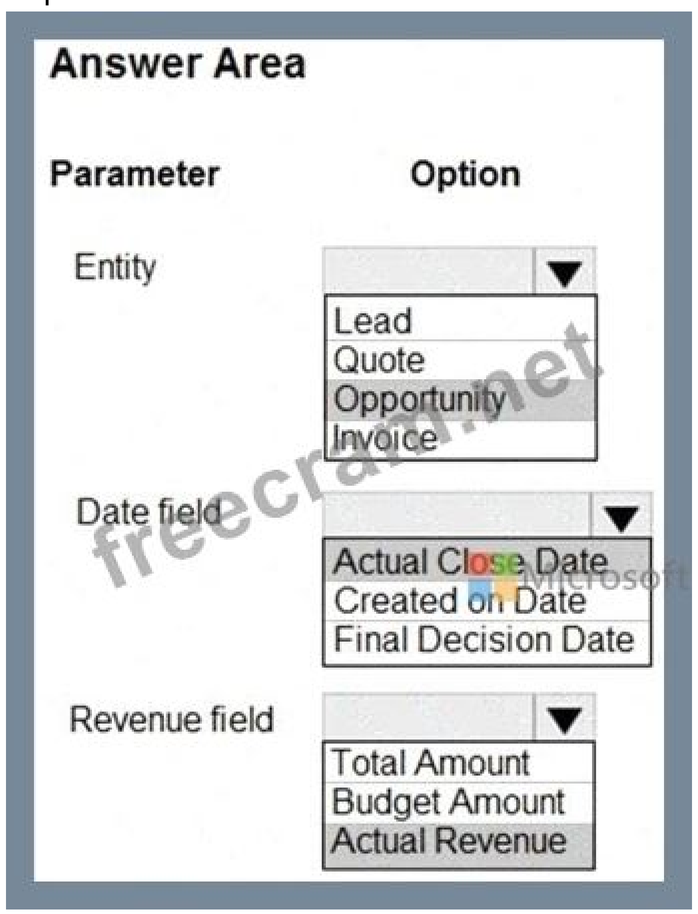
Which options should you select? To answer, select the appropriate options in the answer area.


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:



NEW QUESTION: 58

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: (SHOW ANSWER)

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 AI-driven 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.

NEW QUESTION: 59

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:

Explanation:

NEW QUESTION: 60

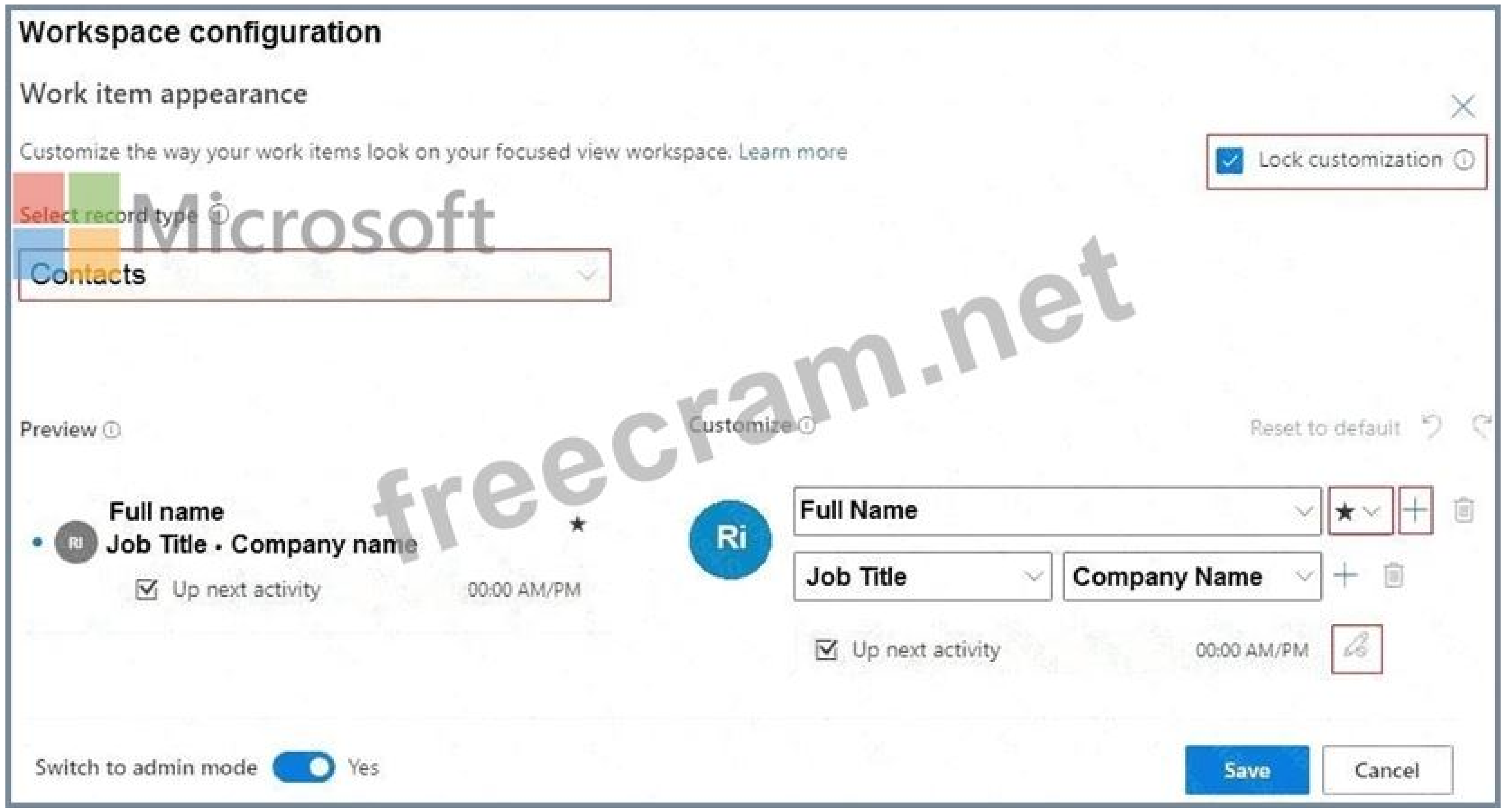
You are customizing a workspace in the sales accelerator.

The workspace must display the industry of a company.

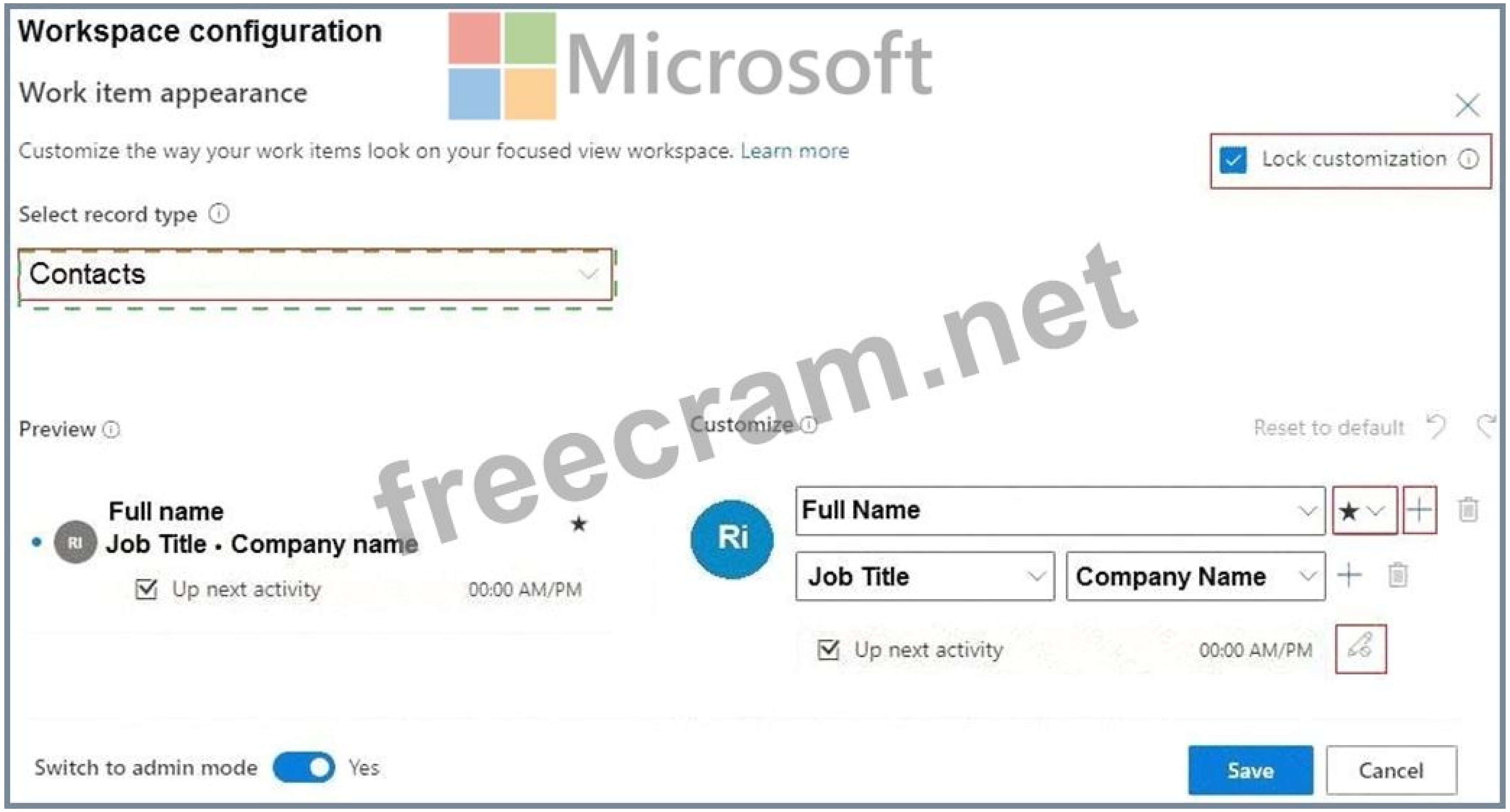
You need to configure the work item appearance for a company.

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

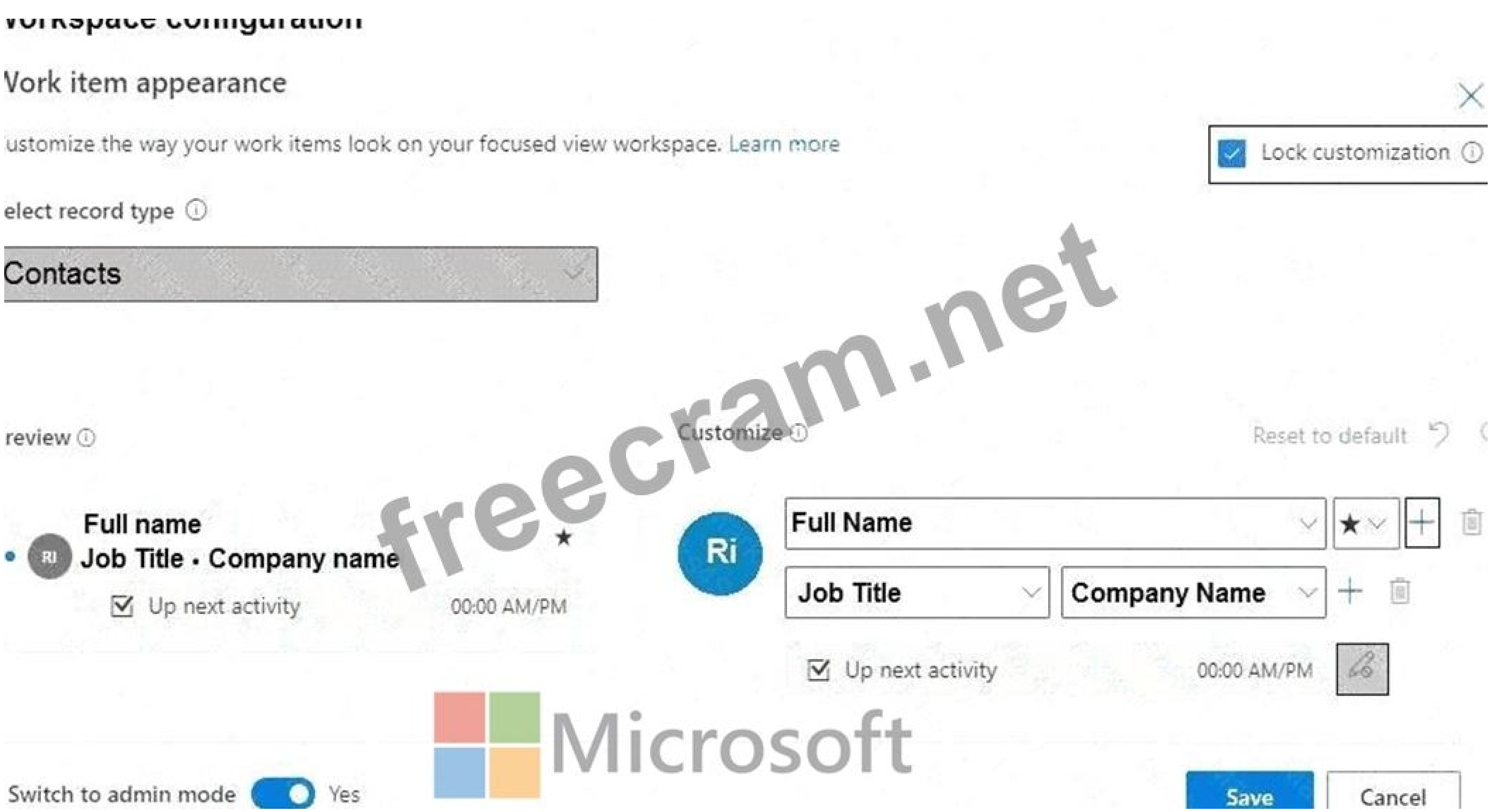
NOTE: Each correct selection is worth one point.



Answer:



Explanation:



NEW QUESTION: 61

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 (LEAVE A REPLY)

Correct:

* Recalculate the forecast

Incorrect:

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

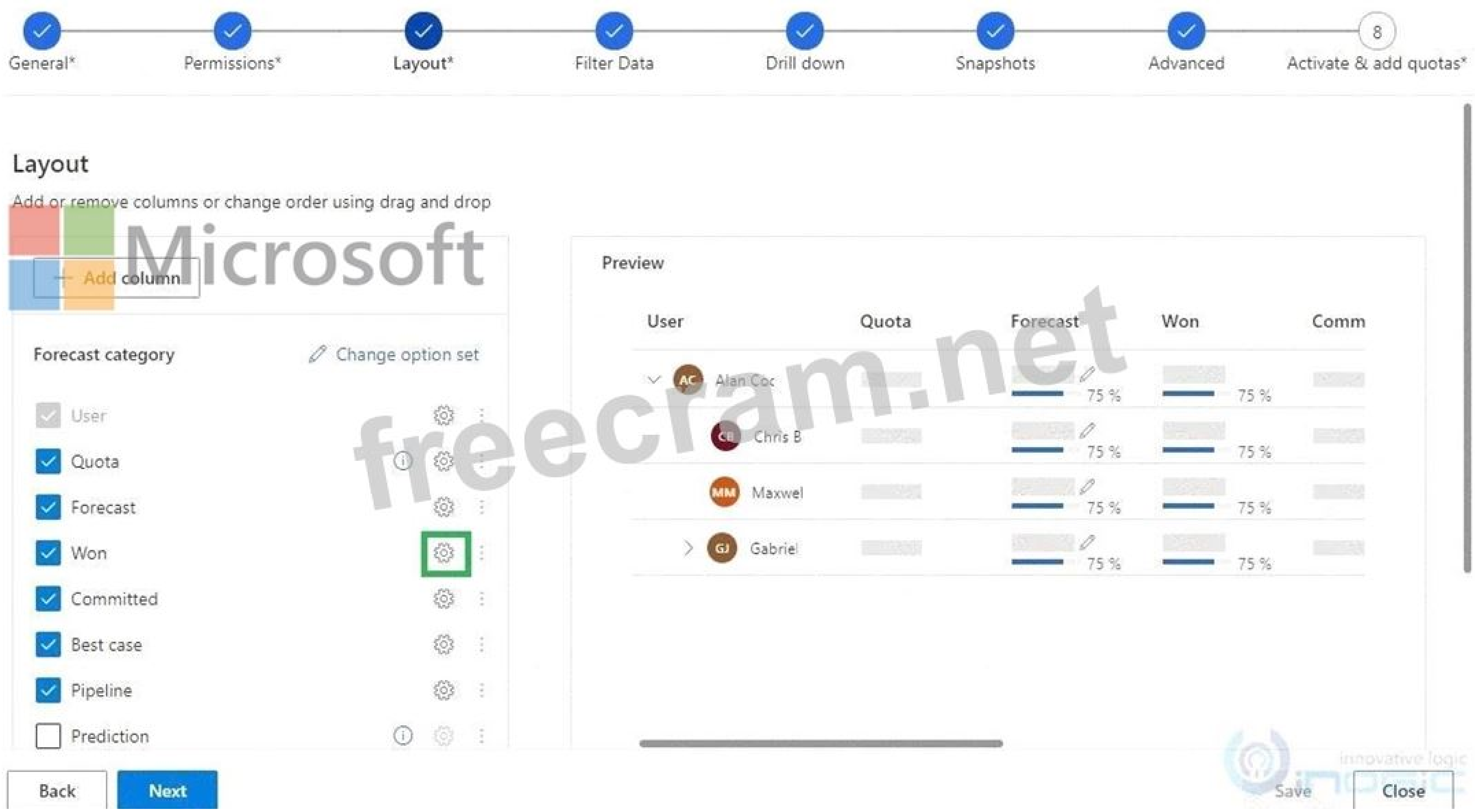
Note:
Example of forecast recalculation methods
Let ' s understand the different methods with an example. Consider a scenario where you have a forecast with
4 quarterly periods and an annual period. Assume that you ' re currently in Q4. The following table shows when and how the forecast data is updated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

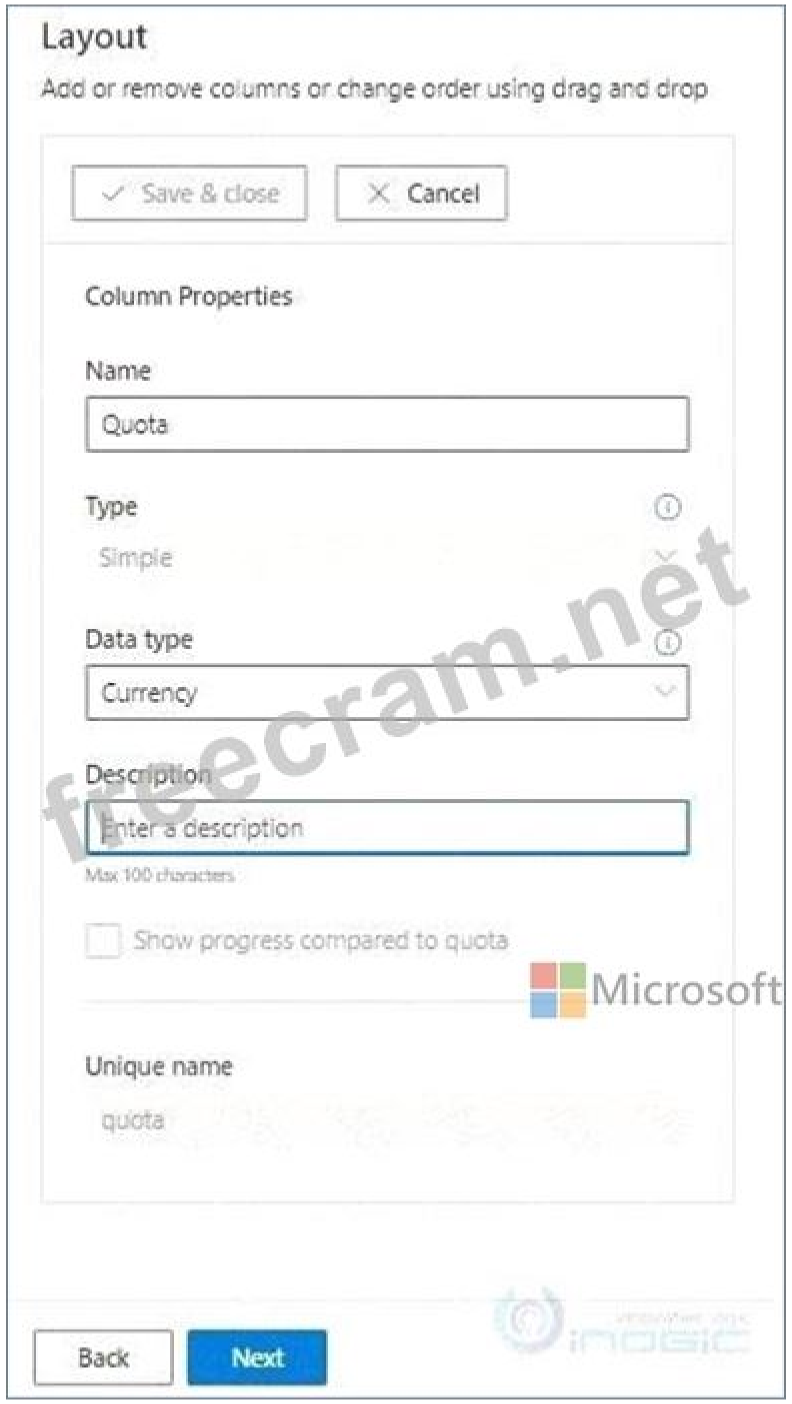
--
Dynamics 365 Sales, Recalculate forecasts manually
You want the forecast data to be up-to-date to make informed decisions. Forecast data is automatically recalculated at regular intervals. However, you can trigger a manual recalculation when you want to recalculate the forecast data immediately. You 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

NEW QUESTION: 62
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: (SHOW ANSWER)
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/

NEW QUESTION: 63

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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: (SHOW ANSWER)

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
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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.

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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

NEW QUESTION: 64

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. Create a dashboard in Dynamics 365 Sales that contains account data.

B. Embed the Power BI Dashboard as a dashboard in the Dynamics 365 Sales application.

C. Embed the Power BI report using contextual filtering for accounts.

D. Provide a link to the Power BI report in the ribbon on the account form.

Answer: (SHOW ANSWER)

NEW QUESTION: 65

You work at a non-profit organization. Your organization ' s contact base includes personal information for some famous celebrities.

You ' ve recently heard that someone from the organization has been calling a specific celebrity for non-work- related reasons.

You need to find out who has been accessing certain contact records. You decide to use auditing.

Which two boxes must be checked as prerequisites steps? To answer, select the appropriate check boxes in the answer area.

NOTE: Each correct selection is worth one point.

Answer:

Explanation:

NEW QUESTION: 66

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: (SHOW ANSWER)
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