Question #1 *Topic 1*

HOTSPOT -

Case study -

This is a case study. Case studies are not timed separately. You can use as much exam time as you would like to complete each case. However, there may be additional case studies and sections on this exam. You must manage your time to ensure that you are able to complete all questions included on this exam in the time provided.

To answer the questions included in a case study, you will need to reference information that is provided in the case study. Case studies might contain exhibits and other resources that provide more information about the scenario that is described in the case study. Each question is independent of the other questions in this case study.

At the end of this case study, a review screen will appear. This screen allows you to review your answers and to make changes before you move to the next section of the exam. After you begin a new section, you cannot return to this section.

To start the case study -

To display the first question in this case study, click the Next button. Use the buttons in the left pane to explore the content of the case study before you answer the questions. Clicking these buttons displays information such as business requirements, existing environment, and problem statements. When you are ready to answer a question, click the Question button to return to the question.

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

+ Add fields

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	☑
	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	☑

Contoso Ltd. Personnel -

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 BDM 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 -

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_clienttier) that contains only a single letter or is blank.

Northwind Traders account -
There are three BDMs who frequently work together on large opportunities.
BDM1 is the account owner for Northwind Traders, a multinational client.
BDM1 owns all Northwind Traders opportunities with estimated revenue greater than or equal to $1,000,000.
BMD2 and BDM3 are assisting BDM1 with several opportunities for Northwind Traders in different cities.
BDM3 owns all other Northwind Traders opportunities. BDM3 is NOT a sales team member for any of the opportunities BDM1 owns.
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 Contact2 and Client Contact3.
BDM1 and 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 for 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.

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.

Answer Area

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.

Suggested Answer:

Answer Area

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.

Elreal 2 months, 2 weeks ago

Question 1,2,3 are correct, Question 4 is wrong:

1. BDM2 is sales team member for both opportunities

-> BDM2 is contact of interest for both opportunities

2. BDM3 owns the Toronto office opportunity (revenue less than $1,000,000) and is not in the sales team of the London office opportunity
-> BDM3 is a contact of interest only for the Toronto office opportunity

3. Client Contact 2 is the contact for the Toronto Office opportunity and Client Contact 2 is NOT the primary contact for the account
-> Client Contact 2 is contact of interest for the Toronto Office opportunity

4. Client Contact 1 is the contact for the London Office opportunity and Client Contact 1 is the primary contact for the account
-> Client Contact 1 is contact of interest for both opportunities
upvoted 4 times

Elreal 2 months, 2 weeks ago
for definition of "contact of interest" see:
https://learn.microsoft.com/en-us/dynamics365/sales/relationship-analytics-kpi-calculations

on Opportunity the following internal contacts are contacts of interest:
- The Owner of the opportunity record
- All users in the opportunity's Sales Team list

on Opportunity the following external contacts are contacts of interest:
- The customer Contact listed for the opportunity
- All contacts in the opportunity's Stakeholders list
- The primary contact for the related Account record
upvoted 2 times

Acrious 2 months, 2 weeks ago
Correct
upvoted 1 times

Question #2 *Topic 1*

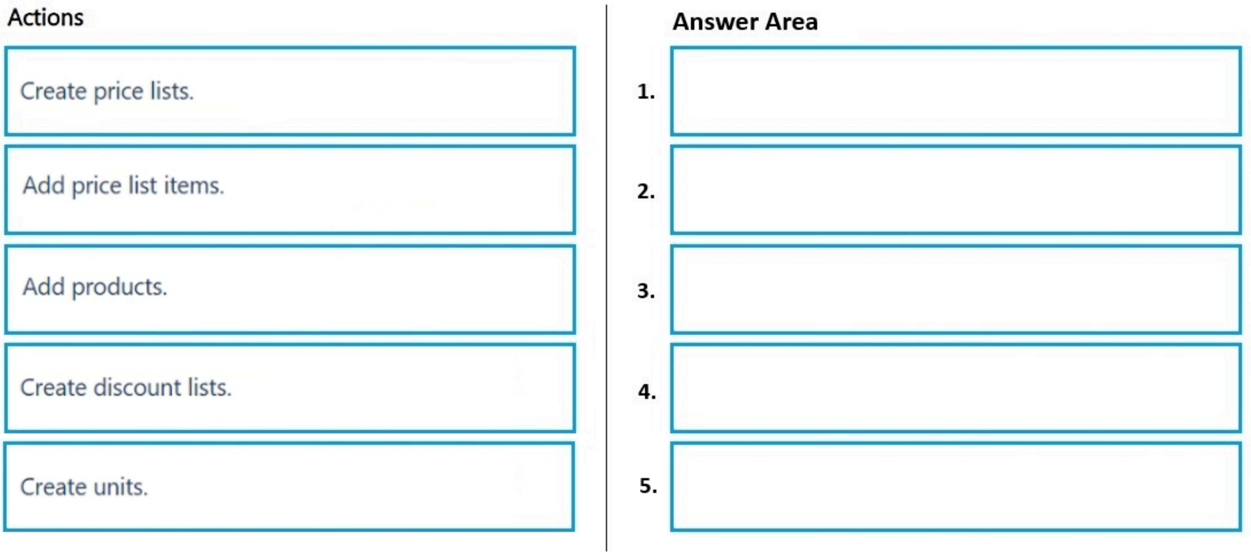
DRAG DROP -

A company uses Dynamics 365 Sales to manage product lines.

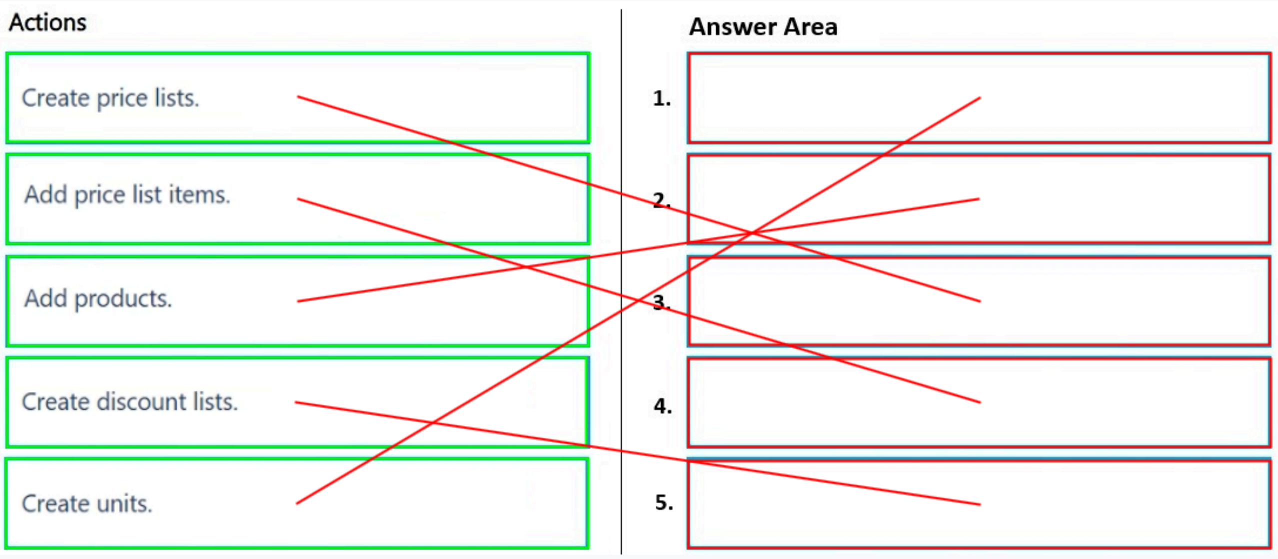
You need to set up the product catalog, including the ability for sellers to apply quantity discounts.

In which order should you perform the actions? To answer, move all actions from the list of actions to the answer area and arrange them in the correct order.

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



Suggested Answer:



manishrawat Highly Voted 4 months ago

It should be:

1. Create Discount List
2. Create Units
3. Add Products
4. Create Price Lists
5. Add price list items

https://learn.microsoft.com/en-us/dynamics365/sales/set-up-product-catalog-walkthrough

upvoted 12 times

timothy123 1 month, 4 weeks ago

I guess this the answer they are looking for, but practically I would choose to Create Price Lists before Adding Products. In this case, you don't need to update the Default pricelist on every Product afterwards as en extra step.

upvoted 3 times

busitecgmbh Most Recent 1 month ago

I think the best way should be:

1. Create units (you need to set it in the product)
2. Create price lists (then you can add the needed pricelist directly in the product as default)
3. Add product
4. Add price list items
5. Add discount lists

This is the most efficent way imho.

upvoted 1 times

lilavi 4 months, 2 weeks ago

Should be:

Create units

Add products

Create discount list

Create price lists

Add price list items

upvoted 1 times

Question #3 Topic 1

HOTSPOT -

You are a Dynamics 365 Sales administrator. You create a forecast by using the forecast category layout shown in the exhibit:

Preview

Territory	Quota	Manager	Best case	Committed	Lost	Omitted	Pipeline	Won
C City								75 %
S South								75 %
N North								75 %

Use the drop-down menus to select the answer choice that answers each question based on the information presented in the graphic.

NOTE: Each correct selection is worth one point.

Answer Area

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

- Forecast Category option set
- Forecast view
- Layout column settings
- Preview grid

Where should you delete the Lost column for this forecast?

- Forecast configuration
- Forecast configuration filter data
- Forecast Category option set value
- Forecast view

Suggested Answer:

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

- Forecast Category option set
- Forecast view
- Layout column settings
- Preview grid

Where should you delete the Lost column for this forecast?

- Forecast configuration
- Forecast configuration filter data
- Forecast Category option set value
- Forecast view

Dopey 2 months, 2 weeks ago

Answers are correct:

Layout column settings

Forecast configuration

upvoted 3 times

Acrious 2 months, 2 weeks ago

Correct

upvoted 1 times

Question #4	*Topic 1*

HOTSPOT -

You are a Dynamics 365 Sales consultant for a food service company. The company caters meals for client companies.

The company wants to set up a product bundle so that the sales staff does not forget items when they create an opportunity.

The lunch bundle is created at $200.00. It will include the following.

Product	Quantity	Unit Cost	Amount	Configuration
Sandwich	50	$5.00	$250.00	Required
Napkins	50	$0.25	$12.50	Optional
Soda	50	$1.00	$50.00	Optional

You need to explain how the sales staff should manage the product bundle in the opportunity.

What should they do for each scenario? To answer, select the appropriate options in the answer area.

NOTE: Each correct selection is worth one point.

Answer Area

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

Suggested Answer:

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

manishrawat Highly Voted 4 months ago

It should be:

1. Use the lunch bundle price
2. Add a new line item for sodas and override the price.
3. Add another line item for sandwiches with the default price.

upvoted 11 times

JoeAI Most Recent 1 month ago

1)Add the lunch bundle price and the price for the napkins and sodas. IMO the bundle price covers the required sandwiches, you only need to add the optional items and their prices.

2)Add a new line item for sodas and override the price.

3)Increase the quantity of sandwiches at list price.

upvoted 1 times

JoeAI 1 month ago

Correction to above.

1)Add the lunch bundle price and the price for the napkins and sodas. IMO the bundle price covers the required sandwiches, you only need to add the optional items and their prices.

2)Add a new line item for sodas and override the price.

3)Add another line item for sandwiches with the default price

upvoted 1 times

pietras 2 months, 1 week ago

I think the bundle has a fixed price, so it won't change after any adjustments inside the bundle.

So the answers should be:

Determine the price of the product bundle – Use the lunch bundle price

Increase the number of sodas at no additional charge – Increase the quantity of sodas in the line item

Increase the number of sandwiches and charge the price list price for each additional sandwich – Add another line item for sandwiches with the default price

upvoted 1 times

Elreal 2 months, 2 weeks ago

Question 1

Add the Lunch bundle price and the price of napkins and sodas

See https://learn.microsoft.com/da-dk/dynamics365/sales/pricing-product-bundles

Question 2

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

Queston 3

Add another line item for sandwiches with the default price

upvoted 4 times

Lemppy 2 months, 3 weeks ago

I think:

1. Use the lunch bundle price
2. Increase the quantity of sodas in the line item / Add a new line item for sodas and override the price.
3. Add another line item for sandwiches with the default price.

upvoted 4 times

Acrious 2 months, 2 weeks ago

I do not believe 2 and 3 are correct. If you simply increase the current line item, it will have the current set price, the new lines will have whatever you set (in this case override and default) but that doesn't stop the original lines from acting how they are.

upvoted 1 times

Question #5 *Topic 1*

HOTSPOT -

You are a Dynamics 365 administrator. The sales team uses goals to track actual to target opportunity amounts.

A salesperson reviews their goals chart and observes the following:

An opportunity updated today is not included in the chart.

The time period for the goal is not accurate.

You need to resolve these issues.

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

NOTE: Each correct selection is worth one point.

Answer Area

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

Suggested Answer:

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

Elreal Highly Voted 2 months, 2 weeks ago

given answers seem correct:

Opportunity not included:

https://learn.microsoft.com/en-us/dynamics365/sales/create-edit-goal-rollup-query-sales

Most probably the rollup query needs to be adjusted to ensure that the Opportunity updated today is included in the goal chart.

Updating Time Period:

https://learn.microsoft.com/en-us/dynamics365/sales/create-edit-goal-sales

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

-> this implies that Salesperson security role is not sufficient to update time period for a goal

upvoted 5 times

believerinbrettusmaximus Most Recent 3 months ago

seems correct

upvoted 4 times

Question #6 | *Topic 1*

HOTSPOT -

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

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

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

NOTE: Each correct selection is worth one point.

Answer Area

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

Suggested Answer:

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

Acrious 2 months, 2 weeks ago

Correct

upvoted 3 times

Question #7 *Topic 1*

HOTSPOT -

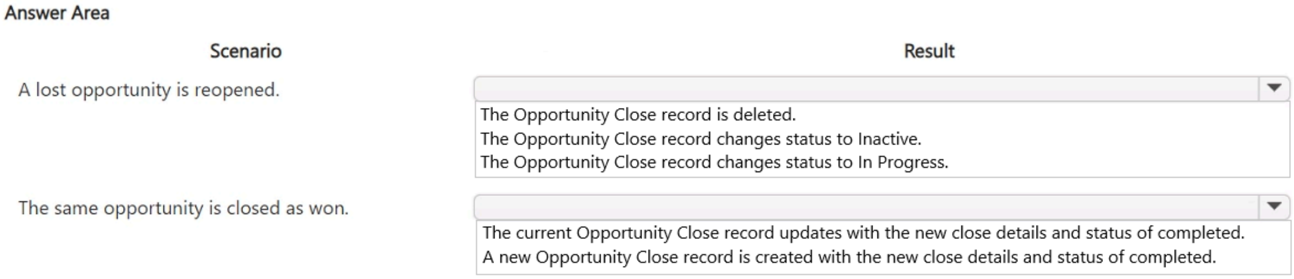
You use opportunities in Dynamics 365 Sales.

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

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

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

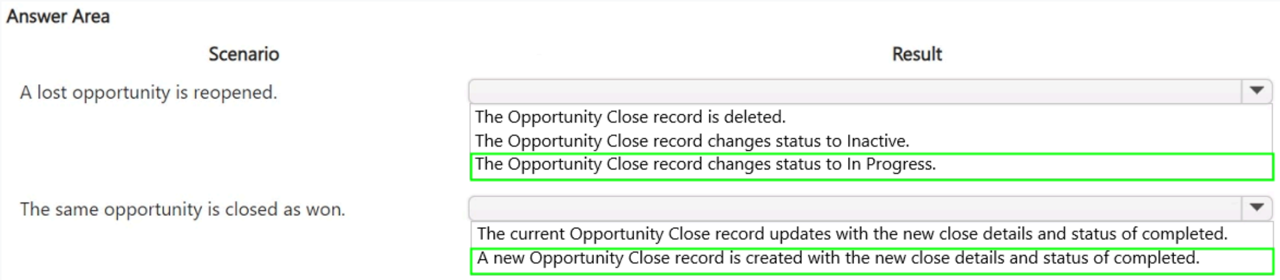
NOTE: Each correct selection is worth one point.



Answer Area

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

Suggested Answer:



Answer Area

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

Dopey Highly Voted 3 months ago

Should be:

The Opportunity Close record changes status to Inactive

A new Opportunity Close record is created with the new close details and status of completed

upvoted 7 times

timothy123 Highly Voted 3 months ago

Scenario: A lost opportunity is reopened.

Result: The Opportunity Close record changes status to Inactive.

Scenario: The same opportunity is closed as won.

Result: A new Opportunity Close record is created with the new close details and status of completed.

upvoted 5 times

yumna101 Most Recent 2 months, 1 week ago

a) The Opportunity Close record changes status to Inactive.

Explanation: Because it is historical log of previous closure event.

b) A new Opportunity Close record is created with the new close details and status of completed

Explanation: D365 will create a new close activity record for every closure (lost/won) and the older close activity records is preserve as historical data.

upvoted 2 times

Question #8 *Topic 1*

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.

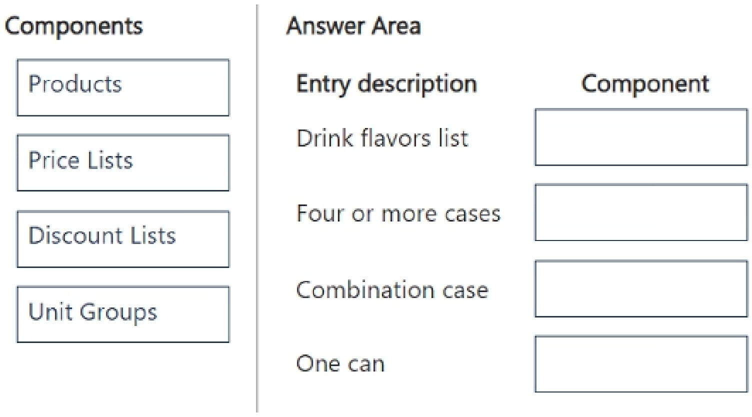
A combination case includes a dozen cans of each flavor and costs $160.00.

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

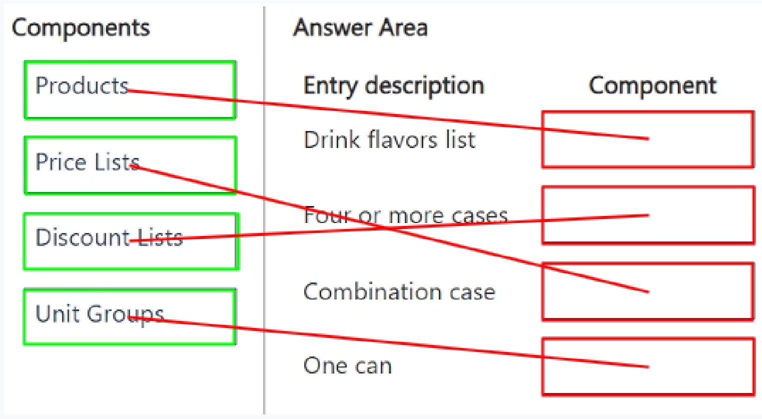
You need to set up the product catalog.

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.



Suggested Answer:



Lemppy Highly Voted 2 months, 3 weeks ago

I think Combination case is achieved by product bundle, so the answer for it should be: Combination case --> Products

upvoted 6 times

yumna101 Most Recent 2 months, 1 week ago

Combination case is Products (as Bundle)

upvoted 2 times

Acrious 2 months, 2 weeks ago

Agree Combination Case is products

upvoted 2 times

Dopey 3 months ago

I think Combination case falls under Unit Groups as well.

upvoted 2 times

Question #9 | *Topic 1*

HOTSPOT -

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

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

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

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

NOTE: Each correct selection is worth one point.

Answer Area

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

Suggested Answer:

Answer Area

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

Elreal Highly Voted 2 months, 2 weeks ago

given answers seem correct

upvoted 5 times

Question #10 *Topic 1*

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.

Suggested Answer: *D*

Community vote distribution

D (44%) B (33%) A (22%)

krishnaacharya 1 month, 3 weeks ago

Selected Answer: A

Creating Each as a unit with Box as base unit

Missing piece is Quantity = 0.5

upvoted 1 times

yumna101 2 months, 1 week ago

Selected Answer: D

D. Make Each the base unit for all units.

There is no concept of Primary unit in D365 Sales.

Major concepts are Base unit, Default unit and Unit groups.

upvoted 1 times

Acrious 2 months, 2 weeks ago

Selected Answer: D

This is about creating the ability to Scale based on the smallest unit, which is Each.

upvoted 1 times

Elreal 2 months, 2 weeks ago

Selected Answer: A

Scenario 1: Unit Group exists already in the system

If the unit group already exists, it is not possible to change the primary unit.

-> not answer B

In this scenario, as well answer D is not possible, as you first would need to create the unit "Each" and for that matter a base unit must be set for Each.

-> not answer D

Only possible answer in this scenario is answer A: create Each as a unit with Box as base unit and Quantity = 0,5. (note: this is possible as quantity field is decimal)

-> answer A

Scenario 2: Unit Group does not exist in the system yet

If I understand this question in a way that the unit group is not existing in the system as of now.

In this scenario, the question is how to define the Unit Group. Here, the given answer B seems correct - to use Each as the primary unit during the creation of the unit group.

upvoted 1 times

Dopey 3 months ago

Selected Answer: D

D is correct. Setting "Each" as the primary unit would make it the default for product sales, it does not establish the correct unit hierarchy. If "Box" is still the base unit, you can't define "Each" as a fraction of a box (Dynamics 365 doesn't support fractional units in this context). So, "Each" must first be the base unit before it can be used as the primary unit.

upvoted 1 times

timothy123 3 months ago

Selected Answer: D

Creating the unit Each with Box as the base unit doesn't solve the problem.

Set Each as the primary unit is nonsense. There is no such thing as a primary unit.

You cannot update the unit Box with Each as the base unit, because it is read only.

You can make Each the base unit for all units, except for the Box unit. So, this is the least worst answer ;)

upvoted 1 times

lilavi 4 months, 1 week ago

Selected Answer: B

For me, the answers were not correct. Because the box is a primary unit, so we cannot make Each as the base unit for all units. We should create a new unit group I thought.

upvoted 3 times

> **Lemppy** 2 months, 3 weeks ago
>
> It is not possible to create a unit group without the base unit (quantity=1). It is neither possible to change the base unit quantity after create. It is possible to change the base unit of other units.
>
> upvoted 1 times

Question #11 *Topic 1*

HOTSPOT

-

You are setting up a product catalog.

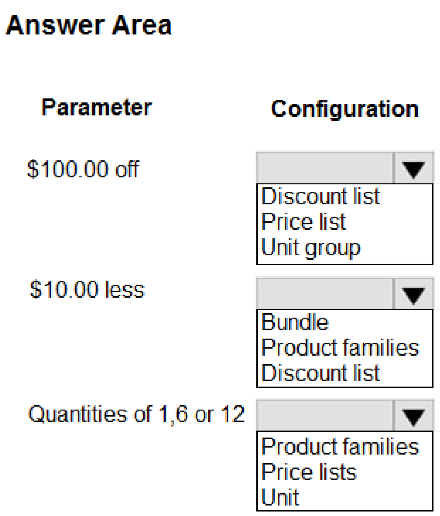
The product catalog must be set up with the following parameters:

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

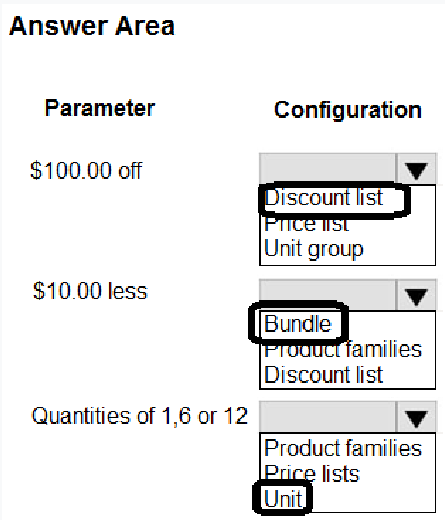
You need to set up the parameters.

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

NOTE: Each correct selection is worth one point.



Suggested Answer:



Elreal 2 months, 2 weeks ago

given answers seem correct

upvoted 4 times

Question #12 *Topic 1*

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

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

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

You need to create the duplicate detection rules.

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

NOTE: Each correct selection is worth one point.

A. First Name and Last Name and Preferred Phone and Business Unit

B. First Name and Last Name and Email and Business Unit

C. First Name and Last Name and Preferred Phone

D. First Name and Last Name and Owner

E. First Name and Last Name and Email

Suggested Answer: *AB*

Community vote distribution

AB (100%)

Acrious 2 months, 2 weeks ago

Selected Answer: AB

Correct, as you have the OR there, so you have to create 2 separate rules

upvoted 2 times

LKB06 2 months, 2 weeks ago

Selected Answer: AB

A,B is correct

upvoted 2 times

Question #13 *Topic 1*

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.

Records and Components	Answer Area
product families	
unit groups	1
discount lists	2
units	3
products	4
price lists	5
price list items	

Suggested Answer:

1. product families
2. products
3. units
4. price lists
5. price list items

Elreal Highly Voted 2 months, 2 weeks ago

Correction to my previous comment:

Unit Group is created before the Units are added to the Unit Group! With that, the answer would be:

1 Unit Group
2 Units
3 Products
4 Price Lists
5 Price List items

upvoted 6 times

timothy123 Most Recent 2 months ago

On Product you can choose a default pricelist. This is not mandatory, but recommended. Both Product families and Discount lists are not mentioned as a requirement in this case. Therefore, I think the right order is:

Unit groups
Units
Price lists
Products
Price list items

upvoted 1 times

yumna101 2 months, 1 week ago

1 Unit Groups

2 Units

3 Products

4 Price Lists

5 Price List Items

upvoted 1 times

Acrious 2 months, 2 weeks ago

They do not specifically mention needing product families or discounts so

Unit Group

Units

Products

Price Lists

Price List Items

There are other combinations and if there were most steps or details then you could add in Product Families and Discount Lists, but to configure and Sell, neither of those are required in the 5 steps to make it work.

upvoted 1 times

bbbfd8d 2 months, 3 weeks ago

Correct answer should be:

1. Discount lists
2. Unit groups
3. Products
4. Price lists
5. Price list items

https://learn.microsoft.com/en-us/dynamics365/sales/set-up-product-catalog-walkthrough

upvoted 2 times

Elreal 2 months, 3 weeks ago

units

unit groups

products

price lists

price list items

upvoted 1 times

Question #14 *Topic 1*

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

Suggested Answer: *C*

Community vote distribution

C (100%)

Elreal 2 months, 2 weeks ago

Selected Answer: C

https://learn.microsoft.com/en-us/dynamics365/sales/create-edit-goal-rollup-query-sales
"Use rollup queries to specify additional criteria that you want to apply on existing goal metrics. For example, you could create a goal metric that measures all invoices closed within a specific period."
This can be applied to calculate all deals won by quarter.
-> answer C

upvoted 4 times

Elreal 2 months, 3 weeks ago

Selected Answer: C

C. Rollup query

upvoted 2 times

Question #15 *Topic 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.

Suggested Answer: *C*

Community vote distribution

C (86%) 14%

Elreal 2 months, 2 weeks ago

Selected Answer: C

See https://learn.microsoft.com/en-us/dynamics365/sales/define-general-properties-scheduling-forecast
for a description about the hierarchy relationship which has to be defined during the set-up of the forecast.

upvoted 4 times

67eaf51 2 months, 3 weeks ago

Selected Answer: B

I think B: Top of hierarchy --> Name existing, only one that is empty and required. Others have slightly different name and are available by default.

upvoted 1 times

Elreal 2 months, 3 weeks ago

Selected Answer: C

C is correct

upvoted 2 times

Question #16 *Topic 1*

HOTSPOT

-

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

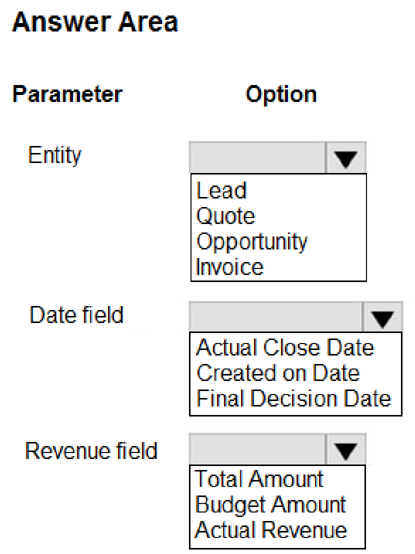
The measurement of goals must be based on the total deal amount upon closing an opportunity.

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

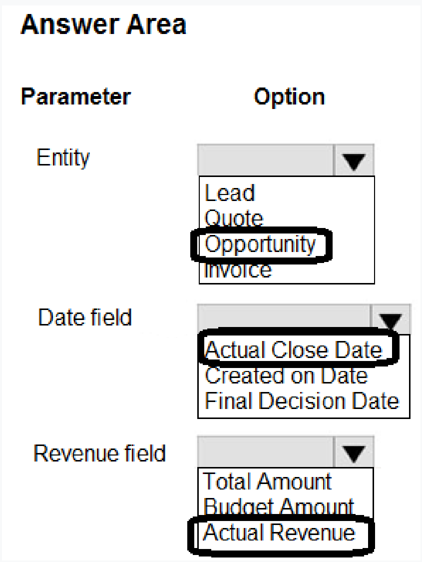
You need to create the rollup query for the goal metrics.

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

NOTE: Each correct selection is worth one point.



Suggested Answer:



Elreal Highly Voted 2 months, 2 weeks ago

"...based on the total deal amount upon closing an opportunity"

-> Entity = Opportunity

"...upon closing an opportunity"

-> Date field = Actual Close Date

"...based on the total deal amount"
-> Revenue field = Actual Revenue

The "Total Amount" of an opportunity represents the projected value based on products, pricing, and discounts, while "Actual Revenue" reflects the real revenue when the opportunity is closed.
upvoted 6 times

Question #17 *Topic 1*

A company manually assigns leads to salespeople.

The sales manager requires automated lead assignment rules. An administrator enables the feature. However, you are unable to access the Assignment rules area.

You need to request access from the administrator.

Which security role should you request?

A. Sales Manager

B. Playbook Manager

C. Vice President of Sales

D. Sequence Manager

Suggested Answer: *D*

Community vote distribution

D (100%)

Elreal 2 months, 3 weeks ago

Selected Answer: D

D. Sequence Manager

This security role includes:

Create, edit, delete, and deactivate the following features in the sales accelerator

- Sequences
- Segments
- Assignment rules

upvoted 4 times

Question #18 *Topic 1*

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

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

You configure forecasts for a clothing manufacturer.

A salesperson updates an opportunity and wants to refresh the forecast

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

Solution: Recalculate the opportunity.

Does this meet the goal?

A. Yes

B. No

Suggested Answer: *B*

Community vote distribution

B (100%)

timothy123 2 months ago

Selected Answer: B

Recalculate and refresh forecast data manually by using "Recalculate date". Source: https://learn.microsoft.com/en-us/dynamics365/sales/keep-forecast-data-up-to-date#recalculate-and-refresh-forecast-data-manually

upvoted 1 times

Elreal 2 months, 3 weeks ago

Selected Answer: B

Recalculate the opportunity is not sufficient.
"Recalculate data" on the Forecast must be used.

upvoted 3 times

Question #19 *Topic 1*

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

Suggested Answer: *A*

Community vote distribution

A (75%) B (25%)

Acrious 2 months, 2 weeks ago

Selected Answer: A

My understanding is that Recaculate Forest is necessary, that specifically recaculate Data is not for Forecasts?

upvoted 1 times

67eaf51 2 months, 3 weeks ago

Selected Answer: B

Action is called "Recalculate data" in the forecasts folder

upvoted 1 times

Elreal 2 months, 3 weeks ago

Selected Answer: A

"Recalculate data" on the Forecast is sufficient to do a Forecast recalculation.

upvoted 2 times

Question #20 *Topic 1*

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

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

You configure forecasts for a clothing manufacturer.

A salesperson updates an opportunity and wants to refresh the forecast

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

Solution: Update the Opportunity Forecast Category Mapping process.

Does this meet the goal?

A. Yes

B. No

Suggested Answer: *B*

Community vote distribution

B (100%)

Elreal 2 months, 3 weeks ago

Selected Answer: B

"Recalculate data" on the Forecast is sufficient to do a Forecast recalculation.

upvoted 1 times

Question #21 *Topic 1*

DRAG DROP

-

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

You need to configure an SMS provider.

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

Actions

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

Order

Suggested Answer:

Order

- In **General Settings**, create a new SMS provider.
- Sign in to your Sales app and change the area to **App Settings**.
- Enter SMS provider-specific values.
- Add a unique phone number to Dynamics 365 Sales.

67eaf51 Highly Voted 2 months, 3 weeks ago

Go to App settings first and there under General Settings open folder SMS Providers.
Then add provider specific details and then add phone number.
No need to publish customizations.
https://learn.microsoft.com/fi-fi/dynamics365/sales/configure-sms-provider

upvoted 5 times

Acrious Highly Voted 2 months, 2 weeks ago

Step 1 from Learn
Sign in to your Sales app and change to the App Settings Area

Step 2. In General create a new SMS Provider

Step 3. Enter SMS Provider Specific values

Step 4. Add a unique phone number

no need to publish

upvoted 5 times

Elreal Most Recent 2 months, 2 weeks ago

see

https://learn.microsoft.com/en-us/dynamics365/sales/configure-sms-provider

for detailed steps on how to set up an SMS provider

upvoted 2 times

bbbfd8d 2 months, 3 weeks ago

Correct answer should be:

Sign in to your Sales app and change the area to App Settings

In General Settings, create a new SMS provider

Enter SMS provider-specific values

Publish all customizations

upvoted 1 times

Acrious 2 months, 2 weeks ago

There is no need to Publish and you did not add in the step to add the phone number.

upvoted 1 times

Question #22 *Topic 1*

A company is using Dynamics 365 Sales to provide quotes to their customers.

Preferred customers must be granted a separate flat rate discount on specific products, depending on their countries or regions.

What should you create?

A. A price list for the currency of each country/region.

B. A product bundle for each country/region.

C. A sequence command step.

Suggested Answer: *A*

Currently there are no comments in this discussion, be the first to comment!

Question #23 *Topic 1*

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

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

You configure forecasts for a clothing manufacturer.

A salesperson updates an opportunity and wants to refresh the forecast

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

Solution: Update the roll-up recurrence frequency.

Does this meet the goal?

A. Yes

B. No

Suggested Answer: *B*

Currently there are no comments in this discussion, be the first to comment!

Question #1 *Topic 2*

Case study -
This is a case study. Case studies are not timed separately. You can use as much exam time as you would like to complete each case. However, there may be additional case studies and sections on this exam. You must manage your time to ensure that you are able to complete all questions included on this exam in the time provided.
To answer the questions included in a case study, you will need to reference information that is provided in the case study. Case studies might contain exhibits and other resources that provide more information about the scenario that is described in the case study. Each question is independent of the other questions in this case study.
At the end of this case study, a review screen will appear. This screen allows you to review your answers and to make changes before you move to the next section of the exam. After you begin a new section, you cannot return to this section.

To start the case study -
To display the first question in this case study, click the Next button. Use the buttons in the left pane to explore the content of the case study before you answer the questions. Clicking these buttons displays information such as business requirements, existing environment, and problem statements. When you are ready to answer a question, click the Question button to return to the question.

Background information -
Terra Flora, Incorporated is a boutique pet hotel that has been in business for six (6) months. The hotel guests include both dogs and cats.
The founder created the Dynamics 365 Sales Professional environment to grow their network and pipeline. They started out using out-of-the-box capabilities only and using the Sales Professional app only. Only one environment (production) is in use.
The pet hotel is gaining in popularity and the number of bookings is growing. The founder has shifted their focus to customizing their environment to record the information they need to delight their customers by tailoring the experience to their unique pets.
Terra Flora has recently hired a part-time carer for the resident pets. The carer has been granted the Salesperson security role to allow them to record new leads and update customer information.
You are a Dynamics 365 Customer Experience consultant who has been hired to assist Terra Flora with their customizations, resolve issues, and advise on best designs to meet their requirements.

Configurations -

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

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

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

Marketing -

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 Pet table 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 -

Duplicate records -
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 date 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.

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

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

NOTE: Each correct selection is worth one point.

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

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

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

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

Suggested Answer: *AC*

Community vote distribution

AC (100%)

lilavi 4 months, 1 week ago

Selected Answer: AC

A and C are correct

upvoted 3 times

Question #2 *Topic 2*

Case study -

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Overall configurations -

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"Onboard new pet" business process flow

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Attachments are enabled for the Pet table, 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 -
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Marketing -

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 Pet table 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 -

Duplicate records -
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 date 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.

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

Where should you upload the image?

A. An image column

B. A file column

C. An icon control

D. A web resource

Suggested Answer: *D*

Community vote distribution

D (100%)

Elreal 2 months, 2 weeks ago

Selected Answer: D

https://learn.microsoft.com/en-us/dynamics365/customerengagement/on-premises/developer/image-web-resources?view=op-9-1

"Use image web resources to make images available for use in Dynamics 365 Customer Engagement"

upvoted 1 times

Acrious 2 months, 2 weeks ago

Selected Answer: D

Due to it being an SVG and the fact that its an ICON, not really a per row pet image.. at least that is how I read it.

upvoted 1 times

Question #3 | *Topic 2*

Case study -

This is a case study. Case studies are not timed separately. You can use as much exam time as you would like to complete each case. However, there may be additional case studies and sections on this exam. You must manage your time to ensure that you are able to complete all questions included on this exam in the time provided.

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To start the case study -

To display the first question in this case study, click the Next button. Use the buttons in the left pane to explore the content of the case study before you answer the questions. Clicking these buttons displays information such as business requirements, existing environment, and problem statements. When you are ready to answer a question, click the Question button to return to the question.

Background information -

Terra Flora, Incorporated is a boutique pet hotel that has been in business for six (6) months. The hotel guests include both dogs and cats.

The founder created the Dynamics 365 Sales Professional environment to grow their network and pipeline. They started out using out-of-the-box capabilities only and using the Sales Professional app only. Only one environment (production) is in use.

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

Terra Flora has recently hired a part-time carer for the resident pets. The carer has been granted the Salesperson security role to allow them to record new leads and update customer information.

You are a Dynamics 365 Customer Experience consultant who has been hired to assist Terra Flora with their customizations, resolve issues, and advise on best designs to meet their requirements.

Configurations -

Overall configurations -

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

The Pet table has been added to the Sales Professional app sitemap. The table has the following columns, each created WITHOUT making any changes to the advanced options.

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

A pet sub-grid has been added to the Contact main form, using the Active Pets view.

Additionally, Read, Write, and Update, Append, Append To, and Assign access to the Pet table has been added to the Salesperson security role.

"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 Pet table.

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 is being used.
Attachments are enabled for the Pet table, 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.

Marketing -

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 Pet table 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 -

Duplicate records -
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 date 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.
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.

Suggested Answer: *B*

Community vote distribution
B (82%) A (18%)

bbbfd8d Highly Voted 2 months, 3 weeks ago
Selected Answer: B
The correct answer is: B. Within the solution, ensure all relevant tables are indexed.

According to Microsoft Learn documentation, to ensure that administrators can find all records referencing a specific keyword (like "Corgis"), you must configure Dataverse search (formerly known as Relevance Search). This involves:

Enabling Dataverse search in the environment.
Ensuring that relevant tables are enabled for search indexing within the solution.
Selecting the appropriate columns (fields) to be included in the search index for each table.
upvoted 5 times

Elreal Most Recent 2 months, 2 weeks ago
Selected Answer: A
https://learn.microsoft.com/en-us/power-apps/user/search
https://www.crmcrate.com/view/different-types-of-searches-in-microsoft-crm-365-search-capabilities-dynamics-crm/

The question deals about Quick Find (also called Categorized Search). For Quick Find a limit of 10 entities is applicable. The 10 entities/tables can be defined under Settings > Administration > System Settings: "Select entities for Categorized Search" - and the selected tables/entities are then considered by the Quick Find/Categorized Search.
upvoted 2 times

LKB06 2 months, 2 weeks ago
Selected Answer: B
B is the correct answer
upvoted 1 times

Sprt 2 months, 3 weeks ago
Selected Answer: B
B seems to be the correct answer
upvoted 3 times

Question #4 Topic 2

Case study -

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Background information -

Terra Flora, Incorporated is a boutique pet hotel that has been in business for six (6) months. The hotel guests include both dogs and cats.

The founder created the Dynamics 365 Sales Professional environment to grow their network and pipeline. They started out using out-of-the-box capabilities only and using the Sales Professional app only. Only one environment (production) is in use.

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

Terra Flora has recently hired a part-time carer for the resident pets. The carer has been granted the Salesperson security role to allow them to record new leads and update customer information.

You are a Dynamics 365 Customer Experience consultant who has been hired to assist Terra Flora with their customizations, resolve issues, and advise on best designs to meet their requirements.

Configurations -

Overall configurations -

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

The Pet table has been added to the Sales Professional app sitemap. The table has the following columns, each created WITHOUT making any changes to the advanced options.

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Dietary requirements	Multiple lines of text	Optional
Litter type	Choice	Optional
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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

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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 Pet table.

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 is being used.
Attachments are enabled for the Pet table, 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.

Marketing -

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 Pet table 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 -

Duplicate records -
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 date 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.
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.

Suggested Answer: *AB*

Community vote distribution

AB (50%) BC (33%) BE (17%)

JoeAl 1 month ago

Selected Answer: AB

a. In the Record types of the timeline settings, uncheck the Notes option. (notes is an option in the record types of the timeline settings)
b. In the Activity area of the timeline settings, remove all activity types, except for Task, Email and Phone Call. (if activities is enabled on the table settings, activity area is editable to remove all activities except what is required in case study).
Note Posts are not a record type and are edited in the system settings:
"To adjust auto-post configuration in Dynamics 365, you can manage auto-post rules through the Customer Service admin center. Here's how to do it:
1. Go to the Customer Service admin center in Dynamics 365.
2. In the left-hand sidebar, select "Miscellaneous" under "Operations".
3. Under "Timeline Settings", select "Manage" next to "Auto-post rules".
4. Review the descriptions against each record and set the record as active to enable or disable auto-posts for that record.
This process allows you to control which auto-posts appear on the relevant record timeline for your organization."
upvoted 1 times

krishnaacharya 1 month, 3 weeks ago

Selected Answer: BC

A. In the Record types of the timeline settings, uncheck the Notes option.
- Can control from Entity/Table Properties
B. In the Activity area of the timeline settings, remove all activity types, except for Task, Email and Phone Call.
- As mentioned in the requirements of "Related Pet table activities", only limited activities will be visible.
C. In the Record types of the timeline settings, uncheck the Posts option.
- Must be unchecked, else auto post will be visible on the timeline.
D. In the Record types of the timeline settings, uncheck the Activities option.
- Activities should be visible (with limited as per B)
E. In the Notes area of the timeline settings, uncheck the Remove notes title when authoring option.
- No such option available.
upvoted 1 times

timothy123 2 months ago

Selected Answer: BC

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.

They don't want posts, and the only want tasks, emails and phone calls as activities.

upvoted 1 times

Elreal 2 months, 2 weeks ago

Selected Answer: AB

Requirement from the text:

"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."

-> with this requirement following answers are applicable (they only want to see Task, Email and Phone Call... implying that as well Notes they don't want to see in the timeline):

B. In the Activity area of the timeline settings, remove all activity types, except for Task, Email and Phone Call.

A. In the Record types of the timeline settings, uncheck the Notes option.

upvoted 1 times

Acrious 2 months, 2 weeks ago

Selected Answer: AB

It was stated that they do not want Notes, so we would need to turn that off

A

B

upvoted 1 times

67eaf51 2 months, 3 weeks ago

Selected Answer: BE

No need to uncheck for posts because they are not enabled. Notes configurations have the Remove notes title when authoring option and it doesn't seem to be against the requirements.

upvoted 1 times

Question #5 *Topic 2*

Case study -

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Configurations -

Overall configurations -

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Pet table icon -

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

Related Pet table activities -

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Post configuration is NOT enabled for the Pet table.

Logs -
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Marketing -

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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 Pet table 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 -

Duplicate records -
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 date 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.
You need to identify the duplicate pet records, so they can be manually merged by the carer.
What must you create?

A. Two duplicate detection jobs and two duplicate detection rules.

B. One duplicate detection job and three duplicate detection rules.

C. Two duplicate detection jobs and three duplicate detection rules.

D. Three duplicate detection rules only.

Suggested Answer: *C*

Community vote distribution

C (100%)

Acrious 2 months, 2 weeks ago

Selected Answer: C

To Explain:
You are looking for duplicates across 2 Tables but there are 3 scenarios

You can have duplicates in the Contact Table, or the Pet Table or Across Contact / Pet tables

So you need 1 job per table and 3 rules
upvoted 2 times

Question #6 *Topic 2*

Case study -

This is a case study. Case studies are not timed separately. You can use as much exam time as you would like to complete each case. However, there may be additional case studies and sections on this exam. You must manage your time to ensure that you are able to complete all questions included on this exam in the time provided.

To answer the questions included in a case study, you will need to reference information that is provided in the case study. Case studies might contain exhibits and other resources that provide more information about the scenario that is described in the case study. Each question is independent of the other questions in this case study.

At the end of this case study, a review screen will appear. This screen allows you to review your answers and to make changes before you move to the next section of the exam. After you begin a new section, you cannot return to this section.

To start the case study -

To display the first question in this case study, click the Next button. Use the buttons in the left pane to explore the content of the case study before you answer the questions. Clicking these buttons displays information such as business requirements, existing environment, and problem statements. When you are ready to answer a question, click the Question button to return to the question.

Background information -

Terra Flora, Incorporated is a boutique pet hotel that has been in business for six (6) months. The hotel guests include both dogs and cats.

The founder created the Dynamics 365 Sales Professional environment to grow their network and pipeline. They started out using out-of-the-box capabilities only and using the Sales Professional app only. Only one environment (production) is in use.

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

Terra Flora has recently hired a part-time carer for the resident pets. The carer has been granted the Salesperson security role to allow them to record new leads and update customer information.

You are a Dynamics 365 Customer Experience consultant who has been hired to assist Terra Flora with their customizations, resolve issues, and advise on best designs to meet their requirements.

Configurations -

Overall configurations -

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

The Pet table has been added to the Sales Professional app sitemap. The table has the following columns, each created WITHOUT making any changes to the advanced options.

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

A pet sub-grid has been added to the Contact main form, using the Active Pets view.

Additionally, Read, Write, and Update, Append, Append To, and Assign access to the Pet table has been added to the Salesperson security role.

"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 Pet table.

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 is being used.
Attachments are enabled for the Pet table, 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.

Marketing -

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.
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Business process flows and the Corgi meet-up gala

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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.

You need to ensure the active stage of the business process flow is visible in the view.

Which two actions should you perform? Each correct answer presents a complete solution. (Choose two.)

NOTE: Each correct selection is worth one point.

A. Add a page for the Onboard new pet table to the Sales Professional app.

B. Add columns from the Pet table to the Active Onboard new pet view.

C. Add columns from the Pet table to the All Onboard new pet view.

D. Create a new column on the Pet table named "Onboarding stage" and add it to the Active pets view.

Suggested Answer: *BD*

Community vote distribution

AD (50%) | BD (25%) | AB (25%)

timothy123 2 months ago

Selected Answer: AB

A. Add a page for the Onboard new pet table to the Sales Professional app.

B. Add columns from the Pet table to the Active Onboard new pet view.

I think they want a quick and dirty solution here. So add the Onboard new pet table to the sitemap and add the columns from the Pet table to the Active Onboard new pet view so it looks like it Pets you're viewing.

In this case you don't need to create column and a flow for the Pet table, but it's not a very customer friendly solution I'm affraid.

upvoted 1 times

Acrious 2 months, 2 weeks ago

Selected Answer: BD

B and D

You need to update the Active View, with the New Column you create. There is no need to add pages as its a View you are asked to make work.

upvoted 1 times

67eaf51 2 months, 3 weeks ago

Selected Answer: AD

Definitively D and I prefer A instead of B, because what is the point of editing views if the table is not available in the sitemap.

upvoted 2 times

Question #7 | *Topic 2*

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.

Suggested Answer: *D*

Community vote distribution

D (100%)

Acrious 2 months, 2 weeks ago

Selected Answer: D

Correct D.

As you want need data, which means Tables you have to have a way to get them. Get Data is how you do it.

upvoted 1 times

Elreal 2 months, 2 weeks ago

Selected Answer: D

https://learn.microsoft.com/en-us/dynamics365/customer-insights/data/connect-power-query

D: see step 10 in the above site: "To add more tables to your data source in the Edit queries dialog, go to Home and select Get data."

not A: you can add more tables to the data source (see step 10 in the above site)

not C: see step 12 in the above site: "Select Save. The Data sources page opens showing the new data source in Refreshing status." - this implies that after saving the refresh is automatically started and does not require to be triggered manually

upvoted 2 times

Question #8 *Topic 2*

You are the Dynamics 365 administrator for a group of financial advisors.

Advisors must use one business process flow to guide them through the standard lead to invoice process.

Each table has the following number of stages and steps:

Table	Number of Stages	Number of Steps per Stage
Lead	10	10
Opportunity	10	10
Quote	10	10
Order	10	10
Invoice	10	10

You need to modify the business process flow to make it valid.

What should you reduce?

A. number of steps per stages

B. number of tables

C. total number of steps

D. total number of stages

Suggested Answer: *D*

Community vote distribution

D (100%)

Elreal 2 months, 2 weeks ago

Selected Answer: D

see

https://learn.microsoft.com/en-us/power-automate/business-process-flows-overview?context=%2Fdynamics365%2Fcontext%2Fsales-context

"Each process can contain no more than 30 stages."

upvoted 4 times

555309d 4 months ago

Selected Answer: D

learn.microsoft.com/en-us/dynamics365/customerengagement/on-premises/customize/business-process-flows-overview

upvoted 2 times

Question #9 *Topic 2*

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.

Suggested Answer: *D*

Community vote distribution

D (67%) A (33%)

Aarch 2 weeks, 6 days ago

Selected Answer: D

To add a new table to the navigation pane, we need to add to App Designer

upvoted 2 times

VL_FMZ 1 month, 2 weeks ago

Selected Answer: D

Location Subarea is a feature of D365 Supply Chain Management which shouldn't be on this exam. If Location is a custom entity it needs to be added to the App Designer

upvoted 2 times

NesrineJen 1 month, 2 weeks ago

Selected Answer: D

To make a table available in a model-driven app, you must add it to the app in the App Designer.

upvoted 2 times

timothy123 2 months ago

Selected Answer: A

A: Sub Area, a term from the classic Sitemap Designer

upvoted 1 times

Acrious 2 months, 2 weeks ago

Selected Answer: D

Its D although anything in the sitemap works

upvoted 2 times

67eaf51 2 months, 3 weeks ago

Selected Answer: A

D or A should both be correct

upvoted 3 times

Question #10 *Topic 2*

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

Suggested Answer: *A*

Community vote distribution

A (80%) B (20%)

Acrious 2 months, 2 weeks ago

Selected Answer: A

Per the documentation (at least Now) the term is Primary, not base. While the term primary was interchangeable before with Base... i don't know if the intent was to change it, or if the documentation people just didn't know it was or should be called Base, but.. it is clearly Primary in the Ux

upvoted 2 times

Elreal 2 months, 2 weeks ago

Selected Answer: A

https://learn.microsoft.com/en-us/dynamics365/sales/create-unit-group-add-units-that-group

During the creation of the Unit Group record, the Primary Unit field must be populated.
(see Step 3 in the above site)

Only when creating a Unit in the Unit Group, for the new Unit the field Base Unit must be populated.
(see Step 6 in the above site)

-> therefore correct answer is: A. primary unit

upvoted 2 times

67eaf51 2 months, 3 weeks ago

Selected Answer: B

When you add new units to the default unit group or create a new unit group the base unit is already available or created automatically. I think the first step is to add related units.

upvoted 1 times

Question #11 *Topic 2*

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

Suggested Answer: *A*

Community vote distribution

A (100%)

Elreal 2 months, 2 weeks ago

Selected Answer: A

https://learn.microsoft.com/en-us/dynamics365/sales/create-product-family

"A product family lets you group and categorize products, making it easier for you to manage them."

upvoted 3 times

Question #12 *Topic 2*

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

Suggested Answer: *B*

Community vote distribution

B (100%)

555309d Highly Voted 3 months, 3 weeks ago

Selected Answer: B

lowest

upvoted 6 times

Acrious Most Recent 2 months, 2 weeks ago

Selected Answer: B

These questions and the history + the new documentation is why its still confusing as if its really base unit and its just a label change (to Primary) or if the term has truly changed, which I cannot find.

As base unit has been it forever, but now people want to say Primary, yet this question even says Base.

upvoted 1 times

Elreal 2 months, 3 weeks ago

Selected Answer: B

https://learn.microsoft.com/en-us/dynamics365/sales/create-unit-group-add-units-that-group
"Primary Unit: Type the lowest common unit of measure that the product will be sold in."

upvoted 3 times

Question #13 *Topic 2*

HOTSPOT -

A bakery uses Dynamics 365 Sales. All loaves of bread sold at the bakery are priced the same. Special bread flavors are developed regularly.

You need to add a new flavor to the product catalog.

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

NOTE: Each correct selection is worth one point.

Answer Area

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

Suggested Answer:

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

67eaf51 2 months, 3 weeks ago

I think:

Create a product property

Delete the opportunity product and readd the item

(because of the learn page, eventhough testing properties is making me a little bit crazy)

https://learn.microsoft.com/en-us/dynamics365/sales/use-properties-describe-product#product-versioning

upvoted 4 times

Elreal 2 months, 2 weeks ago

Yes you are correct - for the second question, the product must be removed from the existing Opportunity and re-added into the Opportunity.

If the product was added to the Opportunity before the Product Properties were defined for the Product, then the Opportunity Product must be removed first from the Opportunity and then re-added into the Opportunity. Only then it is possible to configure the Product Properties for the Opportunity Product.

upvoted 1 times

Elreal 2 months, 3 weeks ago

https://learn.microsoft.com/en-us/dynamics365/sales/use-properties-describe-product

upvoted 1 times

Elreal 2 months, 3 weeks ago

Flavor should be handled via Product Property on the Product record.

With this approach, the flavor can then be selected by the user on the Opportunity Product.

upvoted 2 times

Question #14 | *Topic 2*

DRAG DROP -

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

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

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

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

Answer Area

Actions	Order
Create a new account plan table.	1.
Go to the **Hierarchy Settings** grid view.	2.
Create a new Card form and select this as the default card.	3.
Create a N:N self-referential relationship and mark the relationship as hierarchical.	4.
Open the advanced **Relationship** settings.	
Create a new Quick View form and select this as the default form.	
Create a 1:N self-referential relationship and mark the relationship as hierarchical.	

Suggested Answer:

Actions	Order
Create a new account plan table.	1.
Go to the **Hierarchy Settings** grid view.	2.
Create a new Card form and select this as the default card.	3.
Create a N:N self-referential relationship and mark the relationship as hierarchical.	4.
Open the advanced **Relationship** settings.	
Create a new Quick View form and select this as the default form.	
Create a 1:N self-referential relationship and mark the relationship as hierarchical.	

timothy123 2 months ago

Soon to be replaced by Hierarchical Relationship Visualizer: https://learn.microsoft.com/en-us/dynamics365/release-plan/2025wave2/sales/dynamics365-sales/visualize-work-hierarchical-data-single-table

upvoted 1 times

67eaf51 2 months, 3 weeks ago

I think:

Create a new account plan table.

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

Go to the Hierarchy Settings grid view

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

upvoted 4 times

Elreal 2 months, 3 weeks ago

Create a new account plan table

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

Go to the Hierarchy Settings grid view

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

Source: https://learn.microsoft.com/en-us/dynamics365/customerengagement/on-premises/customize/query-visualize-hierarchical-data?view=op-9-1

upvoted 4 times

Question #15 *Topic 2*

DRAG DROP -

You are designing the user experience for sales users at your organization for a variety of tasks.

One of the user experience requirements is for sales users to be able to see information from custom attributes created for originating leads for opportunities WITHOUT having to navigate to the Lead record.

You are already signed in to the correct editing application and you now need to configure the user experience in Dynamics 365 Sales to enable this.

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

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

Answer Area

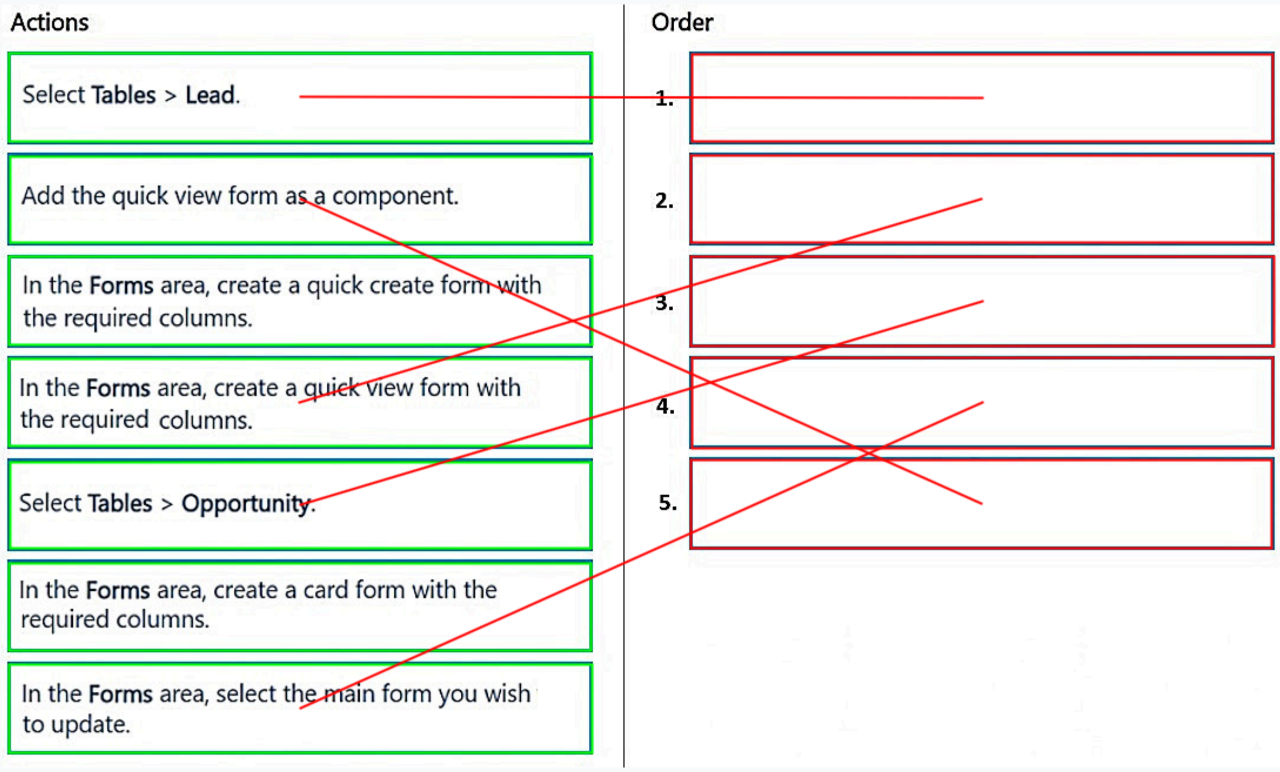
Actions

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

Order

1.
2.
3.
4.
5.

Suggested Answer:



timothy123 2 months ago

Correct.

1. Select Table > Lead
2. In the Forms area, create a quick view form with the required columns
3. Select Tables > Opportunity
4. In the Forms area, select the main form you wish to update
5. Add the quick view form as a component

upvoted 2 times

Elreal 2 months, 3 weeks ago

Answer is correct.

upvoted 4 times

Question #16 *Topic 2*

DRAG DROP -

You are a Dynamics 365 Sales system customizer.

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

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

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

Arrange the three actions in the correct order.

Actions

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

Answer Area

Suggested Answer:

Actions

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

Answer Area

Sprt Highly Voted 2 months, 4 weeks ago

In my mind it should be:

1 Expand the opportunity Entity

2 Open the quick find view

3 Delete the filter criteria of status equals Open

upvoted 8 times

bbbfd8d Most Recent 2 months, 3 weeks ago

Correct answer:

Expand the Opportunity entity

→ This gives access to all views associated with the Opportunity table.

Open Quick Find View

→ This is the specific view used for search functionality in model-driven apps.

Delete the filter criteria Status "Equals Open"

→ Removing this filter allows both open and closed opportunities to be included in search results.

upvoted 4 times

Elreal 2 months, 3 weeks ago

It should be:

1 Expand the opportunity Entity

2 Open the quick find view

3 Delete the filter criteria of status equals Open

Reason: If you add as a last step a filter criteria "Does not equal Open", then you would not be able to see open Opportunities... while the requirement states that the user should be able to search open and closed opportunities.

upvoted 3 times

Question #17 *Topic 2*

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

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

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

What should you do?

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

B. Create an access team that has the nurse as owner. Open the HospitalA account record and assign it to the new team account. Repeat this process for HospitalB.

C. Open the HospitalB record and assign the nurse to a task activity.

D. Open the contact record for the nurse and create a connection to HospitalB.

Suggested Answer: *D*

Community vote distribution

D (100%)

Elreal 2 months, 3 weeks ago

Selected Answer: D

D is correct.
https://community.dynamics.com/forums/thread/details/?threadid=65b6d889-38d2-4fe8-bbfc-c0c163cf7c30#:~:text=Steven%20Rock%20can%20be%20Connected,Thanks.

upvoted 3 times

Question #18 *Topic 2*

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 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

Lookup column display name *

- Campaign
- Parent campaign
- Child campaign
- Campaign Hierarchy

Lookup column name *

cr642_

Lookup column requirement *

Optional

- [x] Searchable
- [x] Hierarchical

General

Advanced options

Current table display settings

Display option *

Use plural name

Custom label

Display area *

Details

Display order *

10000

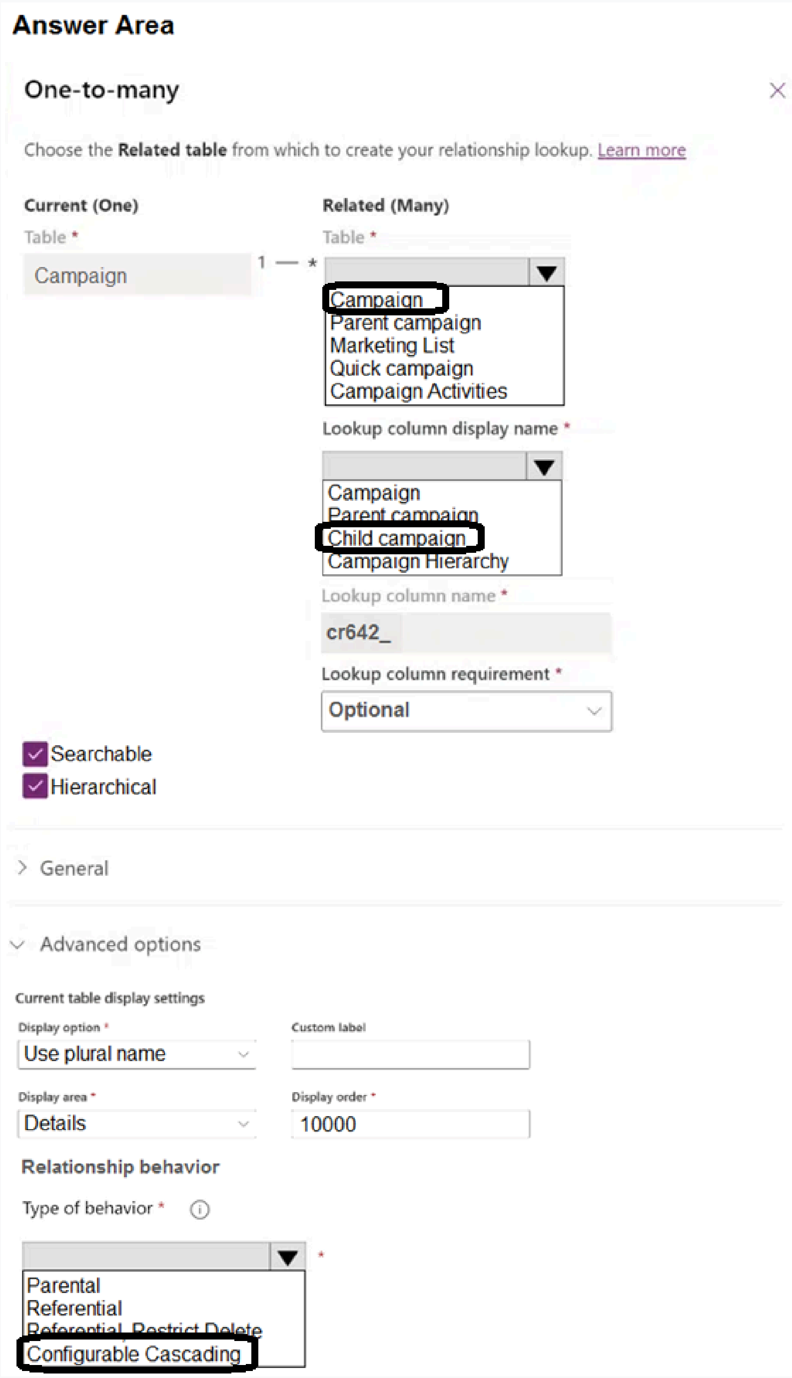
Relationship behavior

Type of behavior *

- Parental
- Referential
- Referential, Restrict Delete
- Configurable Cascading

*

Suggested Answer:



67eaf51 2 months, 3 weeks ago

I think:

Campaign

Parent campaign

Configurable cascading / Parental

Lookup column name will be referencing the parent campaign regardless of which relationship option was selected.

upvoted 3 times

Acrious 2 months, 2 weeks ago

It should be Parent, but you have both listed for #2, it cannot be both

upvoted 1 times

Elreal 2 months, 3 weeks ago

It should be:

Table: Campaign

Lookup column display name: Parent Campaign

Type of Behavior: Parental

Reason:

Table = Campaign, because it should be a hierarchical relationship for Campaigns

Lookup column display name = Parent Campaign, because on child campaign is related via lookup to a parent campaign, meaning that the lookup column contains the parent campaign

Type of behavior = Parental: Any action taken on a record of the parent table is also taken on the related child table records.

upvoted 3 times

Question #19 — Topic 2

DRAG DROP

-

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

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

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

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

Actions

- In PowerApps, select **Solutions** and open an unmanaged solution.
- From Dynamics 365, open **Advanced Settings** and access the **Administration** section.
- Select the checkbox for record type *Charity* only.
- Add a new connection role from the command bar.
- Select the checkbox for record type *Contact* only.
- Describe the connection role and enter "Charity Ambassador" as the name.
- Select the checkbox for record types *Charity* and Contact.

Order

1
2
3
4

Suggested Answer:

Order

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

Acrious 2 months, 2 weeks ago

A,D,F,G is correct, although there are things missing, such as Elreal mentioned, and of course there is no publish customizations step which is necessary too

upvoted 1 times

bbbfd8d 2 months, 3 weeks ago

Correct answer:

1. From Dynamics 365, open Advanced Settings and access the Administration section
2. Add a new connection role from the command bar

3. Describe the connection role and enter "Charity Ambassador" as the name
4. Select the checkbox for record types Charity and Contact
upvoted 2 times

Elreal 2 months, 2 weeks ago
Connection roles can be added in Power Apps for a specific solution, see the section "Create a connection role" on https://learn.microsoft.com/en-us/power-apps/maker/data-platform/configure-connection-roles

I do not see the possibility to create a new connection role under Advanced Settings > Administration.
upvoted 2 times

67eaf51 2 months, 3 weeks ago
I think the 4th should be:
Select the checkbox for record type Contact only

You cannot select the same role for both connected records unless you define matching roles in the role editor.
upvoted 1 times

Elreal 2 months, 3 weeks ago
Answer is correct.

Before you can use connections with a custom table, you need to enable connections for that table. This is done by setting the checkbox on the table property "Can have connections".
Once this is done on the custom table, the custom table can be selected when creating a new Connection Role, by following the steps outlined in the answer here.
upvoted 2 times

Question #20 *Topic 2*

DRAG DROP
-

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

You need to add a timeline control to the form

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

Actions

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

Order

1
2
3
4
5

Suggested Answer:

Order

1. Add all tables you want to be visible in the timeline.
2. Open the form from the table you want to add the control to.
3. Choose the timeline from components list and add to the section you want.
4. Configure the control.
5. Save and publish.

Elreal Highly Voted 2 months, 2 weeks ago

The steps are outlined on
https://learn.microsoft.com/en-us/power-apps/maker/model-driven-apps/set-up-timeline-control?context=%2Fdynamics365%2Fcontext%2Fsales-context

1. Choose a table in the solution you want to edit
2. Open the form from the table you want to add the control to
3. Choose the timeline from components list and add it to section you want
4. Configure the control
5. Save and publish

upvoted 6 times

timothy123 Most Recent 2 months ago

1. Choose a table...
2. Open the form...
3. Choose the timeline...
4. Configure the control.
5. Save and publish.

upvoted 3 times

bbbfd8d 2 months, 3 weeks ago

Correct answer:

1. Choose a table in the solution you want to edit
2. Open the form from the table you want to add the control to
3. Select the area you want to add component to
4. Choose the timeline from components list and add it to section you want
5. Configure the control

upvoted 3 times

67eaf51 2 months, 3 weeks ago

I think the first should be:
Choose a table in the solution you want to edit
(no need to add notes or activities in the solution just for this)

upvoted 1 times

Elreal 2 months, 3 weeks ago

Given answer is wrong.
See https://learn.microsoft.com/en-us/power-apps/maker/model-driven-apps/set-up-timeline-control for detailed steps on how to enable timeline.

It should be:
1 Choose the table in the solution you want to edit
2 Open the form from the table you want to add the control to
3 Choose the timeline from the components list and add to the section you want
4 Add all tables you want to be visible in the timeline
5 Save and publish

In Step 4, on the Timeline component, you can select the record types which should be shown in the timeline (e.g. Activities, Notes)

Note:
To display Notes, the table must be enabled for Attachements (including notes and files). To display Activities, the table must be enabled for "Creating a new activity".

upvoted 4 times

Question #21 *Topic 2*

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

To comply with privacy laws, your organization needs to delete inactive account records after two (2) years.

Some account managers noticed that when they delete accounts, linked account plans are also deleted. Account managers want to be able to use these account plans as references.

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

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

A. Cascade All

B. Cascade Active

C. Remove Link

D. Restrict

Suggested Answer: *C*

Community vote distribution

C (100%)

timothy123 2 months ago

Selected Answer: C

Correct. Remove Link

upvoted 1 times

67eaf51 2 months, 3 weeks ago

Selected Answer: C

I think C is better, because there is no need for users to delete the relationship first like option D has.

upvoted 3 times

Elreal 2 months, 3 weeks ago

Selected Answer: C

Answer is wrong.

Restrict = Any related records can be navigated to. Actions taken on the parent record will not be applied to the child record, but the parent record cannot be deleted while the child record exists.

With this, it would not be possible to delete Accounts which have Account Plans. But according to the requirement it should be possible to delete Accounts even if they have Account Plans.

Correct Answer:

Remove Link = Any related records can be navigated to, and actions taken on one will not affect the other.

upvoted 2 times

Question #22 *Topic 2*

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

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

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

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

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

C. After you save a Power Query data source, you have to manually trigger the initial refresh process.

D. You must select Power Query as an import method when creating the data source.

Suggested Answer: *D*

Community vote distribution

D (100%)

pietras 2 months, 2 weeks ago

Selected Answer: D

Manual refresh is not required upon the initial save

upvoted 1 times

67eaf51 2 months, 3 weeks ago

Selected Answer: D

Because question 2.7

upvoted 2 times

Elreal 2 months, 3 weeks ago

Selected Answer: D

see: https://learn.microsoft.com/en-us/power-query/where-to-get-data

To get data in Customer Insights:

On the left side of Customer Insights, select Data > Data sources.
In the Data sources pane, select Add data source.
In Choose your import method, choose Microsoft Power Query. <<<<<<<<<<
In Save data source as, enter a name for your data source.

upvoted 4 times

Question #23 *Topic 2*

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 are reviewing a Dynamics 365 implementation for your customer.

During the review, the customer tells you that they want a central search function which displays results by relevance.

You need to prepare to configure Dataverse search for the implementation.

Solution: Recognize that when you enable Dataverse search, it is enabled for all model-driven apps.

Does this meet the goal?

A. Yes

B. No

Suggested Answer: *A*

Currently there are no comments in this discussion, be the first to comment!

Question #24 *Topic 2*

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 are reviewing a Dynamics 365 implementation for your customer.

During the review, the customer tells you that they want a central search function which displays results by relevance.

You need to prepare to configure Dataverse search for the implementation.

Solution: Ensure that any tables you wish to display results from are included in the model-driven apps.

Does this meet the goal?

A. Yes

B. No

Suggested Answer: *B*

Currently there are no comments in this discussion, be the first to comment!

Question #25 *Topic 2*

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 are reviewing a Dynamics 365 implementation for your customer.

During the review, the customer tells you that they want a central search function which displays results by relevance.

You need to prepare to configure Dataverse search for the implementation.

Solution: Ensure that you add columns to the search criteria by editing the Advanced Find view for each table.

Does this meet the goal?

A. Yes

B. No

Suggested Answer: *B*

Currently there are no comments in this discussion, be the first to comment!

Question #26 *Topic 2*

DRAG DROP

-

Your sales team indicates there are too many fields on accounts in Copilot for Sales.

You need to remove certain fields from the Copilot for Sales account form.

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

Actions	Order
Select forms in the Copilot for Sales admin settings.	
Hover over the field you want to remove and select the garbage bin icon.	
Select Account as the record type.	
Locate the correct section for the field.	
Select the field you want to remove and drag the field off the form.	

Suggested Answer:

Order
Select forms in the Copilot for Sales admin settings.
Select Account as the record type.
Hover over the field you want to remove and select the garbage bin icon.

Currently there are no comments in this discussion, be the first to comment!

Question #27 *Topic 2*

You are configuring offline mode for a model-driven app on a customer project.

You need to ensure that the customer is aware of the capabilities and limitations of offline mode.

Which two facts should you convey? Each correct answer presents a complete solution.

NOTE: Each correct selection is worth one point.

A. System views are supported on tables, whereas personal views are unsupported.

B. Users must manually advance offline qualified leads.

C. Column-level security is supported.

D. Appointments will auto-send invites to recipients.

Suggested Answer: *AB*

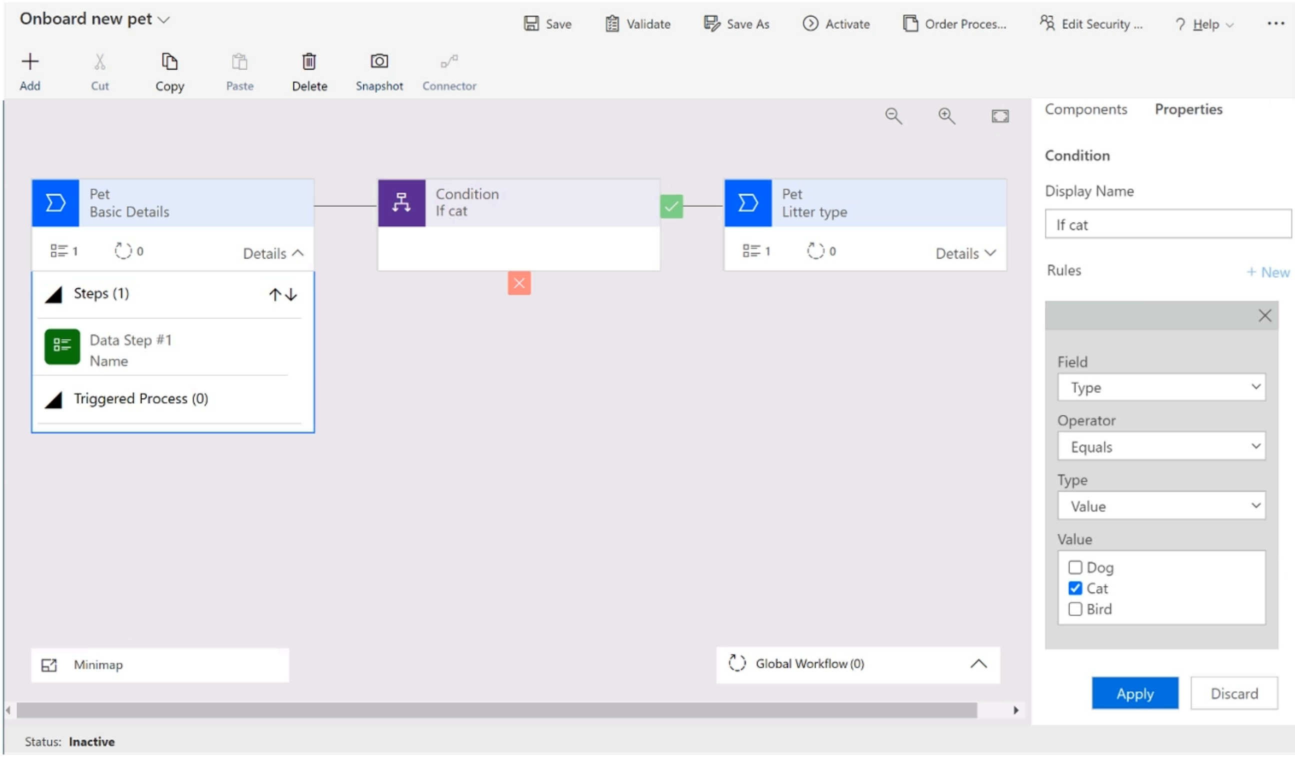
Currently there are no comments in this discussion, be the first to comment!

Question #1 — *Topic 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.

Suggested Answer:

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.

Elreal 2 months, 2 weeks ago

for question 2) when the user starts to create the new pet record, only one stage is visible. The second stage becomes visible only when the condition evaluates to true (i.e. data entered is cat).

upvoted 3 times

Elreal 2 months, 2 weeks ago

for question 1: see https://learn.microsoft.com/en-us/power-automate/enhance-business-process-flows-branching

"Branching rule must be based on the steps in the stage that immediately precedes it."

-> therefore correct answer is "the column used to evaluate the condition is added to the preceding stage"

upvoted 3 times

Acrious 2 months, 2 weeks ago

1. The Column must be in the previous stage and the value set
2. 2 Stages, as it asks after you get validation there are 2 stages on the screen.. so you will end up with 2

upvoted 2 times

67eaf51 2 months, 3 weeks ago

I tested this and only way I got validation error and therefore number of stages:

The column used to evaluate the condition is added to the preceding stage

One stage

upvoted 3 times

JoeAl 1 month ago

I created the BPF as shown. I had two validation errors, one for the missing preceeding step (type), and also for the missing step in the 'If Type' stage. You are not able to activate the process without adding the preceeding step and the type column in the 'If Type' stage.

Once the BPF has be activated, a new pet record is create with ONE STAGE showing. It is only after you complete the 'Type' field in the first stage that you get the second stage on the record, therefore:

1) The column used to evaluate the condition is added to the preceding stage

2) One stage

upvoted 1 times

Question #2 *Topic 3*

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.

Suggested Answer: *AC*

Community vote distribution

AC (100%)

PIPowerCert 1 month, 4 weeks ago

Selected Answer: AC

ac is correct

upvoted 1 times

Elreal 2 months, 3 weeks ago

Selected Answer: AC

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

upvoted 3 times

Question #3 *Topic 3*

Accompany plans to use server-side synchronization to synchronize emails, tasks, and appointments between Microsoft Exchange and Dynamics 365 Sales.
The salespeople want to know when their emails will be synced.
You need to describe the server-side synchronization frequency for the salespeople.
How should you describe the frequency?

A. user-defined

B. constant

C. equal intervals

D. dependent on volume

Suggested Answer: *D*

Community vote distribution

D (80%) C (20%)

Qeis 1 month, 2 weeks ago

Selected Answer: C

This is a tricky question. The Microsoft documentation that's being cited is correct, but it's misleading here.

There's a difference between the synchronization frequency and the algorithm. The frequency itself is set to fixed, equal intervals, for example, every 5 minutes. The 'dynamic' part the documentation refers to is the algorithm that prioritizes busy mailboxes within that fixed schedule for efficiency.

Since the question is about the frequency, the correct answer is C, equal intervals.

upvoted 1 times

PlPowerCert 1 month, 4 weeks ago

Selected Answer: D

https://learn.microsoft.com/de-de/dynamics365/customerengagement/on-premises/admin/server-side-synchronization?view=op-9-1

The synchronization algorithm ensures that mailboxes are synced according to dynamic parameters such as the number of email messages and the activity within the mailbox. "

upvoted 1 times

Elreal 2 months, 3 weeks ago

Selected Answer: D

see https://learn.microsoft.com/de-de/dynamics365/customerengagement/on-premises/admin/server-side-synchronization?view=op-9-1

"When synchronization by using server-side synchronization occurs, the process is dynamic and unique for each user's mailbox. The synchronization algorithm ensures that mailboxes are synced according to dynamic parameters such as the number of email messages and the activity within the mailbox. "

upvoted 3 times

Question #4 *Topic 3*

The assistant to the sales leader has some questions on how delegation works when using the Dynamics 365 App for Outlook. They want to know how columns are populated when an email is tracked.
You need to explain the behavior of the tracked email messages, in particular, what is set as the owner of the tracked email from a delegated mailbox.
What should you convey?

A. The delegate user.

B. System (as it is promoted by server-side synchronization).

C. The owner of the linked contact that sent the email.

D. The primary mailbox owner.

Suggested Answer: *D*

Community vote distribution

D (100%)

Elreal 2 months, 3 weeks ago

Selected Answer: D

see https://learn.microsoft.com/en-us/dynamics365/outlook-app/user/use-delegate-access

upvoted 3 times

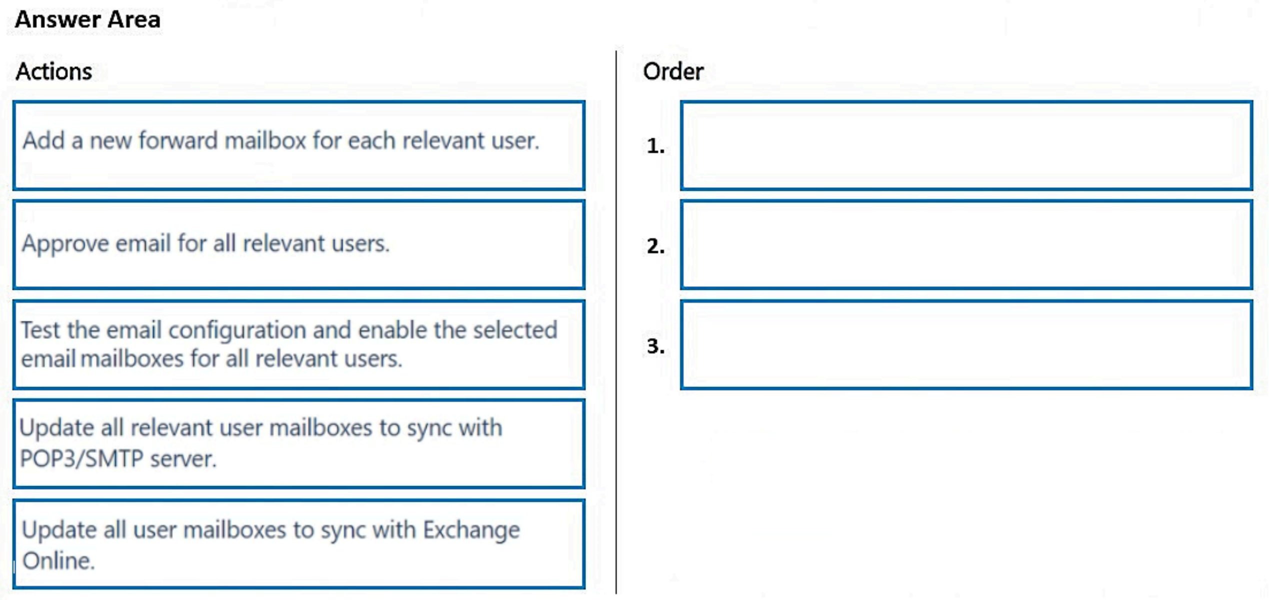
Question #5 *Topic 3*

DRAG DROP -

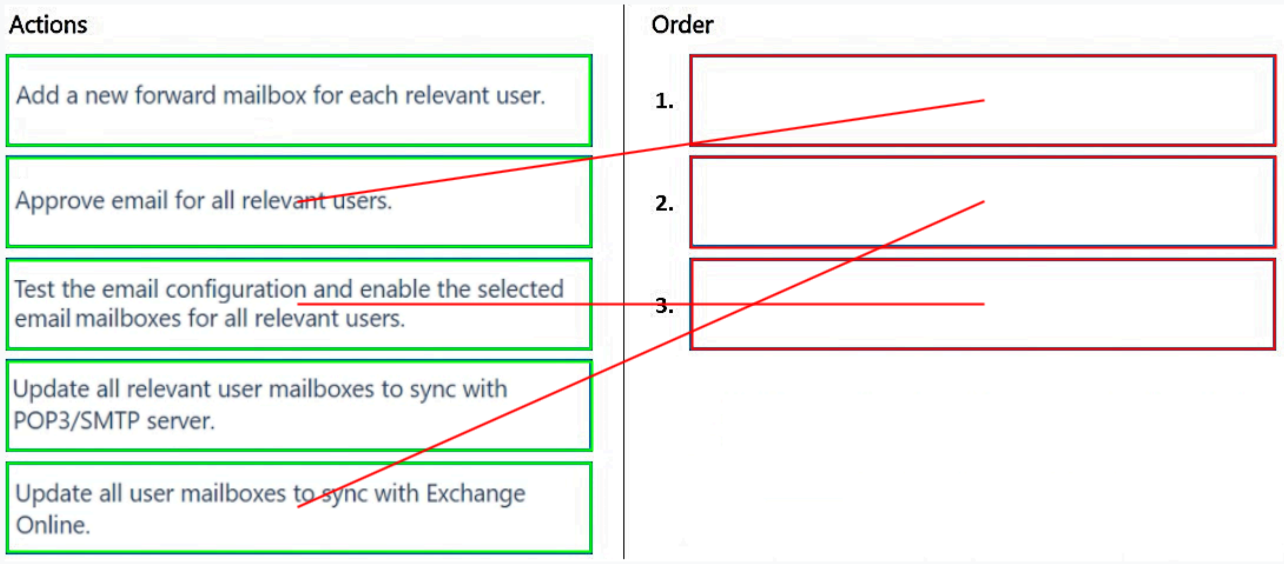
Your organization used Gmail previously and had only one Gmail server profile.

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

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



Suggested Answer:



Elreal Highly Voted 2 months, 3 weeks ago

1 Update all user mailboxes to sync with Exchange Online

2 Approve email for all relevant users

3 Test the email configuration

see https://learn.microsoft.com/en-us/previous-versions/dynamicscrm-2016/administering-dynamics-365/mt622056(v=crm.8)?redirectedfrom=MSDN

upvoted 6 times

Question #6 *Topic 3*

DRAG DROP -

You have enabled Dynamics 365 App for Outlook for your sales team.

Users report that they are dissatisfied that they must track the emails manually, so you propose folder-level tracking. You need to enable folder-level tracking in your environment in order for your users to configure the rules.

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

Answer Area

Actions

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

Order

1.
2.
3.

Suggested Answer:

Actions

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

Order

1.
2.
3.

Elreal 2 months, 2 weeks ago

see https://learn.microsoft.com/en-us/power-platform/admin/configure-outlook-exchange-folder-level-tracking

upvoted 1 times

Elreal 2 months, 3 weeks ago

answer is correct

upvoted 2 times

Question #7 *Topic 3*

HOTSPOT -

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

You need to set up the default mailbox configuration.

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

NOTE: Each correct selection is worth one point.

Answer Area

Synchronization methods

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

Server Profile

Microsoft Exchange Online

Incoming Email

- None
- Forward Mailbox
- Microsoft Dynamics 365 for Outlook
- Server-Side Synchronization or Email Router

Outgoing Email

- None
- Microsoft Dynamics 365 for Outlook
- Server-Side Synchronization or Email Router

Appointments, Contacts, and Tasks

- None
- Server-Side Synchronization
- Microsoft Dynamics 365 for Outlook

Suggested Answer:

Incoming Email

- None
- Forward Mailbox
- Microsoft Dynamics 365 for Outlook
- Server-Side Synchronization or Email Router

Outgoing Email

- None
- Microsoft Dynamics 365 for Outlook
- Server-Side Synchronization or Email Router

Appointments, Contacts, and Tasks

- None
- Server-Side Synchronization
- Microsoft Dynamics 365 for Outlook

Elreal 2 months, 3 weeks ago

Correct

upvoted 2 times

Elreal 2 months, 2 weeks ago

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

Step 1: Set the default synchronization method

point 3. Select the Email tab, and set Process Email Using to Server-Side Synchronization.
-> screenshot on this site how to set these parameters
upvoted 1 times

Question #8 *Topic 3*

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.

Suggested Answer: *AD*

Community vote distribution

AC (67%) AD (33%)

Acrious 2 months, 2 weeks ago

Selected Answer: AC

In this case

A - Once they have the security role it only needs to be add

additional reasoning: In this case it is NOT that some of the users cannot see it, so telling them to manually install will help, its that ALL of them cannot see it, so you have to add the app, then they all will.

C - They need security Role.

upvoted 2 times

bbbfd8d 2 months, 3 weeks ago

Selected Answer: AC

Correct answer:

A. Add the app for all users

You must explicitly add the Dynamics 365 App for Outlook to users. This can be done from the Dynamics 365 environment by navigating to Settings > Dynamics 365 App for Outlook, and then selecting Add App for All Eligible Users

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

In addition to general security privileges, users need the Dynamics 365 App for Outlook User security role to access and use the app

upvoted 1 times

Elreal 2 months, 2 weeks ago

In the text it says that security privileges are already assigned to all users:

"Assign all users the required security privileges."

upvoted 2 times

67eaf51 2 months, 3 weeks ago

Selected Answer: AC

I think D is wrong and C is correct. Instructing users to install the app is only relevant for mobile devices. The question refers to "Outlook client". Also, the most common error scenario with App for Outlook not showing, is the user missing the outlook security role.
https://learn.microsoft.com/en-us/dynamics365/outlook-app/deploy-dynamics-365-app-for-outlook#step-4-install-app-for-outlook

upvoted 1 times

Elreal 2 months, 3 weeks ago

Selected Answer: AD

see https://learn.microsoft.com/en-us/previous-versions/dynamicscrm-2016/outlook-app/v8/deploy-dynamics-365-app-for-outlook

"After setting up server-side synchronization and setting the required privileges, you can push Dynamics 365 App for Outlook to some or all users, or you can have users install it themselves as needed."

upvoted 2 times

Question #9 | *Topic 3*

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

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

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

You decide to enable the Dynamics 365 App for Outlook.

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

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

Does this meet the goal?

A. Yes

B. No

Suggested Answer: *B*

Community vote distribution

B (100%)

PlPowerCert 1 month, 4 weeks ago

Selected Answer: B

https://learn.microsoft.com/en-us/previous-versions/dynamicscrm-2016/outlook-app/v8/deploy-dynamics-365-app-for-outlook

upvoted 1 times

Elreal 2 months, 3 weeks ago

Selected Answer: B

see https://learn.microsoft.com/en-us/previous-versions/dynamicscrm-2016/outlook-app/v8/deploy-dynamics-365-app-for-outlook

Requirement for using Dynamics 365 App for Outlook is
"Synchronization of incoming email through server-side synchronization." which means that it cannot be set to "Microsoft Dynamics 365 for Outlook" in Settings Email Settings.

upvoted 2 times

Question #10 *Topic 3*

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

Suggested Answer: *A*

Community vote distribution

B (100%)

Acrious 2 months, 2 weeks ago

Selected Answer: B

No, it does Not as, lol 67 said its all gibberish AS it relates to Deployment and usage.
Not that its actually total garbage as a detail, its not just related to what we need.

upvoted 1 times

67eaf51 2 months, 3 weeks ago

Selected Answer: B

I think No, because the whole sentence is gibberish with some actual key words.

upvoted 2 times

Question #11 *Topic 3*

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

Does this meet the goal?

A. Yes

B. No

Suggested Answer: *A*

Community vote distribution

A (100%)

Qeis 1 month, 2 weeks ago

I'm having some doubts about this question.

On one hand, the text says the action "does NOT solve the problem completely," which would point to No.

On the other hand, testing and enabling mailboxes is a critical, mandatory step. Without it, the solution is impossible, which could justify Yes.

What do you all think?

upvoted 1 times

Qeis 1 month, 2 weeks ago

The technical requirements: Even if you test and enable the mailboxes, the action is still incomplete. To make the app work, you also need to assign the 'Dynamics 365 App for Outlook User' security role to the users. This is a crucial step that is not included in the action's description.

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

upvoted 1 times

PlPowerCert 1 month, 4 weeks ago

Selected Answer: A

Exchange Online and one step here is the "Test configuration of mailboxes" and the enablement of the mailboxes.

upvoted 1 times

Elreal 2 months, 3 weeks ago

Selected Answer: A

see https://learn.microsoft.com/en-us/previous-versions/dynamicscrm-2016/administering-dynamics-365/mt622056(v=crm.8)

Synchronization of incoming email through server-side synchronization is a pre-requisite for the deployment of Dynamics 365 App for Outlook. This includes to Connect Dynamics 365 (online) to Exchange Online and one step here is the "Test configuration of mailboxes" and the enablement of the mailboxes.

upvoted 2 times

Question #12 *Topic 3*

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: You give the sales team users the Salesperson security role.

Does this meet the goal?

A. Yes

B. No

Suggested Answer: *B*

Currently there are no comments in this discussion, be the first to comment!

Question #13 *Topic 3*

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: Select Email Settings within the environment's settings, and set Process Email Using to Server-Side Synchronization.

Does this meet the goal?

A. Yes

B. No

Suggested Answer: *A*

Currently there are no comments in this discussion, be the first to comment!

Question #14 | *Topic 3*

DRAG DROP

-

Your organization believes sales representatives can gain a lot of value from generative AI support in their daily tasks.

A group of early adopters has been identified and grouped into an Entra user group named “AI Early Adopters.”

You need to install Copilot for Sales in Microsoft Outlook in order to deploy it to this group.

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

Actions	Order
As an administrator, go to Dynamics 365 **Settings** section and select **Solutions**.	
Access AppSource, search for and select **Copilot for Sales**.	
Select Save configuration to save your settings.	
Confirm you wish to deploy Copilot for Sales and then choose the "AI Early Adopters" user group.	
Read and accept the permissions for the app, confirm the deployment settings are correct, and select **Finish deployment**.	

Suggested Answer:

Order
Access AppSource, search for and select **Copilot for Sales**.
Confirm you wish to deploy Copilot for Sales and then choose the "AI Early Adopters" user group.
Read and accept the permissions for the app, confirm the deployment settings are correct, and select **Finish deployment**.

Currently there are no comments in this discussion, be the first to comment!

Question #1 Topic 4

You are working in a manufacturing company that is struggling to get their sales department to input all relevant information into Dynamics 365 for Sales.
You need to deploy the Dynamics 365 App for Outlook for all eligible users as efficiently as possible.
What should you do?

A. Enable the setting to push the app to users in the general environment Settings.

B. Select the checkbox to automatically add App for Outlook to all eligible users in Settings.

C. Notify every eligible user to enable it in their personal app Settings.

D. Grant the Systems Admin security role to the active directory group containing all eligible users.

Suggested Answer: *B*

Community vote distribution

B (100%)

Elreal 2 months, 3 weeks ago

Selected Answer: B

https://learn.microsoft.com/en-us/previous-versions/dynamicscrm-2016/outlook-app/v8/deploy-dynamics-365-app-for-outlook

Go to Settings > Dynamics 365 App for Outlook.
In the Getting Started with Dynamics 365 App for Outlook screen, under Add for Eligible Users (you may have to click Settings if you’re opening this screen for the second or subsequent time), select the Automatically add the app to Outlook check box if you want to have users get the app automatically.

upvoted 3 times

Question #2 *Topic 4*

HOTSPOT -

Case study -
This is a case study. Case studies are not timed separately. You can use as much exam time as you would like to complete each case. However, there may be additional case studies and sections on this exam. You must manage your time to ensure that you are able to complete all questions included on this exam in the time provided.
To answer the questions included in a case study, you will need to reference information that is provided in the case study. Case studies might contain exhibits and other resources that provide more information about the scenario that is described in the case study. Each question is independent of the other questions in this case study.
At the end of this case study, a review screen will appear. This screen allows you to review your answers and to make changes before you move to the next section of the exam. After you begin a new section, you cannot return to this section.

To start the case study -
To display the first question in this case study, click the Next button. Use the buttons in the left pane to explore the content of the case study before you answer the questions. Clicking these buttons displays information such as business requirements, existing environment, and problem statements. When you are ready to answer a question, click the Question button to return to the question.

Background information -
Terra Flora, Incorporated is a boutique pet hotel that has been in business for six (6) months. The hotel guests include both dogs and cats.
The founder created the Dynamics 365 Sales Professional environment to grow their network and pipeline. They started out using out-of-the-box capabilities only and using the Sales Professional app only. Only one environment (production) is in use.
The pet hotel is gaining in popularity and the number of bookings is growing. The founder has shifted their focus to customizing their environment to record the information they need to delight their customers by tailoring the experience to their unique pets.
Terra Flora has recently hired a part-time carer for the resident pets. The carer has been granted the Salesperson security role to allow them to record new leads and update customer information.
You are a Dynamics 365 Customer Experience consultant who has been hired to assist Terra Flora with their customizations, resolve issues, and advise on best designs to meet their requirements.

Configurations -

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

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

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

Marketing -

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 Pet table 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 -

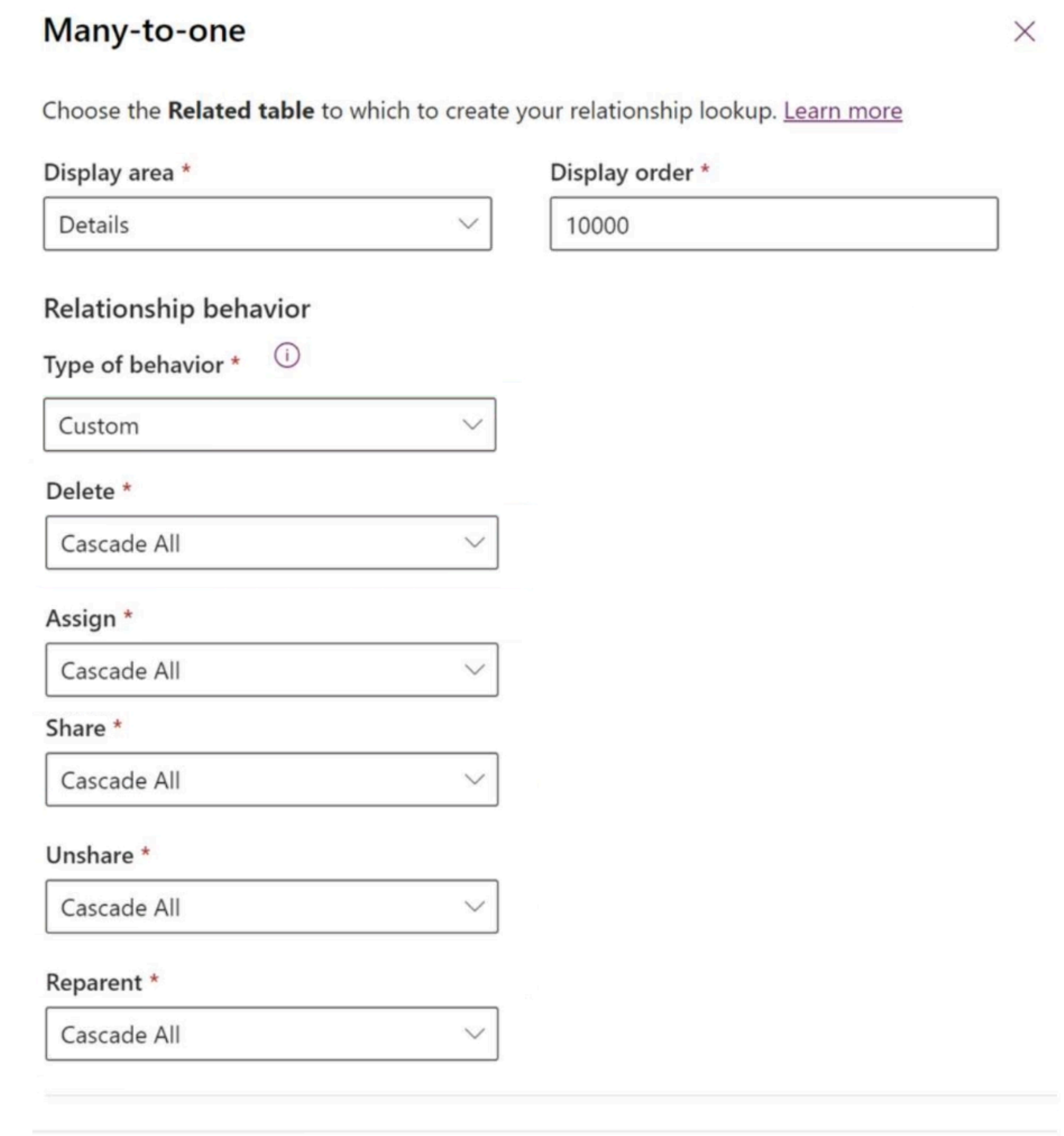
Duplicate records -
Before the creation of the Pet table, information regarding pets was either added to the owner's Contact record in the form of notes or created as Contact records themselves.
These Contact records used the name of the pet in the Last Name column and the owner's address in the first 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 date of the changes.
Terra Flora also needs to track any exports of records to Microsoft Excel within the compliance center.

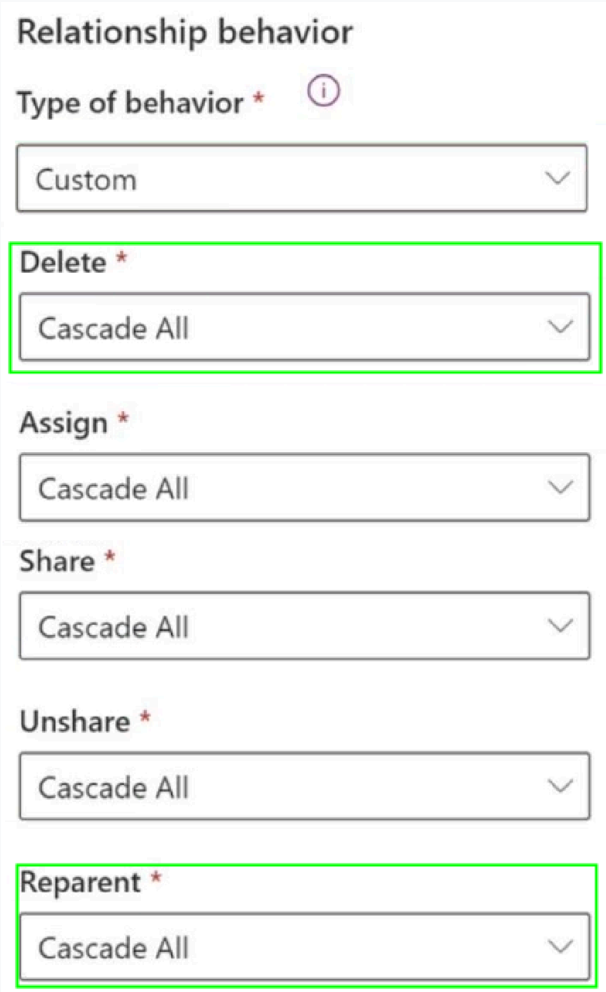
Relationship behavior -
Recently, a pet owner informed Terra Flora that their pet cat has been rehomed.
After receiving this information, the carer deleted the owner's Contact record from the system, which in turn deleted the Pet record.
Shortly after, the new pet owner contacted Terra Flora to book 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.
You are updating the current relationship behavior of the primary owner (Contact) to pet relationship.
You need to ensure the case study requirements are met.
Which two options must be changed? To answer, select the appropriate options in the answer area.
NOTE: Each correct selection is worth one point.

Answer Area



Suggested Answer:



timothy123 2 months ago

It's not correct.

Yes, Delete should be changed to Restrict.

But, Assign should be changed to Cascade Active.

Not Reparent, the owner is not a parent record.

upvoted 1 times

Elreal 2 months, 2 weeks ago

given answer is correct.

https://learn.microsoft.com/en-us/dynamics365/customerengagement/on-premises/customize/create-and-edit-1n-relationships?view=op-9-1

Delete (What should happen when the primary entity record is deleted?)

-> should be changed to "Restrict",

to prevent the primary entity record (Contact) from being deleted when related records (Pets) exist.

Reparent (What should happen when a lookup field value for a parental type relationship in the primary entity record is changed?)

-> should be changed to "Cascade Active",

to perform the action on all active related entity records.

upvoted 3 times

Question #3 *Topic 4*

HOTSPOT -

Case study -
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Background information -
Terra Flora, Incorporated is a boutique pet hotel that has been in business for six (6) months. The hotel guests include both dogs and cats.
The founder created the Dynamics 365 Sales Professional environment to grow their network and pipeline. They started out using out-of-the-box capabilities only and using the Sales Professional app only. Only one environment (production) is in use.
The pet hotel is gaining in popularity and the number of bookings is growing. The founder has shifted their focus to customizing their environment to record the information they need to delight their customers by tailoring the experience to their unique pets.
Terra Flora has recently hired a part-time carer for the resident pets. The carer has been granted the Salesperson security role to allow them to record new leads and update customer information.
You are a Dynamics 365 Customer Experience consultant who has been hired to assist Terra Flora with their customizations, resolve issues, and advise on best designs to meet their requirements.

Configurations -

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

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Breed	Single line of text	Optional
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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 Pet table.
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.
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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 is being used.
Attachments are enabled for the Pet table, 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.

Marketing -

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.

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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 Pet table 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 -

Duplicate records -
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 date 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.

The founder has edited the Salesperson security role to allow the carer to use the Corgi meet-up business process flow, as shown in the following exhibit.

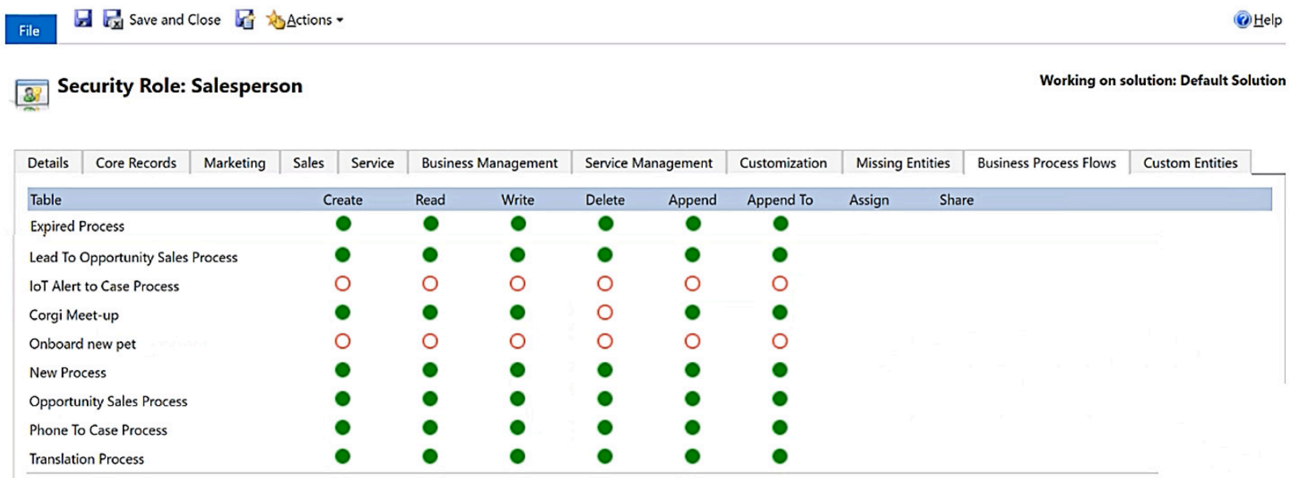

Table	Create	Read	Write	Delete	Append	Append To	Assign	Share
Expired Process	●	●	●	●	●	●		
Lead To Opportunity Sales Process	●	●	●	●	●	●		
IoT Alert to Case Process	○	○	○	○	○	○		
Corgi Meet-up	●	●	●	○	●	●		
Onboard new pet	○	○	○	○	○	○		
New Process	●	●	●	●	●	●		
Opportunity Sales Process	●	●	●	●	●	●		
Phone To Case Process	●	●	●	●	●	●		
Translation Process	●	●	●	●	●	●		

Use the drop-down menus to select the answer choice that completes each statement based on the information presented in the exhibit.

NOTE: Each correct selection is worth one point.

Answer Area

The carer can now see business process flows on pet records
- that the founder created and when the carer creates new pet records.
- that the founder created and on records that the carer previously created.
- only when the carer creates new pet records.

When the carer uses the switch process dialog, they will see
- both the corgi meet-up and onboard new pet business process flows.
- the corgi meet-up flow.

Suggested Answer:

The carer can now see business process flows on pet records
- that the founder created and when the carer creates new pet records.
- that the founder created and on records that the carer previously created.
- only when the carer creates new pet records.

When the carer uses the switch process dialog, they will see
- both the corgi meet-up and onboard new pet business process flows.
- the corgi meet-up flow.

bbbfd8d 2 months, 3 weeks ago

Correct answer should be:

1. That the founder created and on record that the carer previously created
2. The corgi meet-up flow

upvoted 3 times

Question #4 *Topic 4*

Case study -
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Background information -
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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.
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You are a Dynamics 365 Customer Experience consultant who has been hired to assist Terra Flora with their customizations, resolve issues, and advise on best designs to meet their requirements.

Configurations -

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

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

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

Marketing -

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 Pet table 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 -

Duplicate records -
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 date 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.
You need to configure the required audit settings.
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 auditing on the Dietary requirements column.

B. Enable auditing on the Pet table.

C. Enable auditing on the Contact table.

D. Enable auditing on the Email address column.

E. Enable Start read auditing in system settings.

F. Enable Audit user access in system settings.

Suggested Answer: *AB*

Community vote distribution
AB (71%) AD (29%)

Elreal Highly Voted 2 months, 2 weeks ago
Selected Answer: AB
"Auditing has been enabled for common entities."
-> means that on Contact entity they have already auditing (see https://learn.microsoft.com/en-us/power-platform/admin/manage-dataverse-auditing?tabs=new where it is described that Contact table is a common entity for auditing)

With this, auditing on Pet entity (pet's dietary requirements) must be set up.
To do this (described on https://learn.microsoft.com/en-us/power-platform/admin/manage-dataverse-auditing?tabs=new) the following must be done:
1. on the Pet table properties select the "Audit changes to its data" checkbox
2. under the Pet table schema select columns and then in the Advanced options for the column select the "Enable auditing" checkbox.
upvoted 5 times

Acrious Most Recent 2 months, 2 weeks ago
Selected Answer: AD
Correct answer is A and D as we need to specify the specific columns
upvoted 2 times

Question #5 *Topic 4*

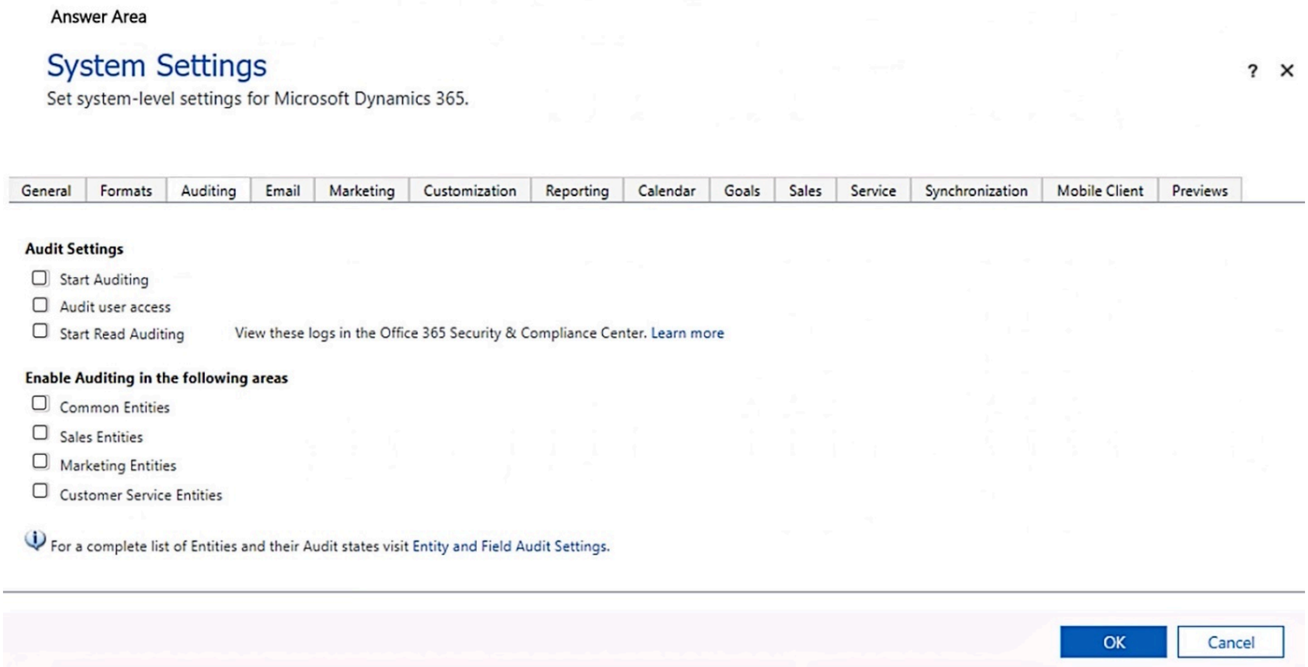
HOTSPOT -

Your organization has been noticing some peculiar field changes on certain records and wants to know what is causing this.

You need to audit user access and updates for several custom tables.

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

NOTE: Each correct selection is worth one point.



Suggested Answer:

Elreal 2 months, 3 weeks ago

Given Answer is correct, see https://learn.microsoft.com/en-us/previous-versions/dynamicscrm-2016/admins-customizers-dynamics-365/mt826646(v=crm.8)

upvoted 3 times

Question #6 *Topic 4*

You need to ensure that a user named User1 can assign salespeople to sales territories. The solution must use the principle of least privilege.
To which security role should you assign User1?

A. System customizer

B. Sales team member

C. Vice president of sales

D. Salesperson

Suggested Answer: *C*

Community vote distribution

C (89%) 11%

bbbfd8d 2 months, 3 weeks ago

Selected Answer: C

The correct answer is: C. Vice president of sales

According to Microsoft Learn documentation, assigning salespeople to sales territories requires elevated privileges typically associated with managerial roles. The "Vice president of sales" security role includes the necessary permissions to manage sales territories, including assigning users to them

upvoted 2 times

67eaf51 2 months, 3 weeks ago

Selected Answer: D

None of the roles listed have the requested privileges (to append users to territory) out of the box, so least privileges has the salesperson role

upvoted 1 times

Elreal 2 months, 3 weeks ago

Selected Answer: C

C is correct answer.

The Security role "Vice President of Sales" has under Miscellaneous privileges the "Assign Territory to User" privilege with a Privilege level of "Parent: Child Business Unit" which allows this security role to assign salespersons to territories.

upvoted 3 times

7cca54f 3 months, 1 week ago

Selected Answer: C

sales person no

upvoted 3 times