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Question 1

Question Type: MultipleChoice

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.

Options:

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:

A, C

Explanation:

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

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

Question 2

Question Type: MultipleChoice

You manage a Dynamics 365 Sales environment where users can only view and edit their own records.

User2 is assisting with User1's opportunities while User1 is on vacation. User1 remains the owner of User1's opportunities.

User2 has reported that they CANNOT update User1's opportunities.

You need to diagnose the issue.

What should you do?

Options:

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

Answer:

A

Explanation:

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

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

When to use access teams

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

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

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

https://learn.microsoft.com/en-us/dynamics365/sales/stakeholders-sales-team-members

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

Question 3

Question Type: MultipleChoice

A company uses Microsoft SharePoint document management in Dynamics 365 Sales to store contracts.

The company wants only the contracts team to have access to the documents. The contracts team has a custom security role.

You need to restrict privileges to secure the documents.

What should you do?

Options:

A- Create a new security role in Dynamics 365 Sales.
B- Update the users list in the SharePoint site.
C- Update privileges in the Dynamics 365 Sales security role of the contract team.
D- Create a new group in the SharePoint site.

Answer:

B

Explanation:

Since the company uses Microsoft SharePoint for document storage, access to documents is controlled through SharePoint permissions rather than Dynamics 365 security roles.

To restrict document access to only the contracts team, you should update the users list in the SharePoint site where the documents are stored. This involves configuring SharePoint permissions to ensure that only the contracts team (or a specific SharePoint group associated with them) has access to the document library where contracts are stored.

Question 4

Question Type: MultipleChoice

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

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

Options:

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

Answer:

B, C, E

Explanation:

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

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

String can also be used as a primary key if it uniquely identifies each record (e.g., an email address).

Integer and Boolean are generally not used as primary keys in Customer Insights because they may not provide unique identifiers suitable for all scenarios.

Question 5

Question Type: MultipleChoice

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

Options:

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

Answer:

B, C

Explanation:

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

Assign the Sales Copilot User Role:

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

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

Microsoft Documentation Reference: Dynamics 365 Sales Copilot Setup

Grant View Audit History Permissions:

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

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

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

Microsoft Documentation Reference: Security Roles and Privileges

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