**Exam** : **MB-280**

**Title** : Microsoft Dynamics 365 Customer Experience Analyst

**Version** : DEMO

1. Topic 1, Terra Flora

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

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

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

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

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

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

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

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

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

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

**Pet table icon**
A custom image svg file has been created for the Portable.
Terra Flora wants to ensure this image is displayed alongside the pet page within the app.

**Related Pet table activities**
Terra Flora wants carers to be able to see their pets' activity history, as well as add new activities related to their pets.
They want the following information to appear on their pets' timeline:
• Tasks carers completed or should do,
• E-mails exchanged with pet's owner (customer).
• A record of phone calls.
Other types of activities should NOT appear to users on the Pets forms.
The founder edited the Pet table advanced setting to enable associating Pet records with activities.
The founder also added Pet table to the app sitemap that i being used.

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

Post configuration is NOT enabled for the Pet table.

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

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

The breed of an owner's pet may be mentioned in many places within the system, including:
1. Emails (subject or body)
2. Notes (including Word documents exports of PDFs uploaded as attachments)
3. Single or multiple lines of text columns on any standard table (including lead, contact and opportunity at minimum)
4. On the Pet table in either the Description or in the Breed columns.
Additionally, the breed may be referenced in several ways including singular, multiple, shorthand (for example: corgi, corgis, or corgs), and may have been misspelled.

**Corgi meet-up gala**
The carer needs to be assigned ownership of several Contact records (representing customers that own Corgis) that live nearby so that event flyers can be delivered personally. When the carer is delivering flyers, they need to quickly check the owner and related pet information on their phone.

When the Contact records are assigned to carer, any pets that are related to these contacts via the primary owner relationship should also be assigned to the carer.

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

**Issues**

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

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

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

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

**Auditing**

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

1. The user who made the change.
2. The current and previous values of the columns.
3. The time and dale of the changes.

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

**Relationship behavior**

Recently, a pet owner informed Terra Flora that their pet cat has been rehomed.
After receiving this information, the carer deleted the owner's Contact record from the system, which in turn deleted the Pet record.

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

In such situations. Terra Flora now requires that the owner's Contact record should NOT be allowed to be deleted if any Pet records are related to it via the primary owner look-up column.
Users should be required to update the look-up column to new owner's Contact record or remove the current value first before they can delete the Pet record. If the new owner's Contact record is selected on a pet any active bookings against the pet should also be updated to the new owner, but previous inactive bookings should NOT be updated.

**Business process flows and the Corgi meet-up gala**
The founder has recently made an update to the Onboard new pet business flow but now CANNOT activate it. For the Corgi gala, the founder has asked the carer for help in:
1. completing the registrations that the founder started, and
2. registering more Corgis for the upcoming gala.

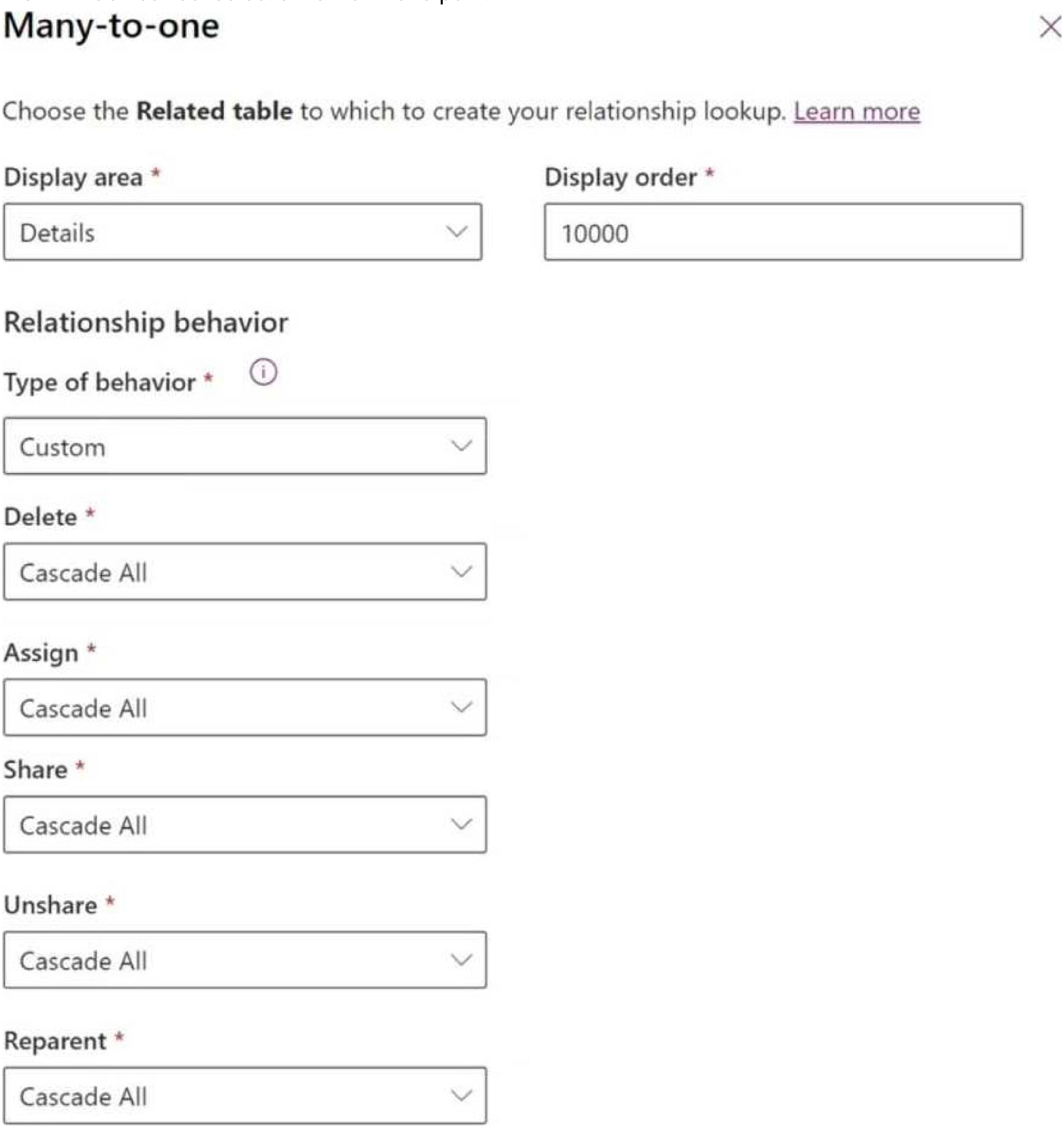
When the carer creates new pet records, the carer is UNABLE to see the Corgi meet-up business process flow.
Currently, when the carer checks the owner's record on their phone, the related pet information is difficult to view as they must scroll down to review the information.

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. NOTE: Each correct selection is worth one point. (Choose two.)
A. Create a new column on the Pet table and use a cloud flow to write the active stage from the Onboard new pet table to the new column
B. Create a new column on the Onboard new pet table and use a cloud flow to write the active stage from the Pet table to the new column.
C. Using the Active Pets view, edit the columns to add the new columns, save the edited view as a new view, and then share the view with the owner.
D. Using the My Pets view, edit the columns to add the new columns, save the edited view as a new view, and then share the view with the owner.
**Answer:** AC
**Explanation:**
To display the active stage of the business process flow (BPF) in the Pet table view, the active stage must be stored in a column within the Pet table. Since the Onboard new pet BPF is linked to the Pet table, a cloud flow can be used to fetch the active stage from the BPF and write it into a newly created column on the Pet table.
Once the data is available in the Pet table, the next step is to modify an existing view. Since the Active Pets view is already being used in the system, modifying this view by adding the newly created column ensures that the relevant data is visible. Saving the edited view as a new one and sharing it with the founder completes the requirement.

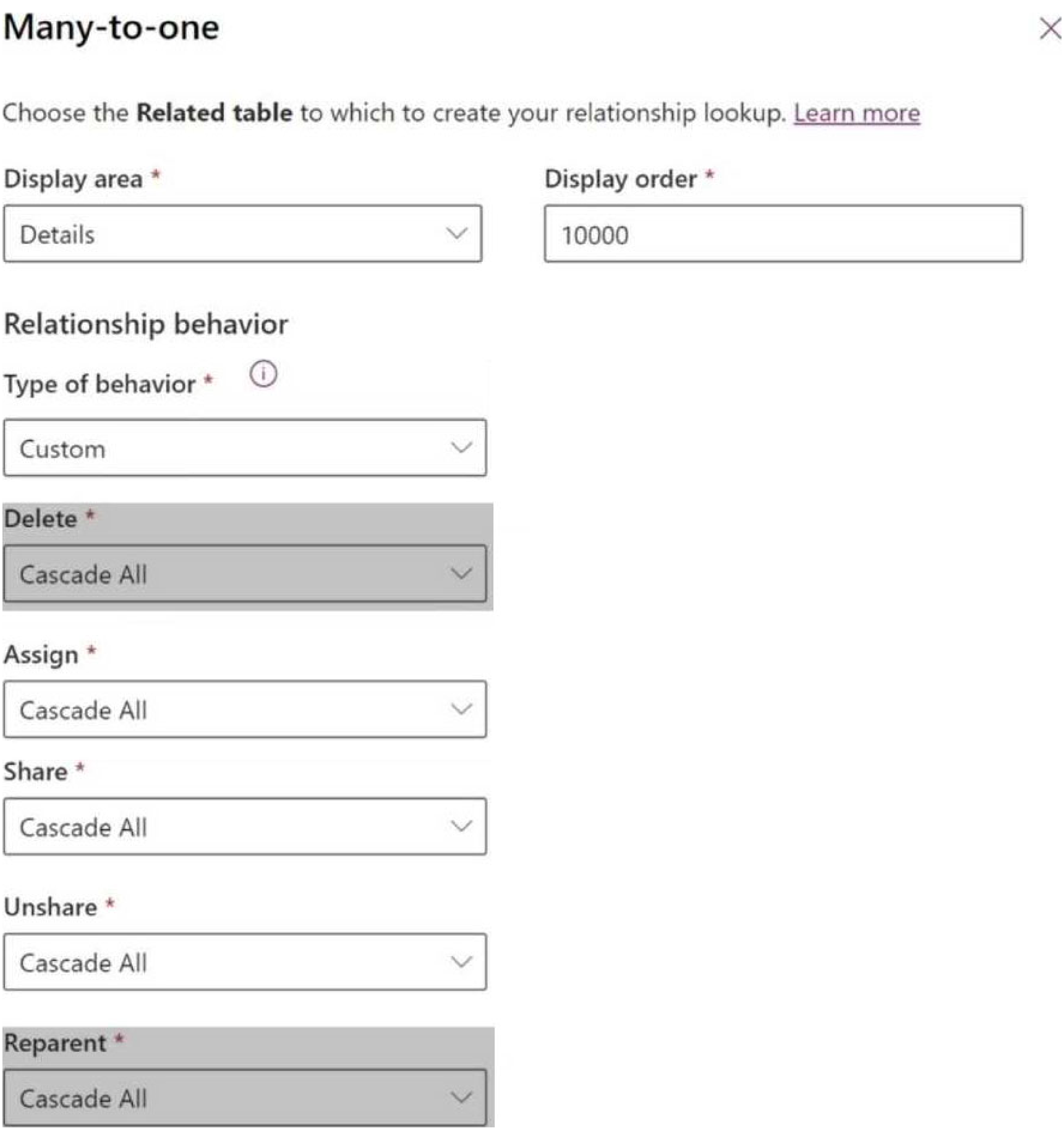
2.You need to satisfy the founder's requirements for displaying the custom image within the app.
Where should you upload the image?
A. An image column
B. A file column
C. An icon control
D. A web resource
**Answer:** D
**Explanation:**
To display a custom image (such as an .svg file) as an icon for a table in a model-driven app, the image should be uploaded as a web resource in Dynamics 365. Web resources are used to store images,

scripts, and other assets that can be referenced within the application.
Once uploaded as a web resource, the image can be set as the table icon in the customization settings of the Pet table.

3.HOTSPOT
You are updating the current relationship behavior of the primary owner (Contact) to pet relationship.
You need to ensure the case study requirements are met.
Which two options must be changed? To answer, select the appropriate options in the answer area.
NOTE: Each correct selection is worth one point.




**Answer:**



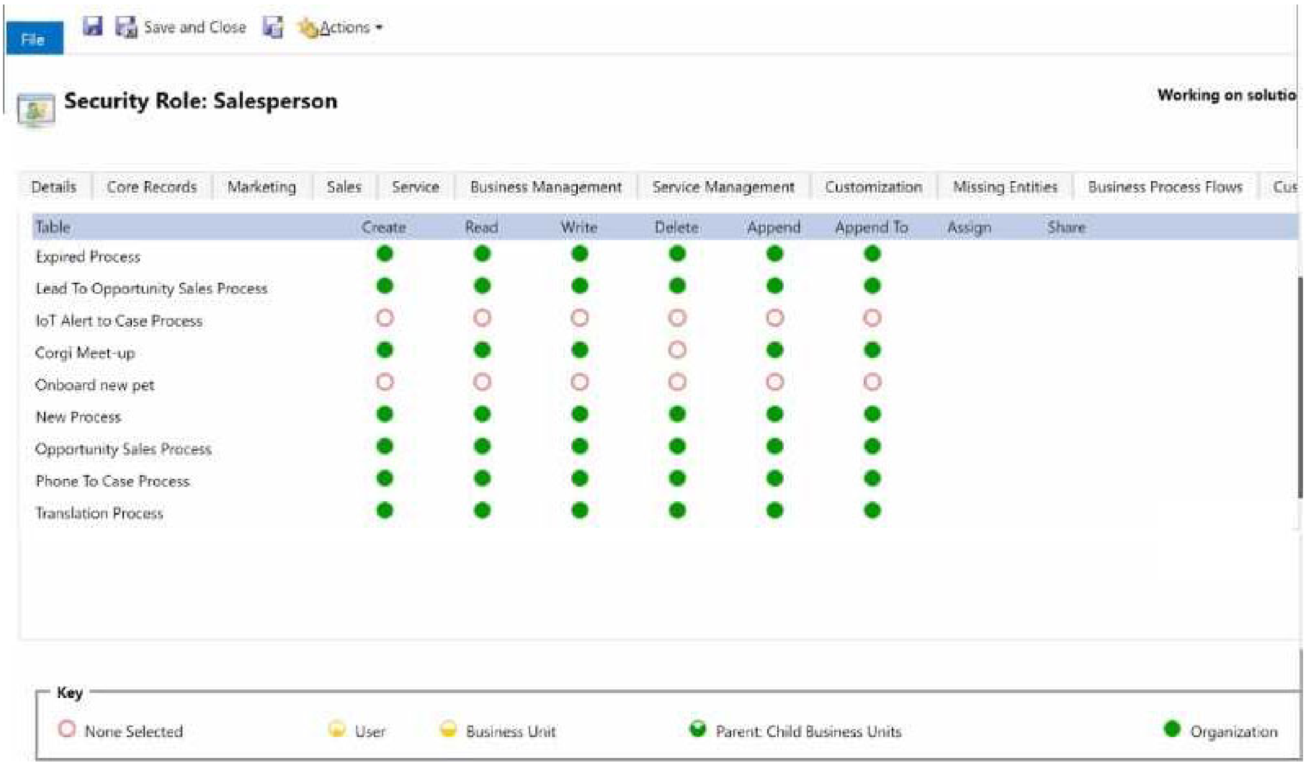

**Explanation:**

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

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

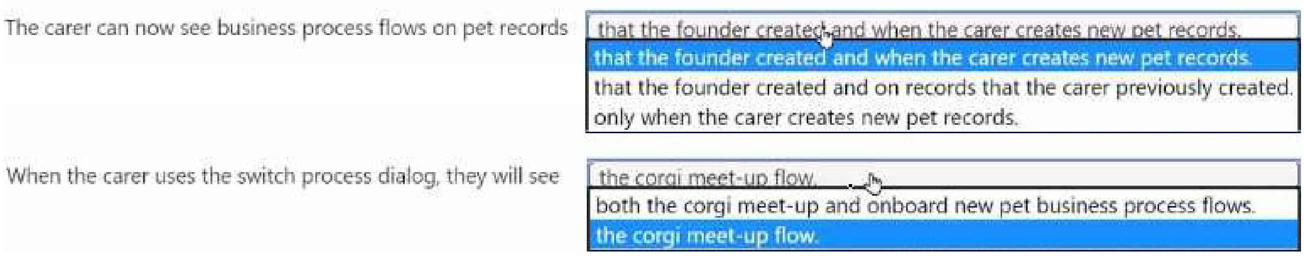
4.HOTSPOT

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



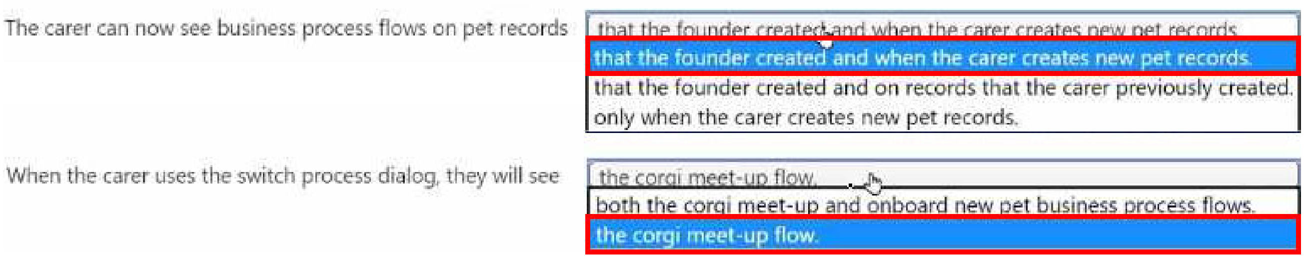

Use the drop-down menus to select the answer choice that completes each statement based on the information presented in the exhibit. NOTE: Each correct selection is worth one point.

Answer Area




**Answer:**

Answer Area




**Explanation:**

The configurations in the Salesperson security role will determine the access and visibility the carer has to the "Corgi meet-up" business process flow. The carer should be able to view and interact with specific business process flows on the Pet records based on the permissions configured by the founder.

Business Process Flow Access Configuration:

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

The green circle indicates permissions at the Organization level, meaning the carer can access all

records associated with the "Corgi meet-up" business process flow across the entire organization.
Visibility of Business Process Flows on Pet Records:
Since the carer has these permissions at the Organization level, they will be able to see all business process flows related to pet records that have been set up by the founder.
In this case, the answer provided in the image indicates that the carer will be able to see business process flows that were created by both the founder and new flows initiated by the carer themselves on the Pet records.
Switch Process Dialog Visibility:
The switch process dialog will allow the carer to select from multiple business process flows that are applicable to a given record.
According to the selection options provided, if both the "Corgi meet-up" and the "Onboard new pet" flows are available, and they are configured to be accessible by the Salesperson role, the carer should be able to see both flows when using the switch process dialog. This aligns with the provided answer choices, which indicate that both flows are visible when switching. Reference from Microsoft Documentation:
Microsoft's official documentation on configuring Security Roles in Dynamics 365 provides detailed guidance on setting permissions for different entities and processes. More information can be found in the Dynamics 365 security model documentation: Manage security, users, and teams
For Business Process Flow configurations, including permissions and visibility settings, refer to the guide on Create a business process flow in Dynamics 365.
This setup ensures that the carer has the appropriate level of access to perform their duties, specifically in handling pet records and business processes like the "Corgi meet-up."
If you have further questions or need more details on this configuration, feel free to ask!

5.You need to configure search to ensure the administrators can find all records which reference Corgis.
Which action must you perform?
A. Within system settings, select up to 10 relevant tables.
B. Within the solution, ensure all relevant tables are indexed.
C. For all relevant tables, ensure that the Can enable sync to external search index setting is False.
D. Add columns to be searched to the Lookup view for each relevant table.
**Answer:** B
**Explanation:**
To enable comprehensive search capabilities for administrators to find all records referencing specific terms (such as "Corgis"), it is essential to ensure that all relevant tables are indexed.
In Dynamics 365, configuring search functionality for specific tables involves setting up the tables to be searchable, which can be done by indexing them within the solution.
Indexing relevant tables makes them accessible in the search feature and ensures all fields within those tables can be searched, allowing for quick retrieval of records that reference specific terms. System settings (Option A) is limited to selecting up to 10 tables and is more about quick search rather than full indexing. The sync to external search index setting (Option C) is for integration with external search tools and does not directly impact internal search capabilities.
Adding columns to the Lookup view (Option D) affects how lookups work but does not influence full-text search results.
Reference from Microsoft Documentation:
For configuring search indexing, refer to Configure relevance search in Dynamics 365 for more

information on indexing tables to enhance search capabilities.