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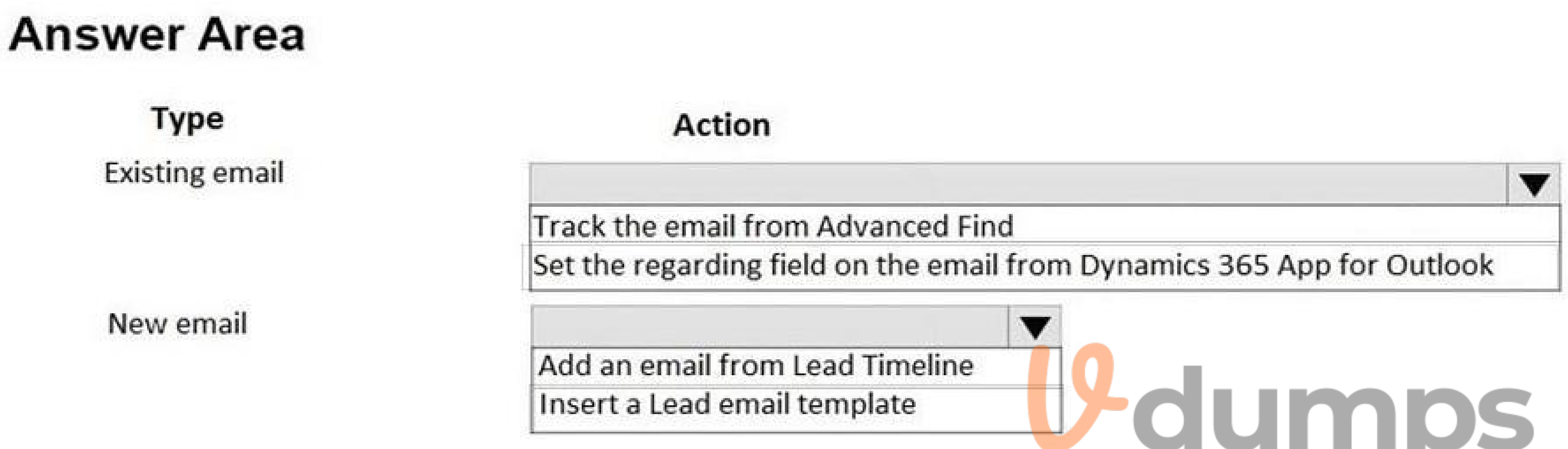
Time Limit: 120
File Version: 22.0

Exam Code: MB-210
Exam Name: Microsoft Dynamics 365 for Sales

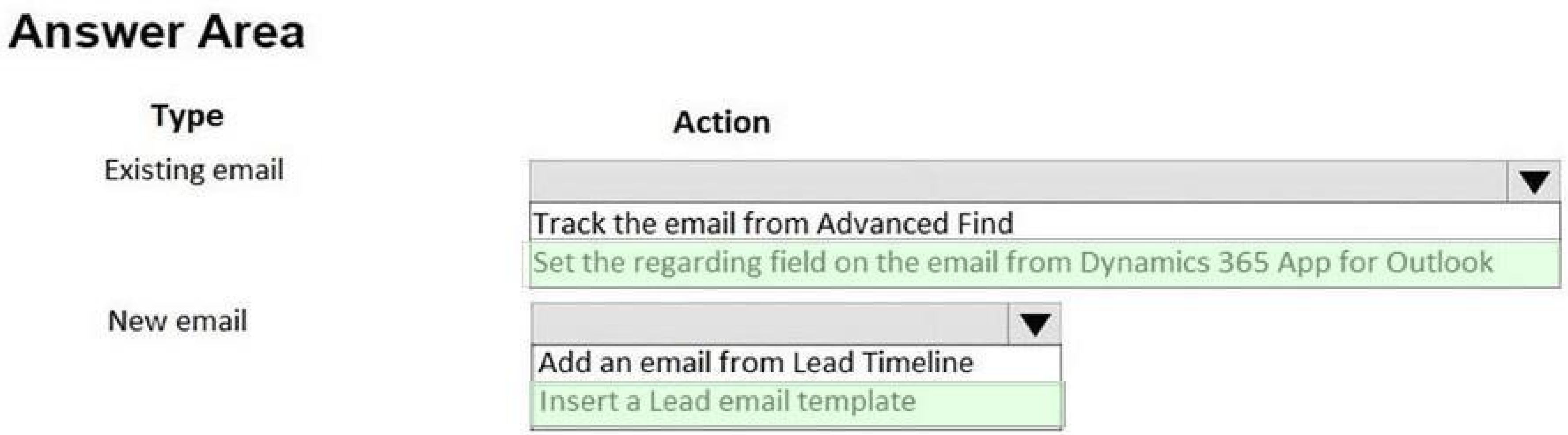
01 - Manage Core Sales Identities

QUESTION 1
HOTSPOT
You implement the Dynamics 365 App for Outlook.
You need to associate emails to lead records.
What should you do? To answer, select the appropriate options in the answer area.
NOTE: Each correct selection is worth one point.

Hot Area:



Answer Area:

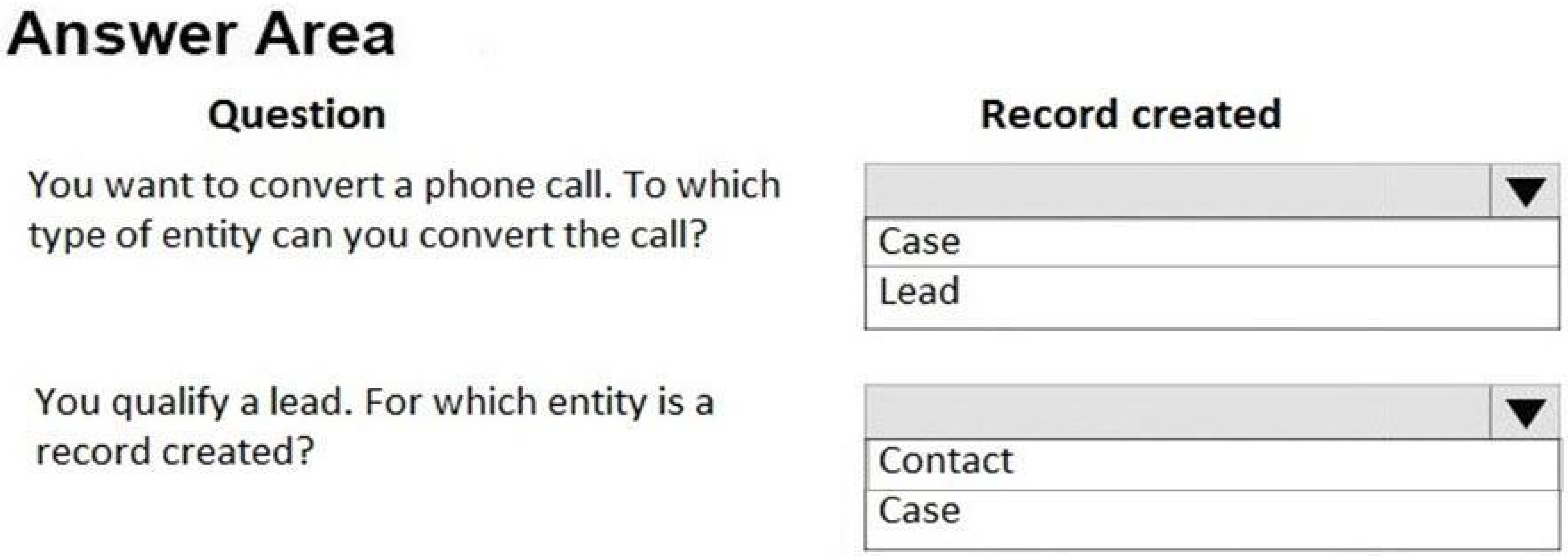


Section:
Explanation:

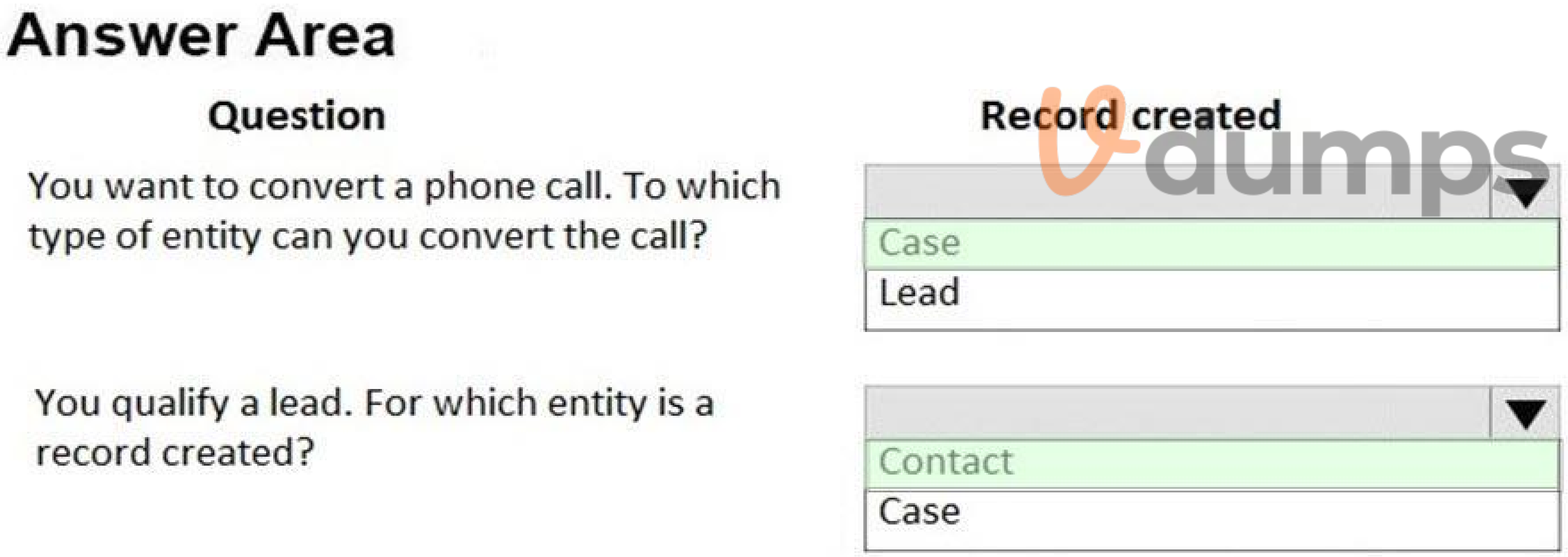
QUESTION 2
HOTSPOT
You are a salesperson using Dynamics 365. You receive customer phone calls and manage leads.
You need to qualify leads and send phone calls to sales representatives.
How should you manage each of the following situations? To answer, select the appropriate options in the answer area.

NOTE: Each correct selection is worth one point.

Hot Area:



Answer Area:

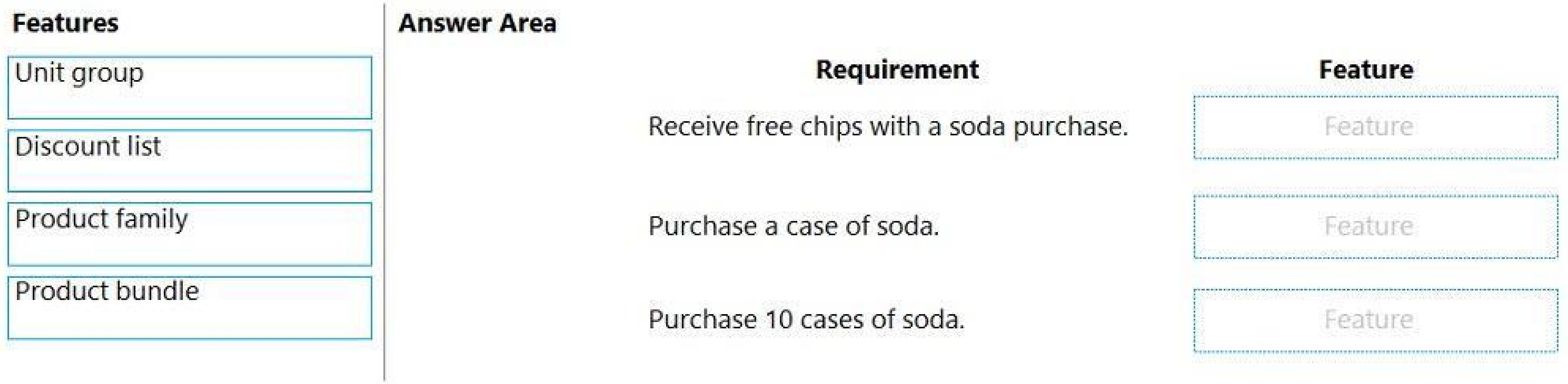


Section:
Explanation:

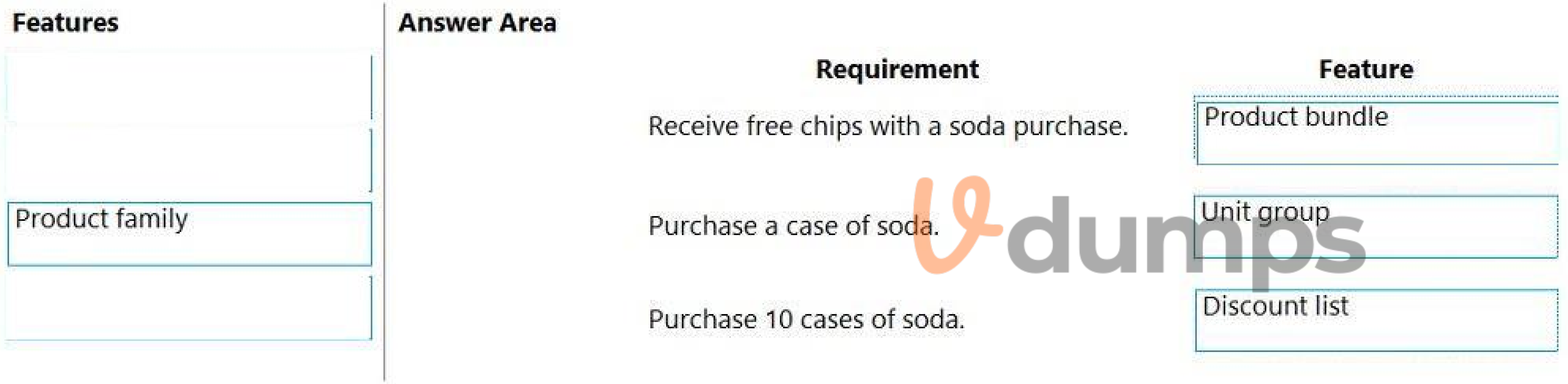
QUESTION 3
DRAG DROP
You are setting up a product catalog in Dynamics 365 Sales.
You must set up the following promotions in the product catalog:
Customers receive a free bag of chips when they purchase one can of soda.
Soda has different prices based on whether customers buy a can, a six-pack, or a case.
Customers receive an additional 10 percent off a purchase of 10 case of soda.
You need to set up the promotions.
Which feature should you configure? To answer, drag the appropriate features to the correct requirements. Each feature may be used once, more than once, or not at all. You may need to drag the split bar between panes or scroll to view content.

NOTE: Each correct selection is worth one point.

Select and Place:



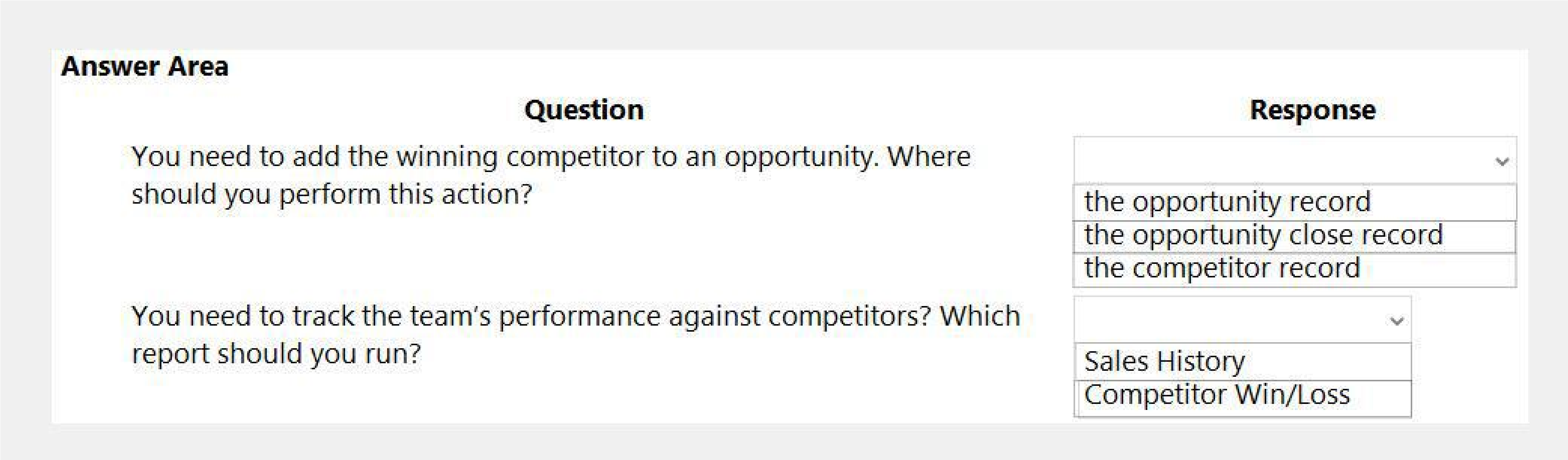
Correct Answer:



Section:
Explanation:
Reference:
https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/set-up-product-catalog-walkthrough

QUESTION 4
HOTSPOT
You are a Dynamics 365 Sales administrator. The sales team has questions about competitor tracking.
You need to provide answers to the questions from the sales team.
How should you respond? To answer, select the appropriate options in the answer area.
NOTE: Each correct selection is worth one point.

Hot Area:

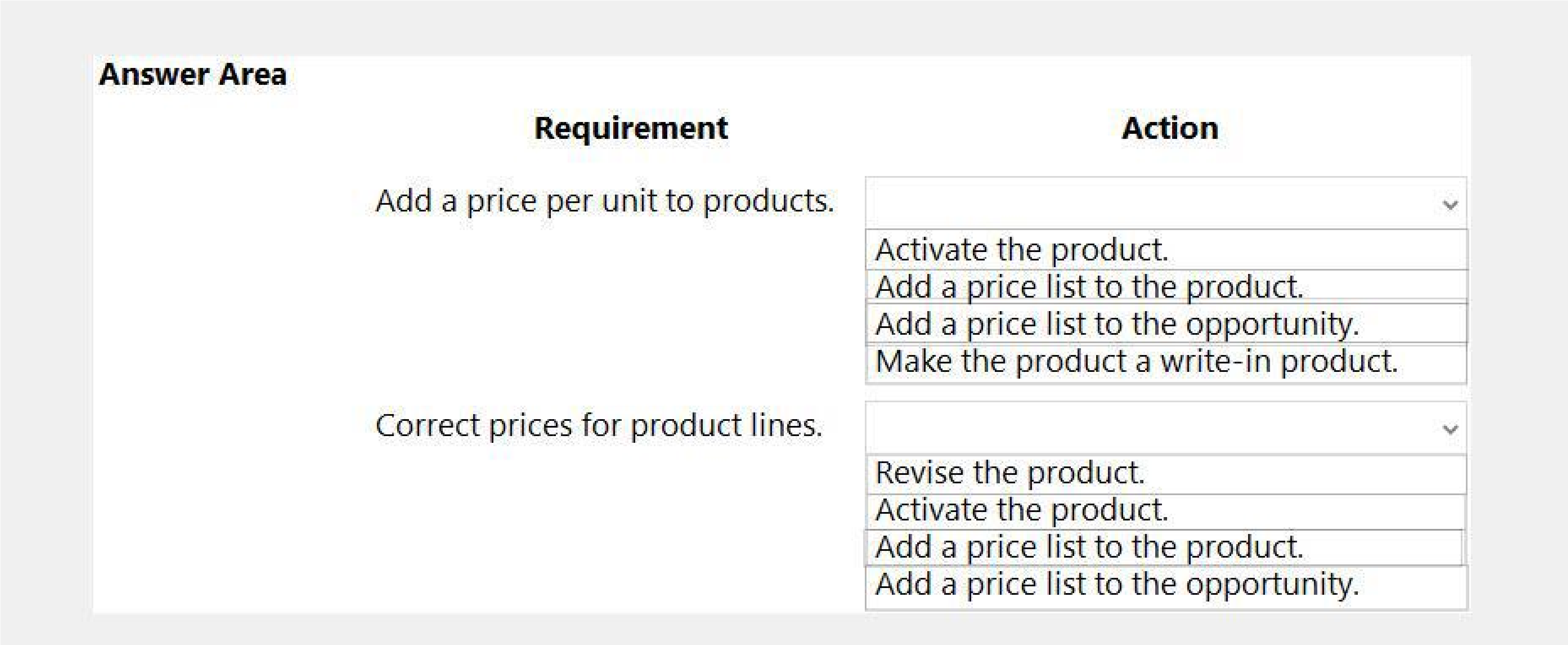


Answer Area:

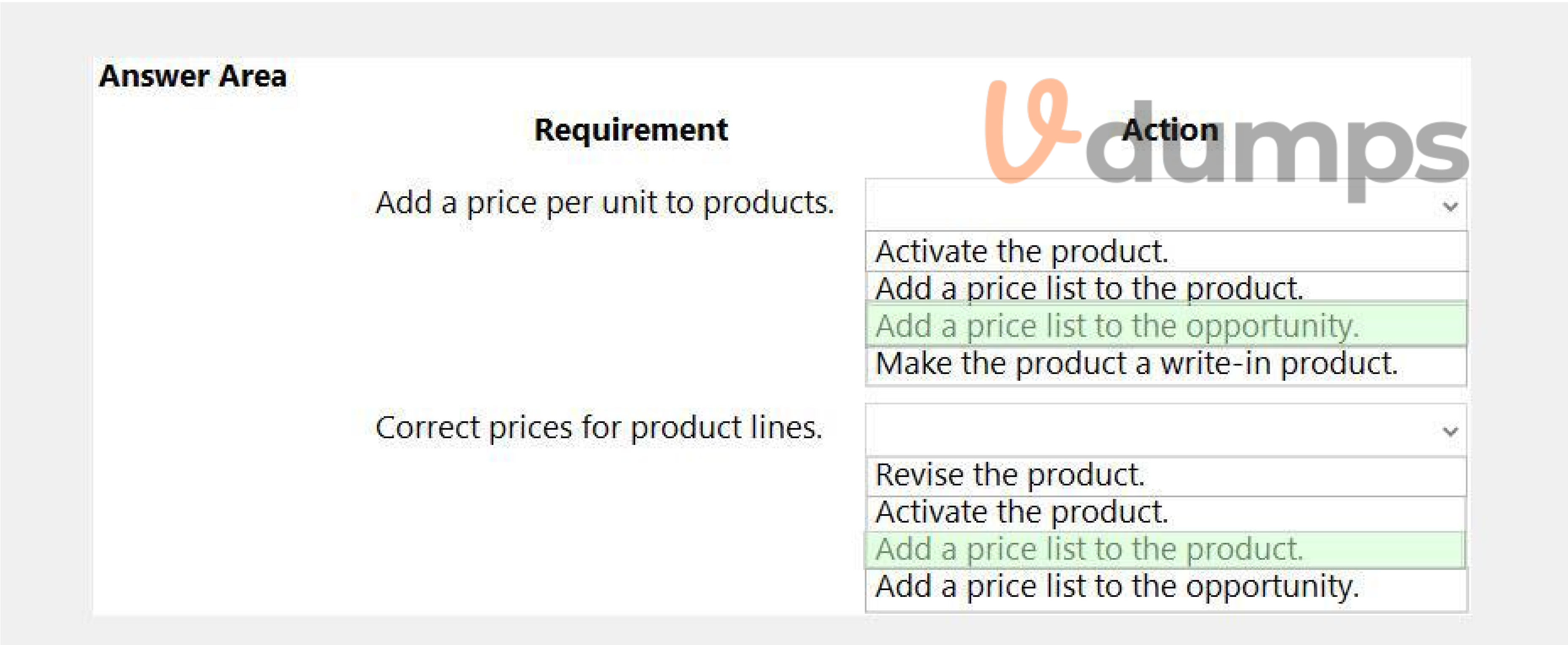
Section:
Explanation:
Reference:
https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/close-opportunity-won-lost-sales

QUESTION 5
HOTSPOT
A salesperson must complete an opportunity by verifying the existing products and adding a new product from the product list. The product list has standard pricing. The salesperson observes the following issues with the products:
The price per unit for each item in the product list is $0.00.
Some of the existing product lines use a default price and have an incorrect price per unit.
You need to complete the opportunity.
What should you do? To answer, select the appropriate options in the answer area.
NOTE: Each correct selection is worth one point.

Hot Area:



Answer Area:



Section:
Explanation:
Reference:
https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/create-price-lists-price-list-items-define-pricing-products

QUESTION 6
A company uses Dynamics 365 Sales. The default currency for the company is US dollars (USD). The company does business in the United States, Mexico, and the United Kingdom. The company sells 10 types of products.
Each product requires its own pricing structure.
You need to create price lists by using the local currency across countries and regions.

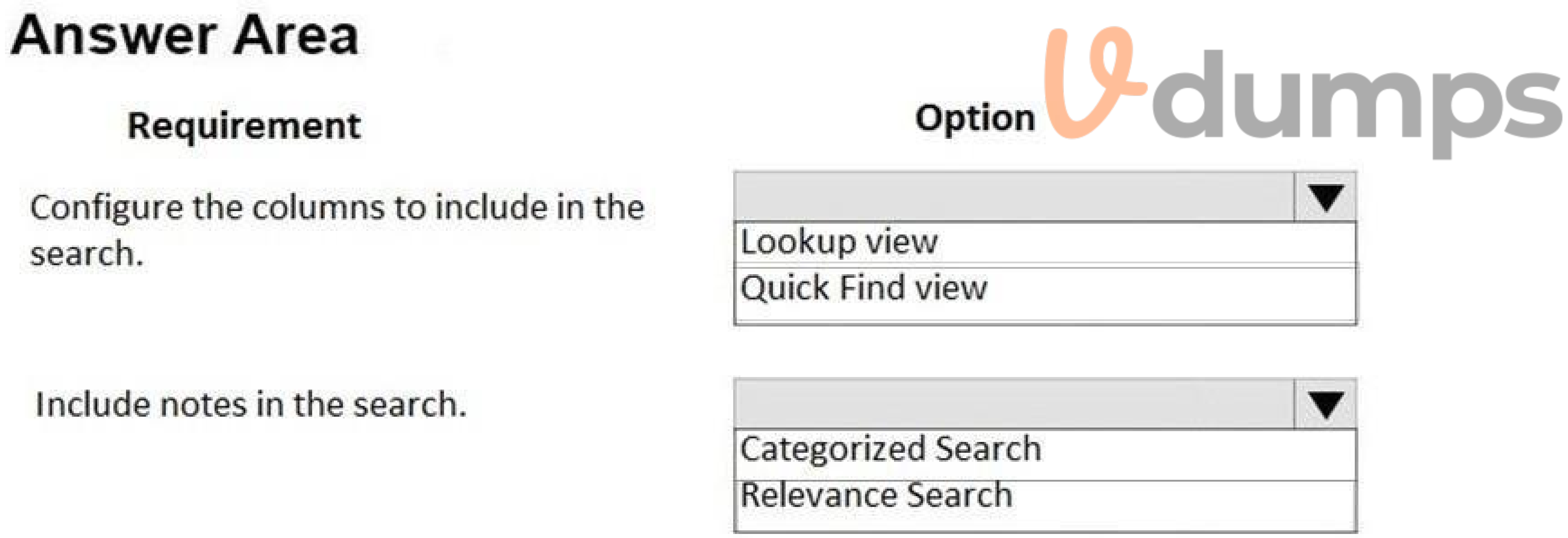
How many price lists should you create?

A. 1
B. 3
C. 10
D. 30

Correct Answer: C
Section:
Explanation:
Reference:
https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/create-price-lists-price-list-items-define-pricing-products

QUESTION 7
HOTSPOT
You use Dynamics 365 for Sales. Users search for leads by using email addresses, phone numbers, and comments made in notes. Users report that the results they obtain when using Global Search are not useful.
You need to configure Dynamics 365 to enable the users to locate leads.
What should you implement? To answer, select the appropriate options in the answer area.
NOTE: Each correct selection is worth one point.

Hot Area:



Answer Area:

Answer Area

Requirement	Option
Configure the columns to include in the search.	Lookup view Quick Find view
Include notes in the search.	Categorized Search Relevance Search

Section:
Explanation:
References: https://docs.microsoft.com/en-us/dynamics365/customer-engagement/basics/relevance-search-results

QUESTION 8
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.

Hot Area:

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.

Answer Area:

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.

Section:
Explanation:

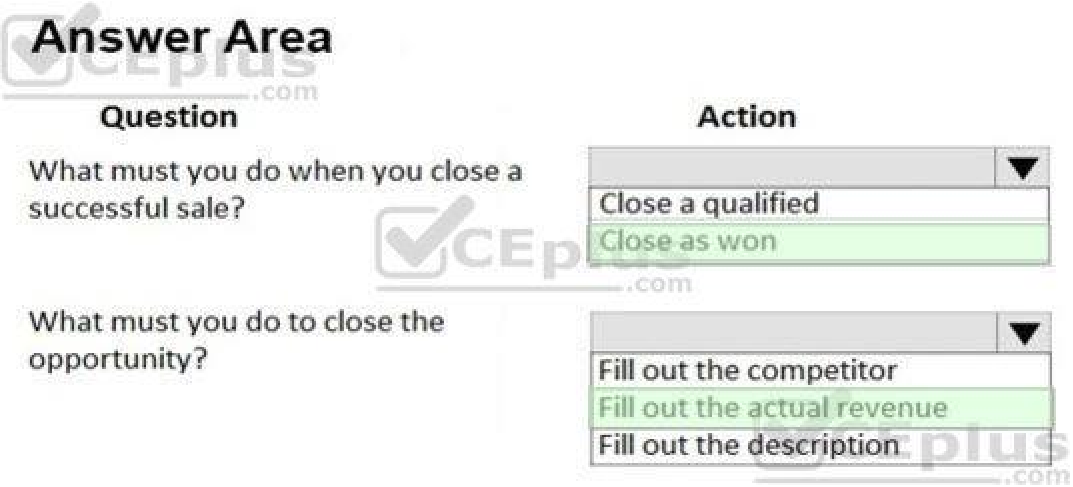
QUESTION 9
HOTSPOT
You are a salesperson working with Dynamics 365. Your role includes working with opportunities.
You need to close opportunities.
Which actions should you perform? To answer, select the appropriate options in the answer area.
NOTE: Each correct selection is worth one point.

Hot Area:

Answer Area

Question	Action
What must you do when you close a successful sale?	Close a qualified Close as won
What must you do to close the opportunity?	Fill out the competitor Fill out the actual revenue Fill out the description

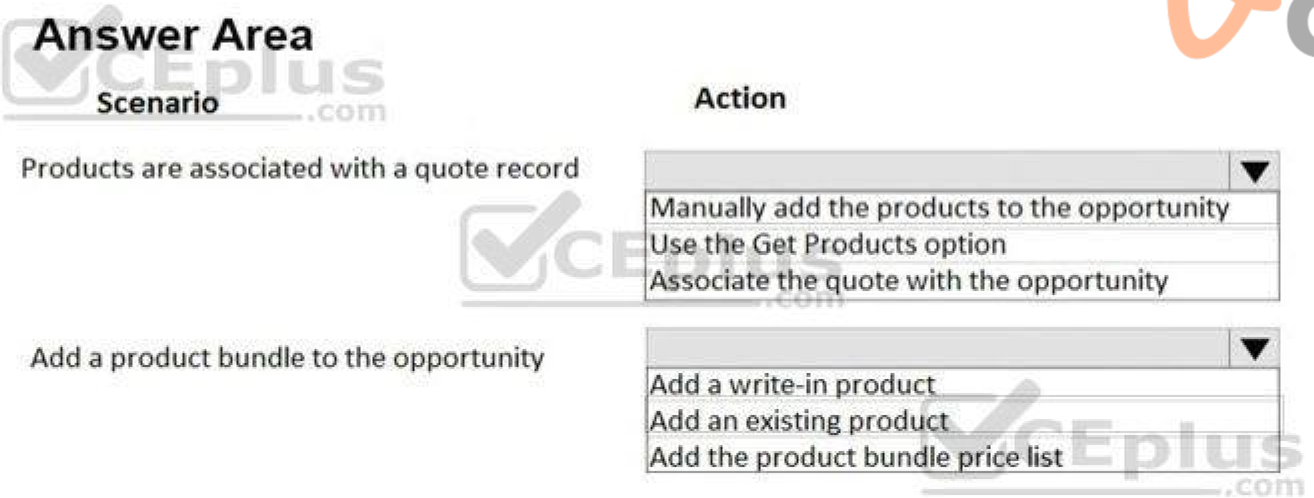
Answer Area:



Section:
Explanation:

QUESTION 10
HOTSPOT
You use Dynamics 365 for Sales.
You need to add products to an opportunity.
Which actions should you perform? To answer, select the appropriate options in the answer area.
NOTE: Each correct selection is worth one point.

Hot Area:



Answer Area:

Section:
Explanation:

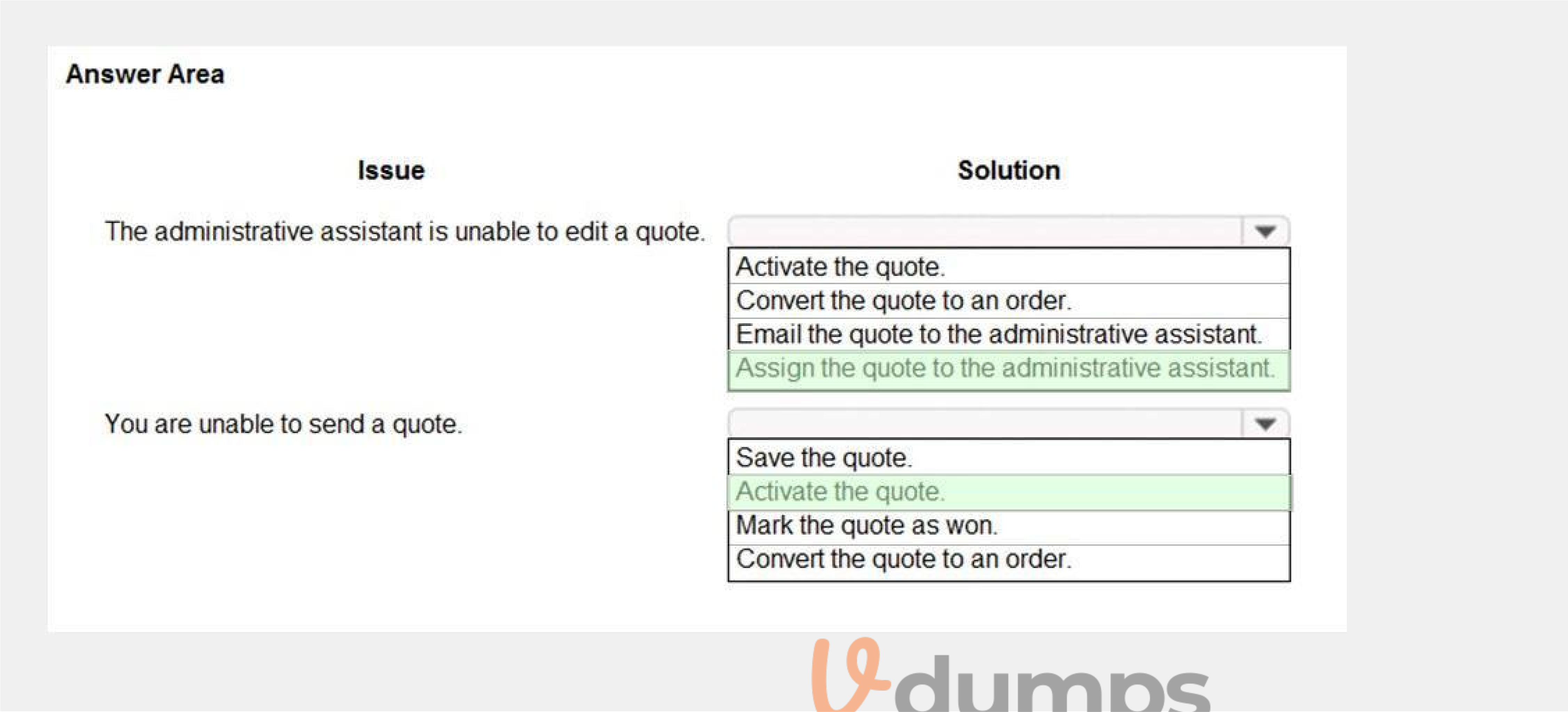
QUESTION 11
HOTSPOT
You experience the following issues when you work with quotes in Dynamics 365 Sales:
An administrative assistant is unable to access the function to edit a quote in the system.
The Send to customer option is unavailable after you enter a quote.
You need to resolve the issues.
What should you do? To answer, select the appropriate options in the answer area.
NOTE: Each correct selection is worth one point.

Hot Area:

Answer Area

Issue	Solution
The administrative assistant is unable to edit a quote.	Activate the quote. Convert the quote to an order. Email the quote to the administrative assistant. Assign the quote to the administrative assistant.
You are unable to send a quote.	Save the quote. Activate the quote. Mark the quote as won. Convert the quote to an order.

Answer Area:



Section:
Explanation:
Reference:
https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/create-edit-quote-sales

QUESTION 12
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 get an extra 10 percent off the price.
You need to set up the product catalog.
Which components should you use? To answer, drag the appropriate components to the correct entry descriptions. Each component may be used once, more than once, or not at all. You may need to drag the split bar between panes or scroll to view content.
NOTE: Each correct selection is worth one point.

Select and Place:

Components

- Products
- Price Lists
- Discount Lists
- Unit Groups

Answer Area

Entry description	Component
Drink flavors list	Component
Four or more cases	Component
Combination of flavors	Component
One can	Component

Correct Answer:

Components

- Products
- Price Lists
- Discount Lists
- Unit Groups

Answer Area

Entry description	Component
Drink flavors list	Products
Four or more cases	Discount Lists
Combination of flavors	Products
One can	Unit Groups

Section:
Explanation:
Reference:
https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/set-up-discount-list
https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/create-product-bundles-sell-multiple-items-together

QUESTION 13
You manage a Dynamics 365 environment. A user named User1 begins work on an opportunity.
User1 asks a user named User2 to assist with the opportunity while she is on vacation.
You need to ensure that User2 can access the opportunity and that User1 retains ownership of the opportunity. What should you do?

A. Share the record with User2

B. Grant User2 the security role
C. Instruct User2 to follow the record
D. Add User2 to the Sales team

Correct Answer: A
Section:
Explanation:
Reference: https://docs.microsoft.com/en-us/dynamics365/customer-engagement/developer/security-dev/use-record-based-security-control-access-records#sharing-records

QUESTION 14
You manage a Dynamics 365 Sales environment.
You need to ensure that all possible activities are automatically converted to leads by using the record creation rule. Which three activities can you convert to leads? Each correct answer presents a complete solution.
NOTE: Each correct selection is worth one point.

A. Service activity
B. Email
C. Phone call
D. Task
E. Custom activity

Correct Answer: B, C, D
Section:

QUESTION 15
An order uses quote and order functionality in Dynamics 365 Sales. Multiple quotes may be provided to customers at one time. Quotes are revised often. Which two opportunities can you close as won? Each correct answer presents a complete solution.
NOTE: Each correct selection is worth one point.

A. an opportunity that has quotes in the draft status
B. an opportunity that has quotes in the won status
C. an opportunity that has quotes in the active status
D. an opportunity that has quotes in the revised status reason

Correct Answer: B, C
Section:

QUESTION 16
You use price lists in Dynamics 365 for Sales. Some price lists have expired.
Users need to be able to continue to manage their opportunities.
Which option is possible?

A. Users can add the expired price list to opportunities created prior to the expire date.
B. Users can add the expired price list to an opportunity but will see a warning.
C. Opportunities that use the expired price list can continue through their lifecycle.
D. Opportunities that use the expired price list will display a warning that prices must be replaced.

Correct Answer: D

Section:

QUESTION 17
An order uses quote and order functionality in Dynamics 365 for Sales. Multiple quotes may be provided to customers at one time. Quotes are revised often.
You need to create a process that meets the following requirements:
Create an order from a quote.
Close the associated opportunity as won.
Update the actual values to reflect values from the quote.
Which two opportunities can you close as won? Each correct answer presents a complete solution.
NOTE: Each correct selection is worth one point.

A. The opportunity has other quotes in the won status.
B. The opportunity has other quotes in the draft status.
C. The opportunity has other quotes in the active status.
D. The opportunity has other quotes in the revised status reason.

Correct Answer: A, B
Section:

QUESTION 18
A company uses Dynamics 365 for Sales.
You must track a competitor to help your company win a sale.
You need to associate the competitor with a Dynamics 365 entity.
To which type of entity can you associate the competitor?

A. Opportunity
B. Lead
C. Account
D. Contacts

Correct Answer: A
Section:
Explanation:
Reference: https://docs.microsoft.com/en-us/dynamics365/customer-engagement/sales-enterprise/create-edit-competitor-record-sales

QUESTION 19
You manage a Dynamics 365 environment. A user named User1 begins work on an opportunity.
User1 asks a user named User2 to assist with the opportunity while she is on vacation.
You need to ensure that User2 can access the opportunity and that User1 retains ownership of the opportunity. What should you do?

A. Share the record with User2
B. Grant User2 the stakeholder role
C. Grant User2 the security role
D. Instruct User2 to follow the record

Correct Answer: A
Section:
Explanation:

Reference: https://docs.microsoft.com/en-us/dynamics365/customer-engagement/developer/security-dev/use-record-based-security-control-access-records#sharing-records

QUESTION 20
You manage Dynamics 365 environments for client organizations.
A client suspects they are losing business. The client must be able to capture reasons each time an opportunity is lost. You need to configure Dynamics 365 to ensure that you can capture the required information.
Which field should you configure?

A. Opportunity status reason
B. Opportunity close status
C. Opportunity status
D. Opportunity close status reason

Correct Answer: A
Section:

QUESTION 21
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.

A. Create the unit Each with Box as the base unit.
B. Update the unit Box with Each as the base unit.
C. Set Each as the primary unit.
D. Make Each the base unit for all units.

Correct Answer: C
Section:
Explanation:
Reference: https://docs.microsoft.com/en-us/dynamics365/sales-professional/create-unit-group-add-units

QUESTION 22
A company is using Dynamics 365 Sales.
Several invoices have an incorrect shipping date.
You need to change the shipping date on all the invoices.
What should you do?

A. Select an order, edit, and then create an invoice for each incorrect order that corresponds to the invoice.
B. Select all invoices simultaneously and select Confirm Invoice to change them.
C. Select individual invoices, select Cancel Invoice for each incorrect order, and then recreate the invoices with the correct date.
D. Select individual invoices and edit. Repeat for all incorrect invoices.

Correct Answer: D
Section:

Explanation:
Reference: https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/create-edit-invoice-sales

QUESTION 23
A customer creates a custom events table. The Events table has an N:1 relationship with the Accounts table. The events team tracks activities against events.
The account manager wants to see all activities related to accounts in the timeline.
You need to allow event activities to appear in the account timeline.
What should you update?

A. Relationship type in the relationship definition
B. Timeline setting in System Settings
C. Timeline field on the account form
D. Relationship Rollup View in the relationship definition

Correct Answer: D
Section:
Explanation:
Reference:
https://docs.microsoft.com/en-us/dynamics365/customerengagement/on-premises/customize/define-rollup-fields?view=op-9-1
https://blog.magnetismsolutions.com/blog/satyvirjasra/2017/10/08/introduction-to-rollup-views-in-microsoft-dynamics-365

QUESTION 24
You are updating a price list item in Dynamics 365 Sales.
You need to manually enter the price of a product for a price list item.
Which pricing method should you use?

A. Percent of List
B. Percent Markup - Current Cost
C. Percent Margin - Standard Cost
D. Currency Amount

Correct Answer: D
Section:
Explanation:
Reference:
https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/create-price-lists-price-list-items-define-pricing-products

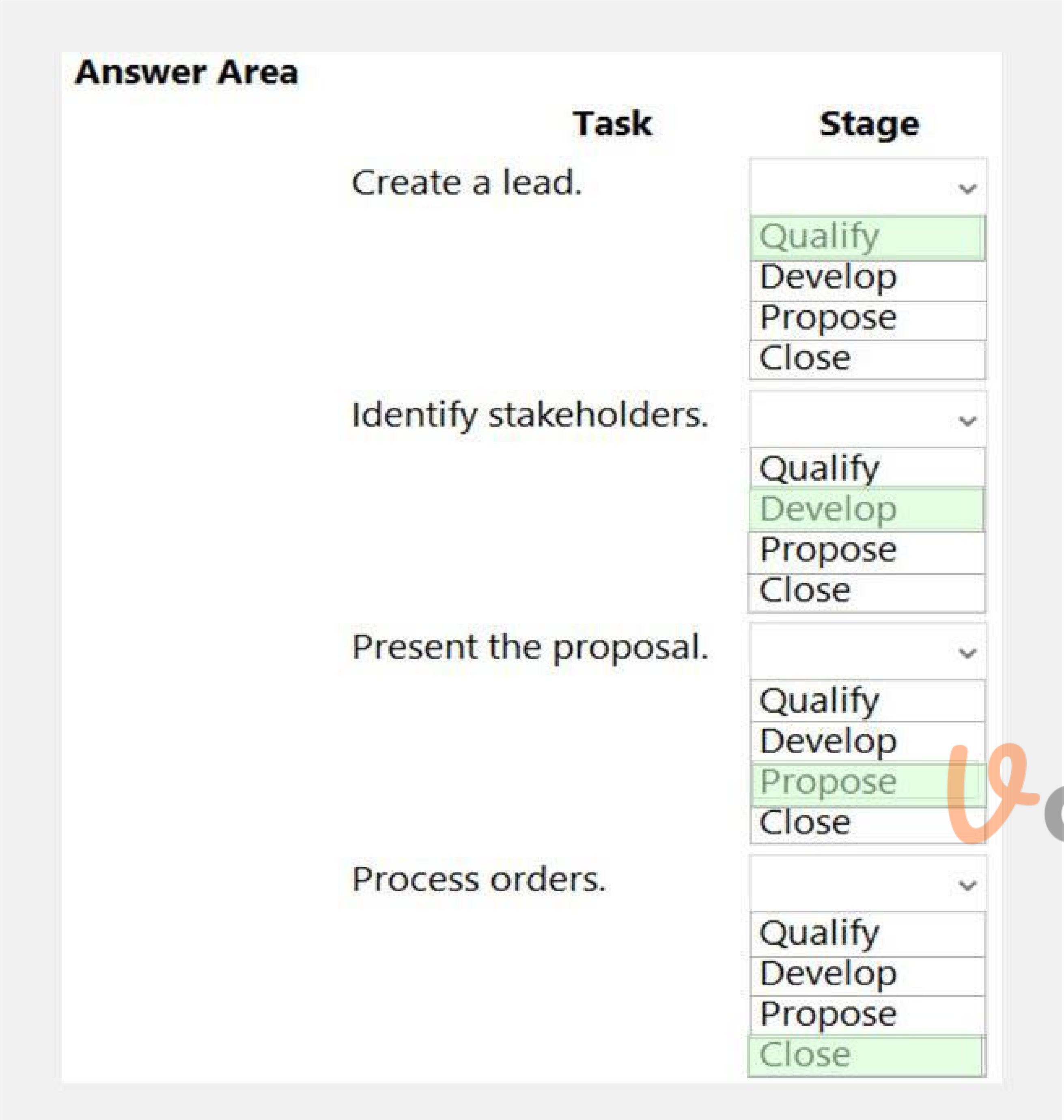
QUESTION 25
HOTSPOT
A company uses Dynamics 365 Sales to manage sales orders.
You need to demonstrate the process of going from a lead to an order.
Which stage applies to each task? To answer, select the appropriate options in the answer area.
NOTE: Each correct selection is worth one point.

Hot Area:

Answer Area

Task	Stage
Create a lead.	Qualify / Develop / Propose / Close
Identify stakeholders.	Qualify / Develop / Propose / Close
Present the proposal.	Qualify / Develop / Propose / Close
Process orders.	Qualify / Develop / Propose / Close

Answer Area:



Section:
Explanation:
Reference:
https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/nurture-sales-from-lead-order-sales

QUESTION 26
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.

Hot Area:

Answer Area

Requirement	Configuration
Allow the sales team to select the red phone.	Create a red phone 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.

Answer Area:

Answer Area

Requirement	Configuration
Allow the sales team to select the red phone.	Create a red phone 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.

Section:
Explanation:
Reference:
https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/create-price-lists-price-list-items-define-pricing-products

QUESTION 27
A company deploys reporting for Dynamics 365 Sales.
You need to set up the Power BI content pack.
Which Power BI product should you use to customize the content pack reports?

A. Power BI website
B. Power BI Desktop
C. Power BI Premium
D. Power BI Professional

Correct Answer: D
Section:
Explanation:
Reference:
https://docs.microsoft.com/en-us/power-bi/collaborate-share/service-organizational-content-pack-introduction

QUESTION 28
You are a salesperson working with Dynamics 365. Your role includes working with opportunities.
You successfully close a sale.
Which two actions should you perform? Each correct answer presents part of the solution.
NOTE: Each correct selection is worth one point.

A. Change Est. Revenue to Actual amount
B. Set the Status reason to Won.
C. Change Est. Close Date to Actual close date.
D. Change the Actual Revenue to Actual amount.

Correct Answer: A, D
Section:
Explanation:
Reference: https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/close-opportunity-won-lost-sales

QUESTION 29
You are a Dynamics 365 Sales administrator. You create a discount list.
The sales team needs to use the discount list for opportunities.
You need to ensure that the discount list is available and that products are discounted as expected. To what should you associate the discount list?

A. Product
B. Price list item
C. Price list
D. Product family

Correct Answer: B
Section:
Explanation:
Reference: https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/create-price-lists-price-list-items-define-pricing-products

QUESTION 30
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. related unit
B. unit of measure
C. primary unit
D. base unit

Correct Answer: C

Section:
Explanation:
Reference: https://docs.microsoft.com/en-us/dynamics365/sales-professional/create-unit-group-add-units

QUESTION 31
A company uses Dynamics 365 Sales.
You need to associate a competitor with each closed opportunity for reporting.
What should you do?

A. Select the Follow option for the competitor.
B. Add the competitor to the opportunity close record.
C. Create a user post for the competitor.
D. Enable auditing for the competitor entity.

Correct Answer: B
Section:
Explanation:
Reference: https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/close-opportunity-won-lost-sales

QUESTION 32
You create an invoice with products and services for a customer.
You need to add pricing for a product that is not available in the product catalog.
What should you do?

A. Add the product to the order and use Get Products
B. Add a write-in product
C. Add an existing product and change the name and price
D. Add the product to the quote and use Get Products

Correct Answer: B
Section:
Explanation:
References: https://docs.microsoft.com/en-us/dynamics365/customer-engagement/sales-enterprise/add-product-quote-order-invoice

QUESTION 33
You are a Dynamics 365 Sales administrator.
The sales team is having difficulty locating related products.
You need to make it easier for the sales team to find groups of products that are similar.
What should you use?

A. Related products
B. Product bundles
C. Product families
D. Product unit groups

Correct Answer: A
Section:
Explanation:

References: https://docs.microsoft.com/en-us/dynamics365/customer-engagement/sales-enterprise/define-related-products-increase-chances-sales

QUESTION 34
You are a salesperson using Dynamics 365 for Sales.
You need to be able to modify the product price on an active invoice that uses current pricing.
What should you do?

A. Set the Invoice Product to Override Price
B. Set an End Date for the Price List to ensure the Price List is expired
C. Set an End Date for the Price List to ensure the Price List is not expired
D. Set the Invoice Product to Use Default

Correct Answer: A
Section:

QUESTION 35
A company uses Dynamics 365 for Sales.
You create a new quote and associate an opportunity to the quote.
You need to display all your items from the opportunity in the quote.
What should you do?

A. Activate the quote
B. Select Get Products from the command bar in the Quote entity
C. Select Add Line Items on the Opportunity entity
D. Select Recalculate from the command bar on the Opportunity entity

Correct Answer: B
Section:

QUESTION 36
An organization attends a tradeshow and identifies several leads.
One specific lead wants to make a purchase in the next week.
You need to create an invoice.
At which stage can you create the invoice?

A. Lead
B. Order
C. Opportunity
D. Quote

Correct Answer: B
Section:

QUESTION 37
You are a Dynamics 365 system customizer. You create a price list with related products. Sales team members use the list to generate opportunities, quotes, and orders. You need to create a product family.
What should you do?

A. Add a new product family to an existing product family

B. Delete the existing price list and create a new one
C. Create a unit group for use with the product family
D. Add a parent product family to an existing product family

Correct Answer: A
Section:
Explanation:
References: https://docs.microsoft.com/en-us/dynamics365/customer-engagement/sales-enterprise/create-product-family

QUESTION 38
You are creating orders from quotes in Dynamics 365.
In some circumstances, customers no longer require an order. In other circumstances, your company delivers the order. You need to ensure that closed orders use existing functionality to reflect the circumstances.
Which two methods of closing an order are available out of the box? Each correct answer presents a complete solution. NOTE: Each correct selection is worth one point.

A. Cancel
B. Activate
C. Accept
D. Fulfill

Correct Answer: A, D
Section:
Explanation:
References: https://docs.microsoft.com/en-us/dynamics365/customer-engagement/sales-enterprise/create-edit-order-sales

QUESTION 39
You are a Dynamics 365 for 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 highest needed to sell the product or service
B. the least frequently used to sell the service
C. the most frequently used to sell the service
D. the lowest needed to sell the product or service

Correct Answer: D
Section:
Explanation:
References: https://docs.microsoft.com/en-us/dynamics365/customer-engagement/sales-professional/create-unit-group-add-units

QUESTION 40
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, you will NOT be able to return to it. As a result, these questions will not appear in the review screen. A customer recently visited one of your retail outlets. You created an opportunity for the customer for a large purchase. The customer is now ready to complete the purchase.
You need to create a quote from the opportunity.
Solution: Close the opportunity as won.
Does the solution meet the goal?

A. Yes
B. No

Correct Answer: B
Section:
Explanation:
References: https://docs.microsoft.com/en-us/dynamics365/customer-engagement/developer/convert-opportunity-quote-sales-order-invoice

QUESTION 41
Note: This question-is part of a series of questions that present the same scenario. Each question-in the series contains a unique solution that might meet the stated goals. Some question-sets might have more than one correct solution, while others might not have a correct solution.
After you answer a question, you will NOT be able to return to it. As a result, these questions will not appear in the review screen. A customer recently visited one of your retail outlets. You created an opportunity for the customer for a large purchase. The customer is now ready to complete the purchase.
You need to create a quote from the opportunity.
Solution: Convert the Opportunity to a quote.
Does the solution meet the goal?

A. Yes
B. No

Correct Answer: A
Section:
Explanation:
References: https://docs.microsoft.com/en-us/dynamics365/customer-engagement/developer/convert-opportunity-quote-sales-order-invoice

QUESTION 42
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, you will NOT be able to return to it. As a result, these questions will not appear in the review screen. A customer recently visited one of your retail outlets. You created an opportunity for the customer for a large purchase. The customer is now ready to complete the purchase.
You need to create a quote from the opportunity.
Solution: Qualify the opportunity.
Does the solution meet the goal?

A. Yes
B. No

Correct Answer: B
Section:
Explanation:
References: https://docs.microsoft.com/en-us/dynamics365/customer-engagement/developer/convert-opportunity-quote-sales-order-invoice

QUESTION 43
You work in a sales role for an organization that uses Dynamics 365. You are managing an opportunity for a potential customer. You need to create a quote that automatically includes all the products from the opportunity.
What should you do?

A. Convert the opportunity to a quote
B. Create a new quote from the customer
C. Create a new quote from the opportunity

D. Create a new quote with the opportunity price list

Correct Answer: A
Section:

QUESTION 44
A company uses Dynamics 365 for Sales.
You need to change the description field on the quote.
Which state allows you to make the change?

A. Closed
B. Active
C. Draft
D. Won

Correct Answer: C
Section:

QUESTION 45
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, you will NOT be able to return to it. As a result, these questions will not appear in the review screen. A customer recently visited one of your retail outlets. You created an opportunity for the customer for a large purchase. The customer is now ready to complete the purchase.
You need to create a quote from the opportunity.
Solution: On the Quotes tab of the opportunity, select Add New Quote.
Does the solution meet the goal?

A. Yes
B. No

Correct Answer: A
Section:
Explanation:
References: https://docs.microsoft.com/en-us/dynamics365/customer-engagement/sales-enterprise/create-edit-quote-sales

QUESTION 46
You are a salesperson using Dynamics 365 for Sales.
You need to revise an active quote.
What happens to the original quote record?

A. The quote is deleted
B. The quote is converted into an order and a copy of the quote is put in draft mode for modification
C. The quote is put in draft mode for modification
D. The quote is closed, and a copy of the quote is put in draft mode for modification

Correct Answer: C
Section:

QUESTION 47
A company uses Dynamics 365 Sales to create and manage opportunities, quotes and orders.
You need to ensure that the Actual Revenue field in an opportunity is automatically updated with the total amount from the quote. What should you do?

A. Convert the quote to an order. Set the value of the Calculate actual revenue from quotes option to Yes.
B. Close the opportunity as won.
C. Convert the quote to an order. Set the value of the Close Opportunity option to Yes.
D. Convert the quote to an order. Set the value of the Close Opportunity option to No.

Correct Answer: B
Section:
Explanation:
Reference: https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/close-opportunity-won-lost-sales

QUESTION 48
You manage a Dynamics 365 environment. Salespeople use a template from the Sales Hub to create quotes. A member of the sales team requests that you change the order in which columns display in customer quotes. You need to modify the quote template.
What should you use?

A. template editor
B. mail merge template
C. Microsoft Word template
D. Report Wizard

Correct Answer: C
Section:

QUESTION 49
You are a system customizer in Dynamics 365 Sales.
You need to set up product families.
Which option is available?

A. Create a maximum of 10 child product families
B. Set a product bundle as a parent of a product family
C. Add the product to multiple product families
D. Set a product property as an option set

Correct Answer: D
Section:
Explanation:
Reference: https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/use-properties-describe-product

QUESTION 50
A company uses Dynamics 365 Sales.
You attempt to add a product to an order, but the product cannot be located.
You need to determine why the product is missing.
What is the cause?

A. The product was not published
B. The product is missing required information
C. The write-in option was not used
D. The product was not listed in the quote

Correct Answer: A
Section:

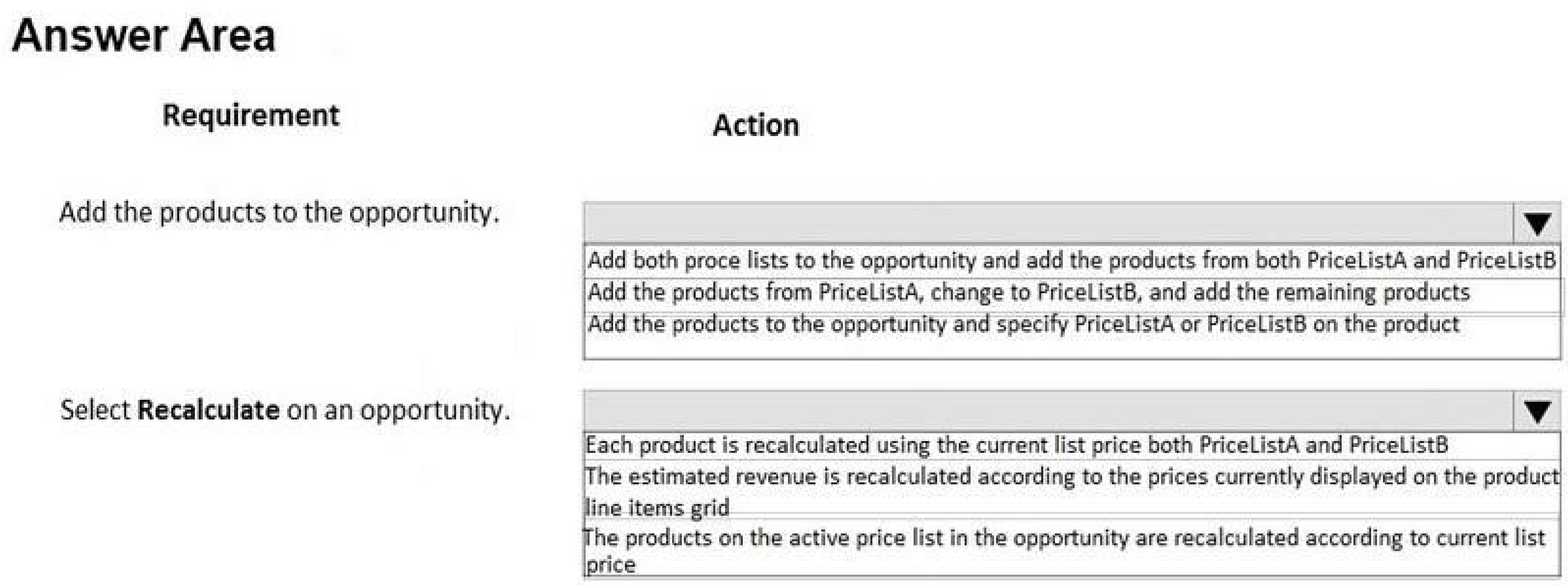
QUESTION 51
You are a Dynamics 365 Sales administrator for an organization.
The organization is no longer going to sell a product in the product catalog.
You need to ensure that the product is no longer available for selection by sales staff.
What should you do?

A. Retire the product
B. Edit the name
C. Delete the product

Correct Answer: A
Section:
Explanation:
Reference: https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/retire-product

QUESTION 52
HOTSPOT
You use opportunities with products and price lists in Dynamics 365 for Sales.
You need to add products than exist in PriceListA and PriceListB to an opportunity.
Which actions should you perform? To answer, select the appropriate options in the answer area.
NOTE: Each correct selection is worth one point.

Hot Area:



Answer Area:

Answer Area

Requirement	Action
Add the products to the opportunity.	Add both proce lists to the opportunity and add the products from both PriceListA and PriceListB Add the products from PriceListA, change to PriceListB, and add the remaining products Add the products to the opportunity and specify PriceListA or PriceListB on the product
Select **Recalculate** on an opportunity.	Each product is recalculated using the current list price both PriceListA and PriceListB The estimated revenue is recalculated according to the prices currently displayed on the product line items grid The products on the active price list in the opportunity are recalculated according to current list price

Section:
Explanation:

QUESTION 53
HOTSPOT
You manage a Dynamics 365 Sales environment.
You need to configure the default status for each lead.
Which status reason should you associate to each scenario? To answer, select the appropriate options in the answer area. NOTE: Each correct selection is worth one point.

Hot Area:

Answer Area

Scenario	Status reason
A lead is created and contacted by phone.	New-Contacted Open-Contacted Qualified-New Qualified-Qualified
A lead has no contact method available.	Open-Cannot Contact Qualified-Cannot Contact Disqualified-Cannot Contact
A lead is ready to be an opportunity.	Qualified-New Qualified-Qualified Qualified-Closed

Answer Area:

Section:
Explanation:

QUESTION 54
HOTSPOT
You are converting a lead for the manufacturing manager from Contoso, Ltd. Neither the company nor the manufacturing manager are in your Dynamics 365 system. You need to ensure that the lead record is correctly converted.
Which values should you use? To answer, select the appropriate options in the answer area.
NOTE: Each correct selection is worth one point.

Hot Area:

Answer Area

Question	Value
Which entity records are created?	Account, Contact, and Opportunity Only Opportunity and Contact
What is the lead status?	Deleted Closed Open

Answer Area:

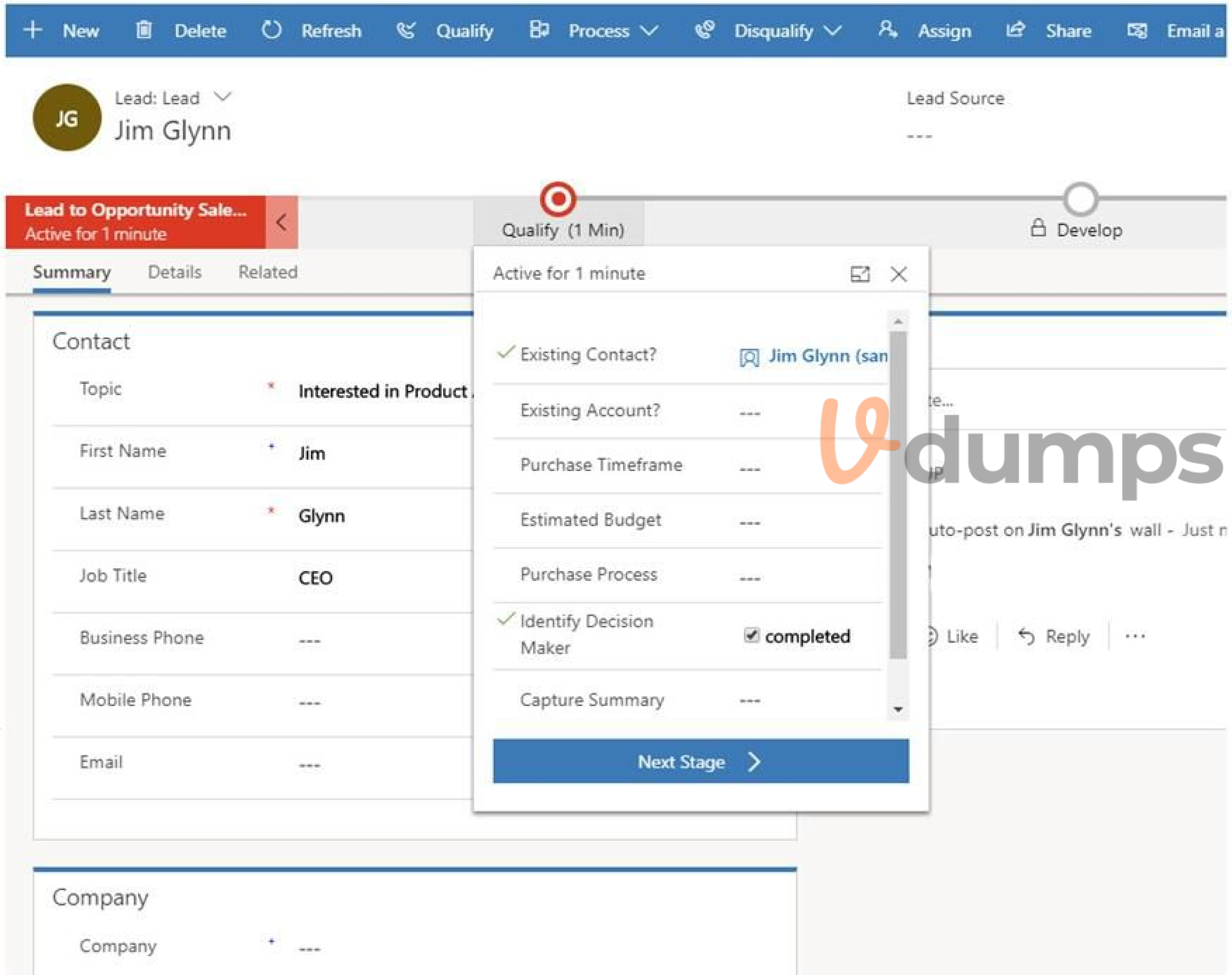
Answer Area

Question	Value
Which entity records are created?	Account, Contact, and Opportunity Only Opportunity and Contact
What is the lead status?	Deleted Closed Open

Section:

Explanation:
Reference:
https://docs.microsoft.com/en-us/dynamics365/sales-professional/manage-leads-sales-professional
https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/ts-leads

QUESTION 55
HOTSPOT
You are a sales representative and use Dynamics 365 Sales.
You are working with the following lead record:



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.

Hot Area:

Answer Area

Question	Answer Choice
You need to move to the Develop stage. What should you do?	Qualify the Lead Select Next Stage Select Develop
Which new record or records are created?	only an Opportunity only an Account and a Contact only an Account and an Opportunity an Account, a Contact, and an Opportunity

Answer Area:

Answer Area

Question	Answer Choice
You need to move to the Develop stage. What should you do?	Qualify the Lead Select Next Stage Select Develop
Which new record or records are created?	only an Opportunity only an Account and a Contact only an Account and an Opportunity an Account, a Contact, and an Opportunity

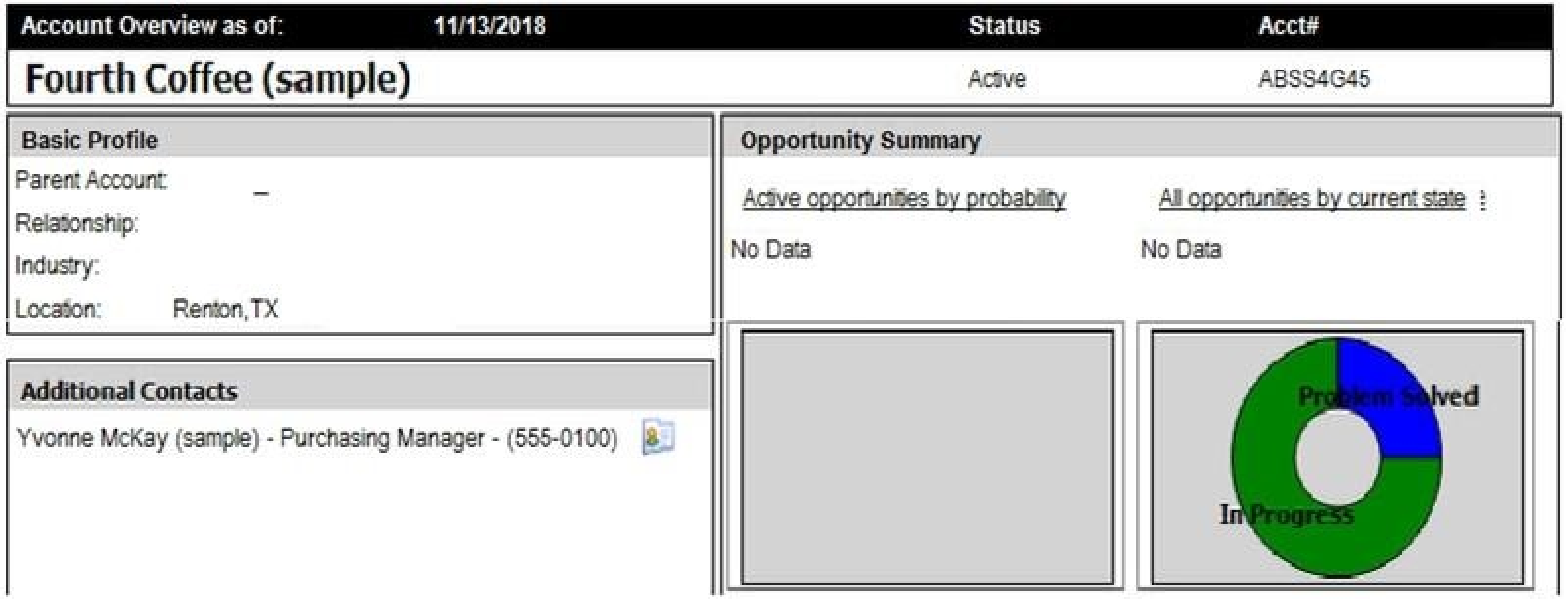
Section:

Explanation:

Box 2: The Contact already exists so only an Account and Opportunity will be created.

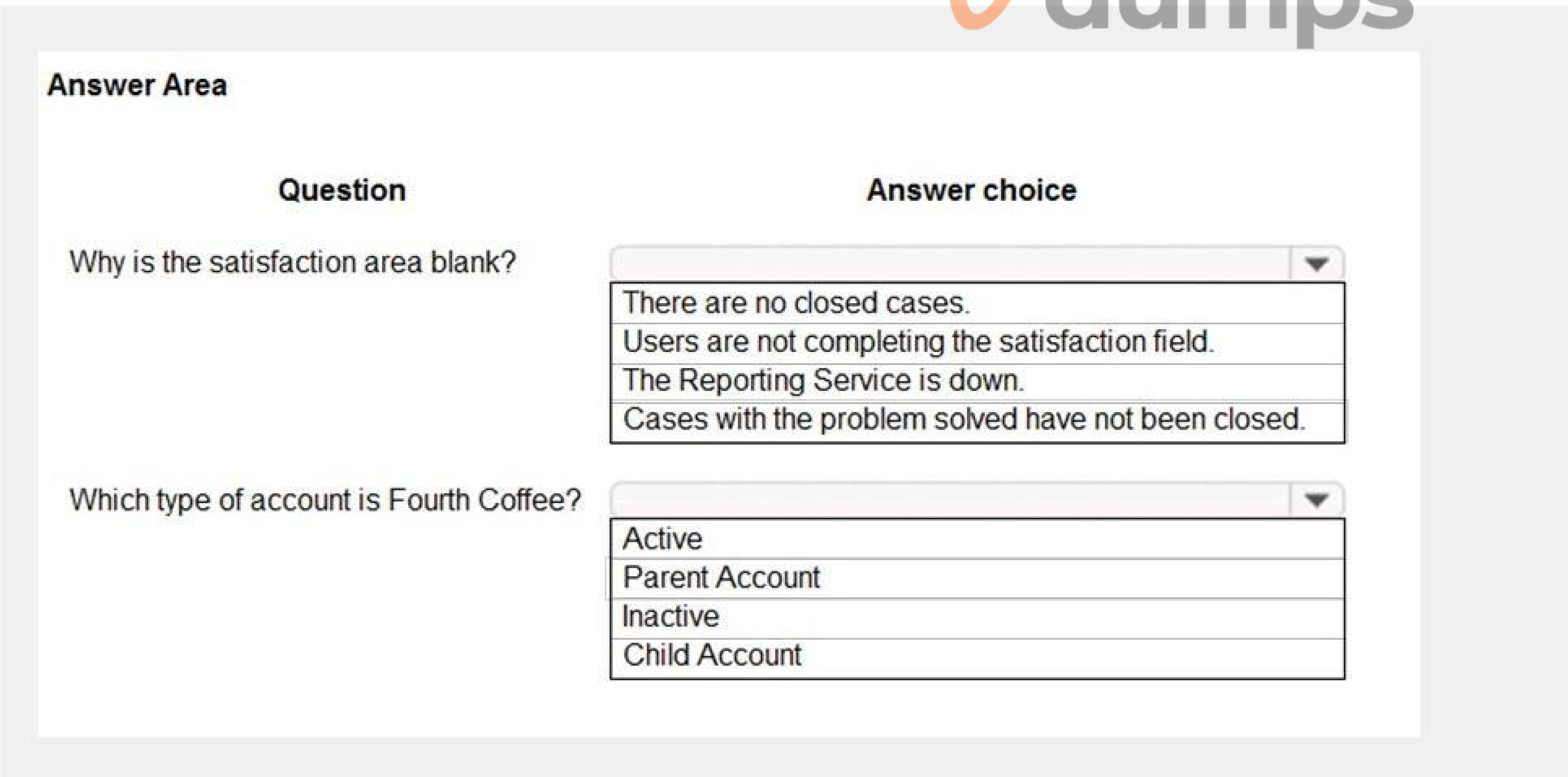
Reference:
https://docs.microsoft.com/en-us/dynamics365/sales-professional/manage-leads-sales-professional

QUESTION 56
HOTSPOT
You run a sales report for Fourth Coffee named Account Overview. The following report displays:

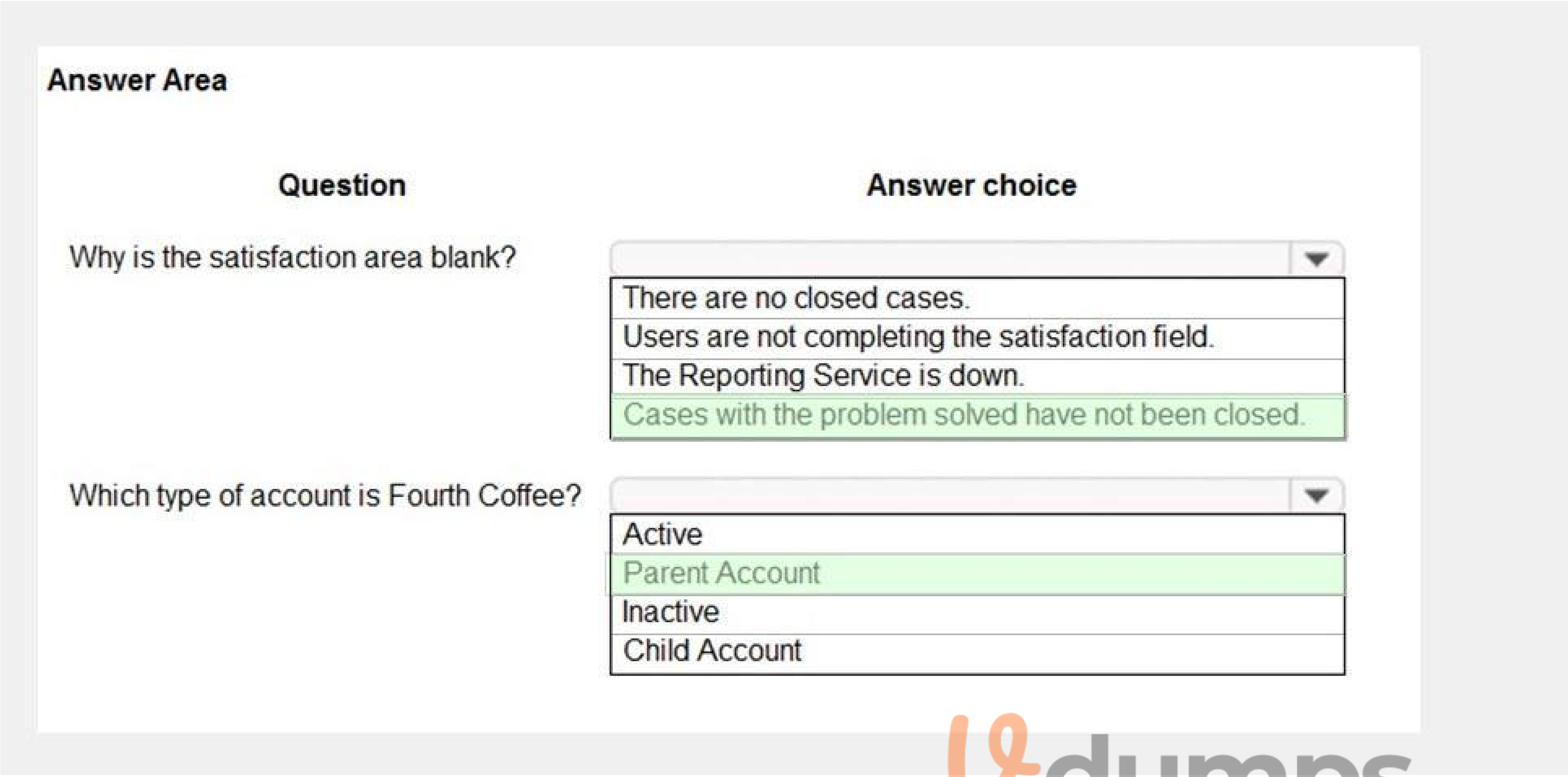


Use the drop-down menus to select the answer choice that answers each question based on the information presented in the graphic.
NOTE: Each correct selection is worth one point.

Hot Area:

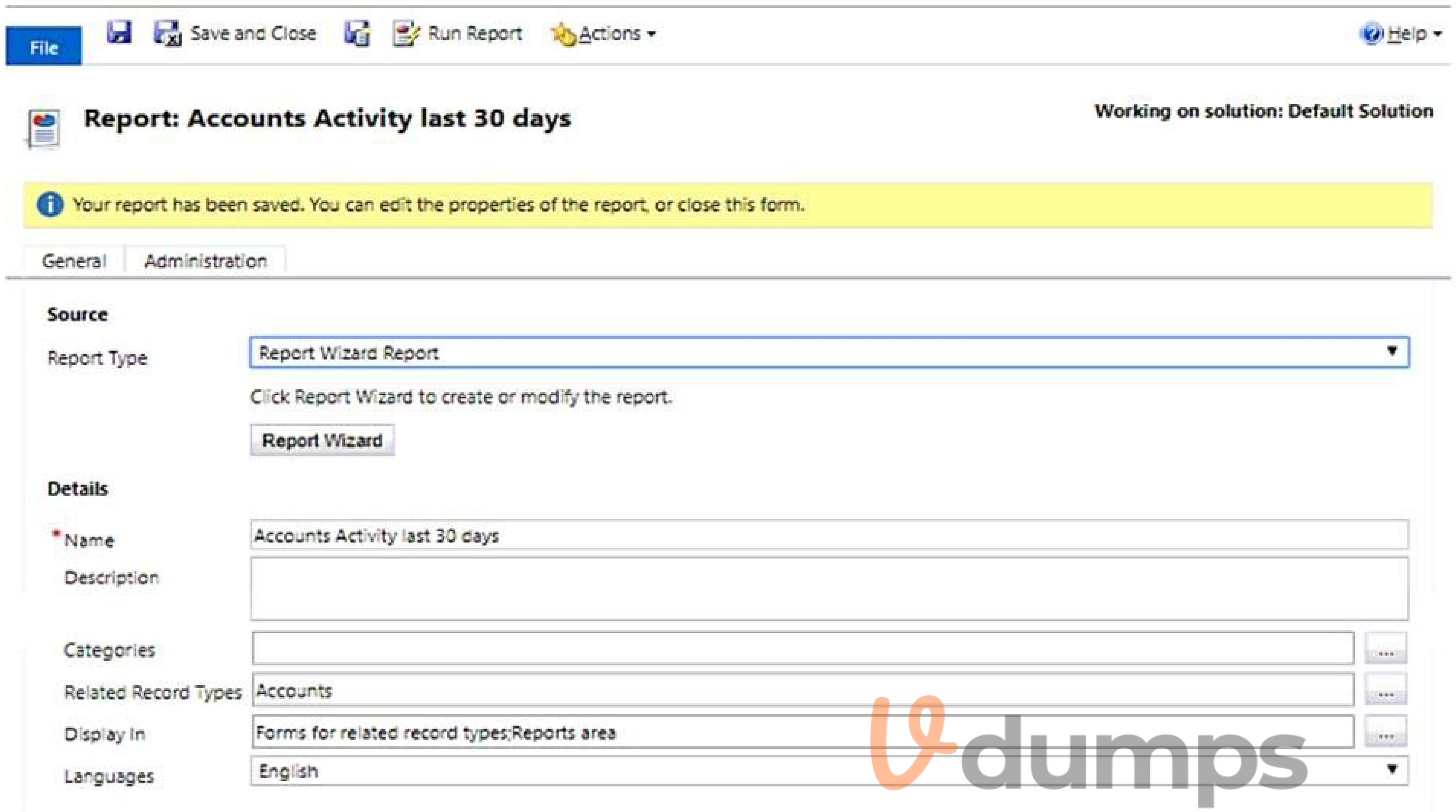


Answer Area:



Section:
Explanation:

QUESTION 57
HOTSPOT
You have a sales report that shows activities for Accounts in the last 30 days. When you run an advanced find query for Accounts with the custom field Heat Level equal to Hot, you are not able to access the report.

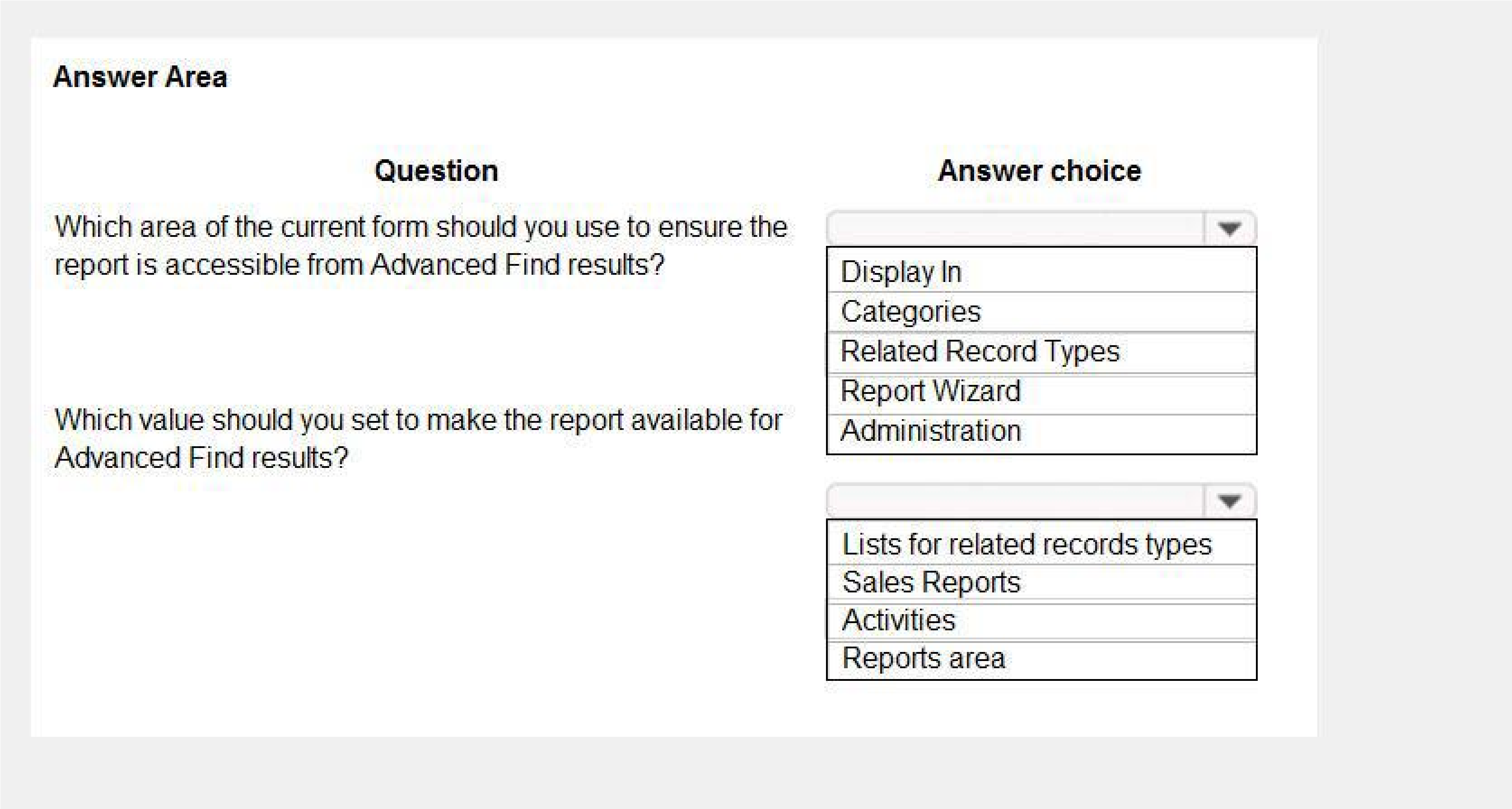


A Form: Report: Account Activity last 30 Days

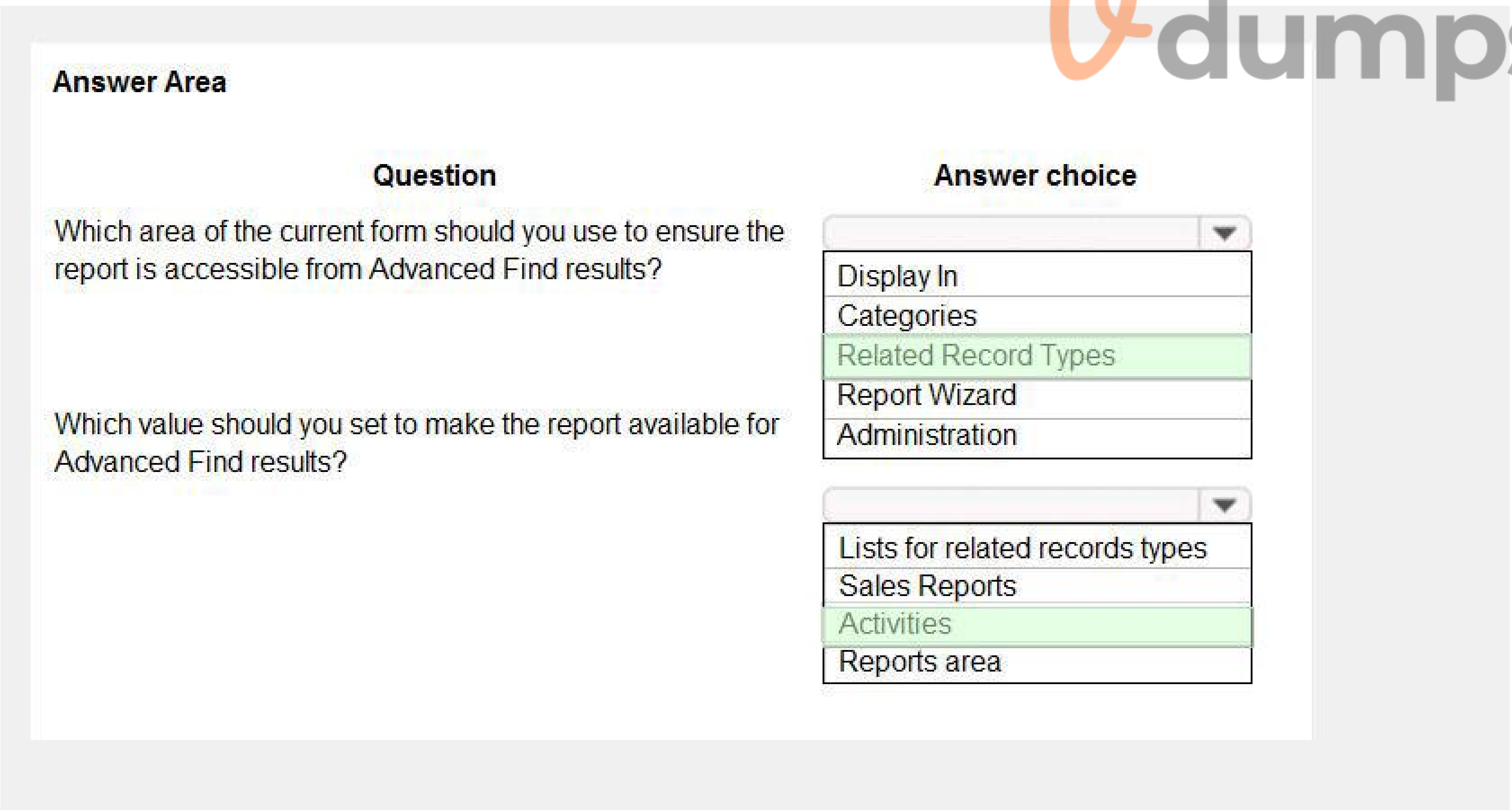
Use the drop-down menus to select the answer choice that answers each question based on the information presented in the graphic.

NOTE: Each correct selection is worth one point.

Hot Area:



Answer Area:

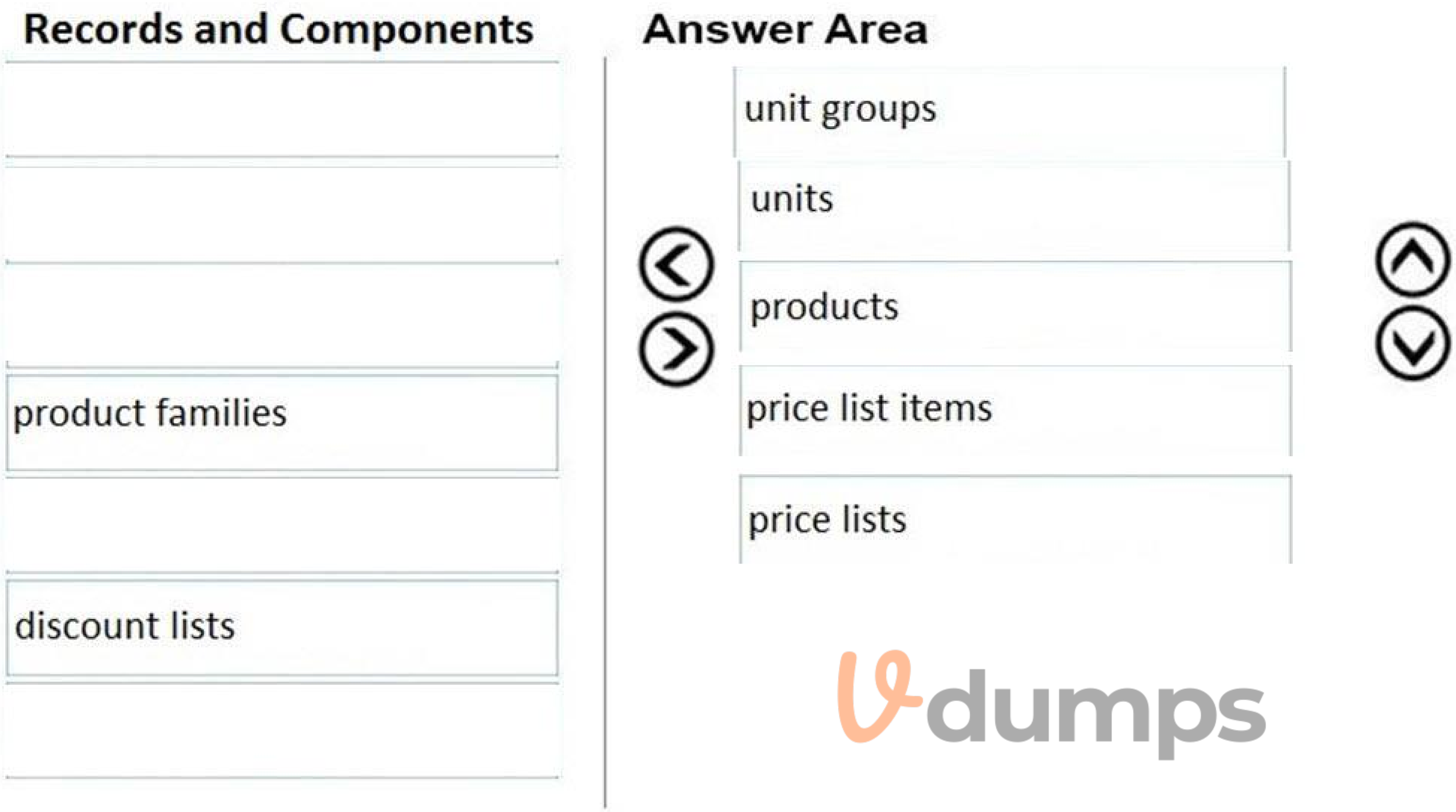


Section:
Explanation:

QUESTION 58
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.
Which five records and/or components should you configure in sequence? To answer, move the appropriate records and/or components from the list of records and components 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.

Select and Place:

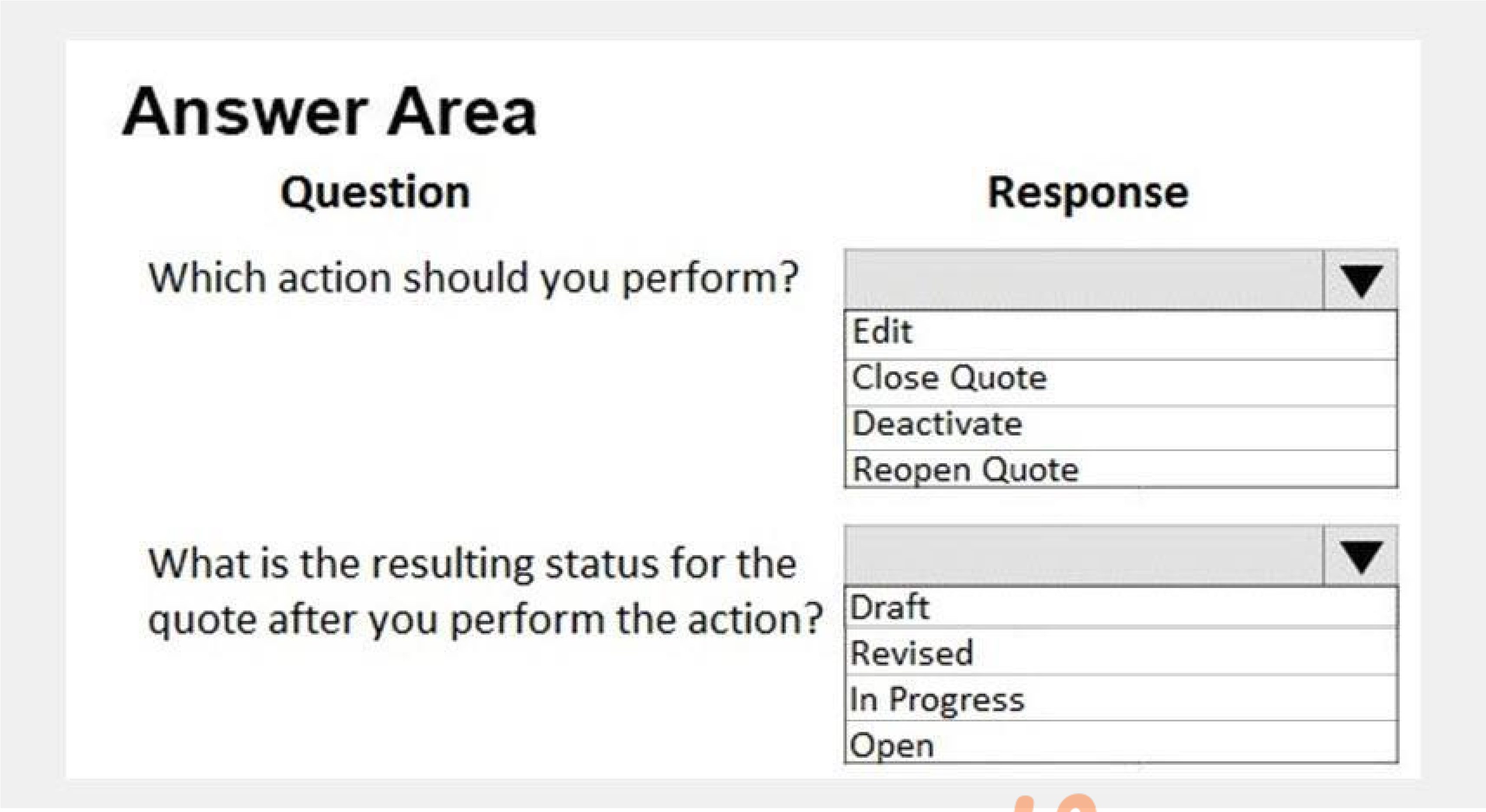
Correct Answer:



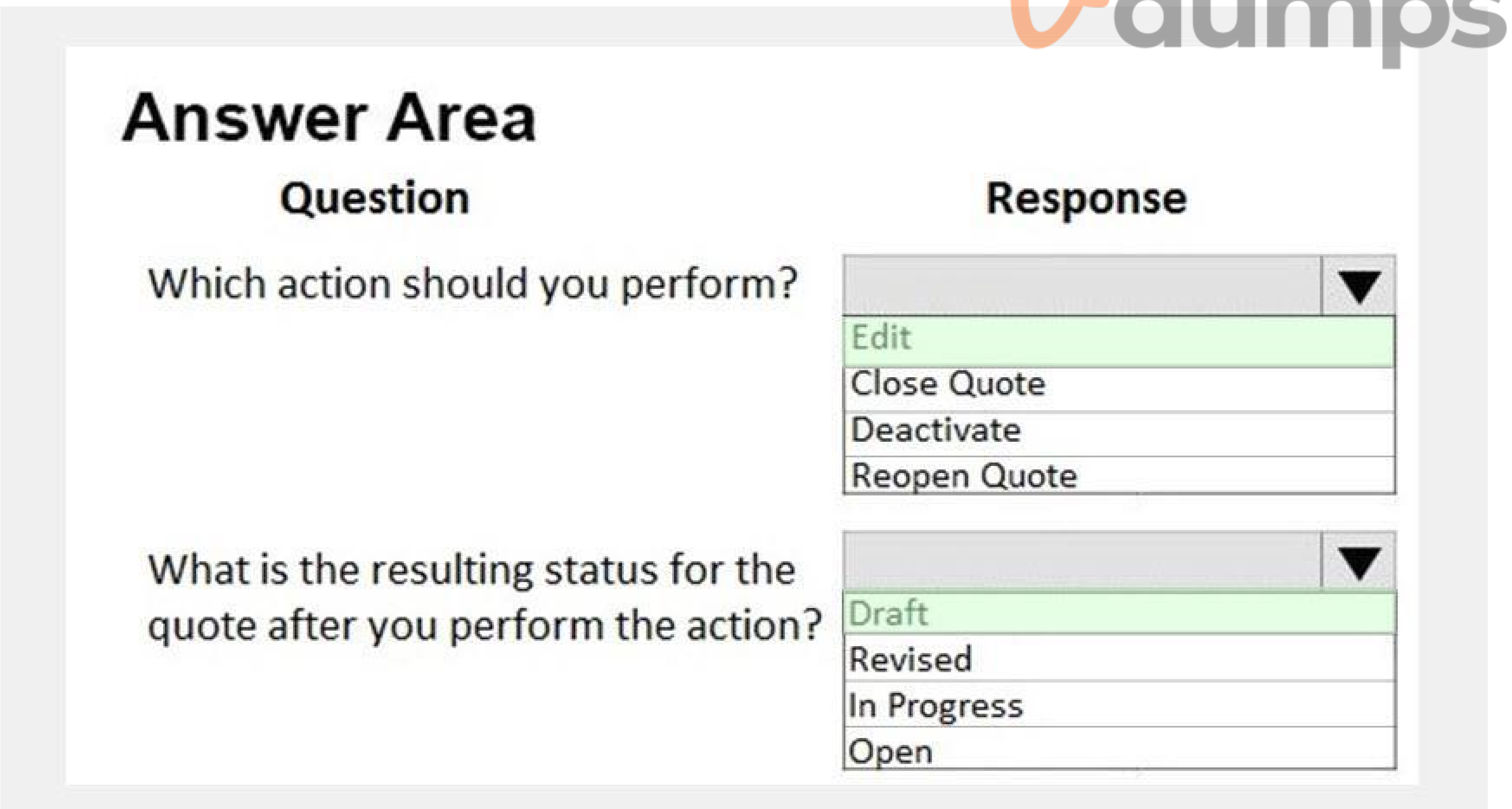
Section:
Explanation:

QUESTION 59
HOTSPOT
You send a quote to a client. The client calls and negotiates a better price.
You need to send an updated quote to the client.
What is required to modify the quote? To answer, select the appropriate options in the answer area.
NOTE: Each correct selection is worth one point.

Hot Area:



Answer Area:



Section:

Explanation:

QUESTION 60

HOTSPOT

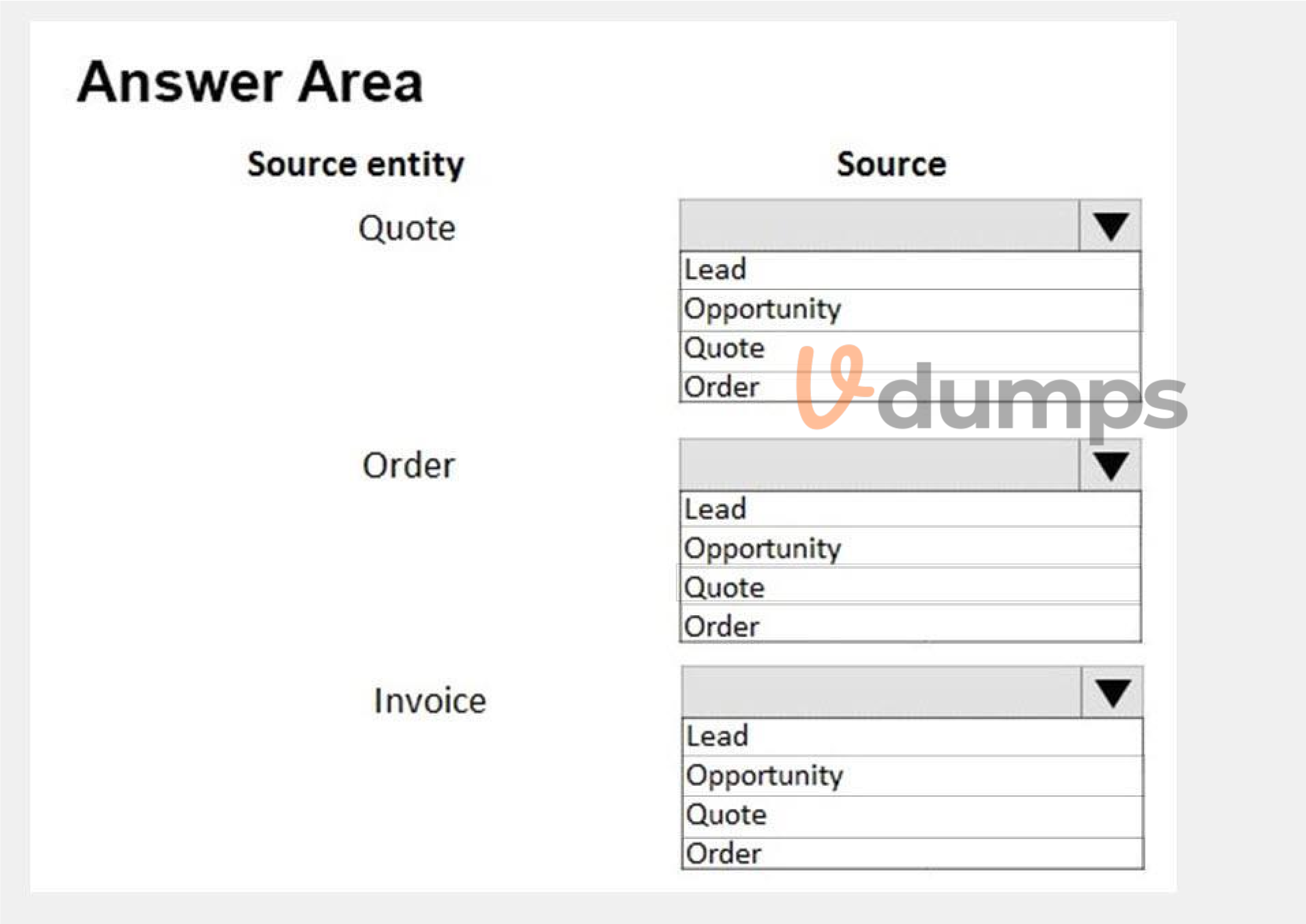
A customer places an order that includes all of the products from a previous order.

You plan to add products from the previous order to the new order.

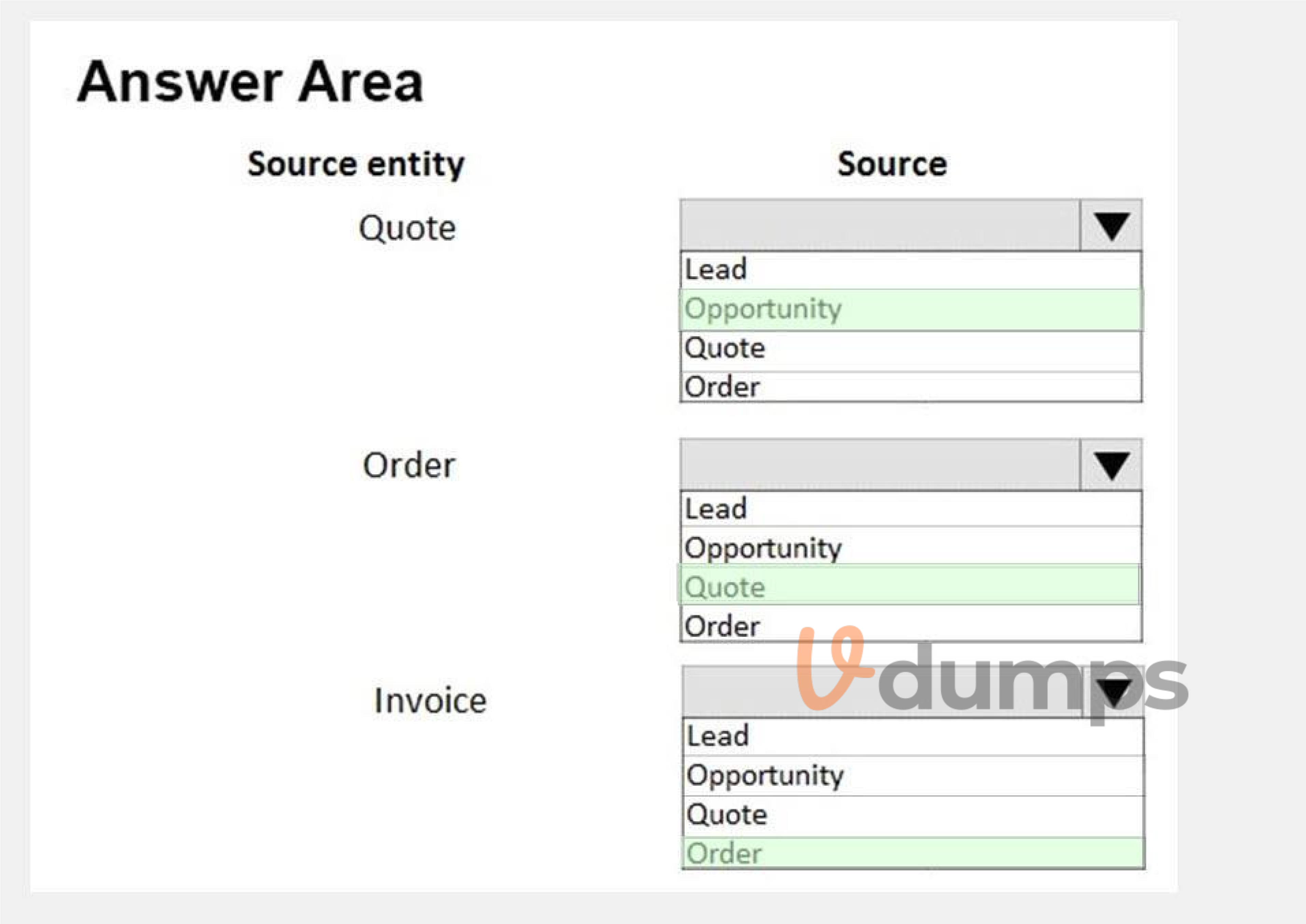
From where can you retrieve the list of products? To answer, select the appropriate options in the answer area.

NOTE: Each correct selection is worth one point.

Hot Area:



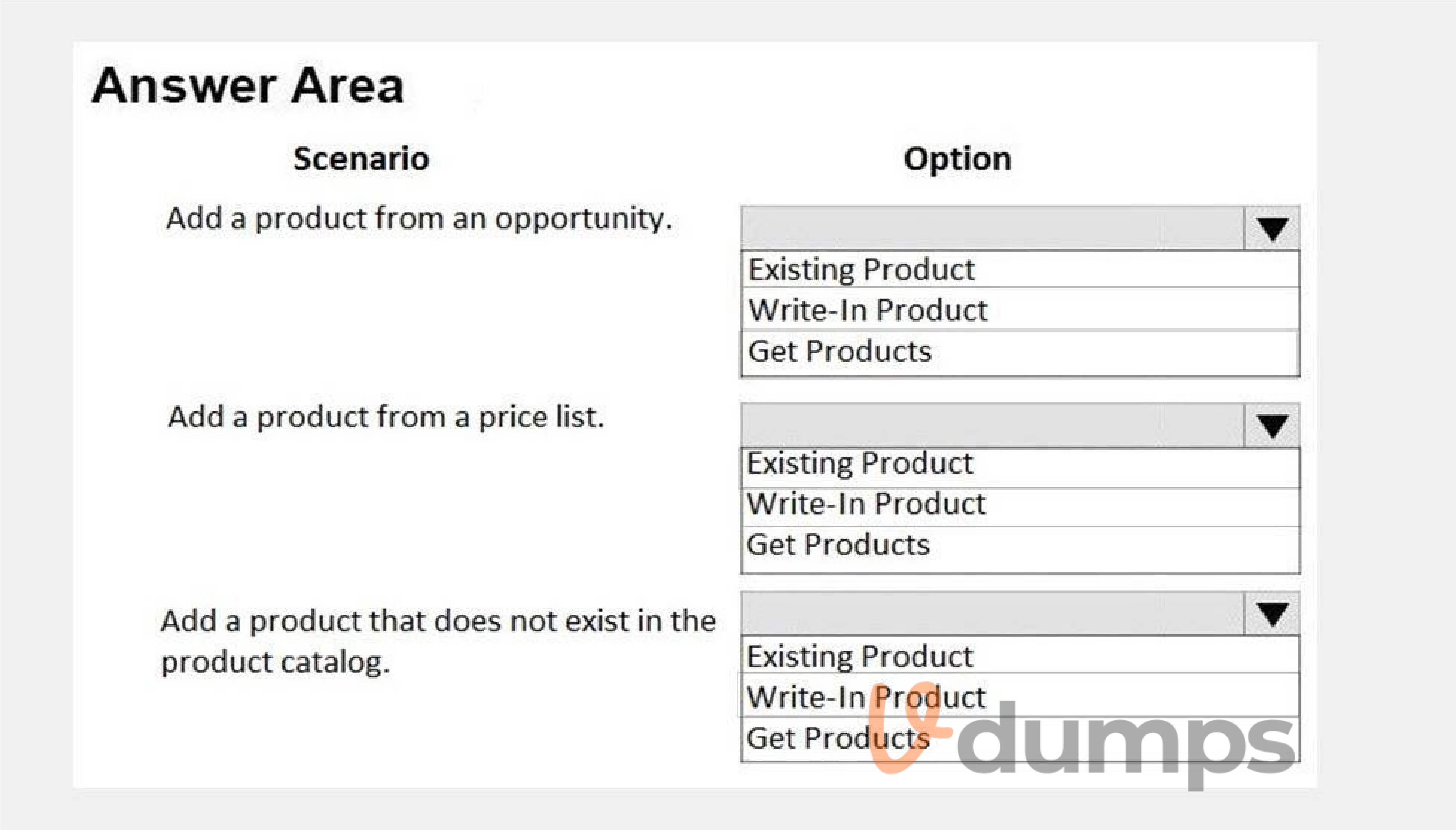
Answer Area:



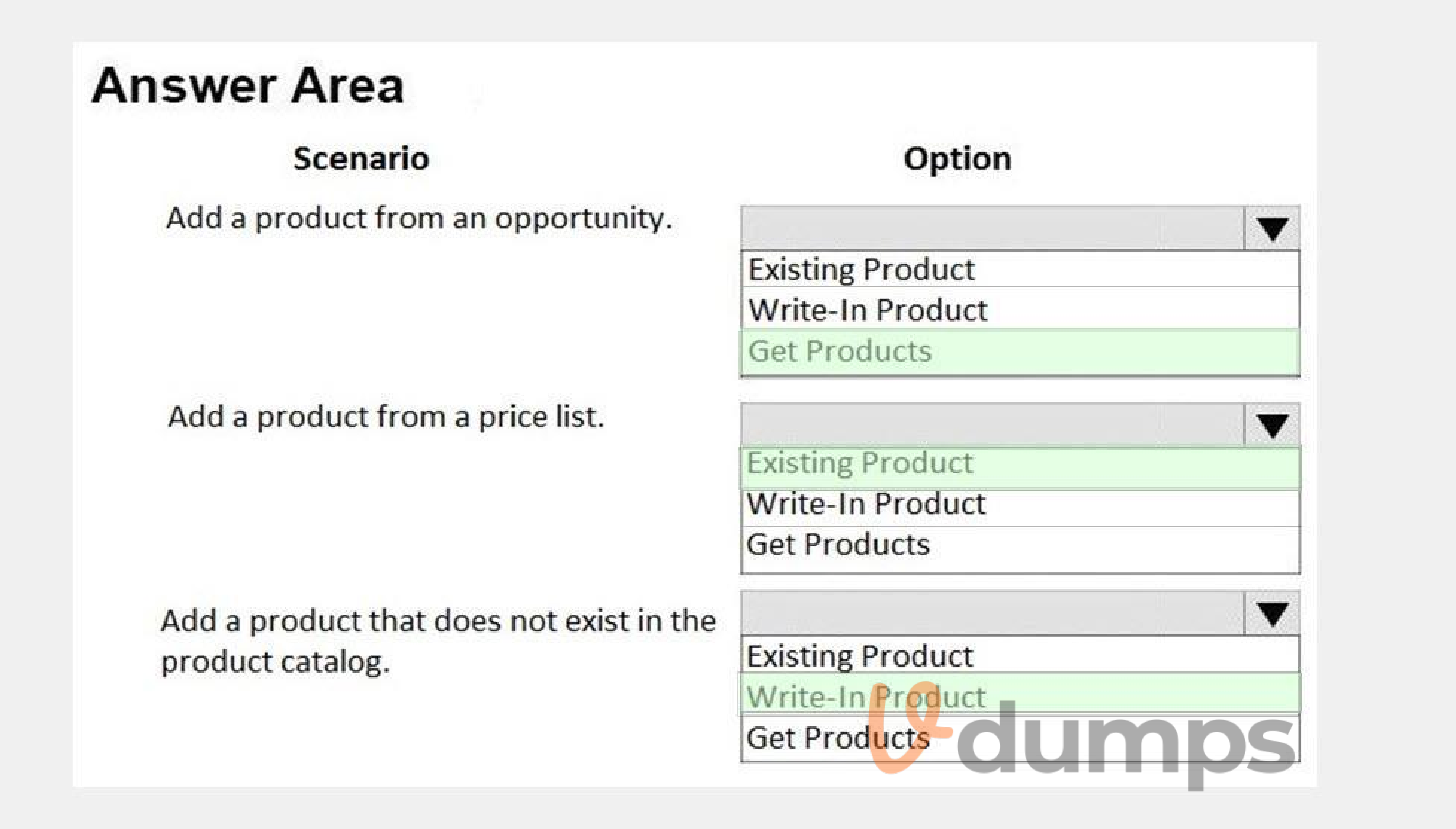
Section:
Explanation:

QUESTION 61
HOTSPOT
You use Dynamics 365 for Sales.
You need to add products to an invoice.
Which options should you use? To answer, select the appropriate options in the answer area.
NOTE: Each correct selection is worth one point.

Hot Area:


Answer Area
Scenario
Option
Add a product from an opportunity.
Existing Product
Write-In Product
Get Products
Add a product from a price list.
Existing Product
Write-In Product
Get Products
Add a product that does not exist in the product catalog.
Existing Product
Write-In Product
Get Products

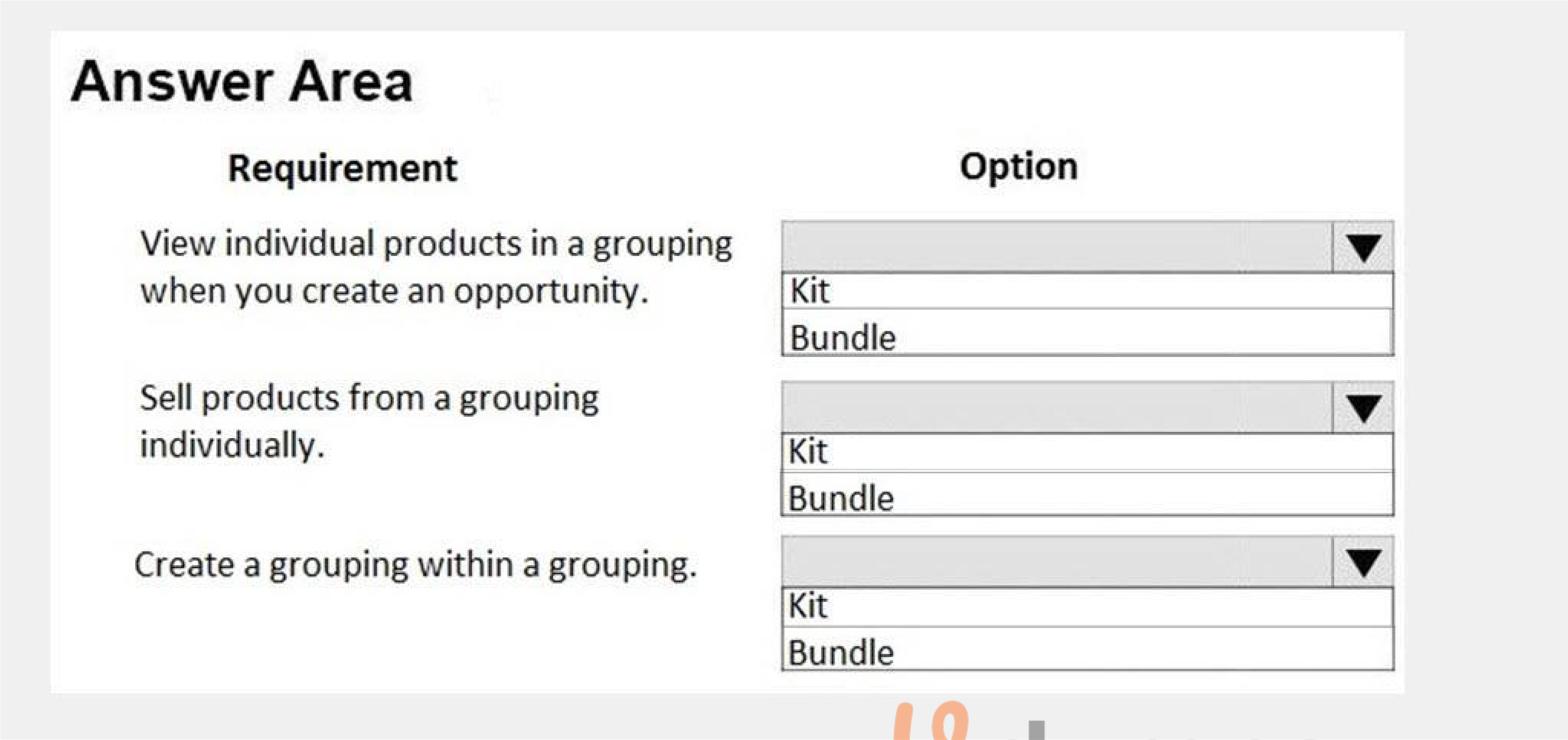
Answer Area:



Section:
Explanation:

QUESTION 62
HOTSPOT
You use Dynamics 365 for Sales system customizer.
You need to create product kits and bundles.
What should you create? To answer, select the appropriate options in the answer area.
NOTE: Each correct selection is worth one point.

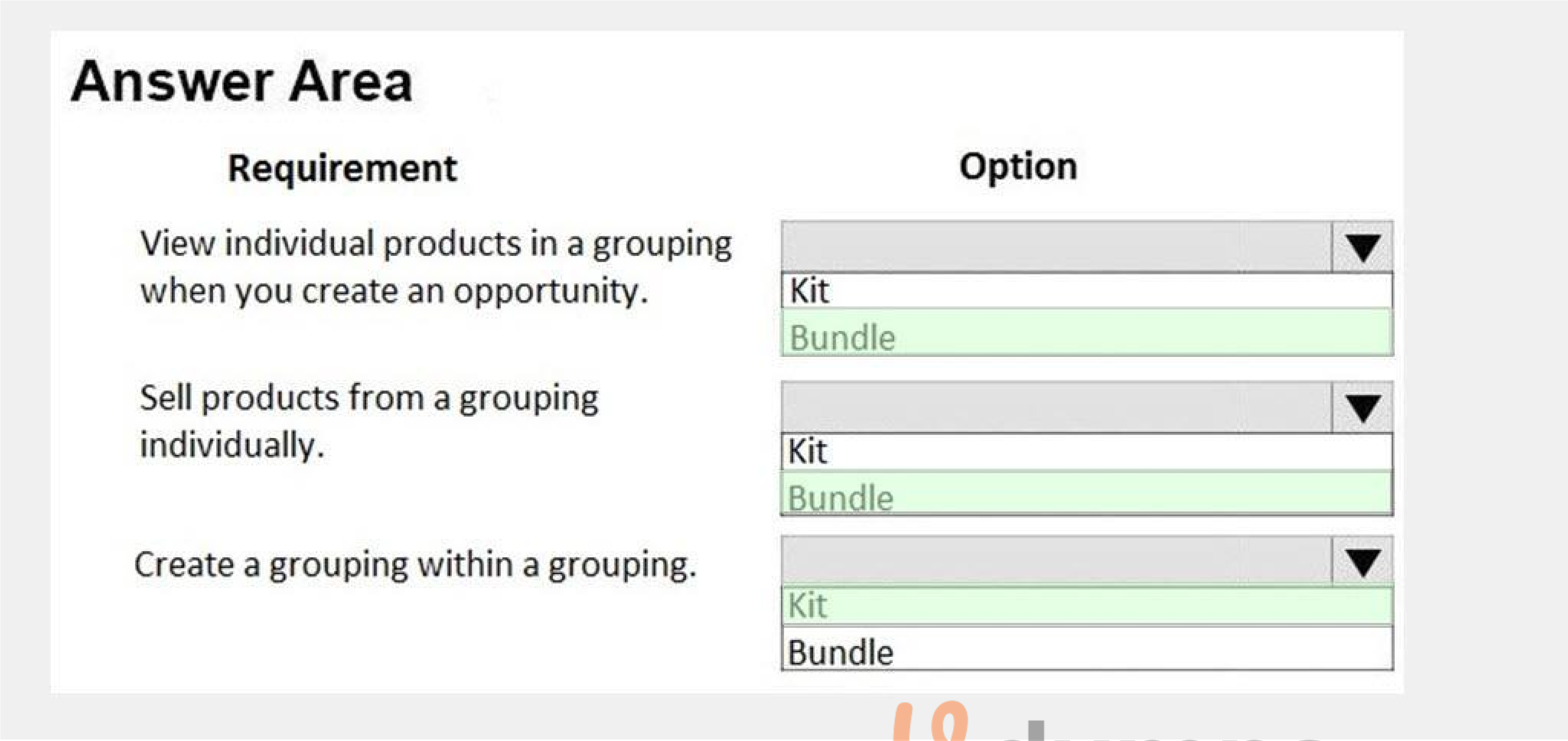
Hot Area:



Answer Area

Requirement	Option
View individual products in a grouping when you create an opportunity.	Kit / Bundle
Sell products from a grouping individually.	Kit / Bundle
Create a grouping within a grouping.	Kit / Bundle

Answer Area:



Section:
Explanation:
References:
https://docs.microsoft.com/en-us/dynamics365/customer-engagement/sales-enterprise/create-product-bundles-sell-multiple-items-together

QUESTION 63
A company sends PDF quotes to customers.
A salesperson wants to revise the look of a quote after selecting the Export to PDF button.
You need to modify the template for the PDF.
Where should you modify the template?

A. Microsoft Excel
B. a report
C. Microsoft Word
D. the PDF document

Correct Answer: C
Section:
Explanation:
Reference:
https://docs.microsoft.com/en-us/dynamics365/sales-professional/create-quote-pdf-sales-professional

QUESTION 64
You are a salesperson using Dynamics 365 Sales.

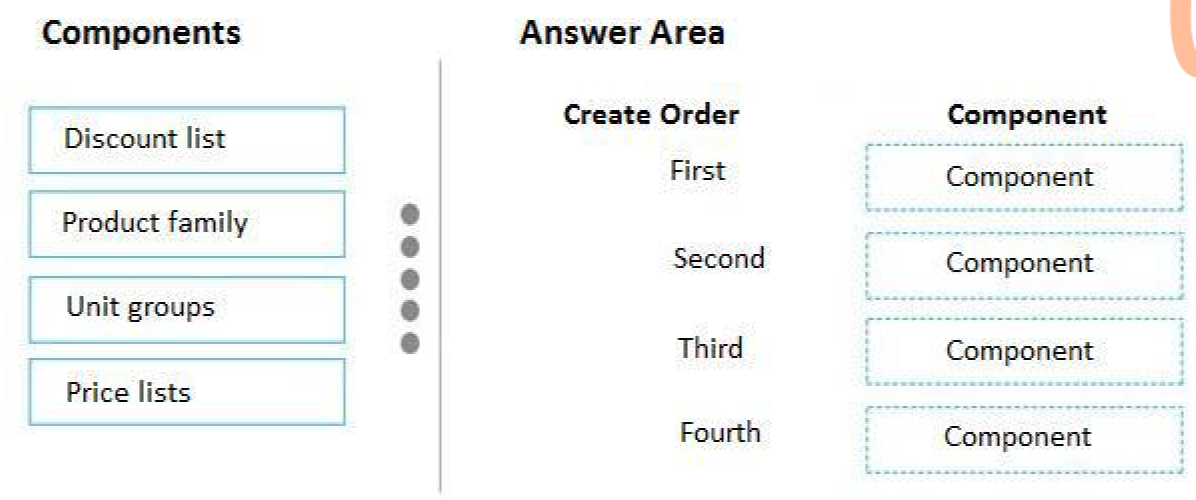
You need to add a product line item in an opportunity.
What should you do first in the opportunity?

A. Add a price list.
B. Specify revenue.
C. Configure units.
D. Add a product name.

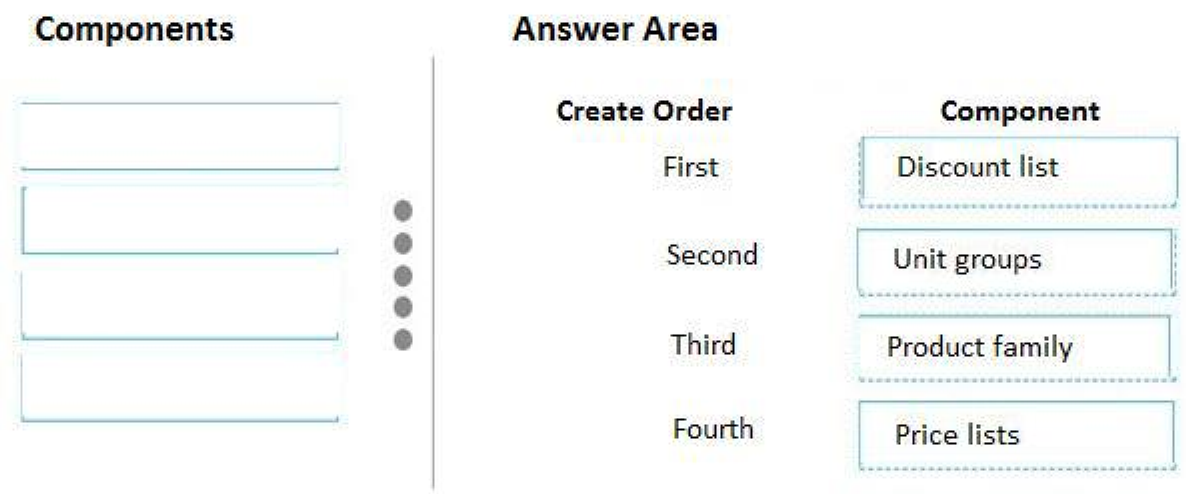
Correct Answer: A
Section:
Explanation:
Reference:
https://docs.microsoft.com/en-us/dynamics365/sales-professional/add-products-opportunity-sp

QUESTION 65
DRAG DROP
You are setting up a product catalog in Dynamics 365 Sales.
You need to set up the catalog using the least amount of effort.
In which order should you set up the catalog? To answer, drag the appropriate components to the correct order position. Each component may be used once, more than once, or not at all. You may need to drag the split bar between panes or scroll to view content.
NOTE: Each correct selection is worth one point.

Select and Place:



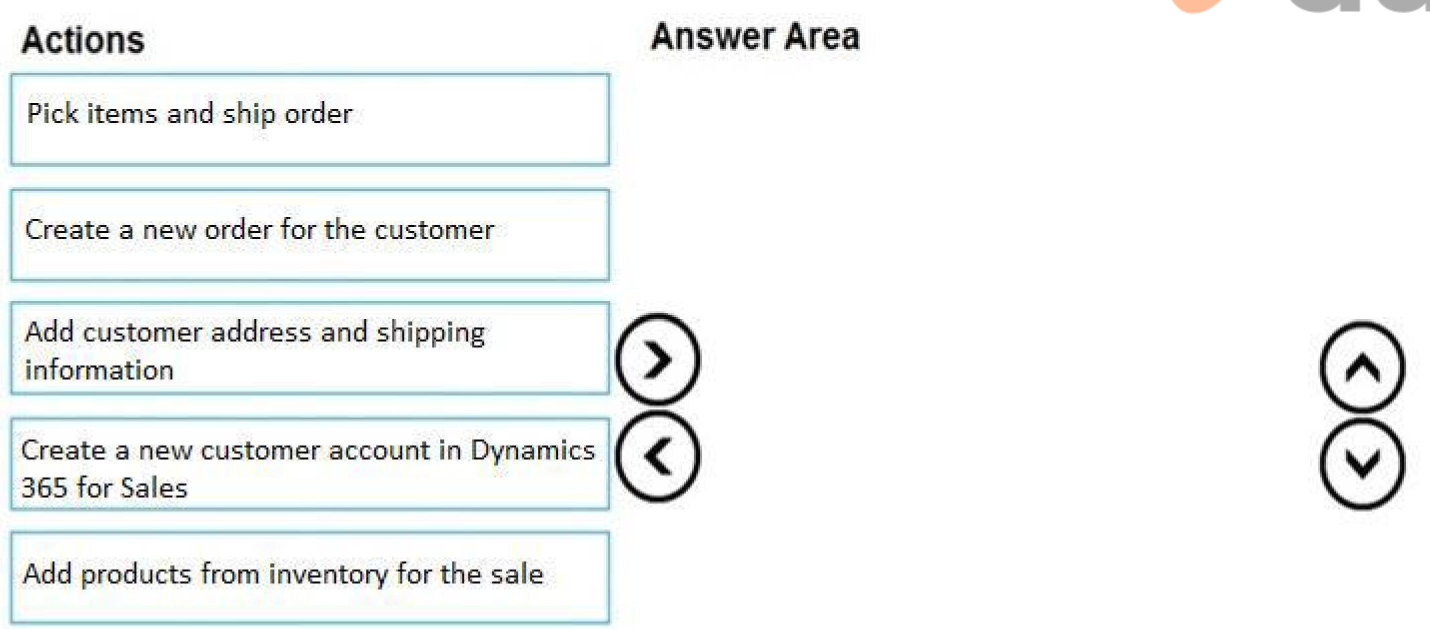
Correct Answer:



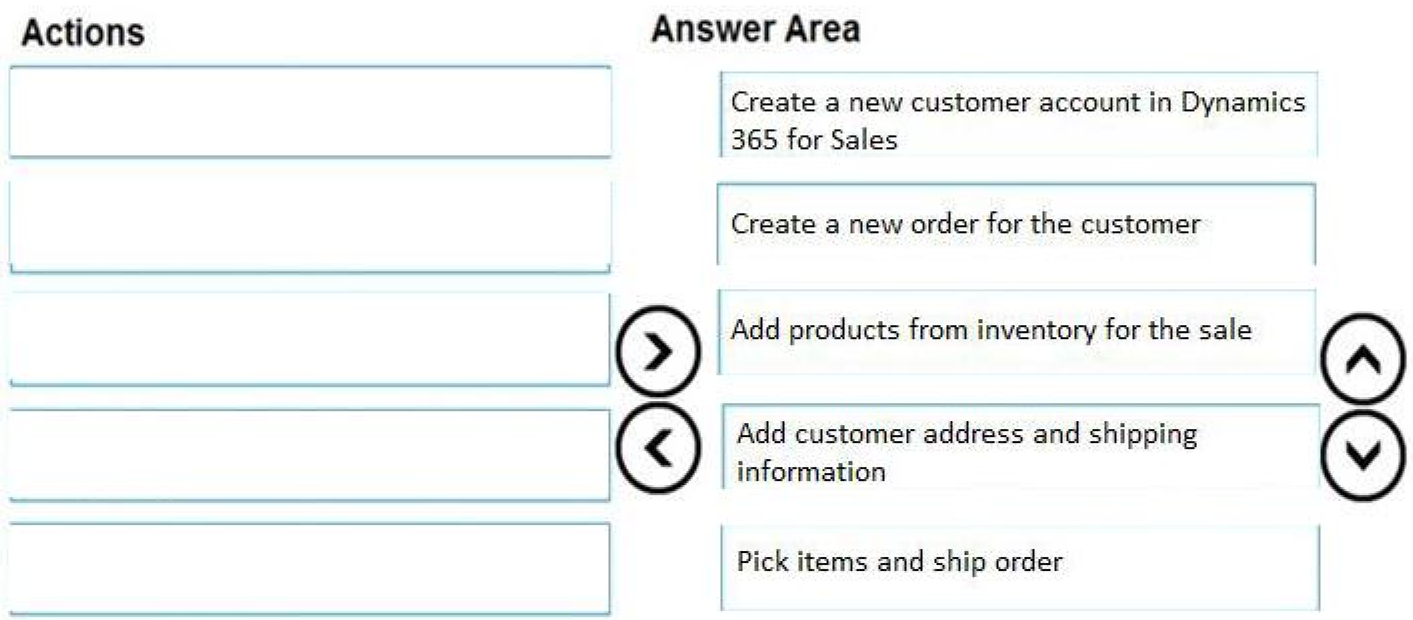
Section:
Explanation:
Reference:
https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/set-up-product-catalog-walkthrough

QUESTION 66
DRAG DROP
A company uses Dynamics 365 Sales to manage sales orders.
You need to create an order for a new customer.
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.

Select and Place:



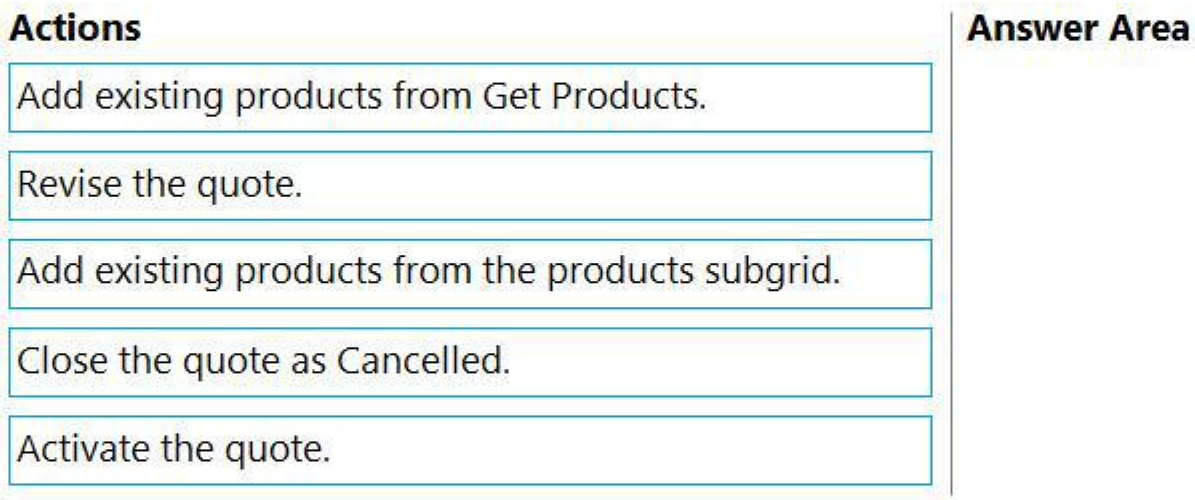
Correct Answer:



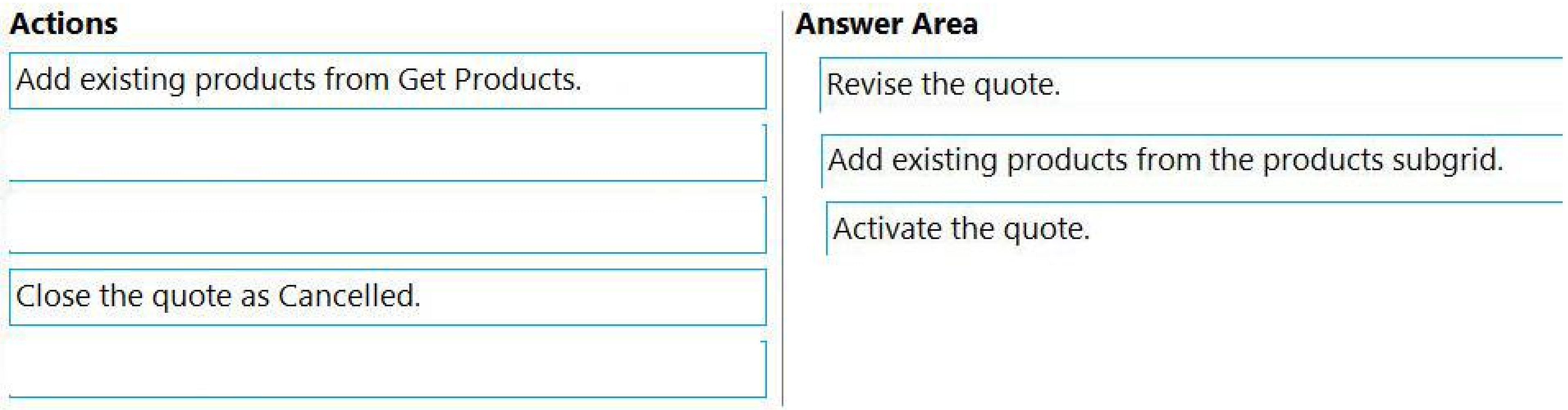
Section:
Explanation:
Reference:
https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/create-edit-order-sales#create-an-order

QUESTION 67
DRAG DROP
You use Dynamics 365 Sales. You create a quote and send it to a customer.
You need to add a product to the quote and make the modified quote available to the customer.
Which three actions should you perform in sequence? To answer, move the appropriate actions from the list of actions to the answer area and arrange them in the correct order.

Select and Place:



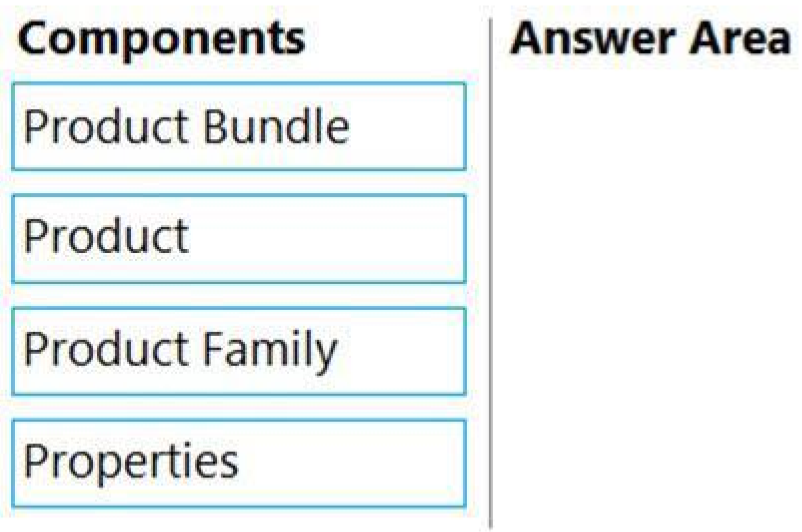
Correct Answer:



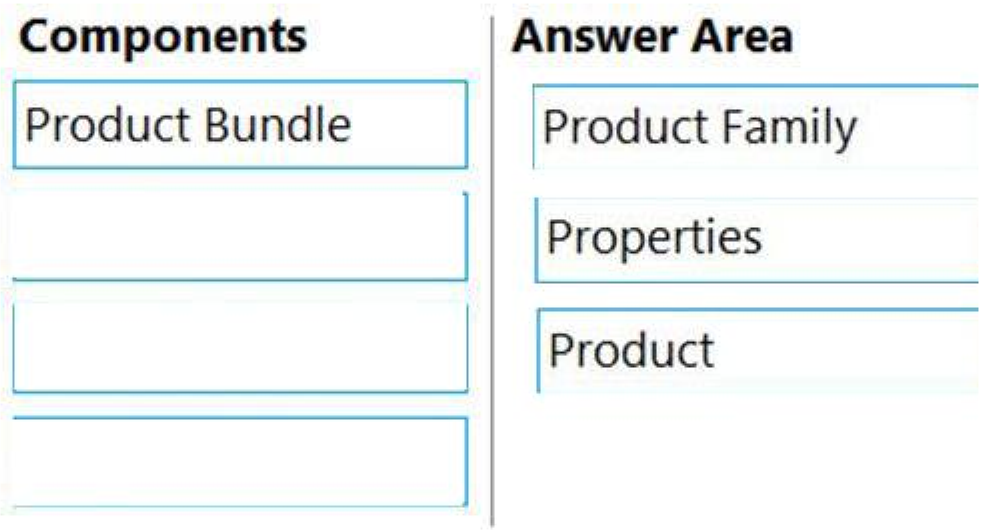
Section:
Explanation:
Reference:
https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/create-edit-quote-sales

QUESTION 68
DRAG DROP
You use products with properties for your opportunities in Dynamics 365.
You are adding a new product to your product catalog.
You need to create the product with a new set of properties.
Which three product catalog components should you configure in sequence? To answer, move the appropriate components from the list of components to the answer area and arrange them in the correct order.

Select and Place:



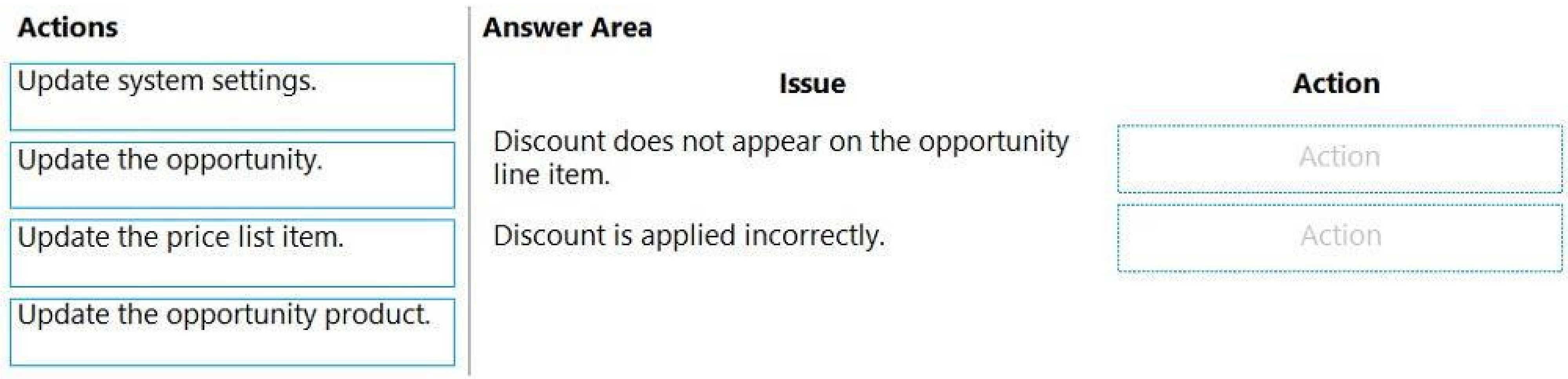
Correct Answer:



Section:
Explanation:
Reference:
https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/create-product-family

QUESTION 69
DRAG DROP
You create a discount list for a company.
Two salespeople encounter the following issues when they create opportunities:
Salesperson1 does not see the discount on the opportunity line item.
Salesperson2 sees the discount applied to the line total instead of the unit price.
You need to ensure that discounts are applied properly.
What should you do? To answer, drag the appropriate actions to the correct issues. Each action may be used once, more than once, or not at all. You may need to drag the split bar between panes or scroll to view content.
NOTE: Each correct selection is worth one point.

Select and Place:



Correct Answer:

Actions

Update the opportunity.

Update the opportunity product.

Answer Area

Issue	Action
Discount does not appear on the opportunity line item.	Update the price list item.
Discount is applied incorrectly.	Update system settings.

Section:
Explanation:
Reference:
https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/set-up-discount-list

QUESTION 70
A company uses Dynamics 365 Sales.
You need to email a quote to a customer.
Which user interface option should you use?

A. Assign
B. Share
C. Form Editor
D. Print Quote for Customer

Correct Answer: D
Section:

QUESTION 71
HOTSPOT
You are a Dynamics 365 Sales system customizer.
You need to create Product Bundles and Product Families.
What should you create? To answer, select the appropriate options in the answer area.
NOTE: Each correct selection is worth one point.

Hot Area:

Answer Area

Requirement	Option
View individual products in a grouping when you create an opportunity.	Product Family Product Bundle
Sell products from a grouping individually.	Product Family Product Bundle
Create a grouping within a grouping.	Product Family Product Bundle

Answer Area:

Answer Area

Requirement	Option
View individual products in a grouping when you create an opportunity.	Product Family Product Bundle
Sell products from a grouping individually.	Product Family Product Bundle
Create a grouping within a grouping.	Product Family Product Bundle

Section:
Explanation:

Reference:
https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/create-product-bundles-sell-multiple-items-together

QUESTION 72
You are a system customizer in Dynamics 365 Sales.
You need to set up product families.
Which option is available?

A. Create a maximum of 10 child product families.
B. Change product properties on a published product.
C. Add the product to multiple product families.
D. Set a product property as an option set.

Correct Answer: D
Section:
Explanation:
Reference:
https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/use-properties-describe-product

QUESTION 73
You are a system customizer in Dynamics 365 Sales.
You need to set up product families.
Which option is available?

A. Create a maximum of 10 child product families.
B. Set a product bundle as a parent of a product family.
C. Add the product to only one product family.
D. Set one product as a parent to another product.

Correct Answer: C
Section:
Explanation:
Reference:
https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/change-product-parent

QUESTION 74
A salesperson sends an active quote to a customer. The customer requests another quote that includes the original details from the opportunity.
You need to create multiple quotes.
What should you do?

A. Close the quote and then create a quote from the opportunity.
B. Create a revision to the active quote.
C. Create a new opportunity.
D. Create a new quote from the original opportunity.

Correct Answer: A
Section:
Explanation:

Reference:
https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/create-edit-quote-sales
https://ellipsesolutions.com/dynamics-365-sales-managing-customer-quotes/

QUESTION 75
You are a system customizer in Dynamics 365 Sales.
You need to set up product families.
Which option is available?

A. Change the data type of an existing product property.
B. Add the product to multiple product families
C. Add the product to only one product family.
D. Set one product as a parent to another product.

Correct Answer: C
Section:
Explanation:
Reference:
https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/change-product-parent

QUESTION 76
You manage a Dynamics 365 environment. A user named User1 begins work on an opportunity.
User1 asks a user named User2 to assist with the opportunity while she is on vacation.
You need to ensure that User2 can access the opportunity and that User1 retains ownership of the opportunity.
What should you do?

A. Assign the record to User2.
B. Grant User2 the stakeholder role.
C. Add User2 to the Owner team.
D. Add User2 to an Access team.

Correct Answer: D
Section:
Explanation:
Note: There are several versions of this questions with two different correct answers. The other possible correct answer is:
Share the record with User2.
Other incorrect answers you may see in the exam include the following:
Grant User2 the security role
Instruct User2 to follow the record
Add User2 to the Sales team

QUESTION 77
HOTSPOT
A salesperson has an active quote for a customer.
The customer wants to add one product to the quote and remove one product from the quote.
You need to make the changes.
What should you do? To answer, select the appropriate options in the answer area.
NOTE: Each correct selection is worth one point.

Hot Area:

Answer Area

Change request	Status
Add a product.	Set the status to Inactive. Close the quote, update the products, and reactivate the quote. Revise the quote, update the products, and reactivate the quote.
Delete a product.	Update the products in the Active state. Close the quote, update the products, and reactivate the quote. Revise the quote, update the products, and reactivate the quote.

Answer Area:

Answer Area

Change request	Status
Add a product.	Set the status to Inactive. Close the quote, update the products, and reactivate the quote. Revise the quote, update the products, and reactivate the quote.
Delete a product.	Update the products in the Active state. Close the quote, update the products, and reactivate the quote. Revise the quote, update the products, and reactivate the quote.

Section:
Explanation:

Reference:
https://neilparkhurst.com/2019/06/27/mb-210-microsoft-dynamics-365-for-sales-quotes/

QUESTION 78
A sales manager asks you to add a reason named DealLost to mark opportunities closed as lost.
You need to modify entity fields.
Which two entity fields should you modify? Each correct answer presents part of the solution.
NOTE: Each correct selection is worth one point.

A. Opportunity Line
B. Opportunity Sales Process
C. Opportunity
D. Opportunity Relationship
E. Opportunity Close

Correct Answer: C, E
Section:
Explanation:
Reference:
https://community.dynamics.com/365/sales/f/dynamics-365-for-sales-forum/377163/customize-opportunity-close
https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/customize-opportunity-close-experience

QUESTION 79
You cancel an order in Dynamics 365 Sales by mistake.
You need to mark the order status as fulfilled instead of cancelled.
What should you do?

A. Change the order status fulfilled.
B. Activate the order and change the order status to fulfilled.
C. Recreate the order.
D. Add the products back in to the original order.

Correct Answer: C
Section:
Explanation:
Reference:
https://docs.microsoft.com/en-us/dynamics365/sales-professional/create-orders-sp

QUESTION 80
A company uses Dynamics 365 Sales.
You need to add an email activity to both a contact and its corresponding account without setting the Regarding field.
Where should you add the email activity?

A. Dynamics 365 App for Outlook
B. Quick Create form
C. Account record only
D. Contact record only

Correct Answer: D
Section:

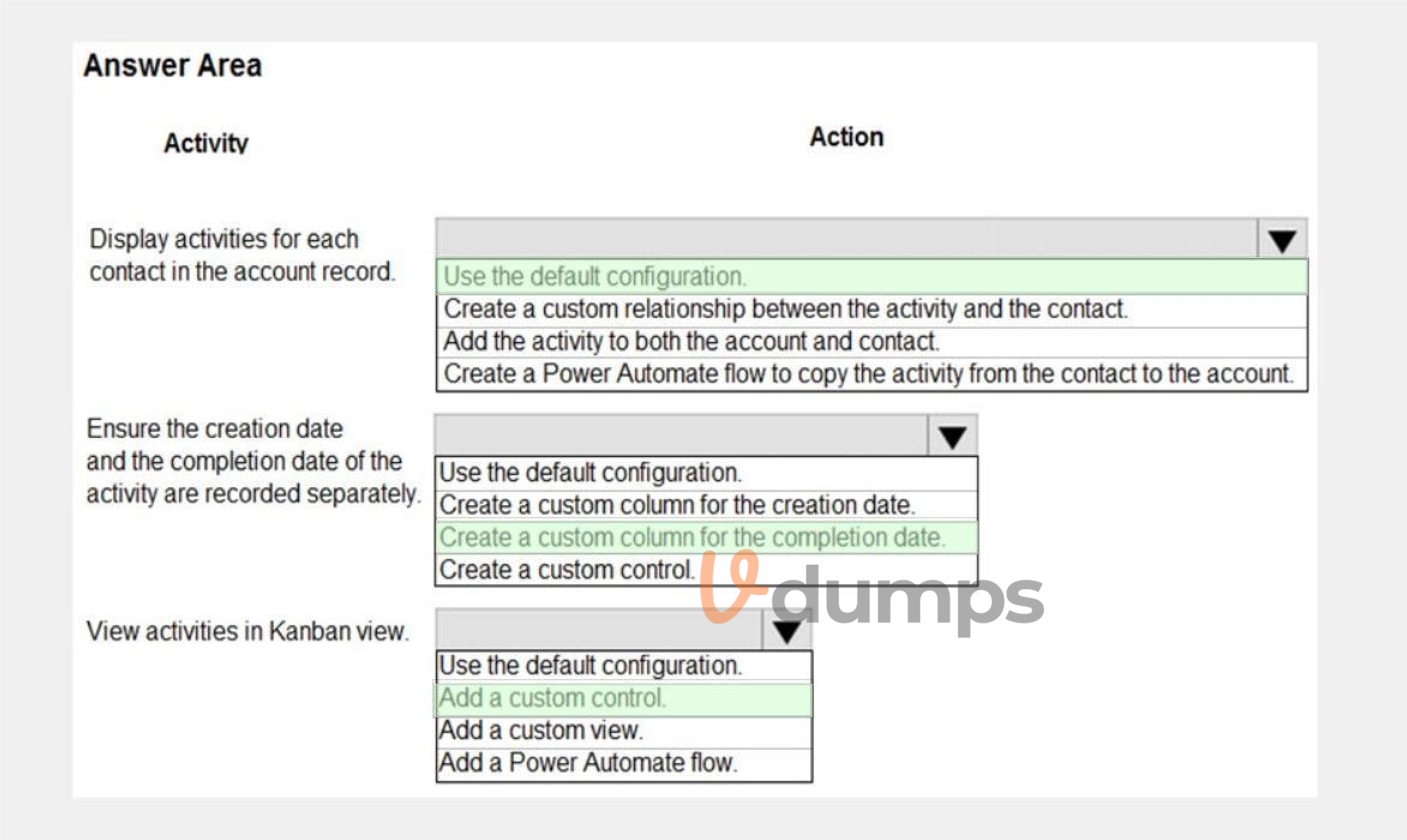
QUESTION 81
HOTSPOT
A company uses Dynamics 365 Sales. The company does not use any customizations.
The system must create activity records for every interaction a salesperson has with customers and contacts.
You need to configure the system by using minimal customizations.
How should you configure the system? To answer, select the appropriate options in the answer area.
NOTE: Each correct selection is worth one point.

Hot Area:

Answer Area

Activity	Action
Display activities for each contact in the account record.	Use the default configuration. Create a custom relationship between the activity and the contact. Add the activity to both the account and contact. Create a Power Automate flow to copy the activity from the contact to the account.
Ensure the creation date and the completion date of the activity are recorded separately.	Use the default configuration. Create a custom column for the creation date. Create a custom column for the completion date. Create a custom control.
View activities in Kanban view.	Use the default configuration. Add a custom control. Add a custom view. Add a Power Automate flow.

Answer Area:



Section:
Explanation:
Reference:
https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/activity-kanban-view

QUESTION 82
You are a Dynamics 365 Sales administrator for a car dealership. You create a custom Service entity.
Salespeople must be able to see all related appointments in the timeline. A salesperson creates an appointment but is unable to see any Service records available in the Regarding field. Salespeople have permission to view service record.
You need to ensure that the salesperson is able to connect the appointment to the service.
What should you do?

A. Create a connection to the Service record.

B. Add a timeline to the Service form.
C. Enable activities on the Service entity.
D. Assign privileges to Activities.

Correct Answer: B
Section:
Explanation:
Reference:
https://docs.microsoft.com/en-us/dynamics365/outlook-app/enable-a-custom-entity-to-appear-in-the-regarding-lookup

QUESTION 83
You close a lost opportunity. The company you lost the opportunity to is a competitor with whom you do business. The company is already set up with an account and competitor record in the system.
You want to track the lost opportunity without having to reopen the opportunity.
You need to track the company to the opportunity.
What should you do?

A. Add the account to the opportunity.
B. Add the competitor to the opportunity.
C. Add the opportunity to the competitor.
D. Add the opportunity to the account.

Correct Answer: C
Section:
Explanation:
Reference:
https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/create-edit-competitor-record-sales

QUESTION 84
A salesperson is viewing a My Activities list as a calendar.
The salesperson wants to change the status of a phone call by dragging an activity to a new status.
You need to ensure that the salesperson can switch their view type.
What should you do?

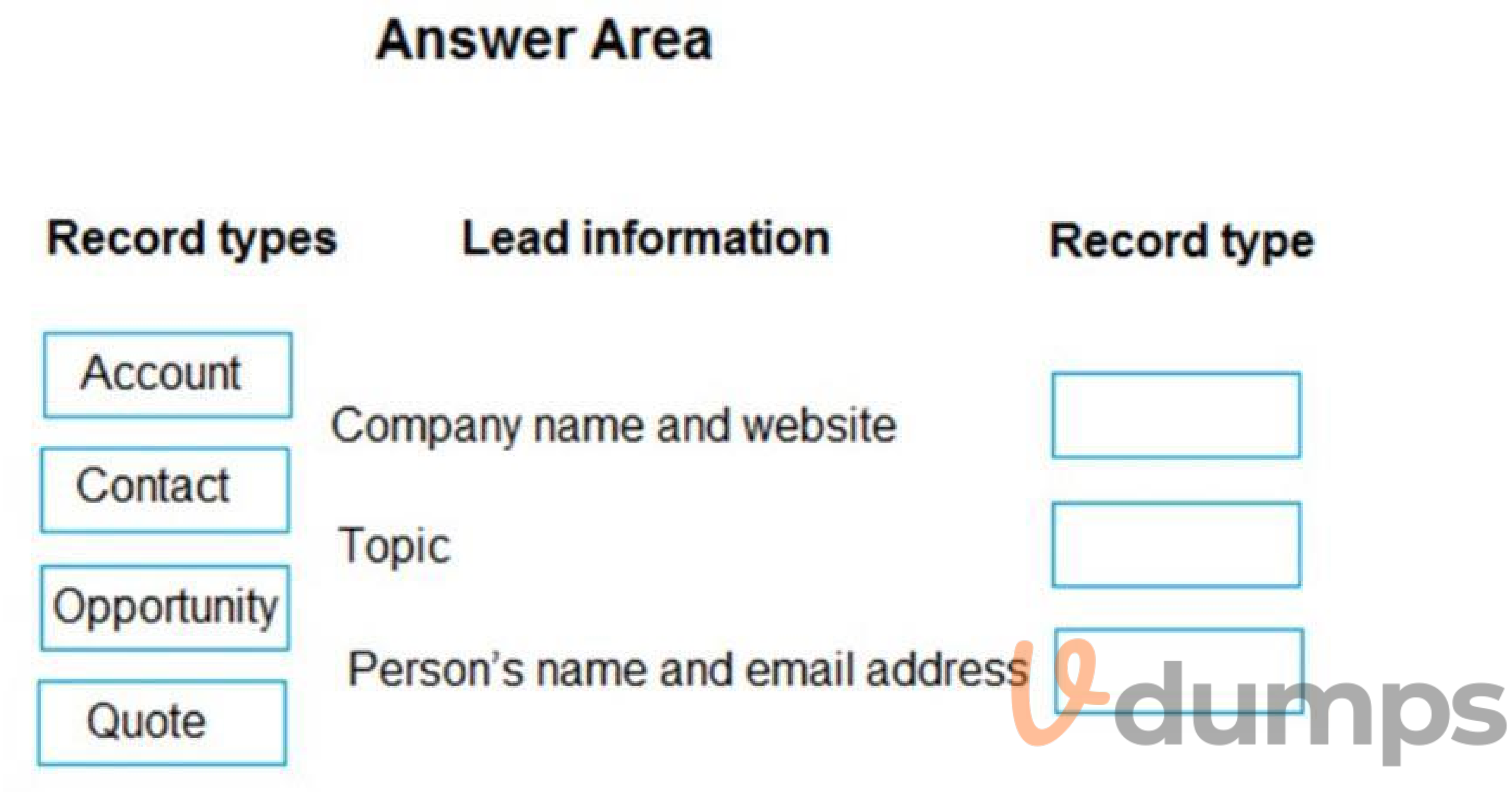
A. Select Show As in the ribbon.
B. Select Create View in the ribbon.
C. Remove the Calendar control, and then add the Kanban control to the view.
D. Add the Kanban control to the view.

Correct Answer: A
Section:
Explanation:
Reference:
https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/activity-kanban-view

QUESTION 85
DRAG DROP
A company uses Dynamics 365 Sales. You qualify a lead record.
Which record is created when you quality a lead? To answer, drag the appropriate record types to the correct leads. Each record type may be used once, more than once, or not at all. You may need to drag the split bar

between panes or scroll to view content.
NOTE: Each correct selection is worth one point.

Select and Place:



Correct Answer:

Answer Area

Record types	Lead information	Record type
	Company name and website	Account
	Topic	Opportunity
	Person's name and email address	Contact
Quote		

Section:
Explanation:
Reference:
https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/qualify-lead-convert-opportunity-sales
https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/create-edit-opportunity-sales

02 - Manage Core Sales Identities
Background
Humongous Insurance provides fleet automotive insurance. The company's accounting year is July 1st-June 31st.
They have experienced rapid growth by acquiring brokerages that have locations in Canada, the United States, and the United Kingdom.
The company is making a big push for the start of their second quarter on October 1st.
Current environment
United States salespeople are located in either the north, east, south, west, or national territory. Only national territory sales team members can send quotes and invoices across multiple territories.
Sales managers route leads based on territory.
Salesperson1 and Salesperson2 are part of the south region and the national account, respectively.
Salespeople cannot accurately report progression of sales and whether they are closed or still in process. Manager and underwriter approval is communicated by email.
Many salespeople use different quote layouts.
Requirements
Territories
Each territory must be set up as a Business Unit for security.
Each territory must have the ability to qualify its own leads.
Security
National sales team members must have privileges in order to see sales and account information managed by the regional sales teams. Configure appropriate security for national and each regional sales.
Goals
Salespeople's goals must roll up to their manager's goal.

Goal metrics need to automatically calculate every 12 hours.
Quotes
Set up version traceability for quotes.
Quotes must be marked with the word “Final” when approved.
Quotes and orders must be generated in their client’s currency.
Quotes and invoices must be able to be viewed across a variety of devices.
Pricing must be standardized for insurance products while supporting tiered pricing across national and regional accounts.
Opportunities
Closed opportunities that are won or lost must capture competitor information. The company wants a visualization built for the categories related to why the opportunities closed a certain way. When an opportunity is nearing time to quote, products should be added to the opportunity.
Other requirements
Simplify data entry and reduce dual data entry.
Help salespeople and their managers keep track of where they are in the sales process.
Use out-of-the-box reports where possible.
Generate invoice numbers automatically.
Begin invoice numbers with the letters INV.
Allow managers to be able to view a diagram and drill down to leads converted in the last 30 days.
Issues
Salespeople cannot identify the sales process stage process for each customer.
Updated products are not easily updated within the product groups.
There is no pricing tool.
Salespeople must research each product every time they have to quote a customer on a product.
UserA is unable to qualify leads.
The manager follows the process on an approved quote but an error occurs.
ClientA purchases products from multiple regions for a single order.
Not all products are available in regional pricelists or national pricelists.

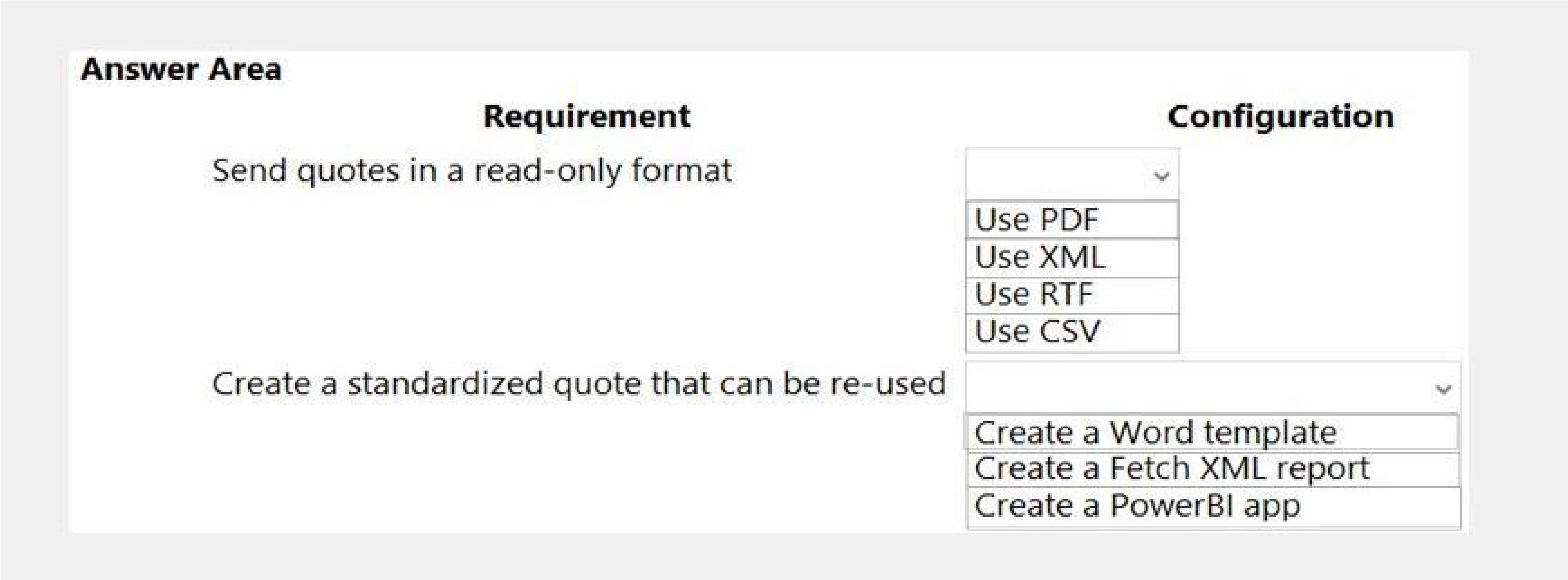
QUESTION 1
You need to determine which fields are required when opportunities are marked as lost.
Which fields are required?

A. Status and Stakeholders
B. Status and Contact
C. Status Reason and Competitor
D. Status Reason and Description

Correct Answer: C
Section:

QUESTION 2
HOTSPOT
You need to set up quotes to meet the requirements.
How should you configure the quotes? To answer, select the appropriate options in the answer area.
NOTE: Each correct selection is worth one point.

Hot Area:



Answer Area:

Section:
Explanation:
Reference:
https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/create-quote-pdf

QUESTION 3
You need to create the required number of orders for ClientA.
How many orders should you create?

A. 1
B. 2
C. 3
D. 7

Correct Answer: A

Section:
Explanation:

QUESTION 4
You need to determine how notes and attachments are handled in converted leads.
How are they handled?

A. moved to the account after the lead is qualified
B. deleted after the lead is qualified
C. stay with the inactive lead after the opportunity is qualified
D. automatically moved to the opportunity after the lead is qualified

Correct Answer: D
Section:
Explanation:
Reference:
https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/qualify-lead-convert-opportunity-sales

QUESTION 5
You need to determine the cause of the error for approved quotes.
Why does the error occur?

A. The opportunity is in Active state.
B. The quote template is in Active mode.
C. The quote has been deleted.
D. The quote is in Active state.

Correct Answer: D
Section:

03 - Manage Core Sales Identities
Background
A company owns a group of theaters that stage live performances. Tickets to shows are sold by individual representatives by using a mobile app.
Each theater has a manager. The managers rotate between theaters every six months.
The company plans to implement Dynamics 365 Sales.
Current environment
The company uses the following pricing structure for tickets:

Quantity tickets per show	Pricing per ticket
Fewer than 10	$50.00
11 or more but fewer than 25	10 percent off ticket price
More than 26	15 percent off ticket price

Representatives create Microsoft Word documents to use as invoices. Pricing for tickets is often inconsistent. Ticket sales are often lost because customers go to other shows.
Requirements
Business cards
The business card of every group sales customer must be scanned and the image saved with the contact record. A customer’s business card must be scanned even if the customer has been to the theatre before.
Business cards must show up on all contact forms.
Salespeople
Each salesperson needs to sell a certain amount of tickets per month.
The number of tickets each salesperson sells must be totalled only at the end of the month, before the monthly meeting between the salesperson and their manager. Salespeople must not be able to check the quantity sold in the system daily.

Opportunities
The name of the sales manager must be added to opportunity records when sales representatives close opportunities. Opportunities that are lost must include the reasons other show and not interested.
Some of the opportunities who order a large quantity of tickets every week want quotes quickly on various quantities. They want it broken down as follows:
- Price breakout by ticket
- Quantity discount amount
- Original ticket price

Orders
Customers who buy a large quantity of tickets to a show must always get a quote first.
Orders must always be created from the Quote record when it is a large purchase.
Customers who buy a smaller quantity of tickets that do not have quotes must have an invoice sent to them.

Data Analysis
Analyze email messages that pertain to ticket sales of the shows.
Analyze relationships to help with potential sales of friends and coworkers for potential ticket buyers. Analyze accounts and assess the account representative's relationship with the customer to gauge the level of communication.

Visuals
A Tickets dashboard for all cashiers must be created that contains the following bar charts:
all the tickets sold for each show
all the tickets available for each show
accounts that have purchased groups of 10 or more tickets
purchased tickets by age groups

Shows
Representatives must track which shows customers go to when they do not purchase the tickets to their shows. This information must be entered in the records. Every time a potential large sale is lost, the representative needs to ask the customer which show ticket was purchased instead of their show. Shows at other theatres must be updated on a monthly basis.
Quantity discounts and bulk purchase for different shows must be consistent

Issues
The Tickets dashboard has eight sections. The dashboard includes a line chart that displays data about age groups. The dashboard also has a chart that group ticket sales. The chart shows 10 or more tickets sold but is missing accounts that purchased more than 20 tickets.
Cashiers report that they cannot see two specific area of the Tickets dashboard. Salespeople report that they can see all areas of the dashboard. Representative1 is unable to scan business cards.
Some users do not see the business cards when using their desktop machines, but they see them from their tablets and mobile phones. There are no business card images in the system.
Duplicate contacts are being created with business card scans.

QUESTION 1
You need to create orders for large quantity purchases.
What are two possible ways to achieve this goal? Each correct answer presents a complete solution
NOTE: Each correct selection is worth one point.

A. Create an invoice from the order record.
B. Make a copy of the quote and save it as won.
C. Select Won when prompted.
D. Select a Create order from the Quote record.
E. Select Convert to work order from the Opportunity record.

Correct Answer: B, D
Section:
Explanation:
Reference: https://docs.microsoft.com/en-us/dynamics365/sales-professional/create-orders-sp

QUESTION 2
You need to configure the system for all the large quantity pricing requirements.
What should you do?

A. Create a product catalog.

B. Create a quote with a write-in product.
C. Create a workflow for price list.
D. Create an opportunity.

Correct Answer: A
Section:
Explanation:
Reference: https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/set-up-product-catalog-walkthrough

QUESTION 3
You need to configure the system to handle all ticket sales.
What should you configure?

A. Discount Lists
B. Product Bundles
C. Product Catalog Settings
D. Goals

Correct Answer: A
Section:
Explanation:
Reference: https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/set-up-discount-list

QUESTION 4
You need to choose where to enter the other show names in the system.
Where should you add the shows?

A. Competitor
B. Product
C. Accounts
D. Contacts

Correct Answer: A
Section:

QUESTION 5
DRAG DROP
You need to handle large quantity opportunities.
Which four actions should you perform in sequence? To answer, move the appropriate actions from the list of actions to the answer area and arrange them in the correct order.

Select and Place:

Actions

- Navigate to Sales Hub and select **Opportunities**.
- Edit a product record.
- Navigate to the Additional detail tab.
- Navigate to Sales Hub and select **Products**.
- Navigate to the Quotes tab.
- Edit an opportunity record.
- Select **Get Products**.

Answer Area

Correct Answer:

Actions

- Edit a product record.
- Navigate to the Additional detail tab.
- Navigate to Sales Hub and select **Products**.

Answer Area

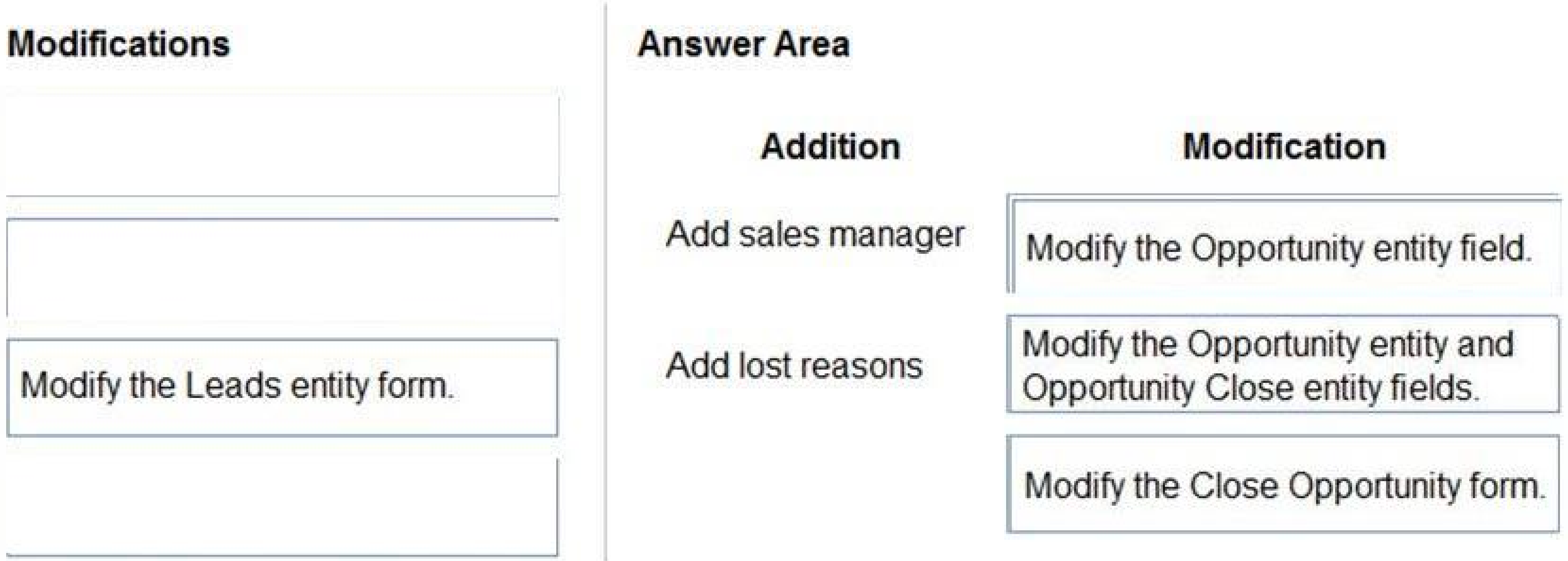
1. Navigate to Sales Hub and select **Opportunities**.
2. Edit an opportunity record.
3. Navigate to the Quotes tab.
4. Select **Get Products**.

Section:
Explanation:
Reference:
https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/create-edit-quote-sales

QUESTION 6
DRAG DROP
You need to determine which configuration changes to make to address closed and lost opportunities.
Which modifications should you complete? To answer, drag the appropriate modifications to the correct additions. Each modification may be used once, more than once, or not at all. You may need to drag the split bar between panes or scroll to view content.
NOTE: Each correct selection is worth one point.

Select and Place:

Correct Answer:



Section:
Explanation:
Reference:

https://community.dynamics.com/365/sales/f/dynamics-365-for-sales-forum/377163/customize-opportunity-close
https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/customize-opportunity-close-experience

04 - Manage Core Sales Identities

Background

Bellows College has several sports teams. Sporting events take place throughout the year. Processes for managing and selling tickets to events are very outdated. The college uses Microsoft Excel to track who has paid for each private box seat for each season. The college uses a paper-based system to manage individual ticket sales. Bellows often loses money on ticket sales due to lack of accurate purchasing information.

The college currently does not support ticket sales on the day of a sporting event. All tickets must be purchased in advance.

Bellows College plans to streamline processes for selling tickets to sporting events. The organization needs an updated system that will support internal sales people and track all ticket sales for a season.

Sales team

Bellows College has inside phone sales representatives and regional sales representatives that are assigned to specific sales territories. Inside phones sales representatives primarily handle individual cash or credit card ticket sales. Regional sales representatives primarily handle group and private box sales. Phone inquiries for group and private box sales are entered into the system and assigned to the appropriate regional representative.

Dynamics 365

Bellows College has purchased Microsoft Dynamics 365 Sales to help manage their ticket sales. You are hired to configure the system to meet the college's needs.

The college has identified the following requirements for the new system:

Enforce repeatable steps to promote and increase efficiency and consistency for ticket sales across all sports and venues. Calculate sales margins based on base ticket prices with discounts for group and alumni sales.

Maximize private box sales.

Provide visibility into all potential and pending sales.

Track and report follow up activities performed by all sales representatives.

Current processes

Ticket sales

Ticket sales are completed and displayed based on the college's fiscal year which begins July 1 and ends June 30.

Ticket sales for existing customers will be entered as new opportunities for tracking and reporting purposes. To facilitate timely follow-up (and sales representative accountability), a phone call activity will be auto-generated every time a new opportunity is created.

Ticket sales for new customers will be entered in the solution as leads. Leads will have the following statuses: Open, Qualified, and Disqualified. Status values cannot be customized. Status values cannot be customized. Status reasons can be customized.

Ticket prices

The standard ticket price for all sporting events is $50. Non-alumni ticket purchases are priced based on the standard rate. Alumni ticket purchases are priced at the current cost. This season the current cost is $35 per ticket. All sports are priced on a markup, except for football. Football is priced based on a hard profit. The college has the following markup and margin policies for the three categories of ticket purchasers:

Purchaser	Markup	Margin
Alumni	10 percent	5 percent
Student	0 percent	0 percent
Non-alumni	0 percent	12 percent

Ticket package discounts are available for group purchases. The following table shows pricing:

# of Tickets for Group	Discount price/ticket
Alumni – 10	$33
Alumni – 20	$31
Alumni > 20	$30
Non-alumni – 10	$48
Non-alumni – 20	$45
Non- alumni > 20	$43

Private box seats

Because of the limited number of private box seats, private box seats sell out quickly. These seats are offered to current renters first, then alumni. Remaining box seat tickets are made available to others from year to year. The dean of the college has expressed the desire to personally call the CEOs or primary decision makers of groups to thank them for renewing their private box rentals.

Private box sales for existing customers will be entered as opportunities and converted to orders when finalized. Private box and group sales for new customers will be entered as leads and will follow a standardized sales process. To support reporting, pending new customer sales will go through a verification process using the stages New, Pending Approval, Approved.

Requirements

Accounting

Budgets and taxes must be tracked over an annual accounting period. The name of the accounting period must be displayed based upon the July 1 date. The accounting period must support abbreviations and must be divisible into four quarters.
Invoices must include:
Price List Products: Products tied to a price list
Non-catalog Products: Existing products not part of the product catalog
Opportunity Products: Products from a previously created opportunity
Product prices on the invoice can be changed at the salesperson's discretion
System configuration
The system must be set up as follows:
Individual cash and credit cards sales will be entered as orders in the system.
New opportunities will automatically generate a required phone call activity for the assigned sales representative to be completed within 5 days. Valid outcomes of the call will be set to Connected, Left Message, and Wrong Number when closed.
Non-renewals of private box rentals should be designated with the following outcomes for tracking and reporting purposes: Not interested, Budget cuts, No Longer in business, Other. If Other is chosen, the sales representative must provide additional information in the provided text box.
Tickets
The ticket manager must be able to create discounts for volume purchases of tickets for either groups or bundles of games.
The ticket manager must be able to calculate the best margins for ticket sales. They need to calculate prices as percentage of costs.
Reporting
The school's athletic director needs a fiscal year report that includes specific formatting based on a defined template. The report must contain a chart that displays the type of ticket purchaser (alumni, non-alumni, and student).
All sales reporting must be completed by using Dynamics 365 for Sales. Bellows College has purchased the online version of the Sales Content Pack for BI to allow for visualizations and the creation of dashboards for ticket sales. The sales team needs to use a secured connection to access the Bellows College Power BI dashboard.
Sales team members need the following report types to meet reporting needs:

Report	Report description
Orders	Provides a view of ticket orders and line items.
Discounts by Number of Employees	Provides a custom report to display discounts provided based upon number of employees within a customer organization.
Standings Report	Provides a report hosted by a third party of current team standings.
Branding Report	Provides images of team logos and fonts. This report never changes.
Mobile Salesperson Report	Provides the ability to create PivotTables for mobile sales team members when connected to a network.

Problem statements
The sales manager is concerned with the lack of sales from one of the sales representatives in comparison to the other sales representatives. The legacy system does not provide enough data to allow the manager to give proper feedback or guidance.
The sales manager has received emails from a potential private box customer named Contoso, Ltd. confirming that they have not had any contact from any sales representative even though they are ready to purchase group tickets.

QUESTION 1
You need to identify new customer pending sales.
What should you do?

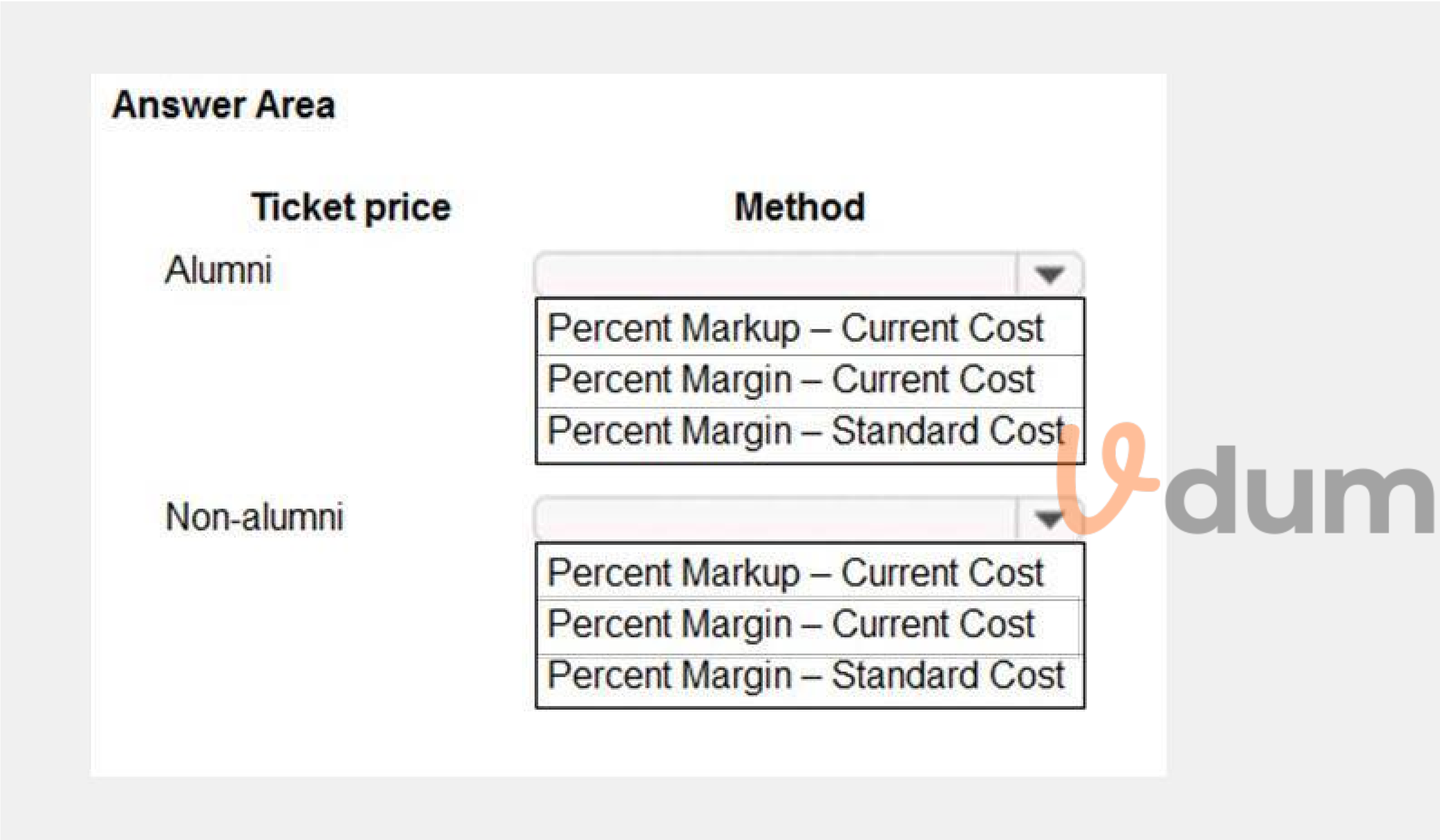
A. Create status reasons in the solution and associate them with Open status
B. Add statuses for all the pending sales stages
C. Set all new leads to a default status of Qualified
D. Configure the solution to automatically convert leads to opportunities

Correct Answer: A

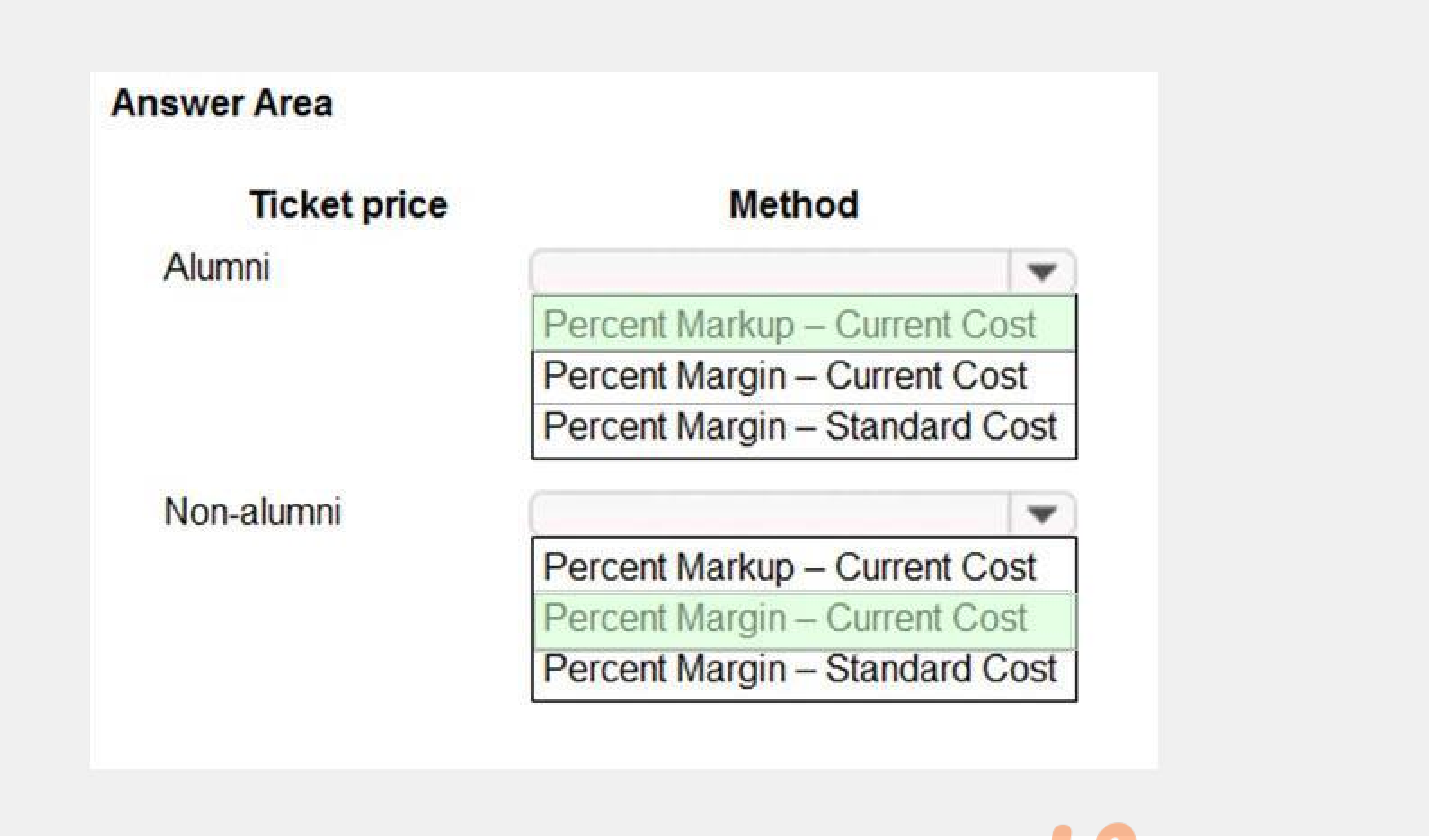
Section:
Explanation:
To support reporting, pending new customer sales will go through a verification process using the stages New, Pending Approval, Approved.

QUESTION 2
HOTSPOT
You need to create a discount list for ticket sales.
Which pricing methods should you use? To answer, select the appropriate options in the answer area.
NOTE: Each correct selection is worth one point.

Hot Area:



Answer Area:



Section:
Explanation:

QUESTION 3
You need to resolve the sales manager's issue regarding private box customers.
What should you do?

A. Convert all incoming phone calls to leads.
B. Convert the dean's phone call to an opportunity.
C. Convert the sales manager's emails to leads.
D. Convert the sales manager's emails to opportunities.

Correct Answer: A
Section:

QUESTION 4
You need to configure a phone call activity for the dean.
To which value should you set the value of the Call With field?

A. stakeholder
B. record owner
C. contact name
D. dean

Correct Answer: C

Section:
Explanation:
Reference: https://docs.microsoft.com/en-us/dynamics365/customerengagement/on-premises/basics/add-phone-call-task-email-appointment-activity-case-record

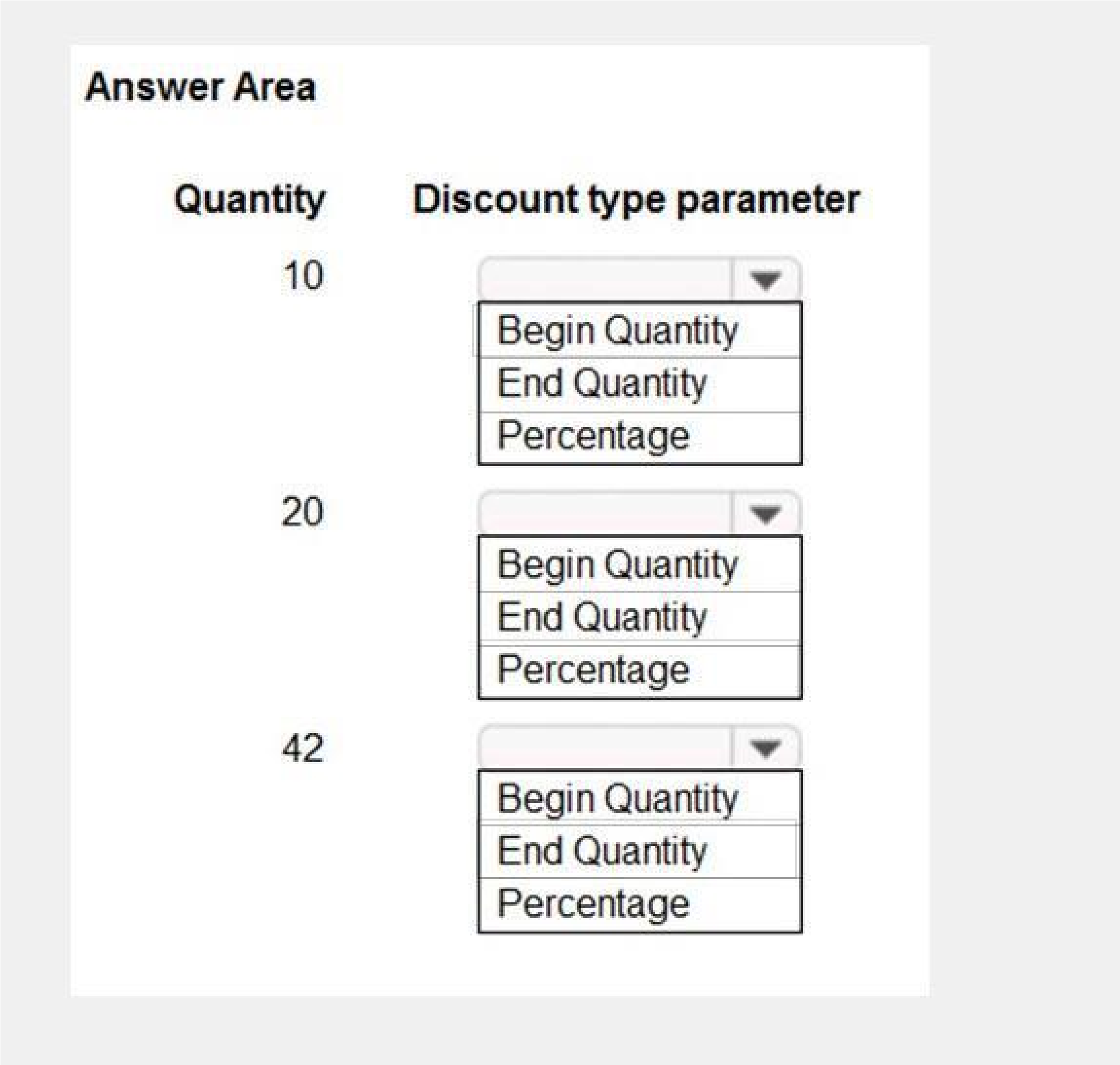
QUESTION 5
You need to configure pricing for the Contoso, Ltd. invoice.
What should you do?

A. Configure an end date for the price list.
B. Set the Invoice Product to Use Default.
C. Set the Invoice Product to Override Price.

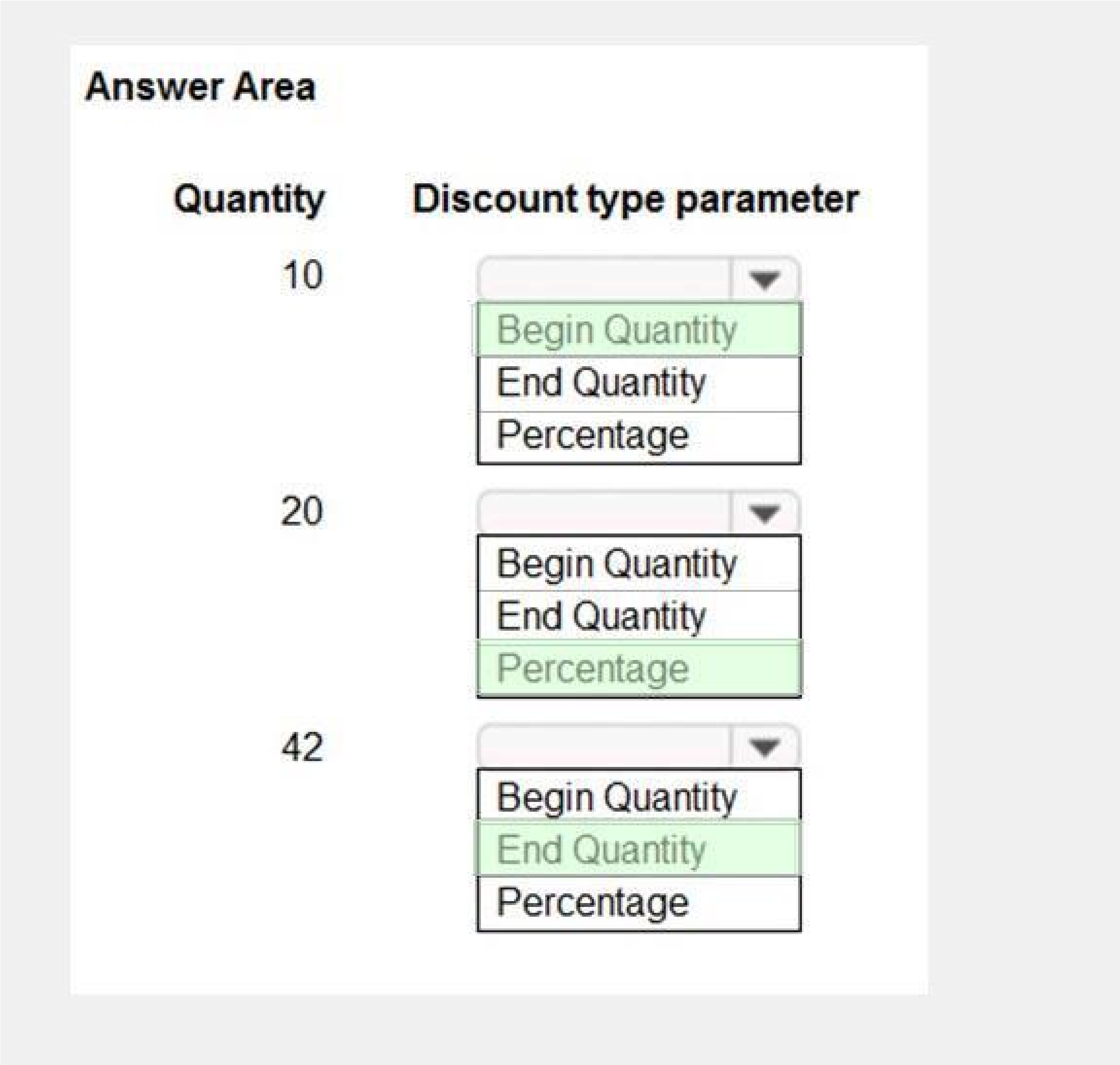
Correct Answer: C
Section:

QUESTION 6
HOTSPOT
You need to configure group sales discounts for alumni.
Which discount type parameters should you use? To answer, select the appropriate options in the answer area.
NOTE: Each correct selection is worth one point.

Hot Area:


Answer Area
Quantity
Discount type parameter
10
Begin Quantity
End Quantity
Percentage
20
Begin Quantity
End Quantity
Percentage
42
Begin Quantity
End Quantity
Percentage

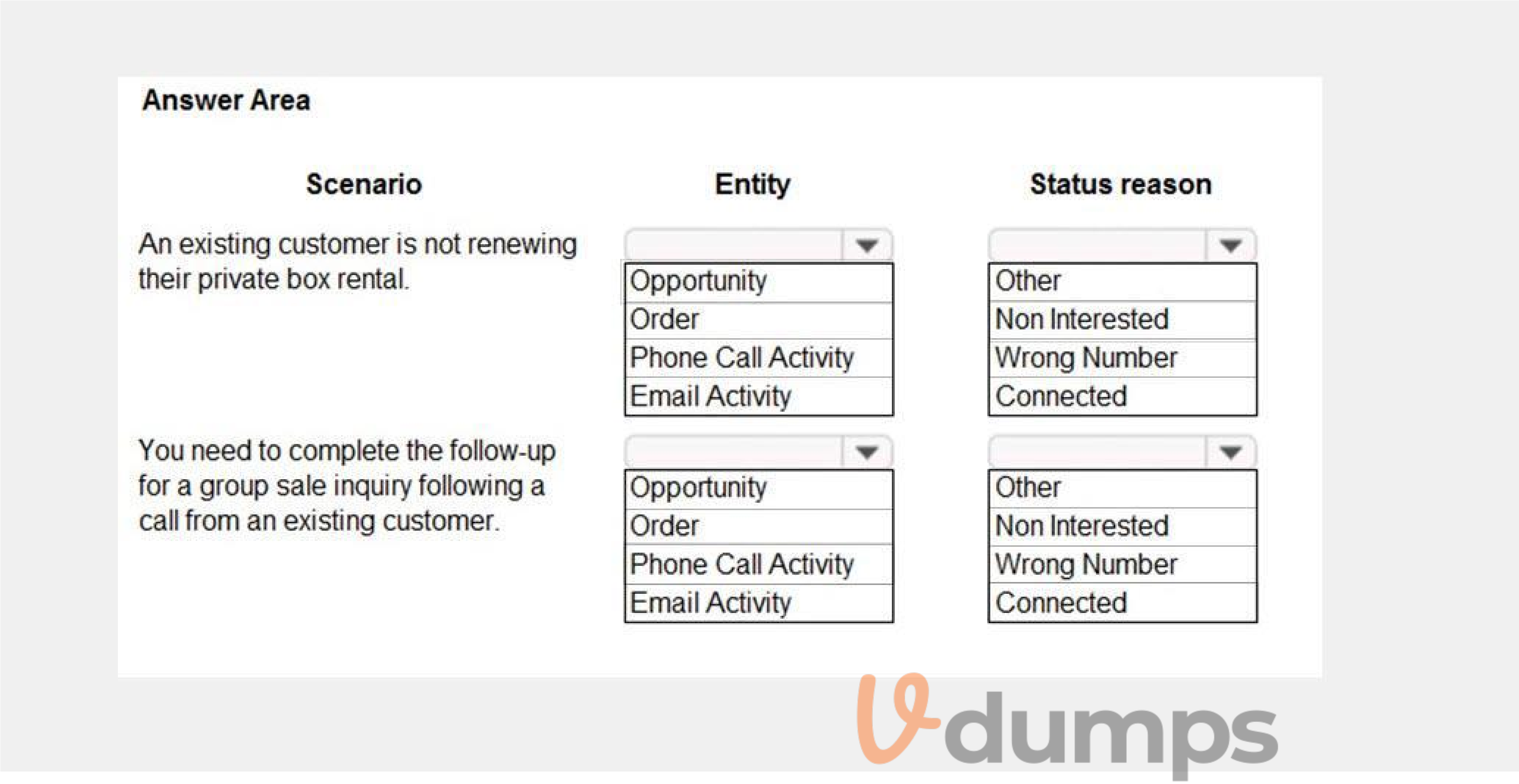
Answer Area:



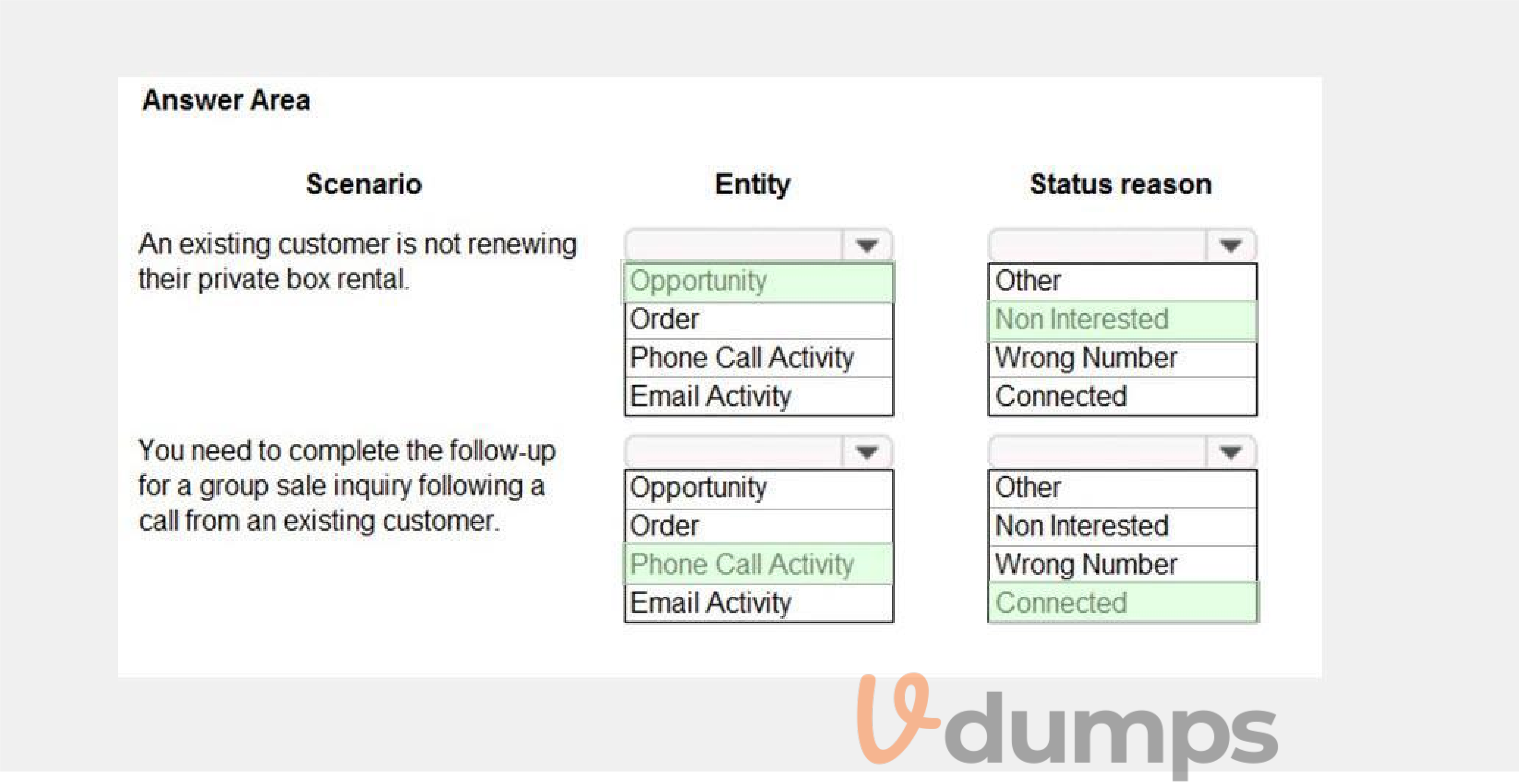
Section:
Explanation:

QUESTION 7
HOTSPOT
You need to configure opportunity status reasons to meet the requirements for existing customer sales.
Which options should you use? To answer, select the appropriate options in the answer area.
NOTE: Each correct selection is worth one point.

Hot Area:


Answer Area
Scenario
Entity
Status reason
An existing customer is not renewing their private box rental.
Opportunity
Order
Phone Call Activity
Email Activity
Other
Non Interested
Wrong Number
Connected
You need to complete the follow-up for a group sale inquiry following a call from an existing customer.
Opportunity
Order
Phone Call Activity
Email Activity
Other
Non Interested
Wrong Number
Connected

Answer Area:



Section:
Explanation:

QUESTION 8
DRAG DROP
You need to create invoices for all customers.
Which products should you use? To answer, select the appropriate options in the answer area.
NOTE: Each correct selection is worth one point.

Select and Place:

Products

- Price List Product
- Non-catalog Product
- Opportunity Product

Answer Area

Option	Product
Existing product	product
Write-in product	product
Get product	product

Correct Answer:

Products

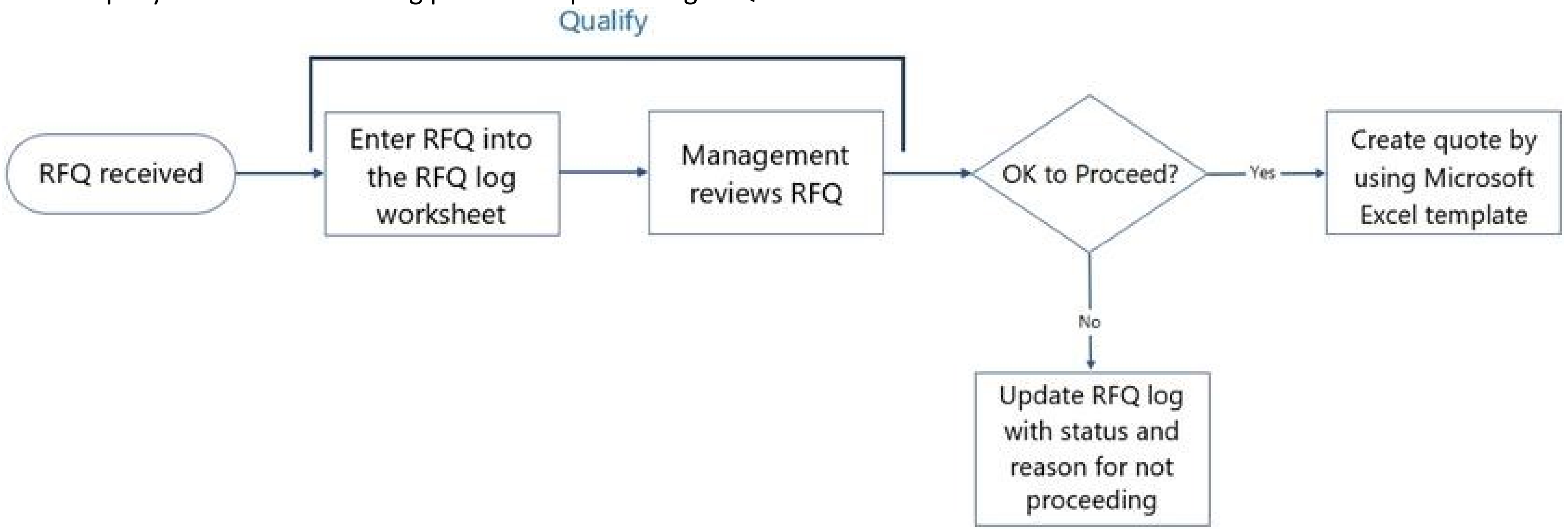
Answer Area

Option	Product
Existing product	Price List Product
Write-in product	Non-catalog Product
Get product	Opportunity Product

Section:
Explanation:

05 - Manage Core Sales Identities
Background
Contoso, Ltd. manufactures electronic components for robotic assembly machines. The company specializes in wiring harnesses that are made to customer specifications.
The company's corporate office and a manufacturing plant are in Detroit. The company also has offices and manufacturing plants in the following countries:
China
Germany
Mexico
United Kingdom (UK)
Current environment
Sales
Customers who have operations in more than one country are managed by the sales team within the country from which a request originated. However, it is difficult to get information about sales for these customers. Each salesperson manually creates customer quotes using Microsoft Word and Excel templates. This causes pricing inconsistencies, which is affecting profitability. Customers who have total sales over $1,5M per year receive special Preferred Customer discount pricing on products and services. Costs, pricing, and product availability vary greatly by country.
Sales teams
Each office has a dedicated sales team. Sales are managed by a global team in countries without a sales office. Each sales team has a projected revenue target that is tied to the factory capacity in their country, except for the global team. The global team's projected revenue target is derived using a percentage of their actual sales from the previous year.
Each sales team maintains a spreadsheet in which they record customer requests for quotes (RFQs). The spreadsheets are stored on a network drive. Sales team revenue targets are set yearly based on manufacturing capacities at each plant.

Individual sales targets are based on product lines by quarter.
Current RFQ process
The company defines the following process for processing RFQs:



Requirements
General setup
Standard functionality must be used when possible.
All open RFQs must be imported into the solution.
All information must be accessible to the entire executive management team.
Country-specific sales information must be accessible only to sales representatives assigned to those teams. Sales and quote processes must be standardized across all sales divisions.
Sales territories must be set up for each country as well as for a global territory.
The global team will take over the management of RFQs for customers who have operations in more than one region. Due to regulatory considerations, the solution must be able to limit the kinds of products that can be sold by region.
RFQ management
New RFQs must be entered initially into the system as Leads until they are reviewed.
The default forecast categories must be used.
Standardized quote formats and product pricing must be enforced across all sales offices.
All tasks and follow-up activities with customers to close RFQs must be associated directly with the RFQs.
Credit and reference checks
All new customers must undergo credit and reference checks before estimates are created for any RFQs. This information will be recorded in a new custom field called Credit Check that has a Yes/No value. The finance manager must be assigned the credit and reference review when an RFQ is ready for review. If a customer's credit and reference review is unfavorable, the finance manager must follow up with the customer and the sales representative by phone. The customer's credit report must be added to the RFQ as a permanent record and for audit purposes.
The solution must provide both a sample script that the finance manager can use as well as a checklist of how to perform the check.
Reporting
The sales manager dashboard must show the following data:
Projected revenue and profitability per country by month and fiscal year.
Projected and current product sales per country by month and fiscal year.
RFQ Won/Loss revenue comparison by fiscal quarter.
RFQ status by sales representative within their territory.
RFQs that are awaiting management approval and how long they have been waiting.
Sales lost to competitors month over month.
Managers must also be able to track how long an RFQ has been awaiting credit and reference checks, and how many RFQs have had unfavorable results from credit or reference checks.
Issues
PreferredCustomerA, who has factories in Germany, the UK, and Canada, reports that their sales representatives give different pricing and discounts to customers depending on the country in which the RFQ is initiated. Several RFQs that have passed management review but failed standard credit checks have been issued quotes. To prevent this, credit checks must now be done before the management approval meeting. Several imported RFQs contain quotes for discontinued products. Updated quotes with current product offers need to be sent to customers. CompanyB needs pricing for harnesses for their plants in Germany, the UK, and Argentina.
CompanyC received a quote for harnesses for their US home office. They need the products for their Canadian plant. CompanyD wants sales orders and shipments sent directly to VendorZ, who manufactures several subassemblies for them. VendorZ also builds components for other customers as well as for Contoso, Ltd. The chief financial officer (CFO) is concerned about the amount of work that the new credit and reference checks will create. Therefore, a time-study needs to be initiated for that work to see whether an additional person needs to be hired.

QUESTION 1
You need to process CompanyB's order.
What should you do?

A. Activate the quotes.
B. Create an invoice for CompanyB.
C. Create an order from each quote per country.
D. Submit the order for CompanyB.

Correct Answer: A
Section:
Explanation:
Reference:
https://docs.microsoft.com/en-us/dynamics365/sales-professional/create-quotes-sales-professional

QUESTION 2
You need to enter information about VendorZ into the system.
Which two actions should you perform? Each correct answer presents part of the solution.
NOTE: Each correct selection is worth one point.

A. Update the contact preference for VendorZ.
B. Create a new connection type.
C. Create an account record for VendorZ.
D. Update the contact preference for CompanyD.
E. Create a sub-contact record for the vendor for CompanyD.

Correct Answer: B, C
Section:

QUESTION 3
You need to add the unfavorable credit and reference check reasons to the RFQ close process.
What should you do?

A. Delete the RFQ Lead record.
B. Create custom status reasons.
C. Convert the credit and reference activities to an opportunity.
D. Add a stage to the business process flow.
E. Create custom activities for the credit and reference checks.

Correct Answer: B
Section:
Explanation:
Reference:
https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/customize-opportunity-close-experience

QUESTION 4
You need to implement the time study.

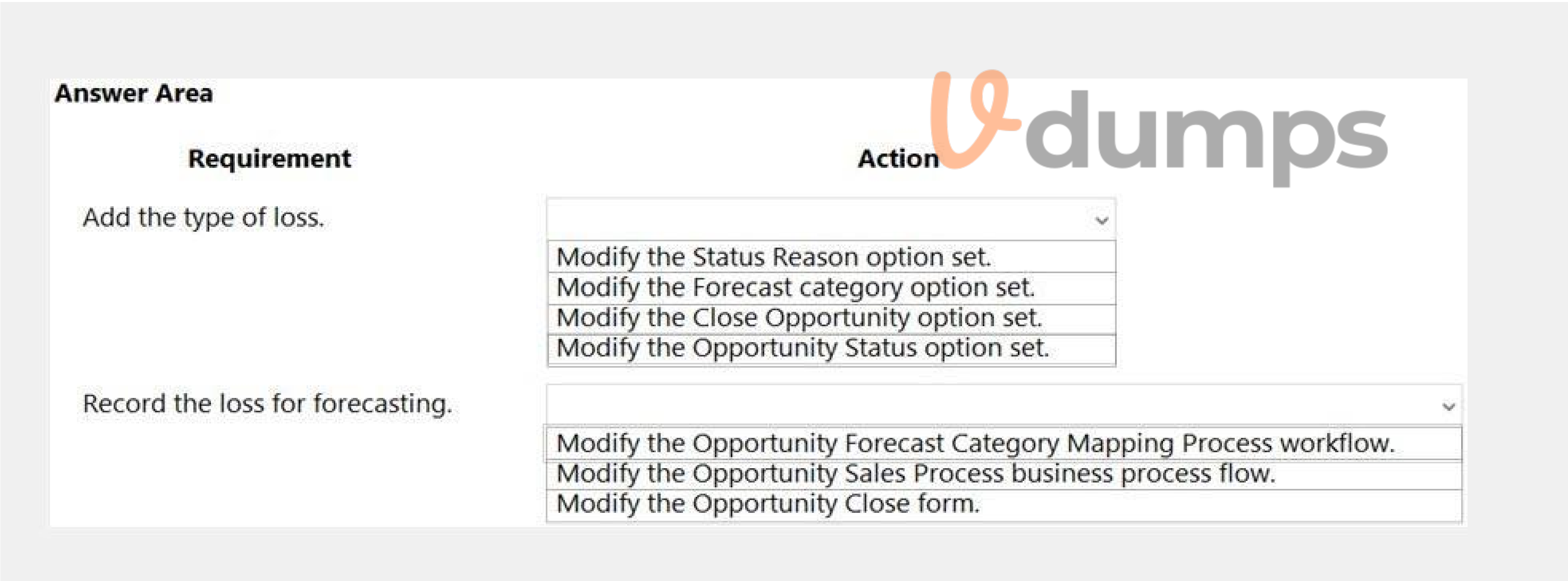
What should you create?

A. business rule
B. insight cards with Sales Insights
C. custom activity type
D. new data step in the business process flow

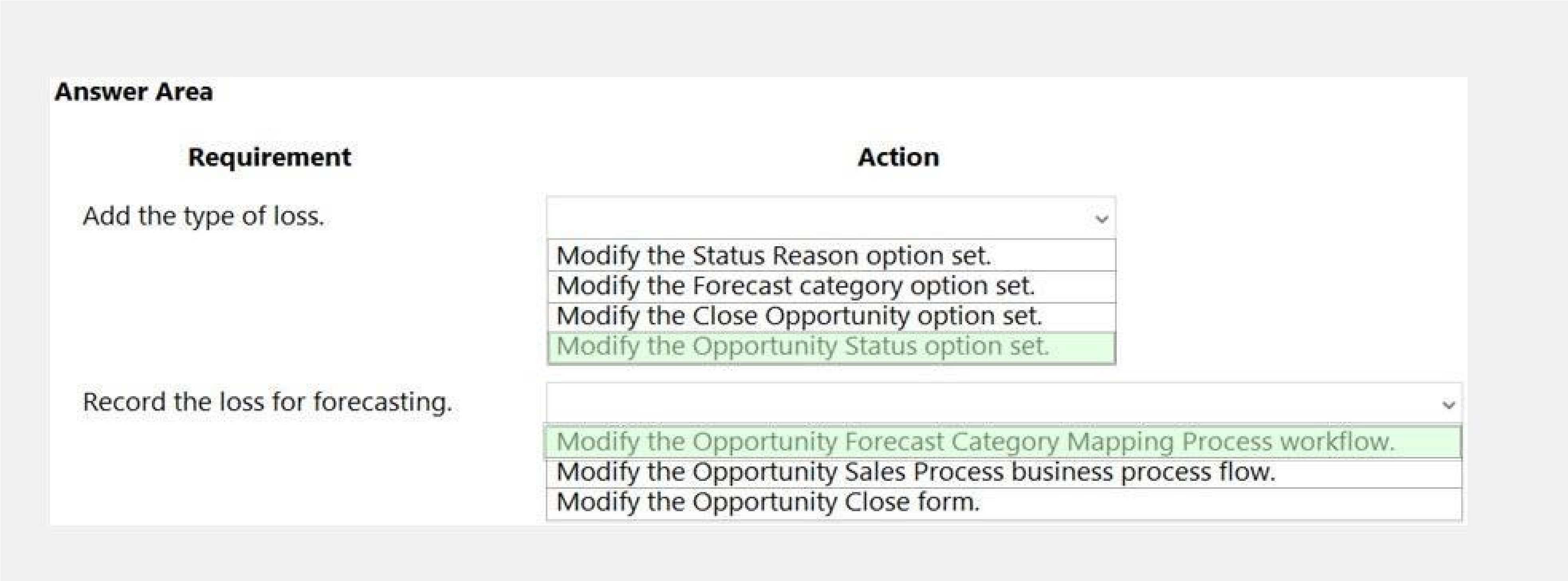
Correct Answer: C
Section:
Explanation:
Reference:
https://docs.microsoft.com/en-us/dynamics365/customerengagement/on-premises/basics/work-with-activities?view=op-9-1

QUESTION 5
HOTSPOT
You need to implement sales lost to competitors.
What should you do? To answer, select the appropriate options in the answer area.
NOTE: Each correct selection is worth one point.

Hot Area:



Answer Area:



Section:
Explanation:
Reference:
https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/configure-forecast

QUESTION 6
You need to resolve the issue for PreferredCustomerA.
What should you create?

A. a product bundle for each country
B. a playbook category
C. a price list for the currency of each country
D. a product catalog for each country
E. a discount list for Preferred Customers

Correct Answer: C
Section:
Explanation:
Reference:
https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/create-price-lists-price-list-items-define-pricing-products

QUESTION 7
HOTSPOT
You need to manage existing RFQs.
What should you do? To answer, select the appropriate options in the answer area.
NOTE: Each correct selection is worth one point.

Hot Area:

Answer Area

Requirement	Action
Provide CompanyB with pricing.	Create a quote for each country. Create a quote for each opportunity. Create a quote for each product bundle.
Update the quotes with discontinued products.	Revise the quote and activate it. Revise the product catalog and activate the quote. Convert the quote to an order.
Update the quote for CompanyC.	Create a new quote. Revise the quote and change the currency to CAD. Convert the quote to an order.

Answer Area:

Answer Area

Requirement	Action
Provide CompanyB with pricing.	Create a quote for each country. **Create a quote for each opportunity.** Create a quote for each product bundle.
Update the quotes with discontinued products.	**Revise the quote and activate it.** Revise the product catalog and activate the quote. Convert the quote to an order.
Update the quote for CompanyC.	**Create a new quote.** Revise the quote and change the currency to CAD. Convert the quote to an order.

Section:
Explanation:
Reference:
https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/ts-currency-pricelist

01 - Configure additional tools and services

QUESTION 1

HOTSPOT

You are a Dynamics 365 Sales administrator for a venue. Customers book series of events in the venue. The series of events are children of a main event.

The sales manager wants to forecast the revenue for each customer's main event by rolling up the forecasts of the children of each main event.

You need to configure the forecast.

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

NOTE: Each correct selection is worth one point.

Hot Area:

Answer Area

Step	Configuration
Configure a relationship definition.	account opportunity contact product
Select the top of the hierarchy.	customer name main event record parent opportunity field opportunity entity

Answer Area:

Answer Area

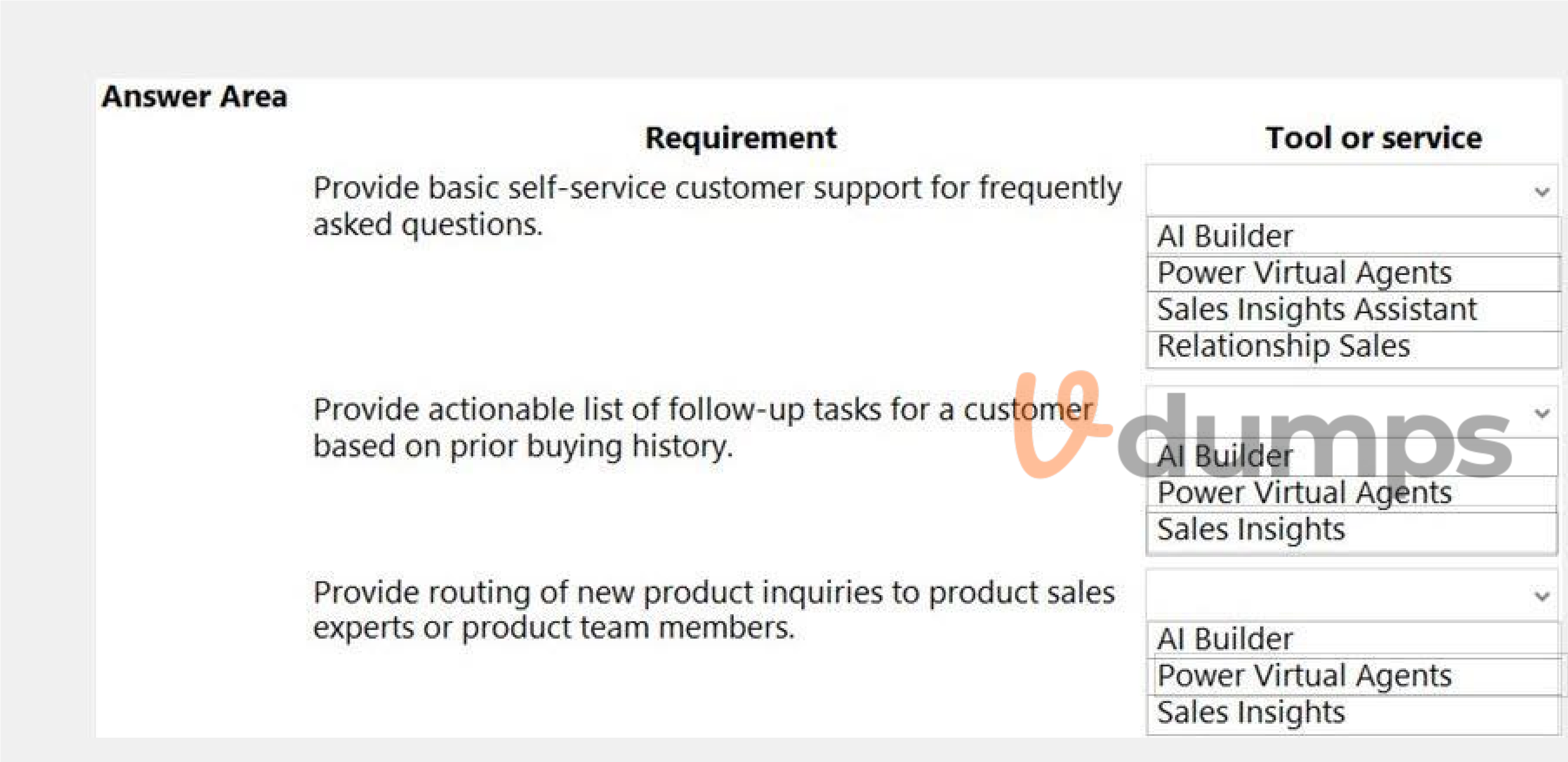
Step	Configuration
Configure a relationship definition.	account opportunity contact product
Select the top of the hierarchy.	customer name main event record parent opportunity field opportunity entity

Section:

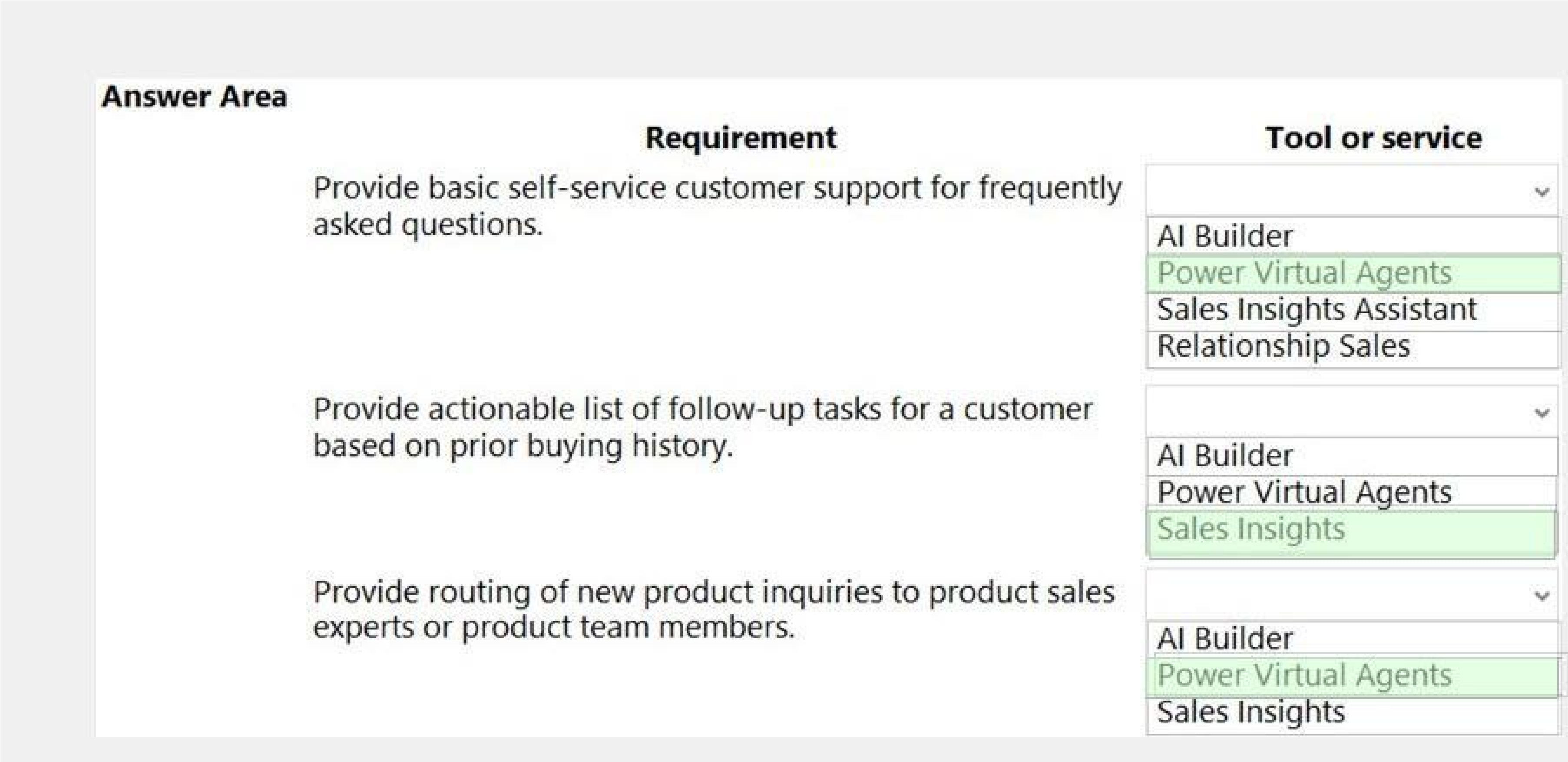
Explanation:
Reference:
https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/configure-forecast-using-custom-rollup-entity

QUESTION 2
HOTSPOT
A company is implementing Dynamics 365 Sales.
You need to determine which tool or service to recommend for the company's requirements.
Which tool or service should you recommend to meet each requirement? To answer, select the appropriate options in the answer area.
NOTE: Each correct selection is worth one point.

Hot Area:



Answer Area:



Section:
Explanation:
Reference:
https://docs.microsoft.com/en-us/power-virtual-agents/fundamentals-what-is-power-virtual-agents
https://docs.microsoft.com/en-us/dynamics365/ai/sales/overview
https://docs.microsoft.com/en-us/power-virtual-agents/advanced-hand-off

QUESTION 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. 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.
Proposed solution: Recalculate the opportunity.
Does the solution meet the goal?

A. Yes
B. No

Correct Answer: B
Section:
Explanation:
Reference:
https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/keep-forecast-data-up-to-date

QUESTION 4

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.
Proposed solution: Recalculate the forecast.
Does the solution meet the goal?

A. Yes
B. No

Correct Answer: A
Section:
Explanation:
Reference:
https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/keep-forecast-data-up-to-date

QUESTION 5
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.
Proposed solution: Update the roll-up recurrence frequency.
Does the solution meet the goal?

A. Yes
B. No

Correct Answer: B
Section:
Explanation:
Reference:
https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/keep-forecast-data-up-to-date

QUESTION 6
You are a Dynamics 365 Sales administrator for a company. All sales representatives at the company have smart phones.
You need to recommend a solution that allows sales representatives to take photos of the opportunity notes and use the photo as input for new opportunities in Dynamics 365.
Which two options will achieve the goal? Each correct answer presents a complete solution.
NOTE: Each correct answer is worth one point.

A. AI Builder with Dynamics 365 for phones
B. Canvas App with a flow button
C. AI Builder with Power Automate instant flow
D. Dynamics 365 for phones only

Correct Answer: B, C

Section:

QUESTION 7
A company uses Dynamics 365 Sales. The company uses their organizational structure to determine how to aggregate forecasts for each year.
The company divides a business unit into three separate units. Each unit will have a new manager.
You need to update the quotas for each user for the current fiscal year's forecast.
Which two actions should you perform? Each correct answer presents part of the solution.
NOTE: Each correct selection is worth one point.

A. Create and assign users to new resource groups for each manager.
B. Adjust the forecast values directly.
C. Assign the users to their new managers.
D. Upload the new quota amounts for each user.

Correct Answer: C, D
Section:
Explanation:
Reference:
https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/activate-upload-simple-columns-data-forecast

QUESTION 8
You are a Dynamics 365 Sales administrator for a company that has locations in five regions.
The company's owner wants regional managers to update their own forecasts. The owner wants full transparency for all forecasts to all current and future employees.
You need to allow users to see the forecasts for every region.
What should you do?

A. Add each security role to the forecast configuration.
B. Grant all security roles access in the forecast configuration.
C. Add the view privilege to each user's security role.
D. Grant users permission to view the Forecast Category field.

Correct Answer: A
Section:
Explanation:
Reference:
https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/provide-permissions-forecast

QUESTION 9
You are a salesperson using Dynamics 365 Sales.
An invoice needs to be created on an order. The Create Invoice button is not visible.
You need to determine why the Create Invoice button is not visible.
Why is the button missing?

A. The sales order is not complete.
B. The price list has expired.
C. The sales order processing integration is enabled.
D. You have not selected the Get Products button.

Correct Answer: C
Section:
Explanation:
Reference:
https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/ts-orders

QUESTION 10
A company measures their sales team on the number of appointments they make in a fiscal year.
The company needs to be able to track how many appointments have been scheduled by each salesperson.
You need to ensure the sales representatives are achieving their appointment targets.
What should you configure?

A. A goal for each salesperson with metric type to set to amount for number of appointments made
B. A goal for each salesperson with metric type set to count for each customer
C. A goal for each salesperson with metric type set to count for number of appointments made
D. A view with the revenue for each salesperson
E. A view with the appointments for each salesperson

Correct Answer: C
Section:
Explanation:
Reference:
https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/create-edit-goal-metric

QUESTION 11
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.
Proposed solution: Update the Opportunity Forecast Category Mapping process.
Does the solution meet the goal?

A. Yes
B. No

Correct Answer: B
Section:
Explanation:
Reference:
https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/keep-forecast-data-up-to-date

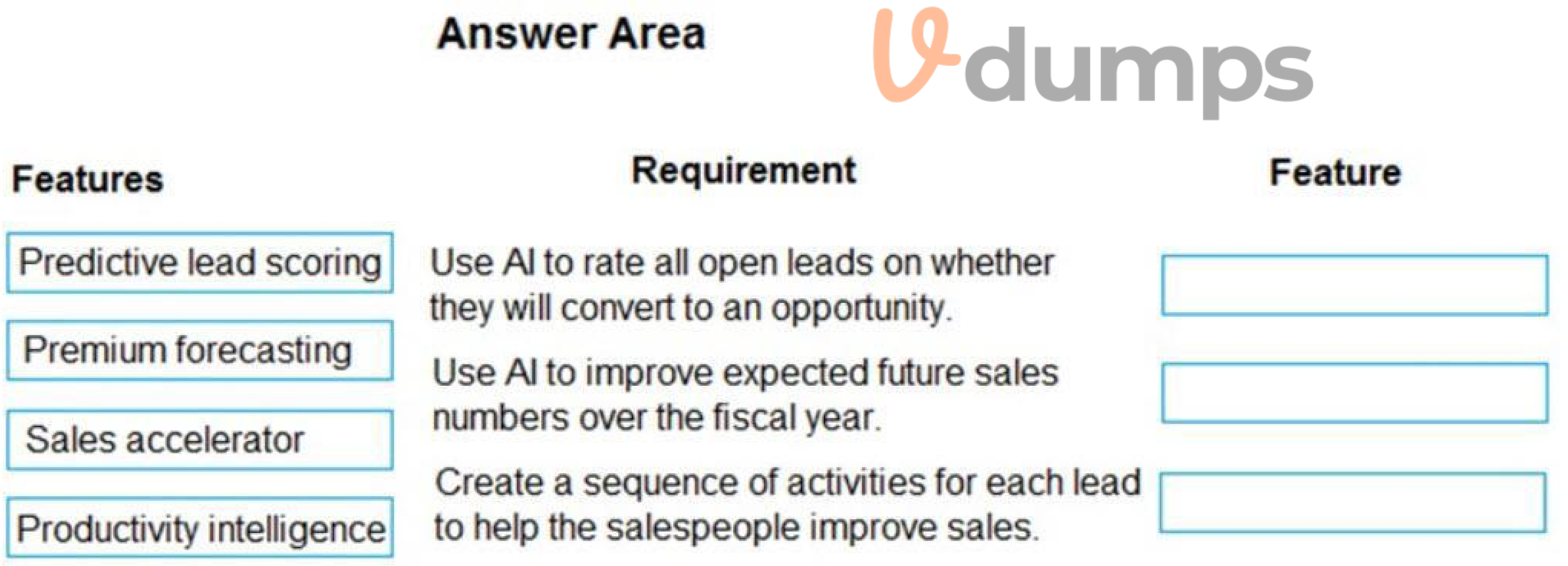
QUESTION 12
You are implementing Dynamics 365 Sales Insights for a company.
Sales team members must be able to view information about customers that have made purchases before and who will most likely purchase products again.
You need to set up this functionality.
What should you configure?

A. Relationship analytics
B. Customer Insights
C. Sales accelerator
D. Power Automate

Correct Answer: A
Section:
Explanation:
Reference:
https://docs.microsoft.com/en-us/dynamics365/ai/sales/relationship-analytics

QUESTION 13
DRAG DROP
You are configuring Dynamics 365 Sales Insights.
You need to configure the system to meet the following requirements:
Use artificial intelligence (AI) to rate all open leads on whether they will convert to an opportunity. Use AI to improve expected future sales numbers over the fiscal year.
Create a sequence of activities for each lead to help the salespeople improve sales.
Which feature should you configure? To answer, drag the appropriate features to the correct requirements. Each feature may be used once, more than once, or not at all. You may need to drag the split bar between panes or scroll to view content.
NOTE: Each correct selection is worth one point.

Select and Place:



Correct Answer:

Answer Area

Features	Requirement	Feature
	Use AI to rate all open leads on whether they will convert to an opportunity.	Predictive lead scoring
	Use AI to improve expected future sales numbers over the fiscal year.	Premium forecasting
	Create a sequence of activities for each lead to help the salespeople improve sales.	Sales accelerator
Productivity intelligence		

Section:
Explanation:
Reference:
https://docs.microsoft.com/en-us/dynamics365/ai/sales/configure-predictive-lead-scoring
https://docs.microsoft.com/en-us/dynamics365/ai/sales/configure-premium-forecasting
https://docs.microsoft.com/en-us/dynamics365/ai/sales/enable-configure-sales-accelerator

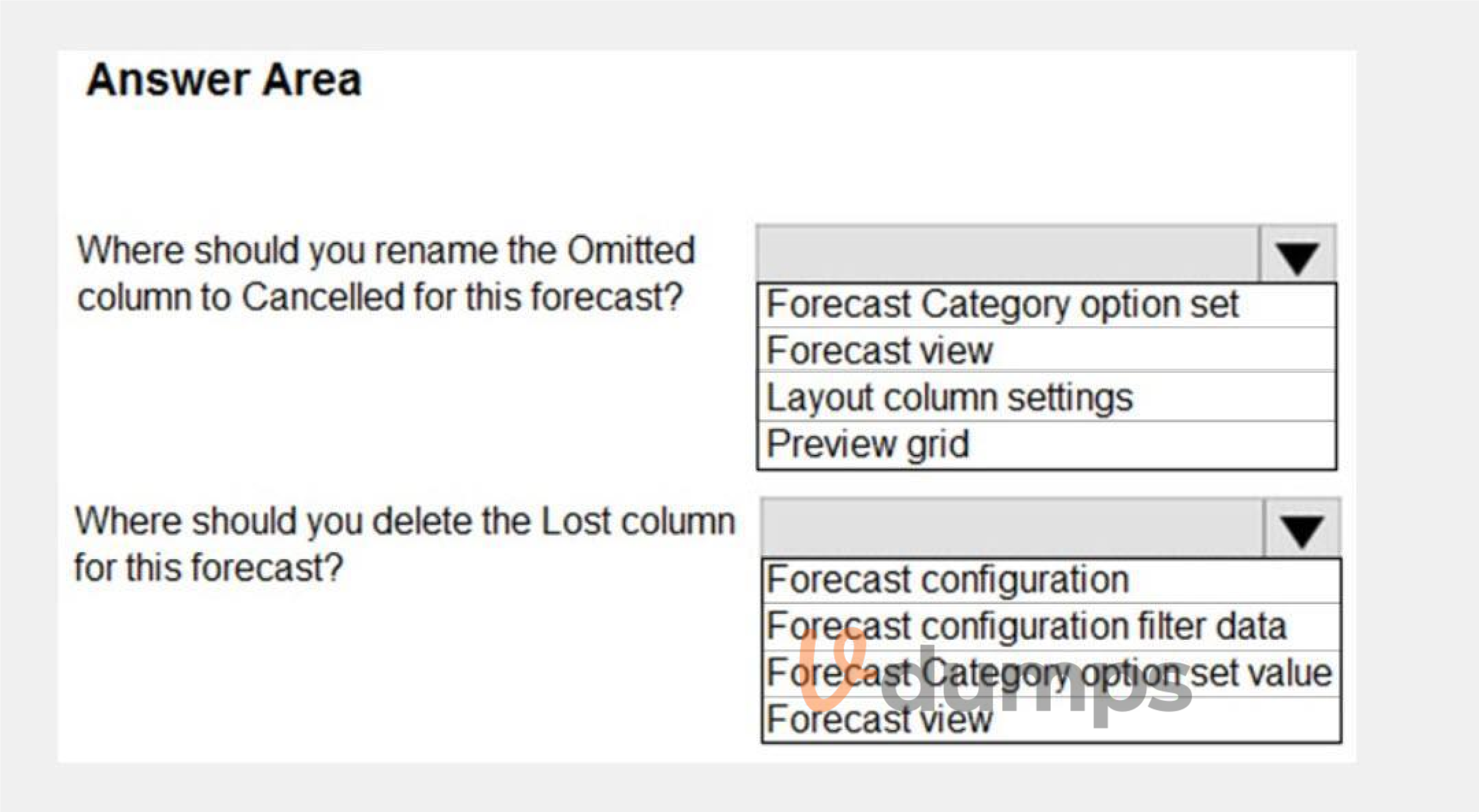
QUESTION 14
HOTSPOT
You are a Dynamics 365 Sales administrator. You create a forecast by using the forecast category layout shown in the exhibit:

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.

Hot Area:


Answer Area

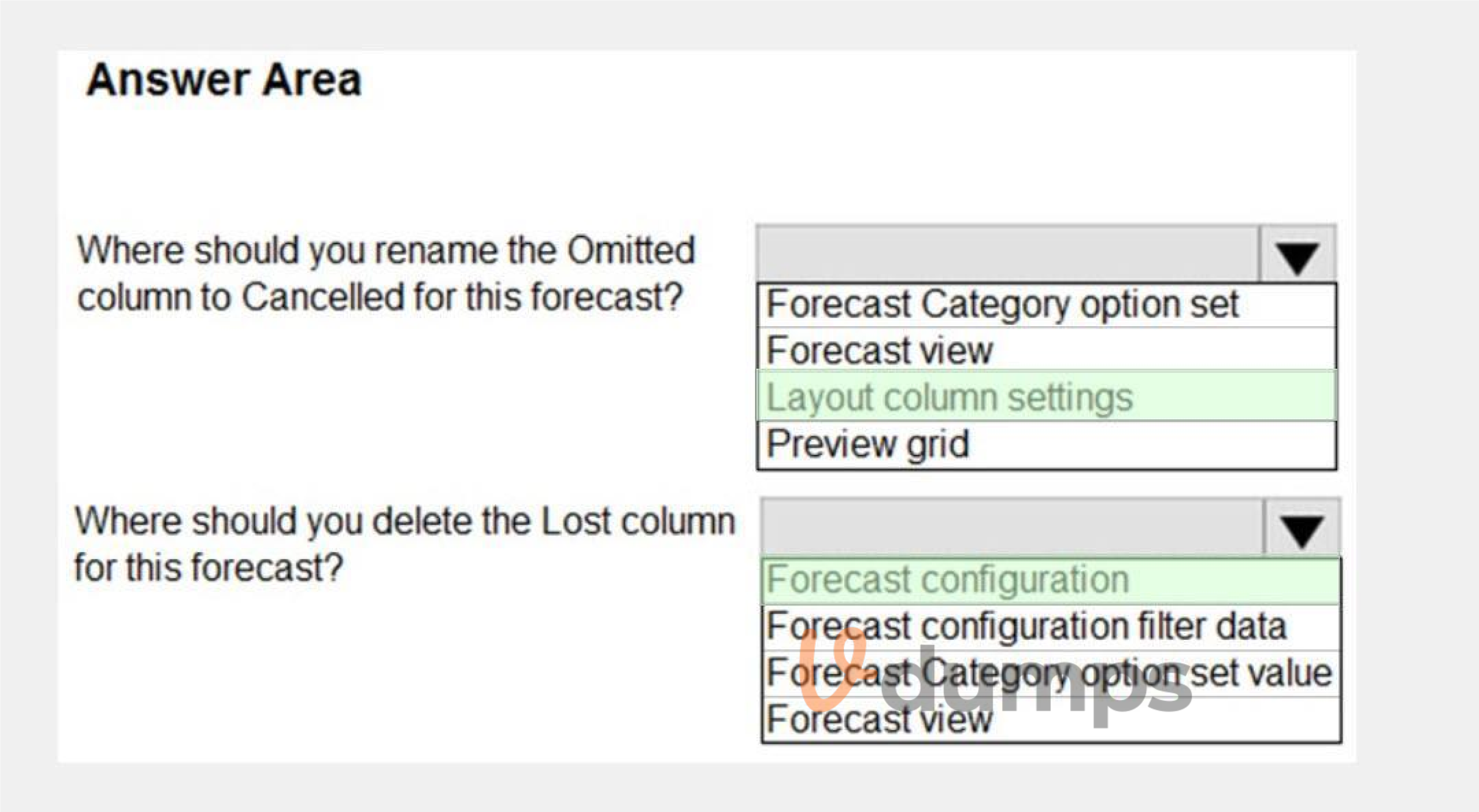
Where should you rename the Omitted column to Cancelled for this forecast?

- 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

Answer Area:



Section:
Explanation:
Reference:
https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/choose-layout-and-columns-forecast

QUESTION 15
You are a Dynamics 365 Sales administrator. You configure a forecast template that uses the Forecast category as a starting point for a layout for the sales team.
The sales manager wants the value of the Lost column to come from the Total Detail Amount instead of the default value because the revenue is always driven by the items.
You need to make the change.
What should you do?

A. Edit the existing forecast, remove the Lost column, and add a new calculated column.
B. Create a new forecast and update the Amount field in the layout.
C. Create a new forecast, remove the Lost column, and add a new calculated column.
D. Edit the existing forecast and update the Amount field in the layout.

Correct Answer: A
Section:
Explanation:

Reference:
https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/choose-layout-and-columns-forecast

02 - Configure additional tools and services
Background
A company owns a group of theaters that stage live performances. Tickets to shows are sold by individual representatives by using a mobile app.
Each theater has a manager. The managers rotate between theaters every six months.
The company plans to implement Dynamics 365 Sales.
Current environment
The company uses the following pricing structure for tickets:

Quantity tickets per show	Pricing per ticket
Fewer than 10	$50.00
11 or more but fewer than 25	10 percent off ticket price
More than 26	15 percent off ticket price

Representatives create Microsoft Word documents to use as invoices. Pricing for tickets is often inconsistent. Ticket sales are often lost because customers go to other shows.
Requirements
Business cards
The business card of every group sales customer must be scanned and the image saved with the contact record. A customer's business card must be scanned even if the customer has been to the theatre before.
Business cards must show up on all contact forms.
Salespeople
Each salesperson needs to sell a certain amount of tickets per month.
The number of tickets each salesperson sells must be totalled only at the end of the month, before the monthly meeting between the salesperson and their manager. Salespeople must not be able to check the quantity sold in the system daily.
Opportunities
The name of the sales manager must be added to opportunity records when sales representatives close opportunities. Opportunities that are lost must include the reasons other show and not interested.
Some of the opportunities who order a large quantity of tickets every week want quotes quickly on various quantities. They want it broken down as follows:
- Price breakout by ticket
- Quantity discount amount
- Original ticket price

Orders
Customers who buy a large quantity of tickets to a show must always get a quote first.
Orders must always be created from the Quote record when it is a large purchase.
Customers who buy a smaller quantity of tickets that do not have quotes must have an invoice sent to them.
Data Analysis
Analyze email messages that pertain to ticket sales of the shows.
Analyze relationships to help with potential sales of friends and coworkers for potential ticket buyers. Analyze accounts and assess the account representative's relationship with the customer to gauge the level of communication.
Visuals
A Tickets dashboard for all cashiers must be created that contains the following bar charts:
all the tickets sold for each show
all the tickets available for each show
accounts that have purchased groups of 10 or more tickets
purchased tickets by age groups
Shows
Representatives must track which shows customers go to when they do not purchase the tickets to their shows. This information must be entered in the records. Every time a potential large sale is lost, the representative needs to ask the customer which show ticket was purchased instead of their show. Shows at other theatres must be updated on a monthly basis.
Quantity discounts and bulk purchase for different shows must be consistent
Issues
The Tickets dashboard has eight sections. The dashboard includes a line chart that displays data about age groups. The dashboard also has a chart that group ticket sales. The chart shows 10 or more tickets sold but is missing accounts that purchased more than 20 tickets.

Cashiers report that they cannot see two specific area of the Tickets dashboard. Salespeople report that they can see all areas of the dashboard. Representative1 is unable to scan business cards.
Some users do not see the business cards when using their desktop machines, but they see them from their tablets and mobile phones. There are no business card images in the system.
Duplicate contacts are being created with business card scans.

QUESTION 1

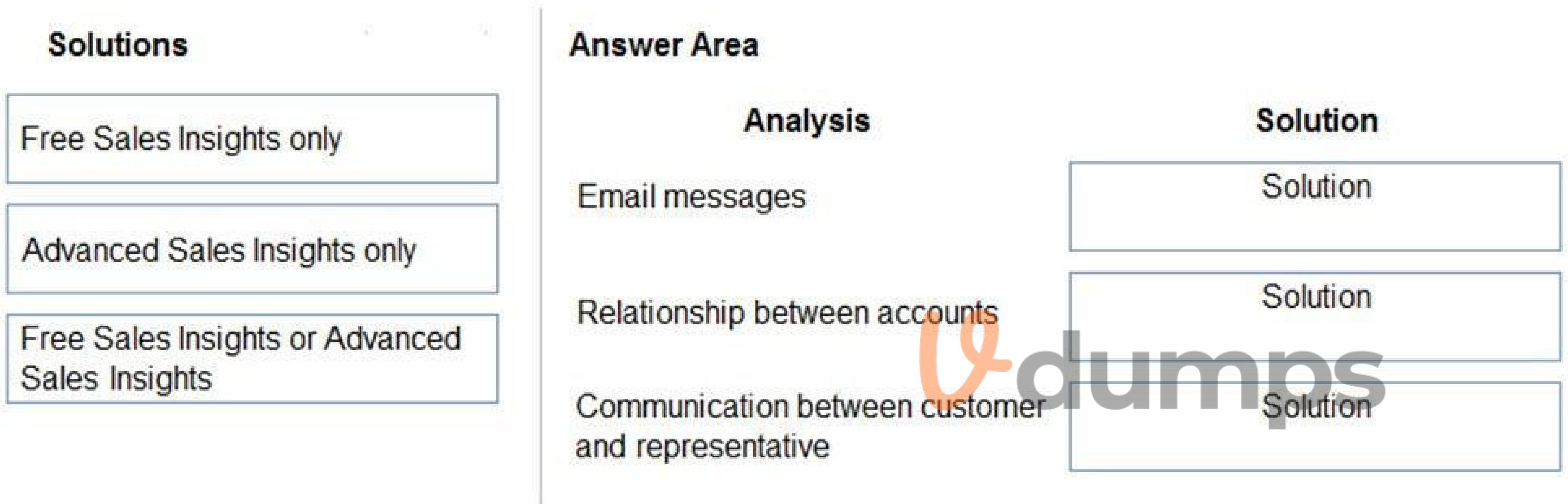
DRAG DROP

You need to choose which product's solution fits the analysis needed.

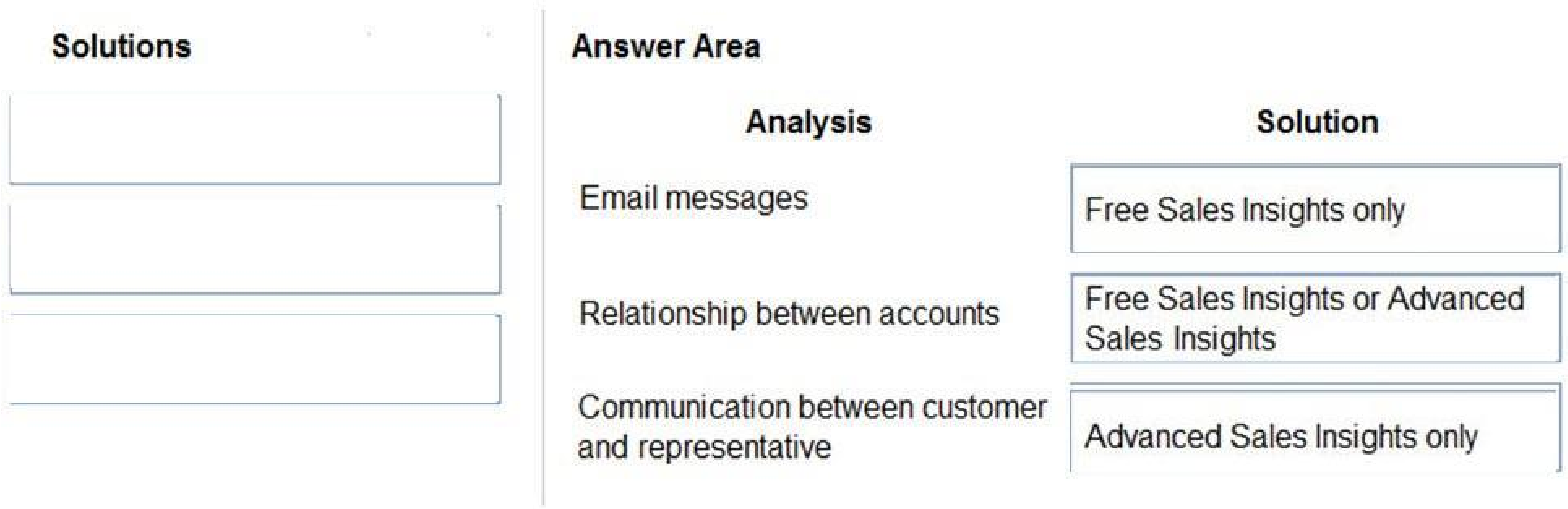
Which solutions should you use? To answer, drag the appropriate solutions to the correct analyses. Each solution may be used once, more than once, or not at all. You may need to drag the split bar between panes or scroll to view content.

NOTE: Each correct selection is worth one point.

Select and Place:



Correct Answer:



Section:
Explanation:
Reference:
https://docs.microsoft.com/en-us/dynamics365/ai/sales/overview

04 - Perform Configuration
Background
A company owns a group of theaters that stage live performances. Tickets to shows are sold by individual representatives by using a mobile app. Each theater has a manager. The managers rotate between theaters every six months.

The company plans to implement Dynamics 365 Sales.
Current environment
The company uses the following pricing structure for tickets:

Quantity tickets per show	Pricing per ticket
Fewer than 10	$50.00
11 or more but fewer than 25	10 percent off ticket price
More than 26	15 percent off ticket price

Representatives create Microsoft Word documents to use as invoices. Pricing for tickets is often inconsistent. Ticket sales are often lost because customers go to other shows.
Requirements
Business cards
The business card of every group sales customer must be scanned and the image saved with the contact record. A customer's business card must be scanned even if the customer has been to the theatre before.
Business cards must show up on all contact forms.
Salespeople
Each salesperson needs to sell a certain amount of tickets per month.
The number of tickets each salesperson sells must be totalled only at the end of the month, before the monthly meeting between the salesperson and their manager. Salespeople must not be able to check the quantity sold in the system daily.
Opportunities
The name of the sales manager must be added to opportunity records when sales representatives close opportunities. Opportunities that are lost must include the reasons other show and not interested.
Some of the opportunities who order a large quantity of tickets every week want quotes quickly on various quantities. They want it broken down as follows:
- Price breakout by ticket
- Quantity discount amount
- Original ticket price
Orders
Customers who buy a large quantity of tickets to a show must always get a quote first.

Orders must always be created from the Quote record when it is a large purchase.
Customers who buy a smaller quantity of tickets that do not have quotes must have an invoice sent to them.
Data Analysis
Analyze email messages that pertain to ticket sales of the shows.
Analyze relationships to help with potential sales of friends and coworkers for potential ticket buyers. Analyze accounts and assess the account representative's relationship with the customer to gauge the level of communication.
Visuals
A Tickets dashboard for all cashiers must be created that contains the following bar charts:
all the tickets sold for each show
all the tickets available for each show
accounts that have purchased groups of 10 or more tickets
purchased tickets by age groups
Shows
Representatives must track which shows customers go to when they do not purchase the tickets to their shows. This information must be entered in the records. Every time a potential large sale is lost, the representative needs to ask the customer which show ticket was purchased instead of their show. Shows at other theatres must be updated on a monthly basis.
Quantity discounts and bulk purchase for different shows must be consistent
Issues

QUESTION 1
You need to make the appropriate change to the system to ensure that statistics are correct in time for each manager/salesperson meeting. What should you do?

A. Create a workflow for the Goals entity
B. In the Goals section of App Settings, select Actuals
C. In the Business Management section of Settings, configure Goal Metrics
D. In the Goals Settings section of App Settings, select Rollup recurrence

Correct Answer: D
Section:
Explanation:
The number of tickets each salesperson sells must be totalled only at the end of the month, before the monthly meeting between the salesperson and their manager. Salespeople must not be able to check the quantity sold in the system daily.

QUESTION 2
You need to determine the cause of the issue with desktop users and business cards.
What is the cause of the issue?

A. The field needs to be added to the form
B. Show image on the form is not selected in Form Properties
C. The users do not have the appropriate permissions
D. A business rule needs to be set up to show the field
E. The AI Builder Business Card control needs to be configured for the field on the form

Correct Answer: B
Section:

QUESTION 3
HOTSPOT
You need to resolve the issues on the ticket's dashboard.
Which configurations should you change? To answer, select the appropriate options in the answer area.
NOTE: Each correct selection is worth one point.

Hot Area:

Answer Area

Scenario	Configuration
Tickets dashboard	Permissions View on dashboard Dashboard type Chart type
Age groups chart	Chart type Dashboard type Series Field in view
Groups of tickets chart	Field to view Dashboard type Series Chart type

Answer Area:

Answer Area

Scenario	Configuration
Tickets dashboard	Permissions View on dashboard Dashboard type Chart type
Age groups chart	Chart type Dashboard type Series Field in view
Groups of tickets chart	Field to view Dashboard type Series Chart type

Section:
Explanation:

QUESTION 4
DRAG DROP
You need to ensure that new managers receive the information they need.
What should you do? To answer, drag the appropriate actions to the correct information. Each action may be used once, more than once, or not at all. You may need to drag the split bar between panes or scroll to view content.
NOTE: Each correct selection is worth one point.

Select and Place:

Actions

- Create a playbook template
- Export the list to a file
- Add the manager's user ID to the correct business unit
- Add the security role to the manager's user ID

Answer Area

Information	Action
Price lists	Action
Competitor list	Action

Correct Answer:

Actions

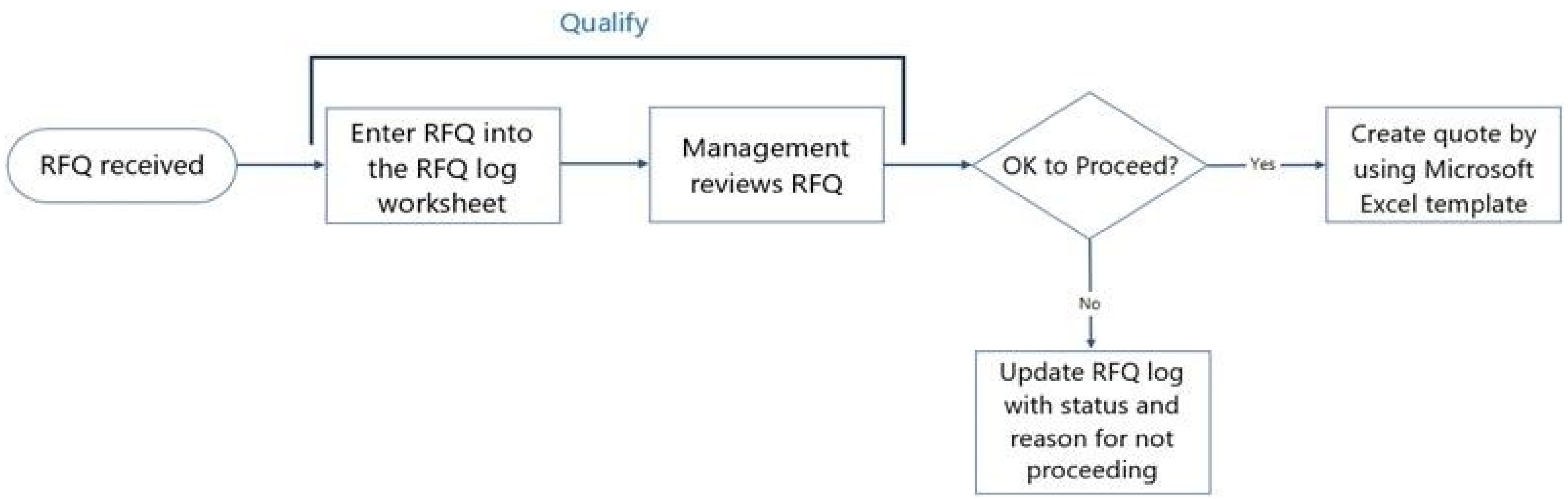
- Create a playbook template
- Add the security role to the manager's user ID

Answer Area

Information	Action
Price lists	Add the manager's user ID to the correct business unit
Competitor list	Export the list to a file

Section:
Explanation:

05 - Perform Configuration
Background
Contoso, Ltd. manufactures electronic components for robotic assembly machines. The company specializes in wiring harnesses that are made to customer specifications.
The company's corporate office and a manufacturing plant are in Detroit. The company also has offices and manufacturing plants in the following countries:
China
Germany
Mexico
United Kingdom (UK)
Current environment
Sales
Customers who have operations in more than one country are managed by the sales team within the country from which a request originated. However, it is difficult to get information about sales for these customers. Each salesperson manually creates customer quotes using Microsoft Word and Excel templates. This causes pricing inconsistencies, which is affecting profitability. Customers who have total sales over $1,5M per year receive special Preferred Customer discount pricing on products and services. Costs, pricing, and product availability vary greatly by country.
Sales teams
Each office has a dedicated sales team. Sales are managed by a global team in countries without a sales office. Each sales team has a projected revenue target that is tied to the factory capacity in their country, except for the global team. The global team's projected revenue target is derived using a percentage of their actual sales from the previous year.
Each sales team maintains a spreadsheet in which they record customer requests for quotes (RFQs). The spreadsheets are stored on a network drive. Sales team revenue targets are set yearly based on manufacturing capacities at each plant.
Individual sales targets are based on product lines by quarter.
Current RFQ process
The company defines the following process for processing RFQs:



Requirements
General setup
Standard functionality must be used when possible.
All open RFQs must be imported into the solution.
All information must be accessible to the entire executive management team.
Country-specific sales information must be accessible only to sales representatives assigned to those teams. Sales and quote processes must be standardized across all sales divisions.
Sales territories must be set up for each country as well as for a global territory.
The global team will take over the management of RFQs for customers who have operations in more than one region. Due to regulatory considerations, the solution must be able to limit the kinds of products that can be sold by region.
RFQ management
New RFQs must be entered initially into the system as Leads until they are reviewed.
The default forecast categories must be used.
Standardized quote formats and product pricing must be enforced across all sales offices.
All tasks and follow-up activities with customers to close RFQs must be associated directly with the RFQs.
Credit and reference checks
All new customers must undergo credit and reference checks before estimates are created for any RFQs. This information will be recorded in a new custom field called Credit Check that has a Yes/No value. The finance manager must be assigned the credit and reference review when an RFQ is ready for review. If a customer's credit and reference review is unfavorable, the finance manager must follow up with the customer and the sales representative by phone. The customer's credit report must be added to the RFQ as a permanent record and for audit purposes.
The solution must provide both a sample script that the finance manager can use as well as a checklist of how to perform the check.
Reporting
The sales manager dashboard must show the following data:
Projected revenue and profitability per country by month and fiscal year.
Projected and current product sales per country by month and fiscal year.
RFQ Won/Loss revenue comparison by fiscal quarter.
RFQ status by sales representative within their territory.
RFQs that are awaiting management approval and how long they have been waiting.
Sales lost to competitors month over month.
Managers must also be able to track how long an RFQ has been awaiting credit and reference checks, and how many RFQs have had unfavorable results from credit or reference checks.
Issues
PreferredCustomerA, who has factories in Germany, the UK, and Canada, reports that their sales representatives give different pricing and discounts to customers depending on the country in which the RFQ is initiated. Several RFQs that have passed management review but failed standard credit checks have been issued quotes. To prevent this, credit checks must now be done before the management approval meeting. Several imported RFQs contain quotes for discontinued products. Updated quotes with current product offers need to be sent to customers. CompanyB needs pricing for harnesses for their plants in Germany, the UK, and Argentina.
CompanyC received a quote for harnesses for their US home office. They need the products for their Canadian plant. CompanyD wants sales orders and shipments sent directly to VendorZ, who manufactures several subassemblies for them. VendorZ also builds components for other customers as well as for Contoso, Ltd. The chief financial officer (CFO) is concerned about the amount of work that the new credit and reference checks will create. Therefore, a time-study needs to be initiated for that work to see whether an additional person needs to be hired.

QUESTION 1
HOTSPOT
You need to configure the RFQ Won/Loss chart.
How should you configure the chart? To answer, select the appropriate options in the answer area.

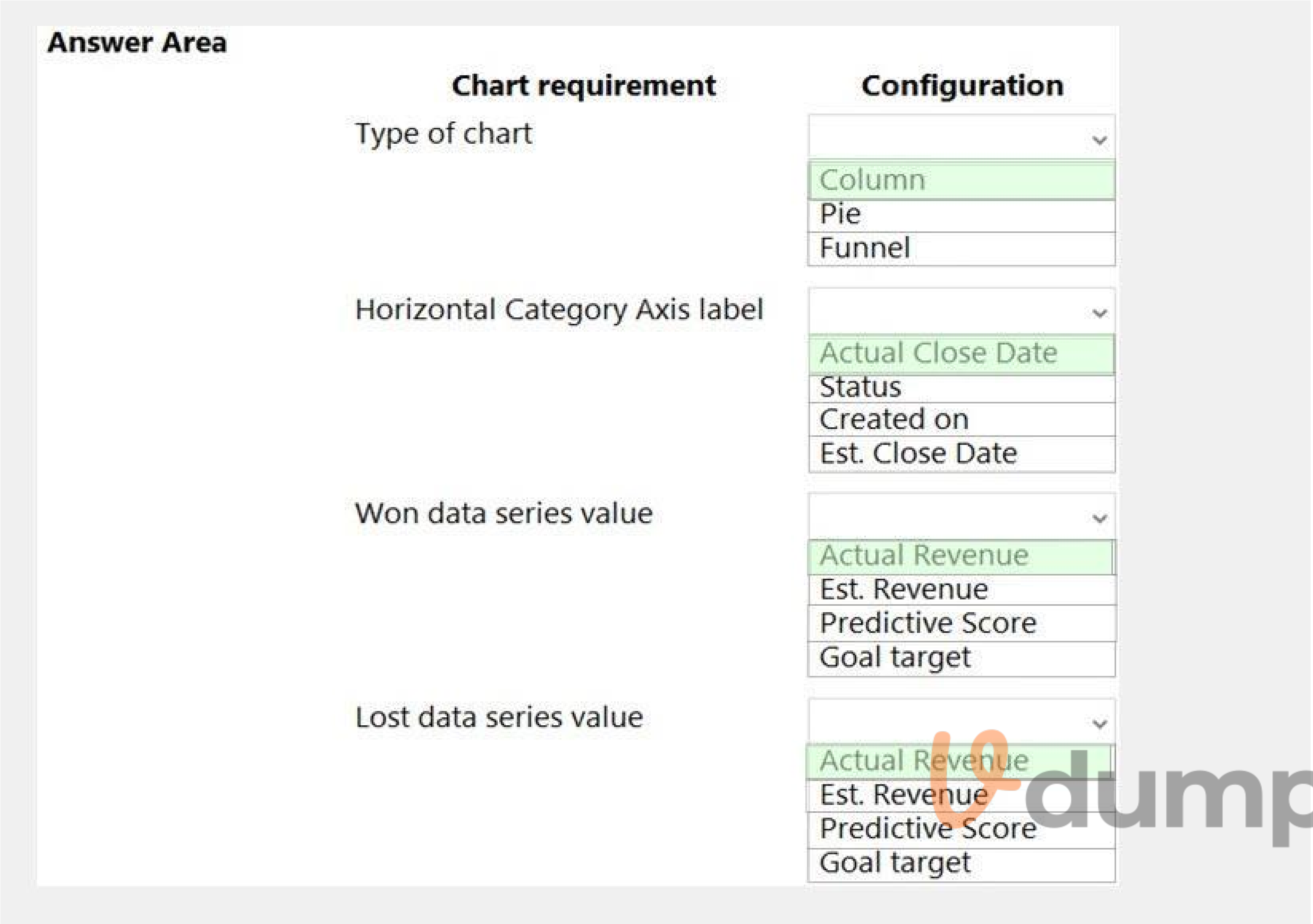
NOTE: Each correct selection is worth one point.

Hot Area:

Answer Area

Chart requirement	Configuration
Type of chart	Column Pie Funnel
Horizontal Category Axis label	Actual Close Date Status Created on Est. Close Date
Won data series value	Actual Revenue Est. Revenue Predictive Score Goal target
Lost data series value	Actual Revenue Est. Revenue Predictive Score Goal target

Answer Area:



Section:
Explanation:

QUESTION 2
HOTSPOT
You need to configure forecasting according to the requirements.
What should you do? To answer, select the appropriate options in the answer area.
NOTE: Each correct selection is worth one point.

Hot Area:

Answer Area

Requirement	Action
Include projected revenue by factory capacity.	Set the hierarchical entity to Territory. Set the rollup entity to Product. Set the goal metric to Revenue. Set the hierarchical entity to Product.
Include current revenue targets.	Upload quota data for each territory. Create a goal metric. Create a goal target for revenue. Upload a goal target from an Excel template.
Include both high confidence and won opportunities.	Create a calculated column and add it to the column layout. Add the Committed and Won values to the column layout. Create a rollup column and add it to the column layout. Add a calculated value to the Opportunities Forecast view.

Answer Area:

Answer Area

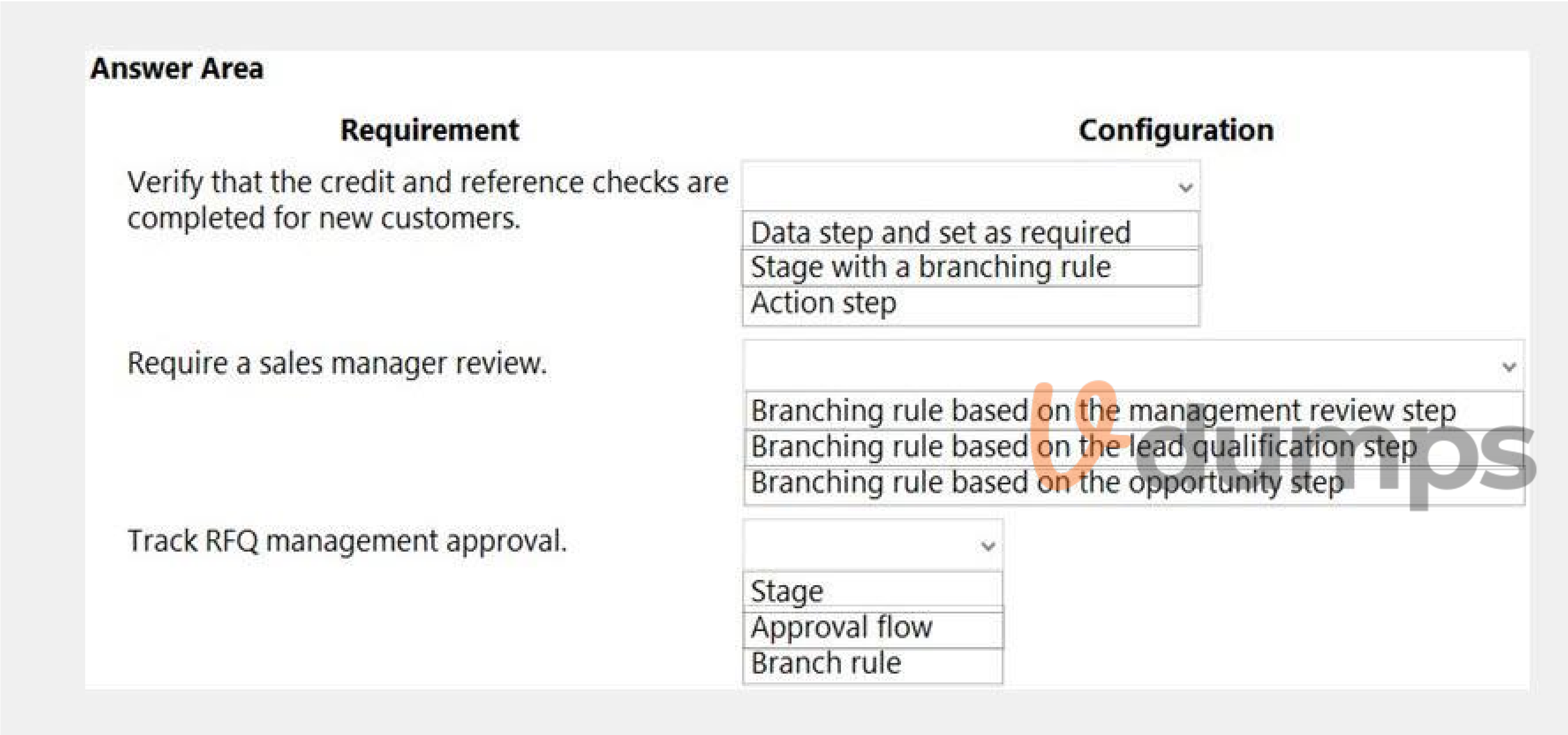
Requirement	Action
Include projected revenue by factory capacity.	Set the hierarchical entity to Territory. Set the rollup entity to Product. Set the goal metric to Revenue. Set the hierarchical entity to Product.
Include current revenue targets.	Upload quota data for each territory. Create a goal metric. Create a goal target for revenue. Upload a goal target from an Excel template.
Include both high confidence and won opportunities.	Create a calculated column and add it to the column layout. Add the Committed and Won values to the column layout. Create a rollup column and add it to the column layout. Add a calculated value to the Opportunities Forecast view.

Section:

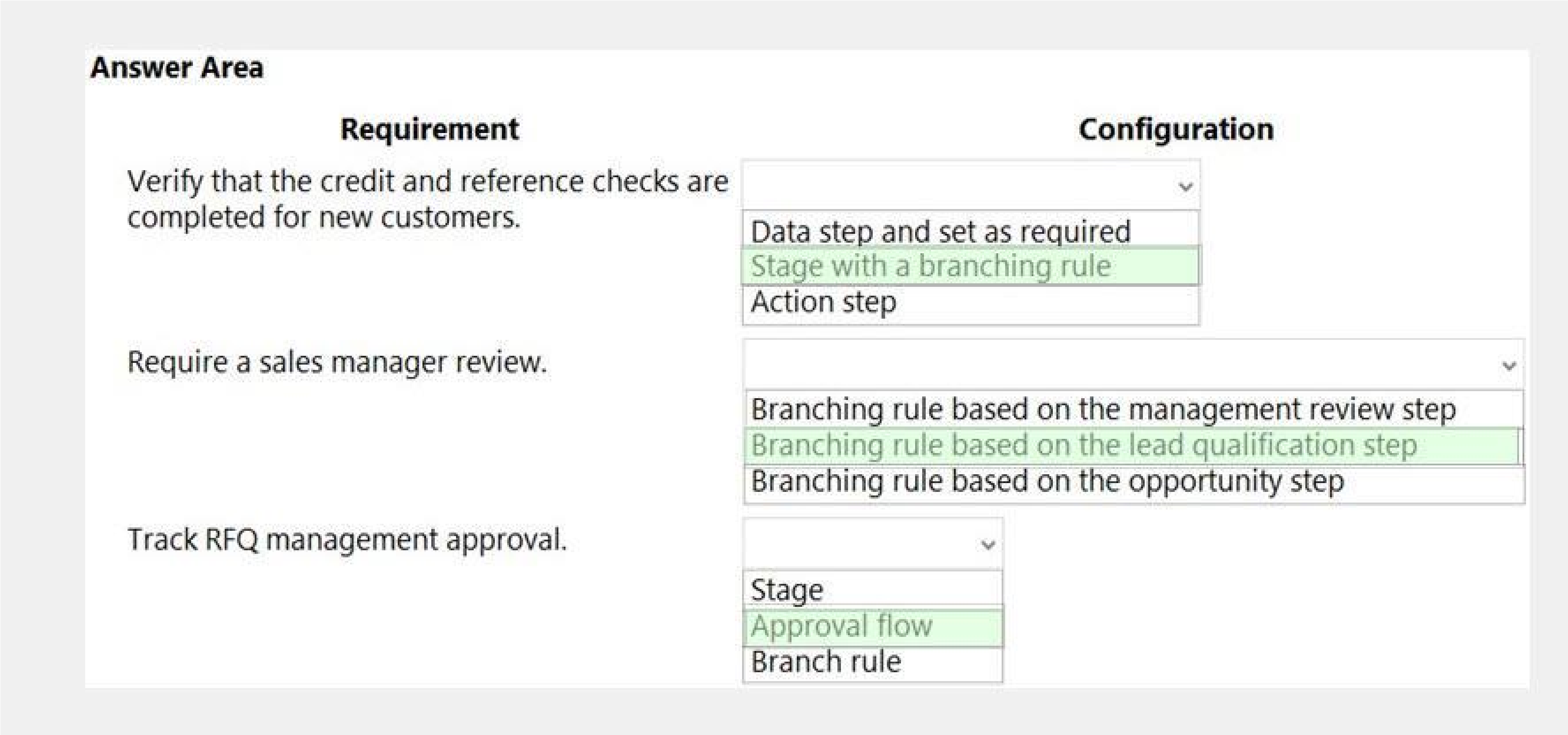
Explanation:
Reference:
https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/capture-forecast-category-opportunity
https://rocketcrm.co.uk/sales-forecasting-dynamics-365-new-feature/

QUESTION 3
HOTSPOT
You need to configure the RFQ process flow.
What should you create to meet each requirement? To answer, select the appropriate options in the answer area.
NOTE: Each correct selection is worth one point.

Hot Area:



Answer Area:



Section:
Explanation:
Reference:
https://docs.microsoft.com/en-us/dynamics365/customerengagement/on-premises/customize/business-process-flows-overview?view=op-9-1

QUESTION 4
You need to set up the required sales tracking for multinational customers.
Which two actions should you perform? Each correct answer presents part of the solution.
NOTE: Each correct selection is worth one point.

A. Create a primary account for the customer and contacts for each country of operation.
B. Create each country sales territory as a sub-territory of the global territory.
C. Associate the customer accounts for each country with the primary account.
D. Create a primary account for the customer and assign it to the global territory.
E. Associate the accounts in each country with the country sales territory in which it is located.

Correct Answer: B, E
Section:
Explanation:
Reference:
https://docs.microsoft.com/en-us/power-platform/admin/set-up-sales-territories-organize-business-markets-geographical-area

QUESTION 5
HOTSPOT
You need to configure the credit and reference screening playbook to meet the requirements.
What should you do? To answer, select the appropriate options in the answer area.
NOTE: Each correct selection is worth one point.

Hot Area:

Answer Area

Requirement	Configuration
Ensure that the finance manager performs the credit screening.	Add a Task activity to the playbook. Add the credit screening to the playbook. Add the finance manager as the publisher of the playbook. Add a custom activity for Perform Credit Check and add it to the playbook.
Ensure that the finance manager has the latest version of the unfavorable screening phone script.	Add the script to the phone call activity. Add a phone script to the playbook template. Add the phone script to the Task activity.
Ensure that playbooks can be initiated from all RFQs.	Associate the playbook with the Lead entity only. Associate the playbook with the Opportunity entity only. Associate the playbook with the Lead and Opportunity entities. Associate the playbook with the Quote entity.
Ensure proper tracking for all tasks associated with playbooks.	Set Track Progress to No. Set Track Progress to Yes. Set the estimated duration of the playbook template. Set the estimated duration of the activity.

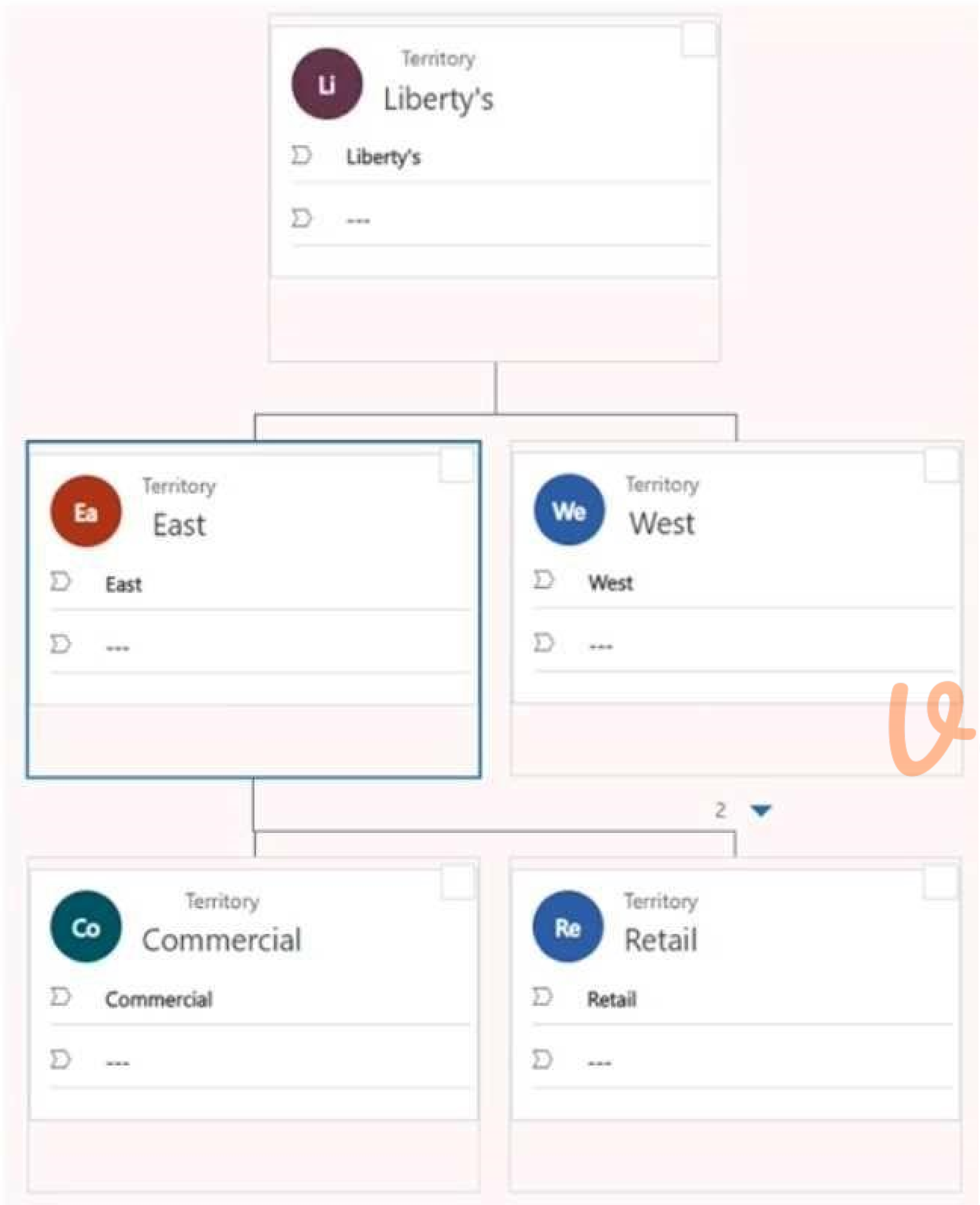
Answer Area:

Answer Area

Requirement	Configuration
Ensure that the finance manager performs the credit screening.	Add a Task activity to the playbook. Add the credit screening to the playbook. Add the finance manager as the publisher of the playbook. Add a custom activity for Perform Credit Check and add it to the playbook.
Ensure that the finance manager has the latest version of the unfavorable screening phone script.	Add the script to the phone call activity. Add a phone script to the playbook template. Add the phone script to the Task activity.
Ensure that playbooks can be initiated from all RFQs.	Associate the playbook with the Lead entity only. Associate the playbook with the Opportunity entity only. Associate the playbook with the Lead and Opportunity entities. Associate the playbook with the Quote entity.
Ensure proper tracking for all tasks associated with playbooks.	Set Track Progress to No. Set Track Progress to Yes. Set the estimated duration of the playbook template. Set the estimated duration of the activity.

Section:
Explanation:
Reference:
https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/enforce-best-practices-playbooks

06 - Perform Configuration
Liberty's Delightful Sinful Bakery & Cafe (Liberty's) sells baked goods to only commercial customers for resale from its East and West territories. The bakery acquired a company that it will incorporate as its retail line of business. Each territory will contain a Retail and Commercial territory.
Liberty's has two territories, each divided as shown below.



Configuration:

- The Commercial territory has a different price list than the Retail territory.
- The criteria used to measure the probability of a sale will be different for retail and commercial. • All loaves cost the same and all buns cost the same.
- Auto-create records for newly qualified leads is turned on to simplify the lead qualification process.
- Liberty's logs all phone calls, appointments, and emails in Dynamics 365 Sales.
- Accounts were imported for the Retail territory.
- Liberty's finds that the information on their accounts and contacts are often outdated.
- Liberty's must use Microsoft Relationship Sales.

Discounts

To add the pricing for retail, Liberty's will update all price lists to reflect the retail price and provide the following discounts:

• 10 percent off for 10-19 items
• 20 percent off for 20-49 items
• 30 percent off for more than 50 items
Job roles
EmployecA:
• Manages the Commercial territory
• Will also manage the new Retail terntory starting next month
• Responsible for all sales functions, including forecasting and product management
EmployeeB:
• Hired for retail sales only
• Must create new accounts and contacts but should not be able to create or edit products
EmployeeC:
• Serves as a Liberty's executive
• Requires read-only access to Contacts and Accounts tables in Dynamics 365 Sales
Employee©:
• Serves as an operations manager, responsible for managing orders and deliveries
General
• With the acquisition of the retail company, new bread types must be added. These bread types must apply to loaves and buns.
• A lead must be generated from an activity record.
• Liberty's wants to improve accuracy about Accounts and Contacts but does not want to track messages generated outside of the system.
• With the addition of the retail branch. Liberty's must create a forecasting model to estimate the revenue for the next quarter.
• If a phone call is received from a new potential customer, a lead must be generated from the activity record.
• Liberty's must automatically maintain current account and contact information.
• The system must be able to rate the health of an opportunity based on the following scale:
o 1 = Good
o 2 = Fair
o 3 = Poor
• The health rating must include all conversations and interactions, including those on social media. Issues
• A duplicate detection rule is set up, and the flag to check for duplicates is turned on; however, duplicates still exist.
• EmployeeB and other employees notice that all their opportunities are rated as Good, but when reviewing the activities, they see that the rating should be Poor.
• User1 complains that the user's message responses to leads in LinkedIn are missing.
• TesterA cannot find the model-driven app to test.
• Liberty's receives an email with a customer order. When the customer calls to pay with a credit card over the phone, Liberty's cannot find the customer order.

QUESTION 1
DRAG DROP
You need to create new leads from activities.
What should you do? To answer, drag the appropriate actions to the correct activity types. Each action may be used once, more than once, or not at all. You may need to drag the split bar between panes or scroll to view content. NOTE: Each correct selection is worth one point.

Select and Place:

Correct Answer:

Section:
Explanation:

QUESTION 2
You need to resolve the issue reported by User1.
Which three actions should you perform? Each correct answer presents part of the solution.
NOTE: Each correct selection is worth one point.

A. Configure the connection graph.
B. Configure LinkedIn Sales Navigator Lead lookup control.
C. Create a tab for LinkedIn Sales Navigator and make it visible.
D. install Linkedin Sales Navigator and enable it.
E. Enable CRM sync and activity writeback.

Correct Answer: A, B, E
Section:

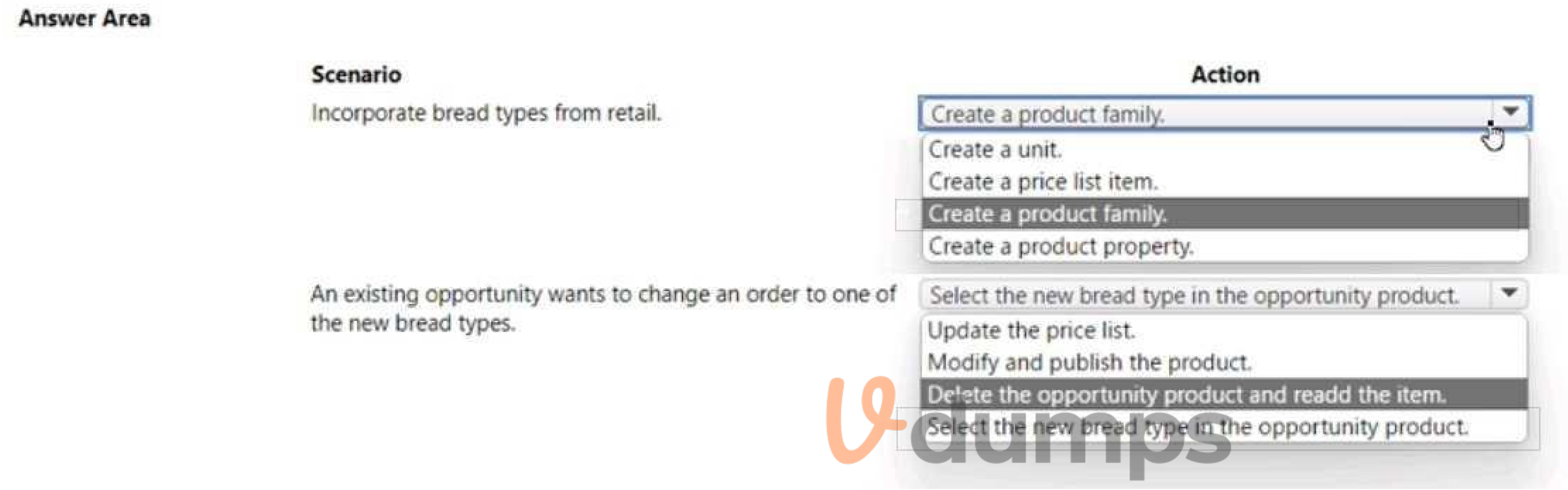
QUESTION 3
You need to create a price list for loaves of bread. What should you set up?

A. one price list item, one discount list
B. one price list item, three discount lists
C. three price list items, one discount list
D. three price list items, no discount lists

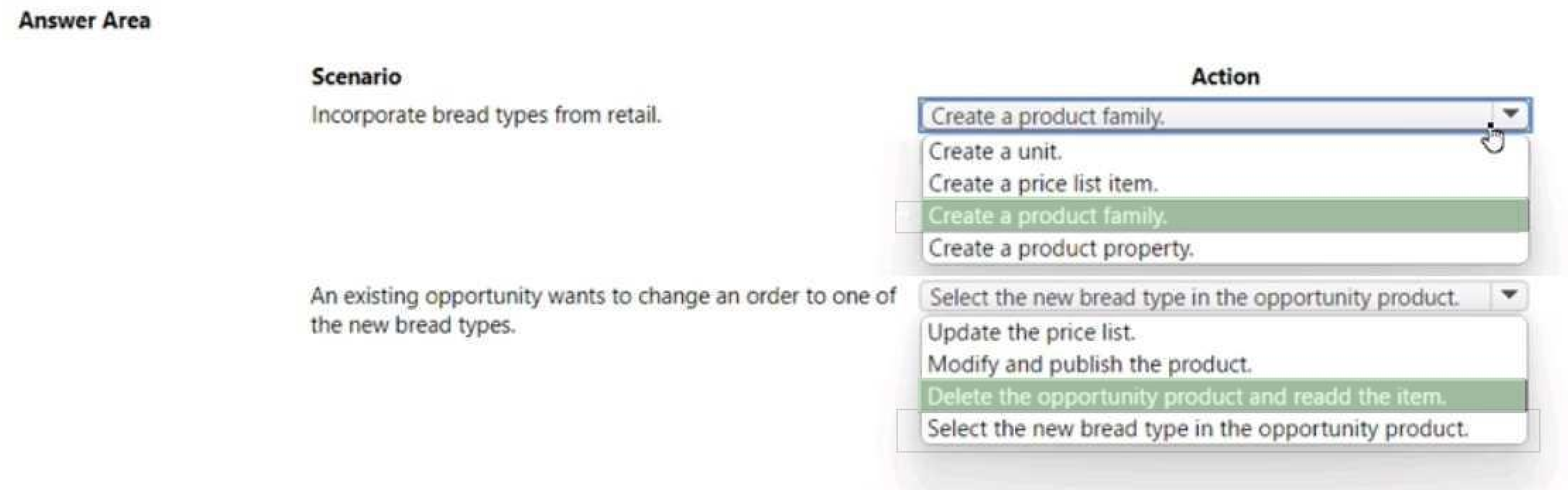
Correct Answer: B
Section:

QUESTION 4
HOTSPOT
You need to add the new types 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.

Hot Area:



Answer Area:



Section:
Explanation:

QUESTION 5
You need to create a component for deliveries. What should you create?

A. scheduled flow
B. booking alert
C. custom activity table
D. business process flow

Correct Answer: A
Section:

QUESTION 6
You need to resolve the missing credit card order.
Which two actions should you perform? Each correct answer presents part of the solution.
NOTE: Each correct selection is worth one point.

A. Create the order.
B. Qualify a lead.
C. Create a contact
D. Convert the email.

Correct Answer: C, D
Section:

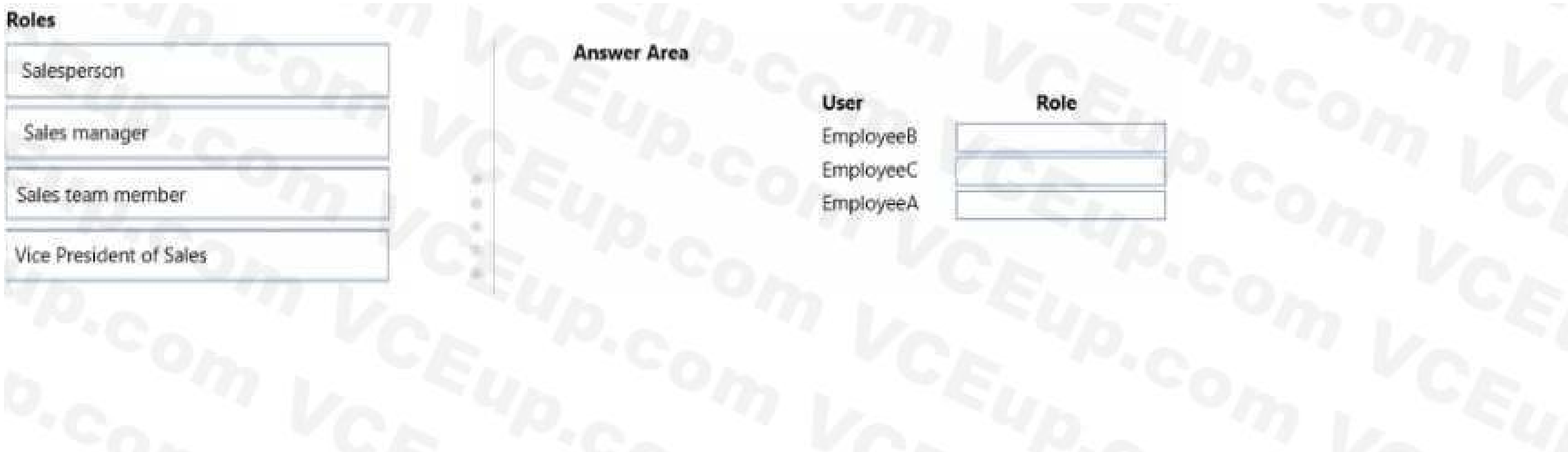
QUESTION 7
You need to fix the opportunity fating issue that EmployeeB reports. What should you update?

A. Exchange data
B. Activity influence
C. Health score grading
D. Communication frequency

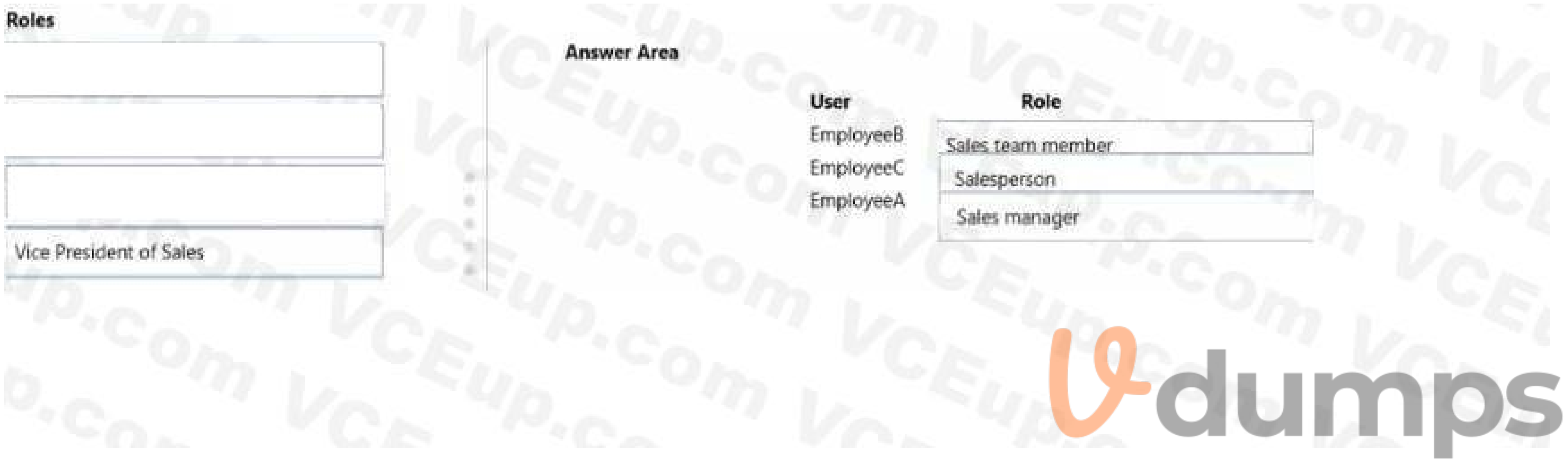
Correct Answer: C
Section:

QUESTION 8
DRAG DROP
You need to assign the appropriate out-of-the-box security roles.
Which roles should you assign? To answer, drag the appropriate roles to the correct users. Each role may be used once, more than once, or not at all. You may need to drag the split bar between panes or scroll to view content. NOTE: Each correct selection is worth one point.

Select and Place:



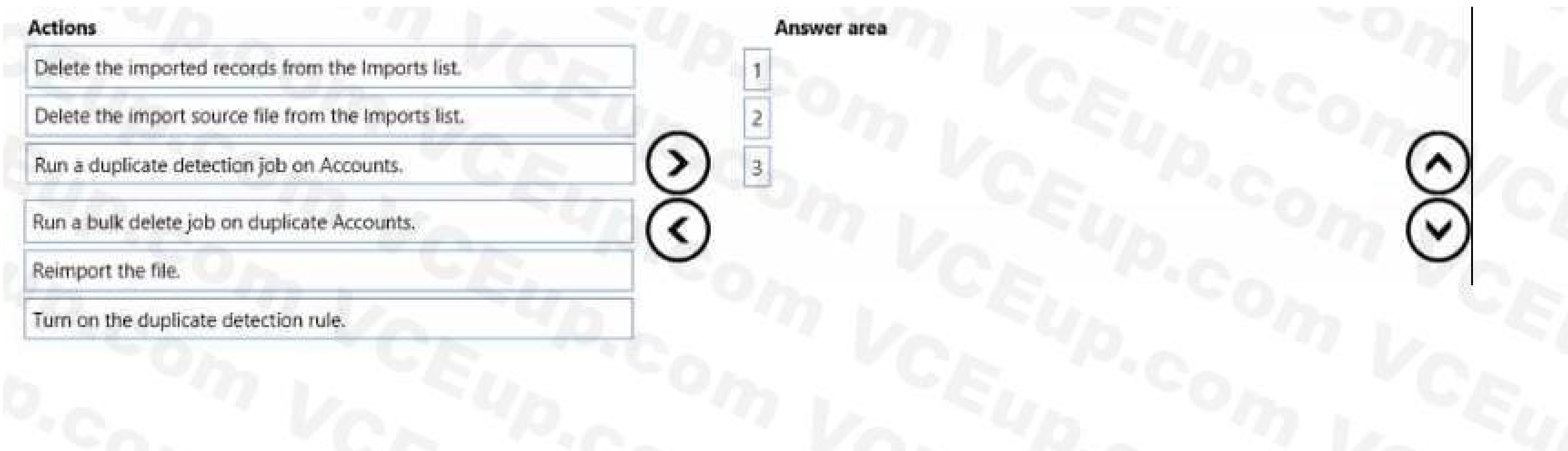
Correct Answer:



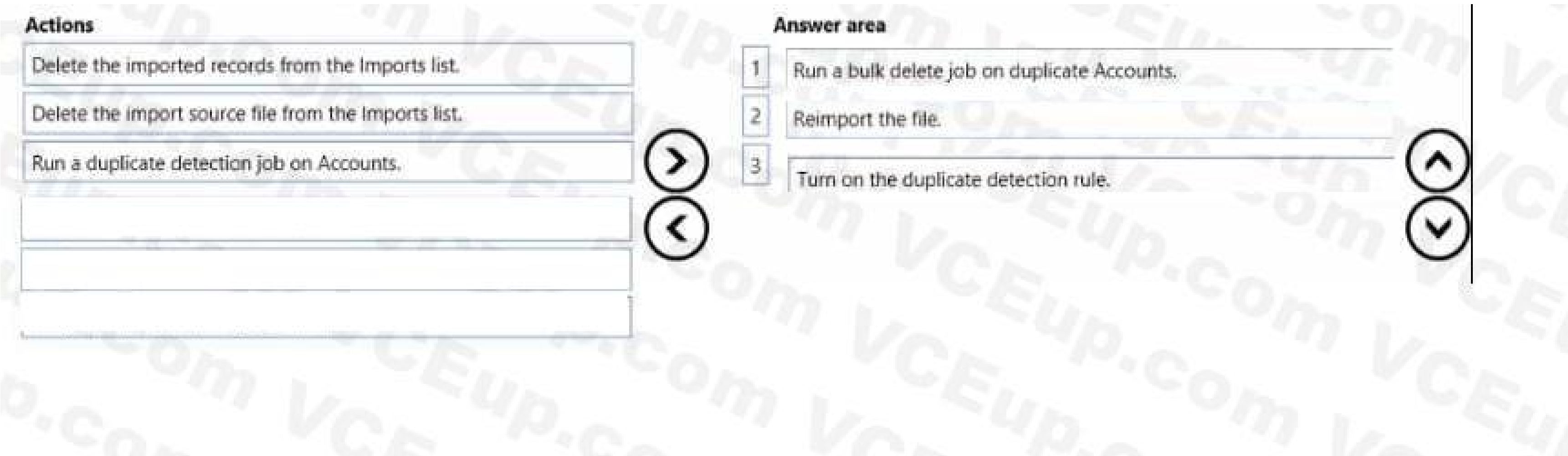
Section:
Explanation:

QUESTION 9
DRAG DROP
You need to ensure that the Accounts table data does not contain duplicates.
Which three actions should you perform in sequence? To answer move the appropriate 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.

Select and Place:



Correct Answer:



Section:
Explanation:

QUESTION 10
You need to optimize generated forecasts. What should you create?

A. one predictive opportunity scoring model
B. two predictive opportunity scoring models
C. two predictive lead scoring models
D. one predictive lead scoring model

Correct Answer: B
Section:

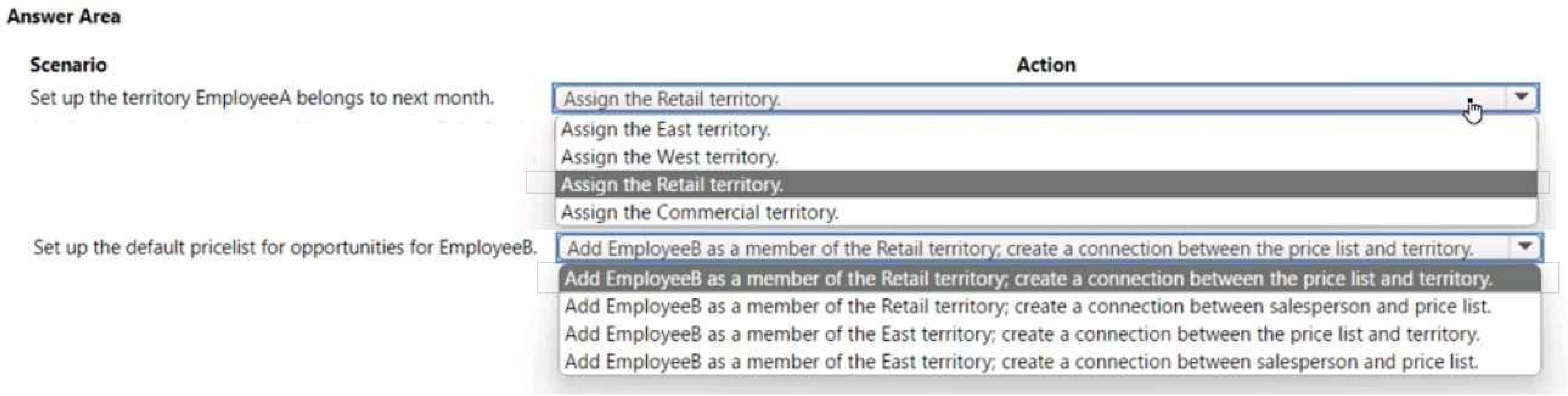
QUESTION 11
You need to solve the TesterA issue. What should you do?

A. Select Enable Dynamics 365 for mobile.
B. Log out and log back in to view non-production apps.
C. Select Apps from the non-production apps.
D. Customize the mobile app to match the model-driven app.

Correct Answer: C
Section:

QUESTION 12
HOTSPOT
You need to ensure that employees have the appropriate territory set up.
What should you do? To answer, select the appropriate option in the answer area.
NOTE: Each correct selection is worth one point.

Hot Area:



Answer Area:

Section:
Explanation:

Exam K

QUESTION 1
You need to help the salespeople track their emails.
Which three actions should you perform? Each correct answer presents pan of the solution.
NOTE: Each correct selection is worth one point.

A. Enable server-side synchronization.
B. Add the Dynamics 365 App for Outlook security role to the user.
C. Enable email engagement.
D. Turn on auto capture.

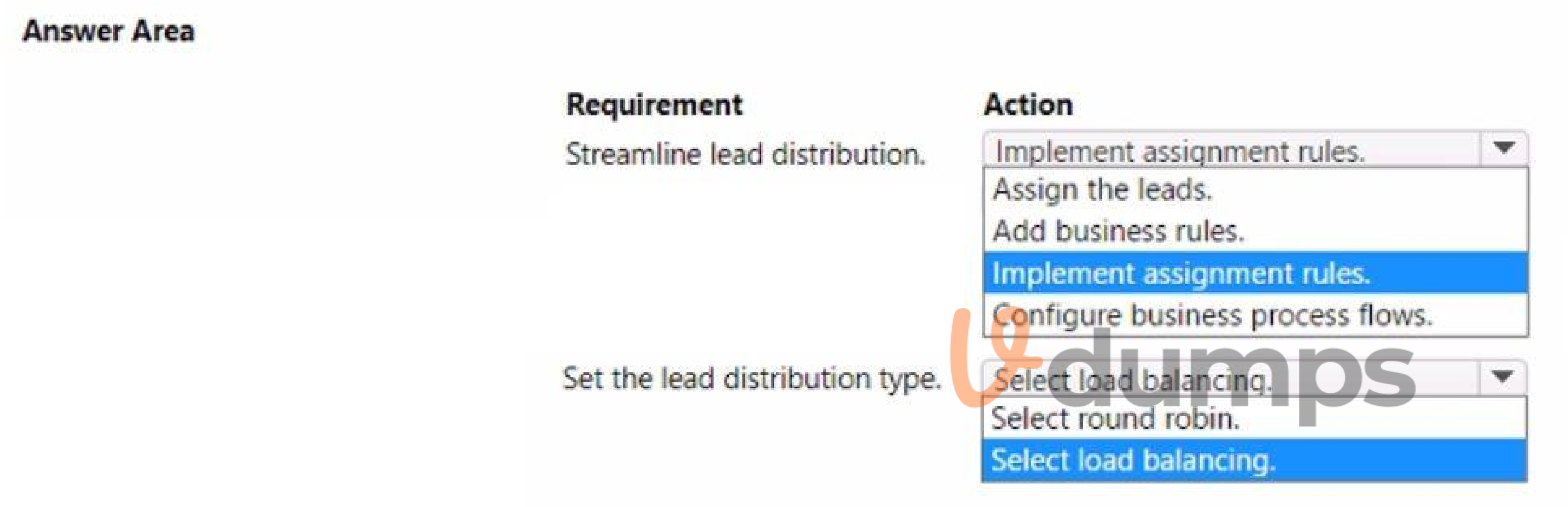
E. Add the Dynamics 365 App for Outlook to the salesperson.

F. Approve the salesperson's email address.

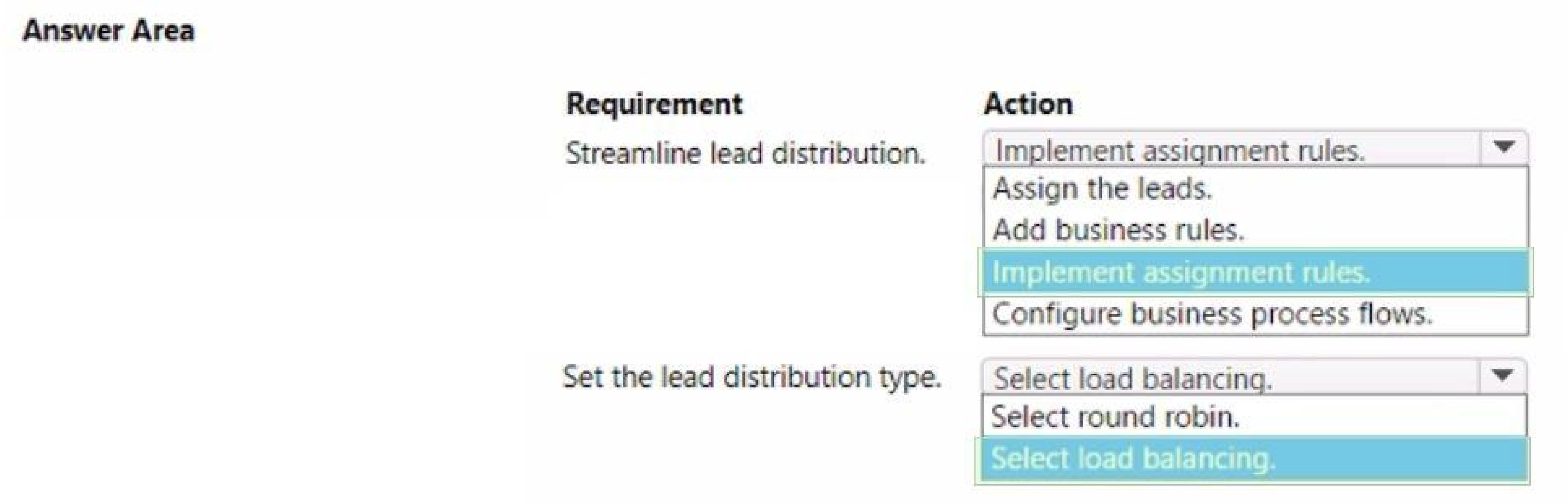
Correct Answer: C, D, E
Section:

QUESTION 2
HOTSPOT
You need to improve lead assignments.
Which actions should you take? To answer, select the appropriate options in the answer area.
NOTE: Each correct selection is worth one point.

Hot Area:



Answer Area:



Section:
Explanation:

QUESTION 3
You need to send a notification to contacts for the pop-up sale.
What should you create?

A. campaign
B. quick campaign
C. marketing email
D. customer journey

Correct Answer: A
Section:

QUESTION 4
You need to recommend to the sales manager which license to use for salespeople who work on tradeshow leads.
What should you recommend?

A. Dynamics 365 Sales Premium
B. Dynamics 365 Team member
C. Dynamics 365 Sales Enterprise
D. Dynamics 365 Sales Professional

Correct Answer: D
Section:

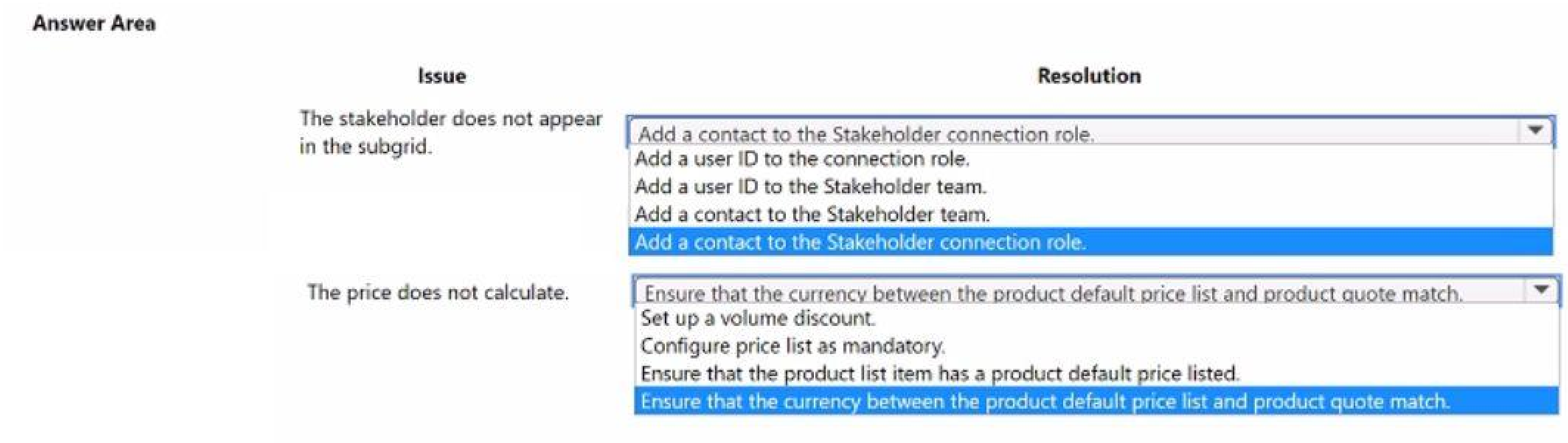
QUESTION 5
You are configuring sales accelerator for a retail business. The company uses four tables: Lead, Quote, Product and a custom merchandise table. The default main form is used for all tables.
The company plans to implement the Up Next widget for sellers on all applicable tables. You need to configure the widget so it is displayed correctly for sellers. Solution: Add the widget to the custom merchandise table form.
Does the solution meet the goal?

A. Yes
B. No

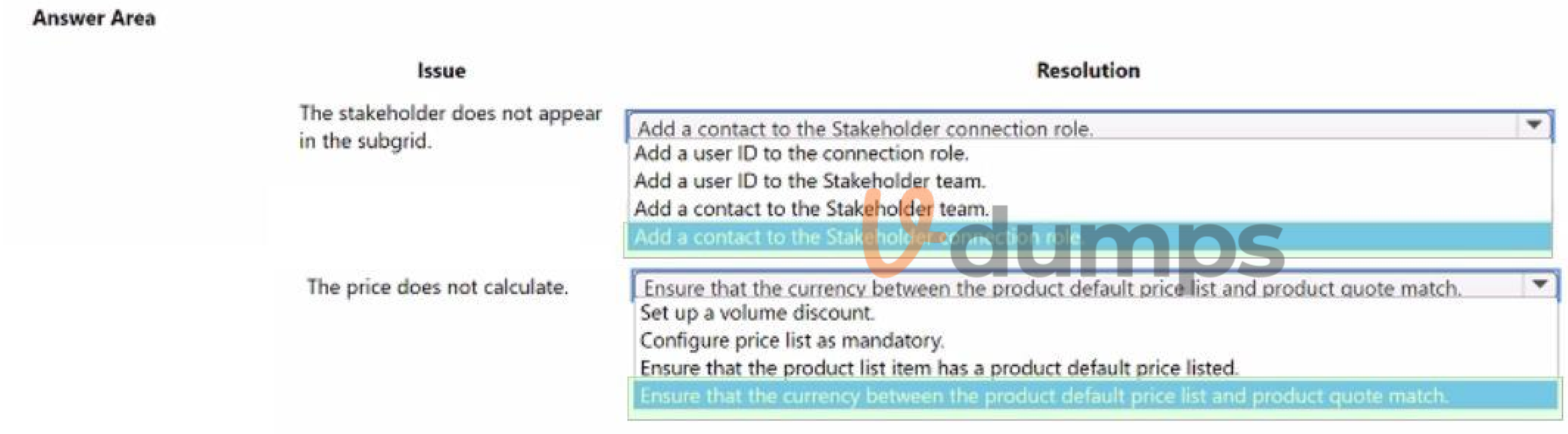
Correct Answer: B
Section:

QUESTION 6
HOTSPOT
You are a salesperson for a company.
You experience the following issues when you open an opportunity:
* One of the stakeholders does not appear in the Stakeholders subgrid.
* The price does not calculate for one of the products added to the opportunity.
You need to resolve the issues.
What should you do? To answer, select the appropriate options in the answer area.
NOTE: Each correct selection is worth one point.

Hot Area:



Answer Area:



Section:
Explanation:

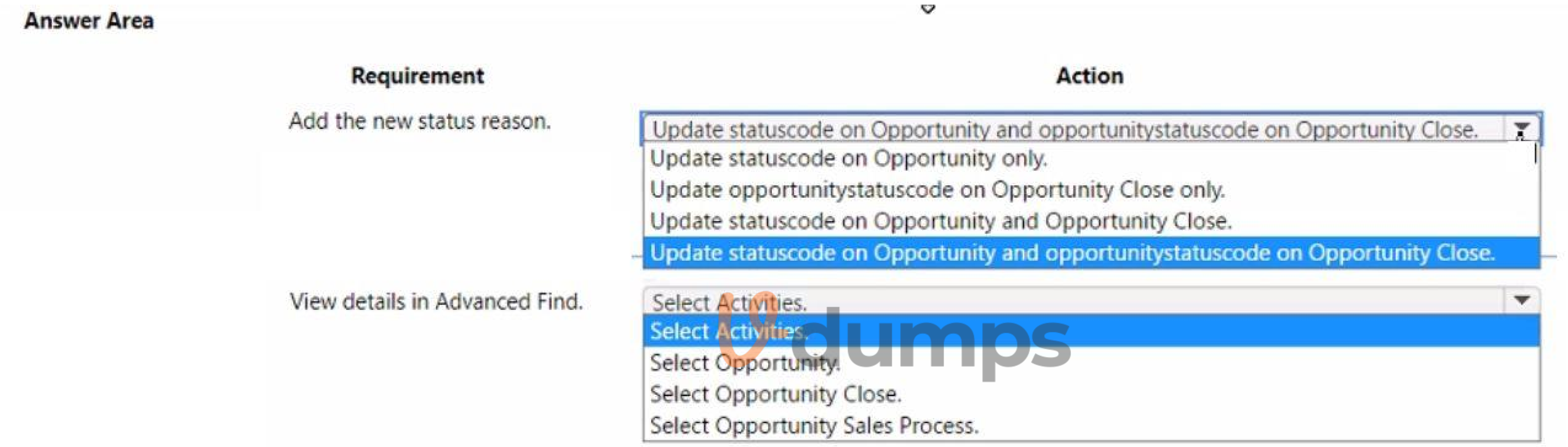
QUESTION 7
You are running Dynamics 365 Sales for a pharmaceutical company. The hospitals are set up as accounts. The nurses are set up as contacts under each hospital name.
A nurse works for HospitalA and HospitalB part time. You add the nurse as a contact for HospitalA. You realize you can add the 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. Open the contact record for the nurse and create a connection to HospitatB.
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. Create business units for HospitalA and HospitalB Open the contact record for the nurse and assign it to a user in HospitalB.
D. Open the Hospital8 record and assign the nurse to a task activity.

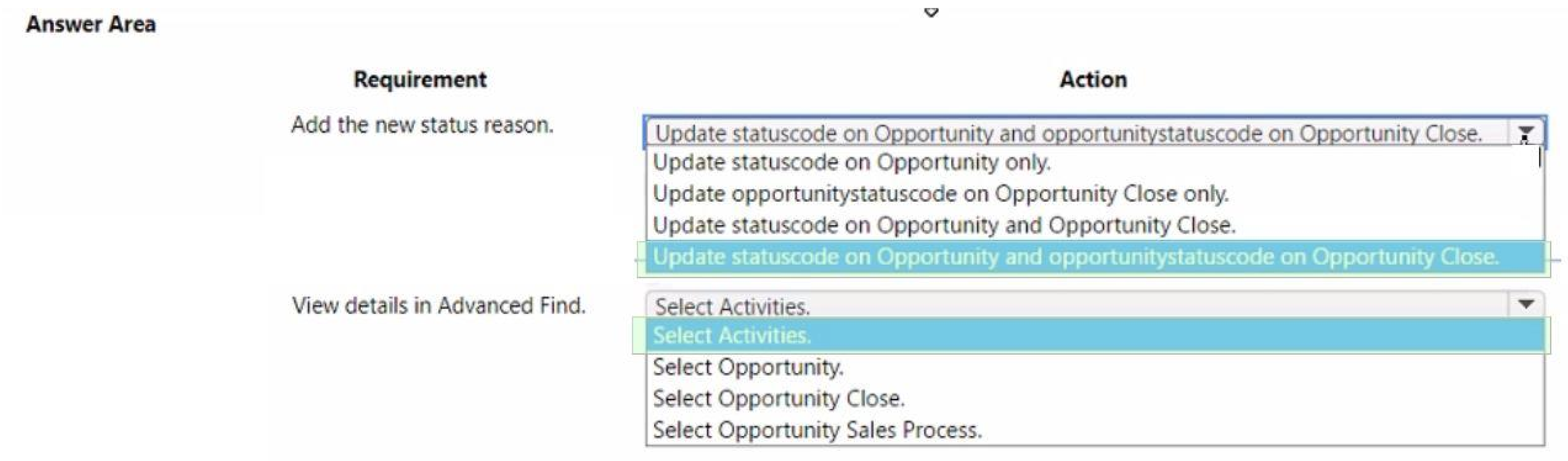
Correct Answer: B
Section:

QUESTION 8
HOTSPOT
A customer uses opportunities as part of a sales cycle.
The sales team wants to close opportunities. The team requires the following:
* an additional status reason when the opportunity is lost
* the ability to view details in Advanced Find when the opportunity is lost
You need to configure the system.
What should you do? To answer, select the appropriate options in the answer area.
NOTE: Each correct selection is worth one point.

Hot Area:



Answer Area:



Section:
Explanation:

QUESTION 9
A company uses Dynamics 365 Sales.
You are setting up the product catalog for customers. Pricing must be set up as follows:
• 1 can - $5.00
• 6 cans - $28.00
• 1 case = S100.00
Partial orders are allowed. A customer wants to buy 2.5 cases of a product. The customer receives a system error when trying to enter the quantity. You need to resolve the issue. What should you modify?

A. Amount
B. Discount List
C. Price List
D. Quantity Selling Option

Correct Answer: A
Section:

QUESTION 10
A company uses Dynamics 365 Sales. The company uses their organizational structure to determine how to aggregate forecasts for each year. The company divides a business unit into three separate units. Each unit will have a new manager.
You need to update the quotas for each user for the current fiscal year's forecast.
Which two actions should you perform? Each correct answer presents part of the solution.
NOTE: Each correct selection is worth one point.

A. Update the target goal amount for each user.
B. Upload the new quota amounts for each user.
C. Create a new relationship between sites.

D. Create and assign users to new resource groups for each manager.
E. Adjust the forecast values directly.
F. Assign the users to their new managers.

Correct Answer: B, F
Section:

QUESTION 11
A company uses Dynamics 365 Sales.
A sales manager wants a salesperson to send an email activity to a marketing list. The manager wants to track the successes and failures of the emails in one view. The salesperson must be limited to sending only this email activity to the marketing list You need to recommend which feature the manager should use.
What should you recommend?

A. quick campaign
B. customer Journey
C. campaign
D. direct email

Correct Answer: A
Section:

QUESTION 12
A company uses Dynamics 365 Sales insights predictive modeling. The prediction accuracy score no longer meets the company's standards. You need to resolve this issue. What should you do?

A. Change the business process flow that it is referencing.
B. Retrain the model.
C. Add a new model.
D. Refresh the data.

Correct Answer: B
Section:

QUESTION 13
A company uses Dynamics 365 Sales.
You need to configure the Sales Insights sales accelerator.
What should you create?

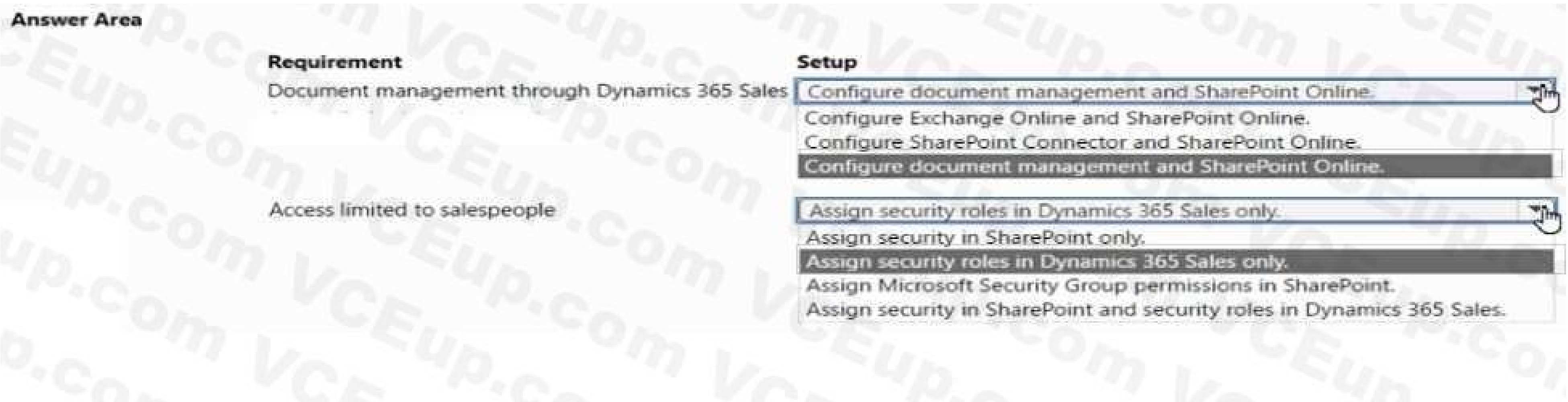
A. Insight cards
B. Leads
C. Communication frequency
D. Sequences

Correct Answer: C
Section:

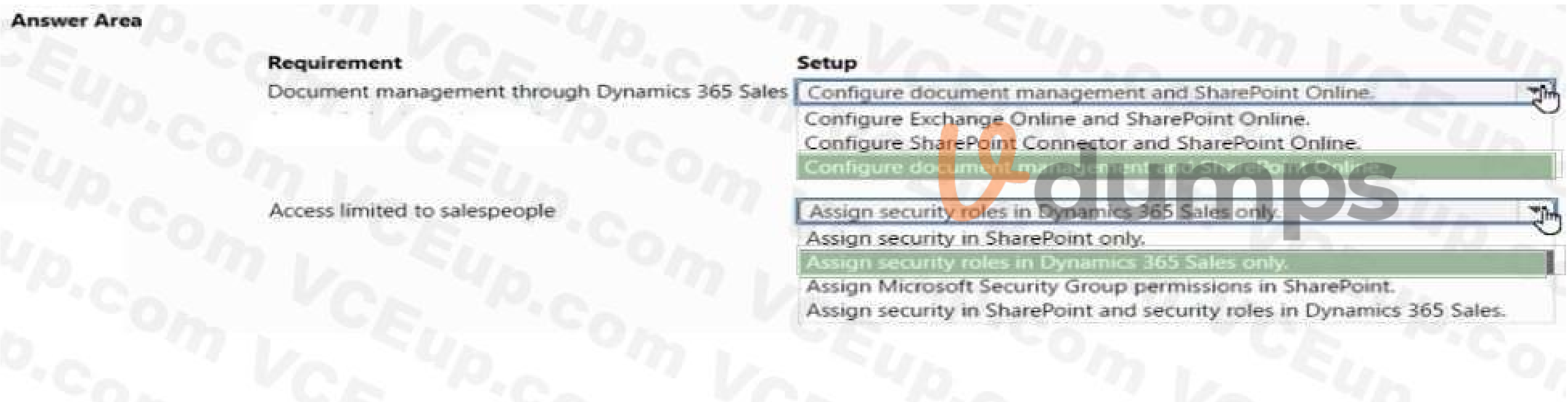
QUESTION 14
HOTSPOT

A company uses Dynamics 365 Sales. The company plans to use Microsoft SharePoint to organize documents. All access to documents must be through Dynamics 365 Sales. You must limit document access to only salespeople. You need to set up SharePoint for use.
What should you set up for each requirement? To answer, select the appropriate options in the answer area. NOTE: Each correct selection is worth one point.

Hot Area:



Answer Area:



Section:
Explanation:

QUESTION 15
DRAG DROP
A company is using Dynamics 365 Sales Premium with Linkedin Sales Navigator.
You must configure the following process steps:
• Set up a meeting and notify the manager if a quote is sent for over a million dollars.
• Enable the salesperson to view Linkedin customer profiles and manually add info to records without leaving the view.
• Ensure that the sequence is added to existing quotes.
You need to enforce this process.
Which feature should you use? To answer, drag the appropriate features to the correct requirementsEach feature may be used once, more than once, or not at all. You may need to drag the split bar between panes or scroll to view content.

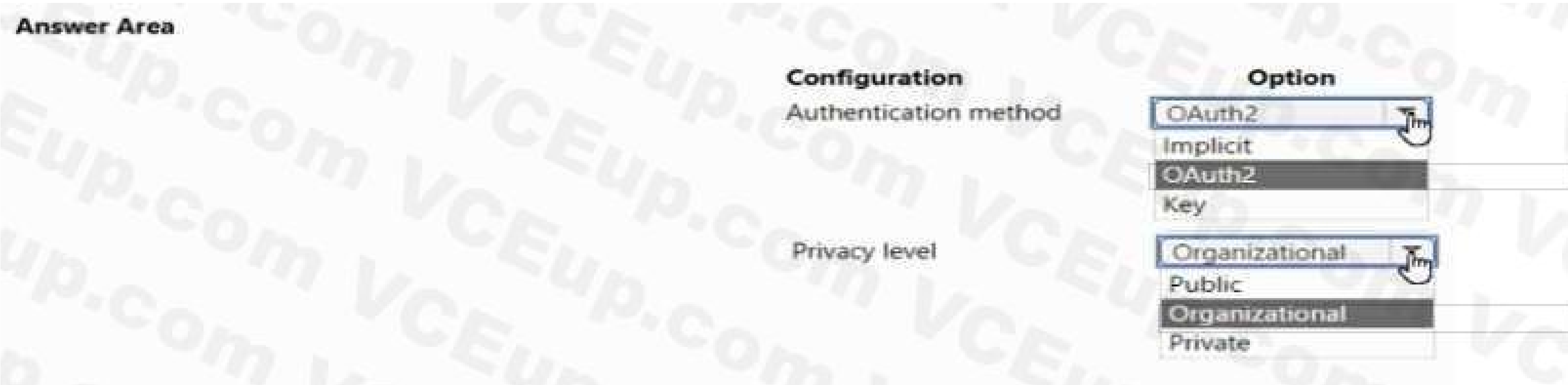
Select and Place:

Correct Answer:

Section:
Explanation:

QUESTION 16
HOTSPOT
You are consulting for a company that is installing Microsoft Power BI to work with a Dynamics 365 Sales application. The administrator must configure each required option to successfully integrate the Sales Analytics template for use in Dynamics 365 Sales.
You need to identify which option to select.
Which option should you use? To answer, select the appropriate option in the answer area.
NOTE: Each correct selection is worth one point.

Hot Area:



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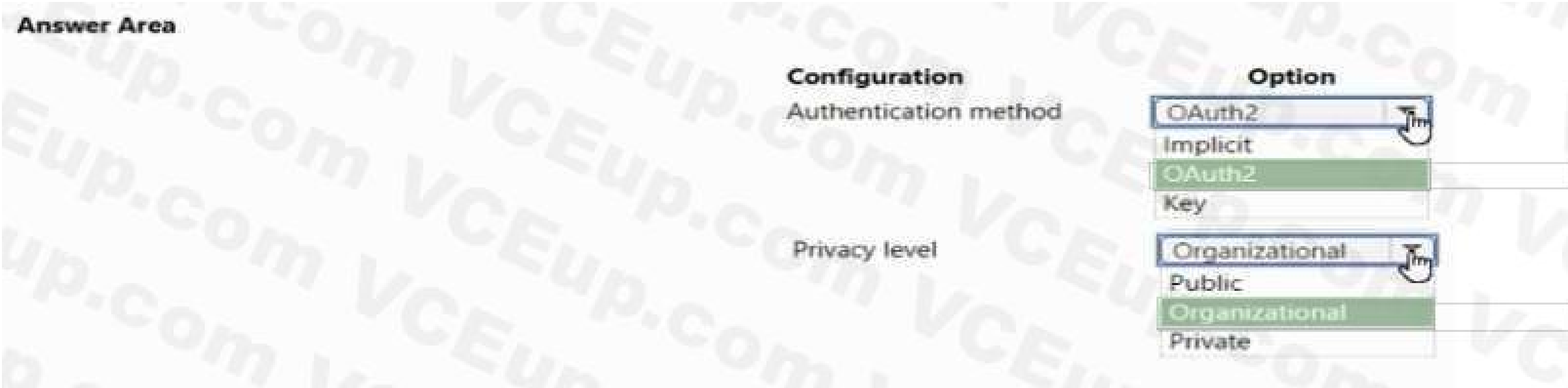
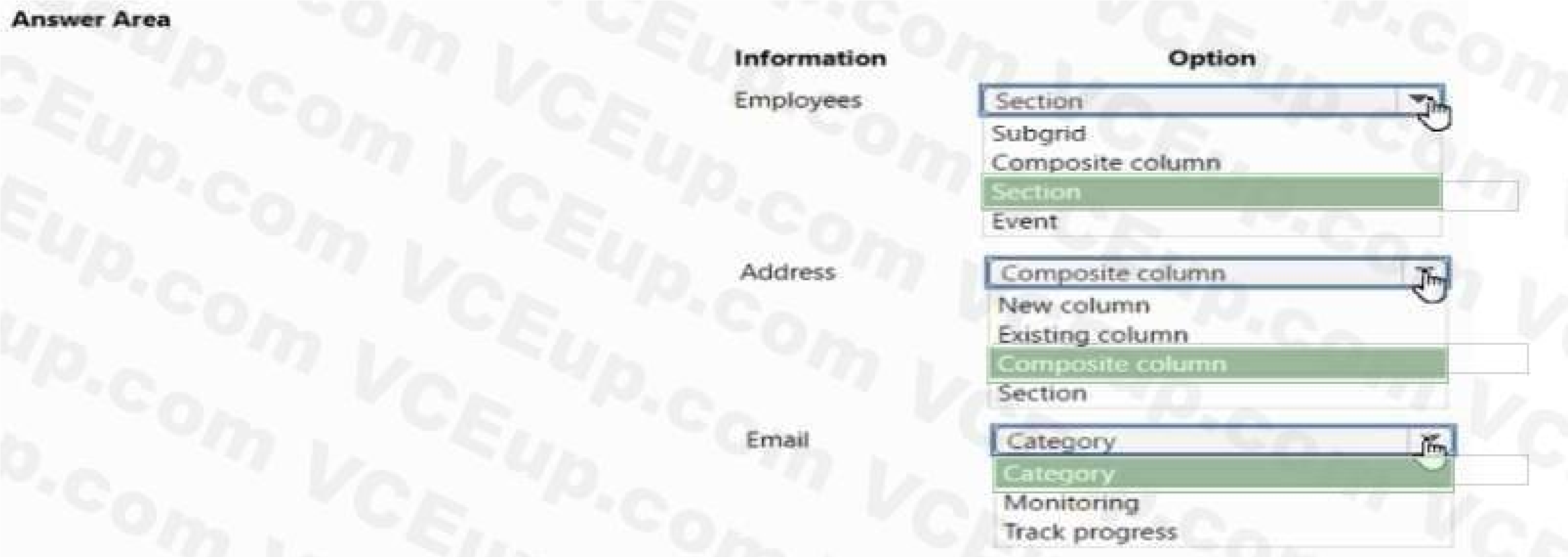


Section:
Explanation:

QUESTION 17
HOTSPOT
You are creating a new account form for Inside sales. The company name is in the account name field. Company employees are entered as contacts. The form must meet the following requirements with minimal additions:
• List employee names.
• include the street address, city, and state as one field.
• Include columns to allow for entry of three separate email addresses.
• Ensure that users can only edit the phone number and email columns.
You need to configure the form.
Which option should you use? To answer, select the appropriate options in the answer area.
NOTE: Each correct selection is worth one point.

Hot Area:

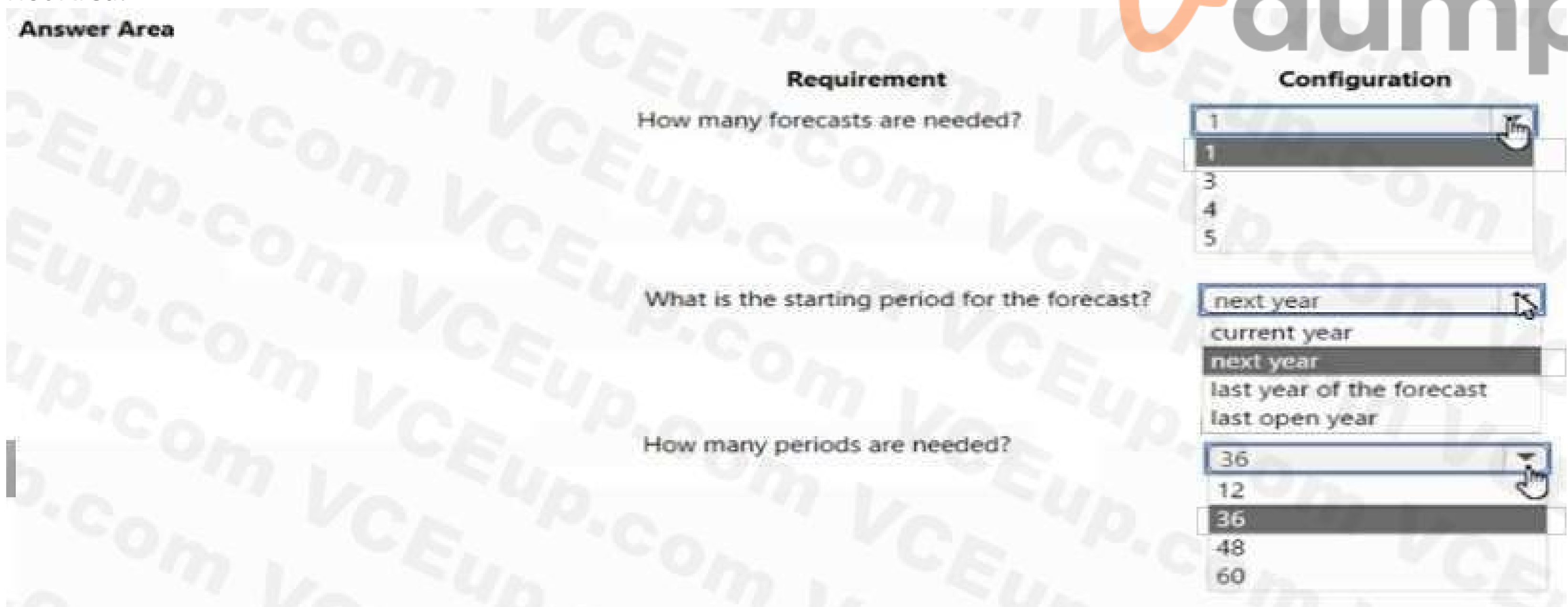
Answer Area:



Section:
Explanation:

QUESTION 18
HOTSPOT
You are a Dynamics 365 Sales administrator. You set the fiscal year to begin in January.
A sales manager needs a monthly forecast for the next three years that starts in August of the next year. You need to configure the forecast using the fewest number of forecasts.
How should you configure each requirement? To answer, select the appropriate options in the answer area. NOTE: Each correct selection is worth one point.

Hot Area:



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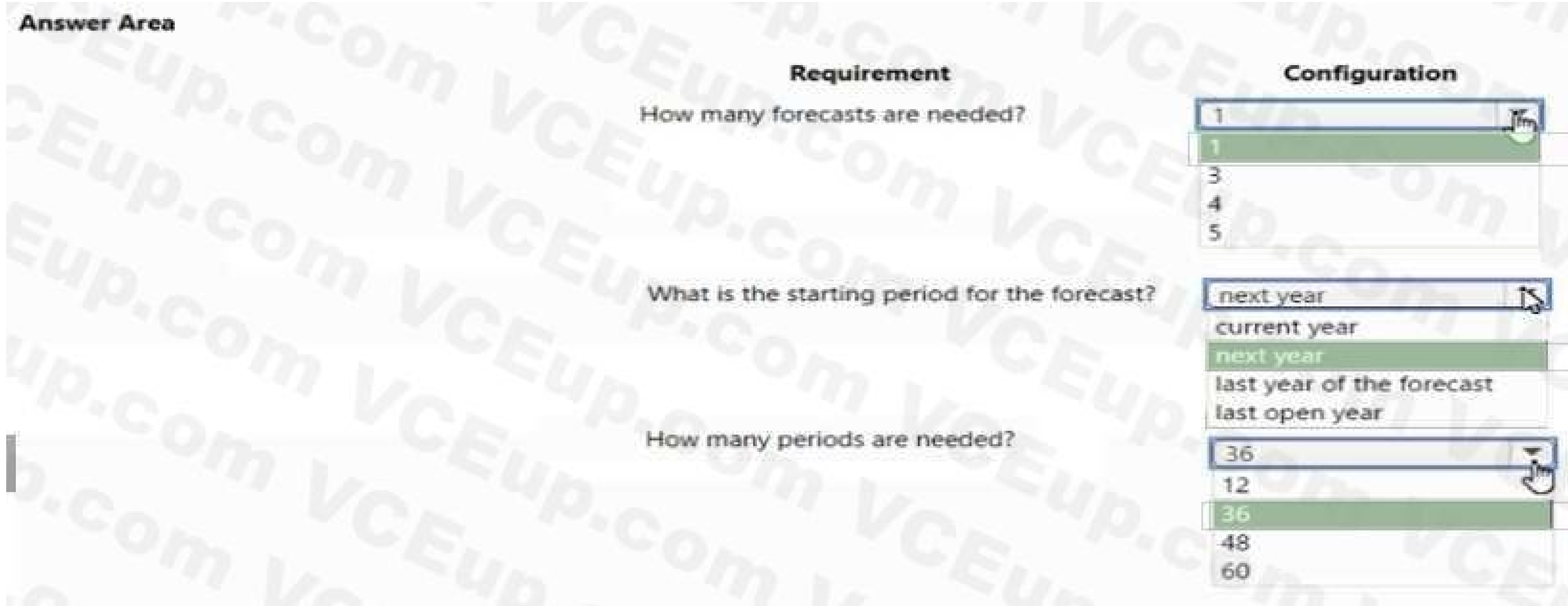


Section:
Explanation:

QUESTION 19
HOTSPOT
You are a Dynamics 365 Sales administrator for a medical office. The office provides a new service for doctors to consult with patients online on a first come, first served basis. Patients are created as Contacts. Doctors can only view patient records for patients in their care.
The doctors need to see a graph of all interactions with each patient.
You need to create an entity to log online interactions.
How should you configure the entity? To answer, select the appropriate options in the answer area
NOTE: Each correct selection is worth one point.

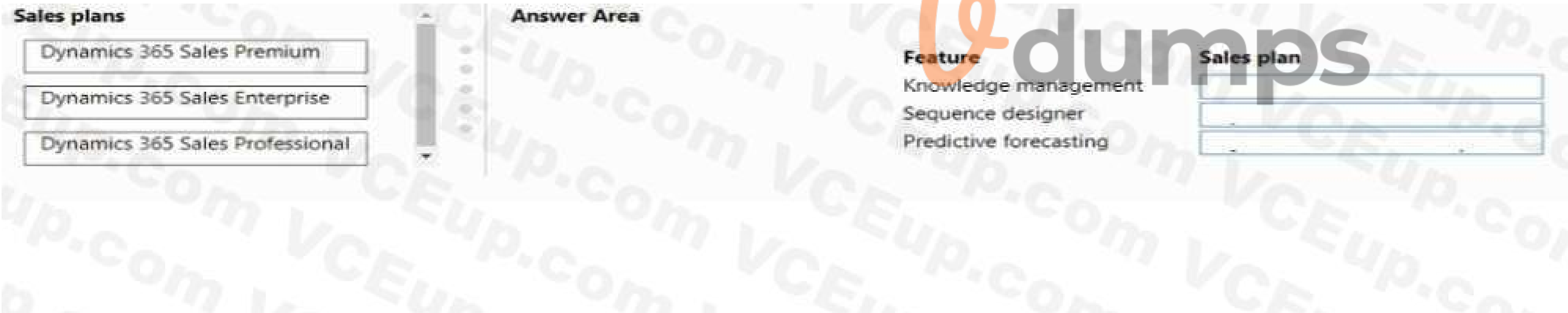
Hot Area:

Answer Area:

Section:
Explanation:

QUESTION 20
DRAG DROP
A company is evaluating Dynamics 365 Sales licenses. The sales manager wants the following features:
• knowledge management
• sequence designer
• predictive forecasting
You need to recommend sales plans that provide the full feature capabilities in the most costeffective manner. Which sales plans should you recommend? To answer, drag the appropriate sales plans to the correct features. Each sales plan may be used once, more than once, or not at all. You may need to drag the spirt bar between panes or scroll to view content.

Select and Place:



Correct Answer:

Section:
Explanation:

QUESTION 21

DRAG DROP

You are configuring Dynamics 365 Sales for a U.S.-based company. The company has two territories that are divided as follows:

• West territory: California to Texas

• East territory; Missouri to Maine

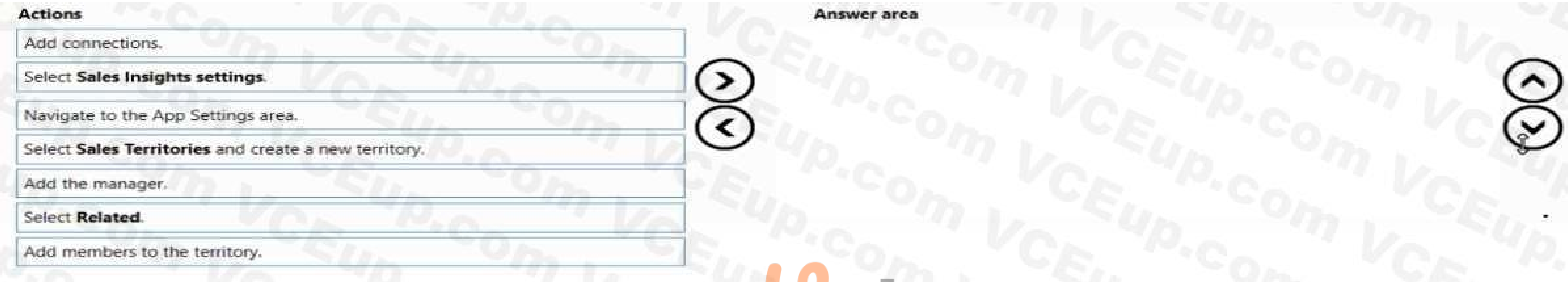
The sales territories should be configured as follows:

Territory	Manager	Salespeople
East	ManagerB	SalespersonC SalespersonD
West	ManagerA	SalespersonA SalespersonB

You need to set up the sales territories.

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

Select and Place:



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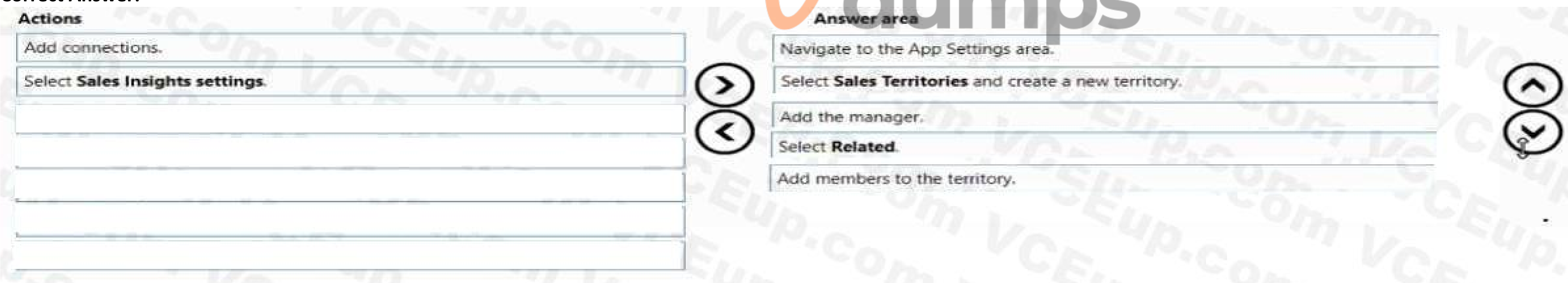


Section:

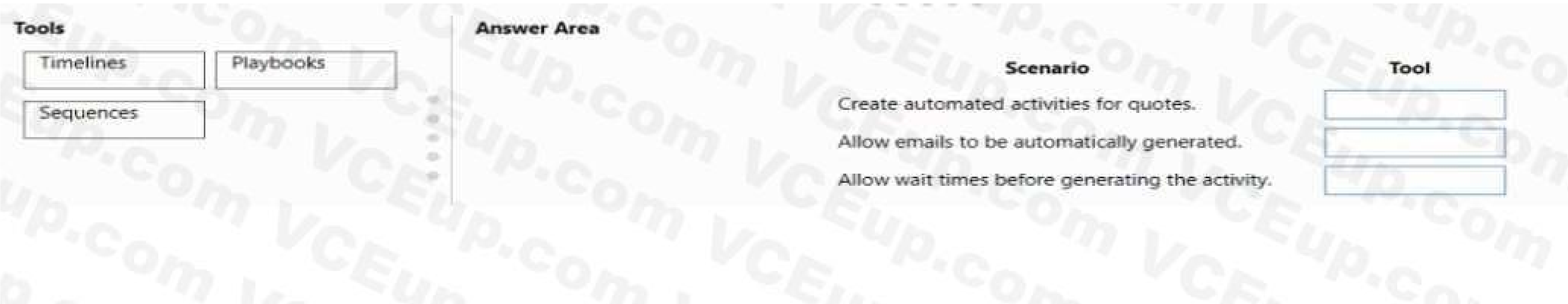
Explanation:

QUESTION 22

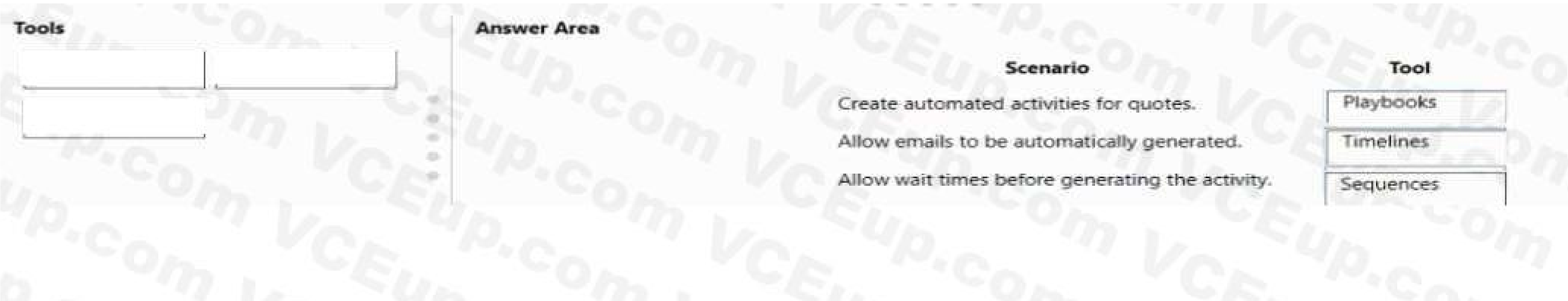
DRAG DROP

A customer uses Dynamics 365 Sales and Sales insights sales accelerator. The company wants to use an automatic activity generator. You need to set up the generator. Which tool should you use? To answer, drag the appropriate tools to the correct scenarios. Each tool may be used once, more than once, or not at all. You may need to drag the split bar between panes or scroll to view content. NOTE: Each correct selection is worth one point.

Select and Place:

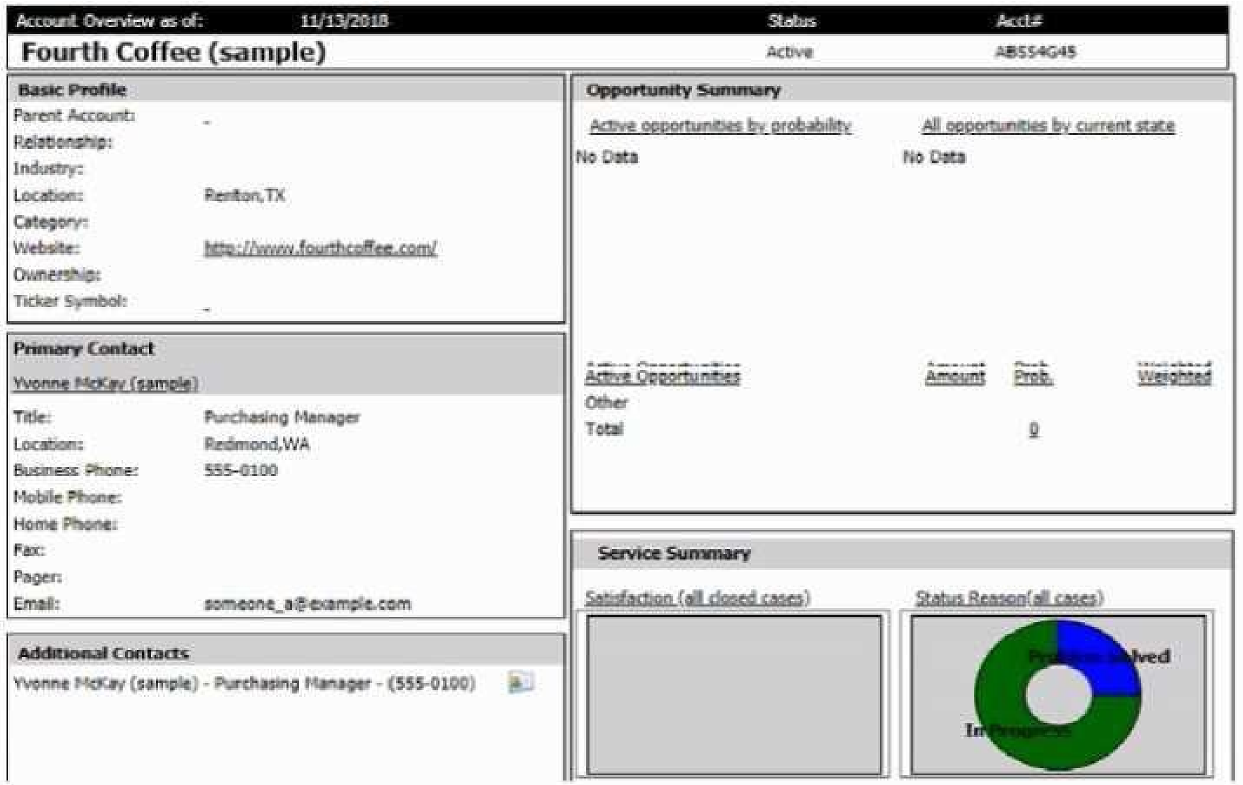


Correct Answer:



Section:
Explanation:

QUESTION 23
HOTSPOT
You run a sales report for Fourth Coffee named Account Overview. The following report displays:



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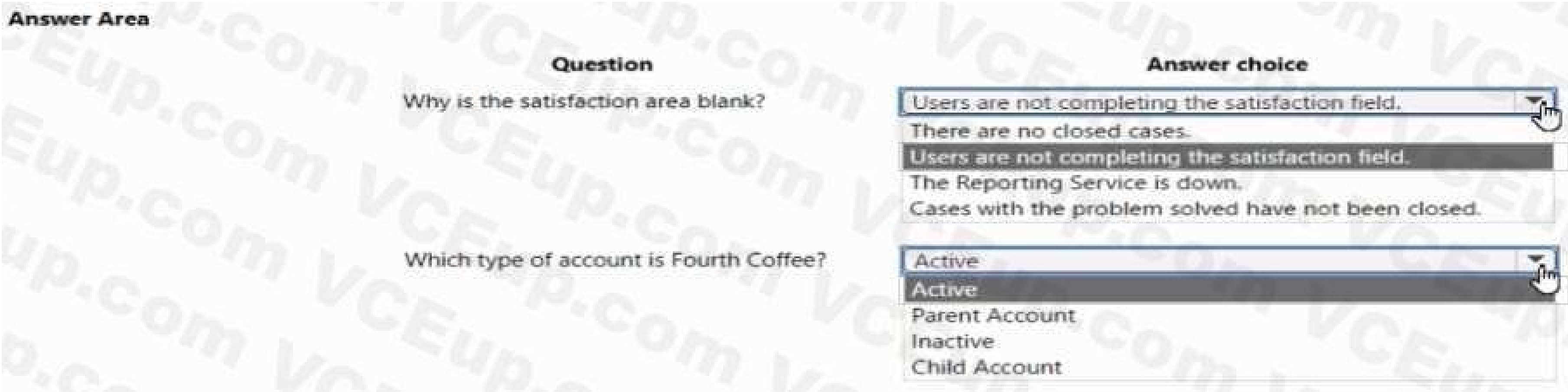

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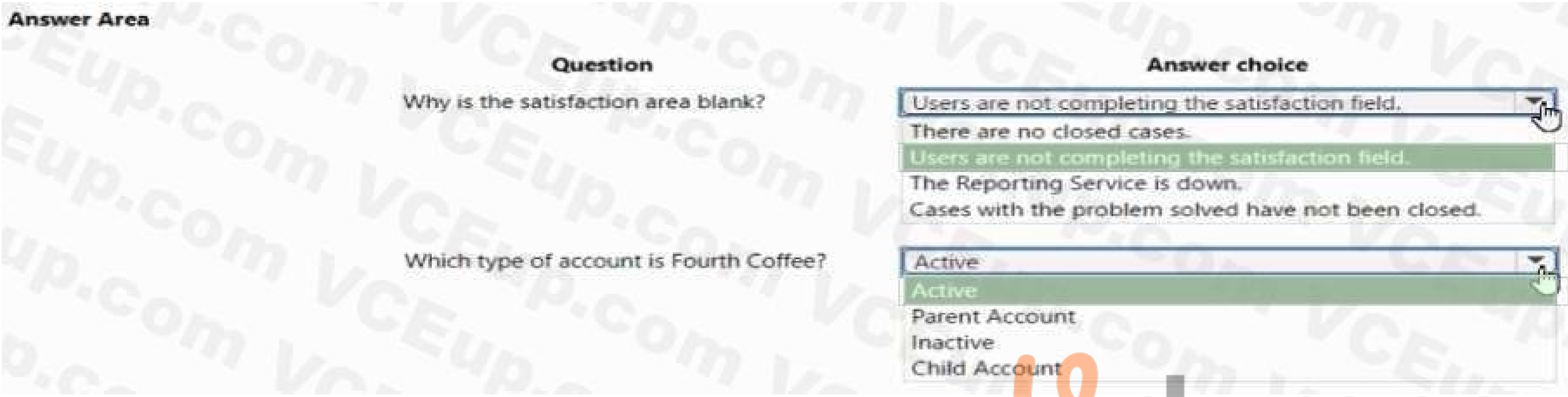


Section:
Explanation:

QUESTION 24
A sales representative at a company uses Dynamics 365 Sa4es. The representative is assigned the Salesperson security role The representative requires a list that has only full name, address, phone number, and opportunity amount. The system does not provide this setup by default. Other sales representatives must be able to display the same information and format when necessary.
You need to set up the system.
What should you create?

A. personal view, and share it with the other representatives
B. report that is sent to the team once a day
C. system view
D. system dashboard

Correct Answer: A
Section:

QUESTION 25
You manage a Dynamics 365 environment. You plan to implement business process flows from AppSource. You need to ensure that a user can install the business process flows. What should you do?

A. Assign the Dynamics 365 System Customizer role to the user.
B. Assign the Common Data Service User role to the user.
C. in the Power Apps Admin center, assign Environment Maker permissions to the user.
D. In the Office 365 Admin center, assign Application proxy permissions to the user.

Correct Answer: A
Section:

QUESTION 26
A sales manager creates a view for leads in the manager s region. The view displays only 25 records per page. The sales manager wants the view to display 100 records per page. You need to recommend a solution for the sales manager. What should you recommend?

A. Update system settings.
B. Create a personal view.
C. Create a public view.
D. Update personalization settings.

Correct Answer: D
Section:

QUESTION 27
A company has two departments. Each department uses only custom forms and views designed for each department. Currently, all users can view all forms and views. The company wants to improve usability for its users. You need to limit users to only individual department forms and views.
What should you do?

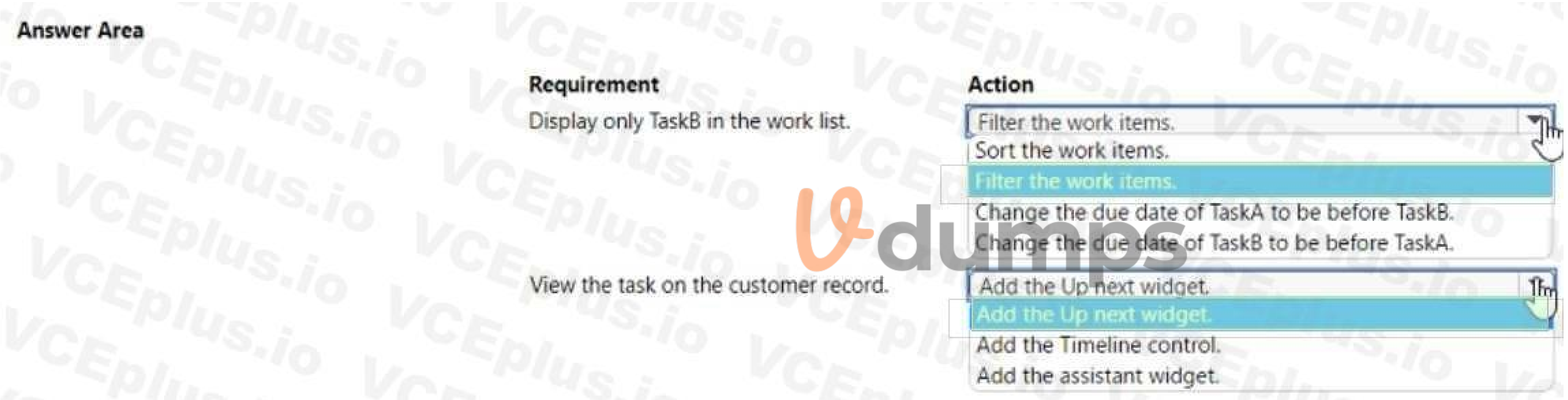
A. Create a site map for each department.
B. Create a model-driven app for each department
C. Use a hierarchy security model.
D. Use security roles.

Correct Answer: D
Section:

QUESTION 28
HOTSPOT
A company enables sales accelerator in Microsoft Dynamics 365 Sales. All salespeople use a custom customer form. A salesperson observes that a work list displays TaskA instead of TaskB for a customer. The salesperson requires the following setup:
• Display only TaskB in the work list.
• View the task on the customer record as a visual cue.
You need to recommend changes to meet the requirements.

Hot Area:

Answer Area:



Section:
Explanation:

QUESTION 29
A company is using Relationship Analytics. The company emails customers three times a month.
To increase customer loyalty, the company is adding a policy that requires sales representatives to meet with customers two times a quarter as well. You need to update the settings.
What should you configure?

A. Health score
B. Talking points
C. ommunication frequency
D. Conversation intelligence

Correct Answer: C
Section:

QUESTION 30
A company that sells products in multiple regions uses Dynamics 365 Sales.

The company has different product offerings in each region.
The system must be set up to send the latest product information to each region every month.
You need to set up the distribution of product information for the regions.
What should you set up?

A. guided selling
B. territories
C. relationship intelligence
D. dynamic marketing lists

Correct Answer: D
Section:

QUESTION 31
DRAG DROP
A company uses Dynamics 365 Sales. The company uses the accounts, contacts, leads, and opportunities tables and five custom tables. The company has three roles: manager, administrator, and frontline worker.
The sales manager requires the most cost-effective licensing option for each level of user. The user requirements are as follows:

	Accounts table	Contacts table	Leads table	Opportunities table	Custom tables
Manager role	Read and update	Read and update	Read	Read	Read
Administrator role	Create, read, and update	Create, read, and update	Create, read, and update	Create, read, and update	Create, read, and update
Front-line worker role	Create and update activities	Create and update activities	Create and update activities	Create and update activities	Create and update activities

You need to assign the licenses.
Which licenses should you assign? To answer, drag the appropriate licenses to the correct roles. Each license may be used once, more than once, or not at all. You may need to drag the split bar between panes or scroll to view content. NOTE: Each correct selection is worth one point.

Select and Place:

Correct Answer:

Section:
Explanation:

QUESTION 32
A company uses Dynamics 365 Sales.
The sales manager wants leads to automatically route to the salesperson who has the fewest leads.
You need to automate the process.
What should you set up?

A. assignment rule
B. assistant
C. sequence
D. playbook
E. business process flow

Correct Answer: A
Section:

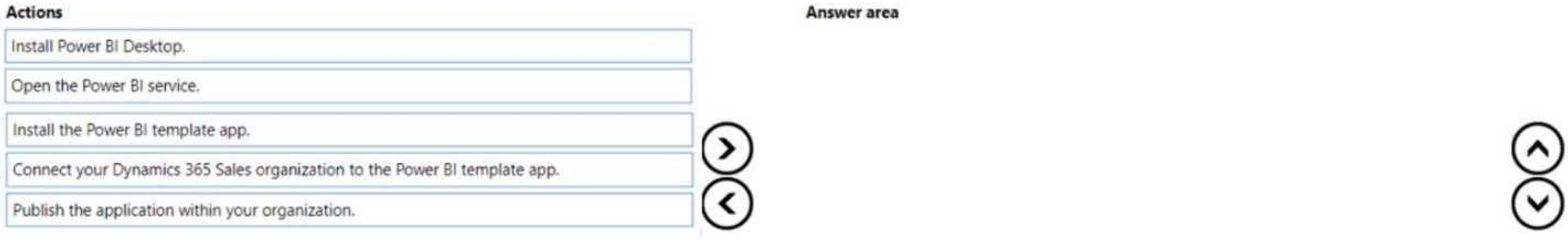
QUESTION 33
A company uses Dynamics 365 Sales.
Sales representatives for the company want changes to the data entry page for new customers. Much of the information on the page is not required. The representatives request fewer tab entries to get to required data entry areas.
You need to simplify data entry for the sales representatives.
What should you do?

A. Remove unnecessary columns from the view.
B. Create a Microsoft Power BI dashboard that contains only the relevant information.
C. Remove unnecessary columns from the form.
D. Edit the site map so only the main form is available.

Correct Answer: C
Section:

QUESTION 34
DRAG DROP
You implemented Dynamics 365 Sales for a company.
The company s management team requires templates for sales analytics within Dynamics 365 Sales.
You recommend Microsoft Power Bl templates to the team.
You need to assist the team with Power Bl template installation.
Which three actions should you recommend be performed in sequence? To answer, move the appropriate actions from the list of actions to the answer area and arrange them in the correct order.

Select and Place:



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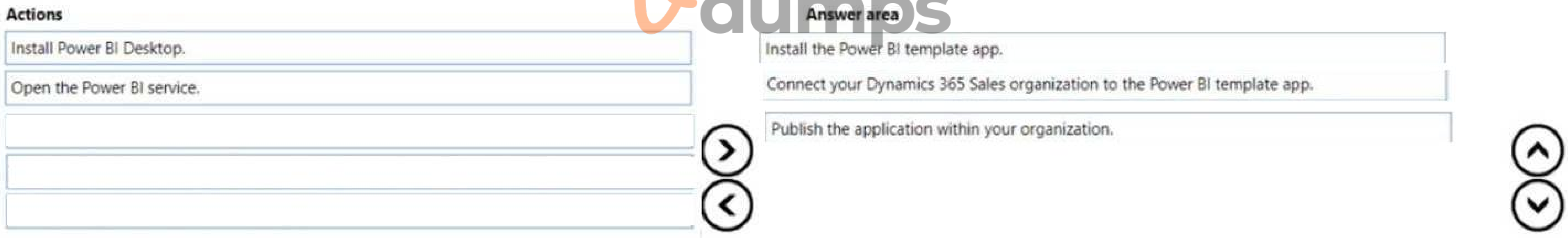
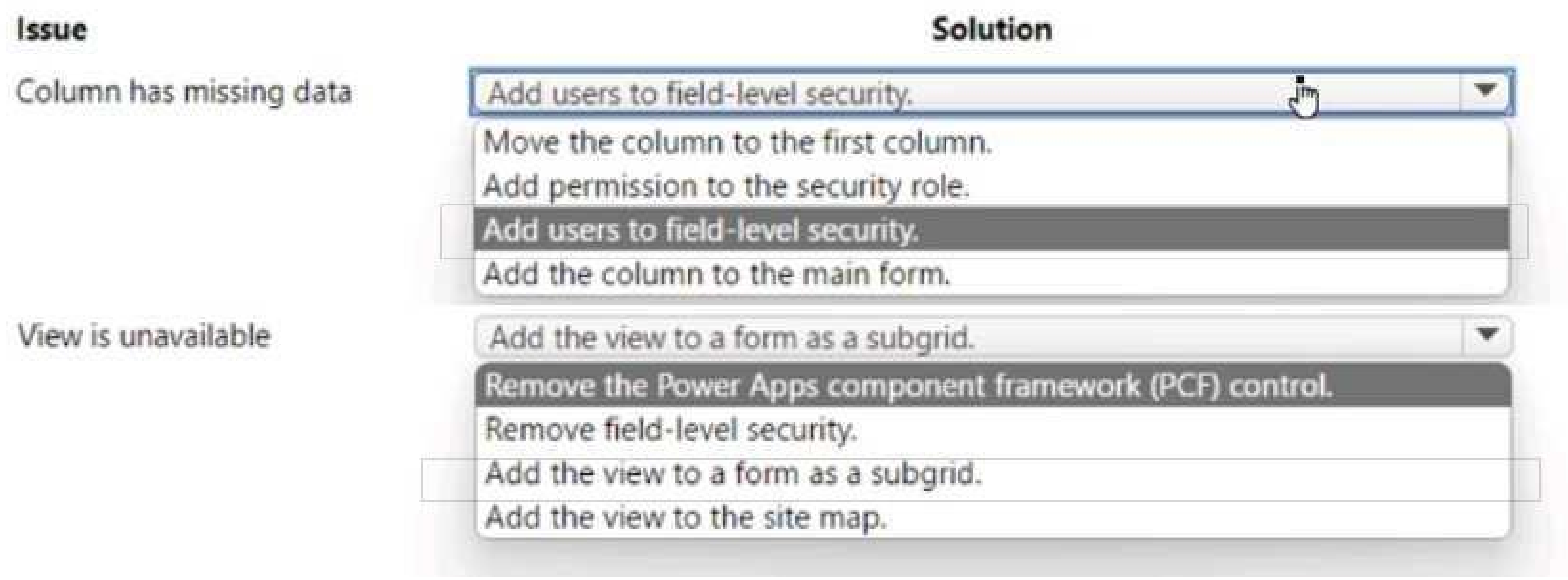


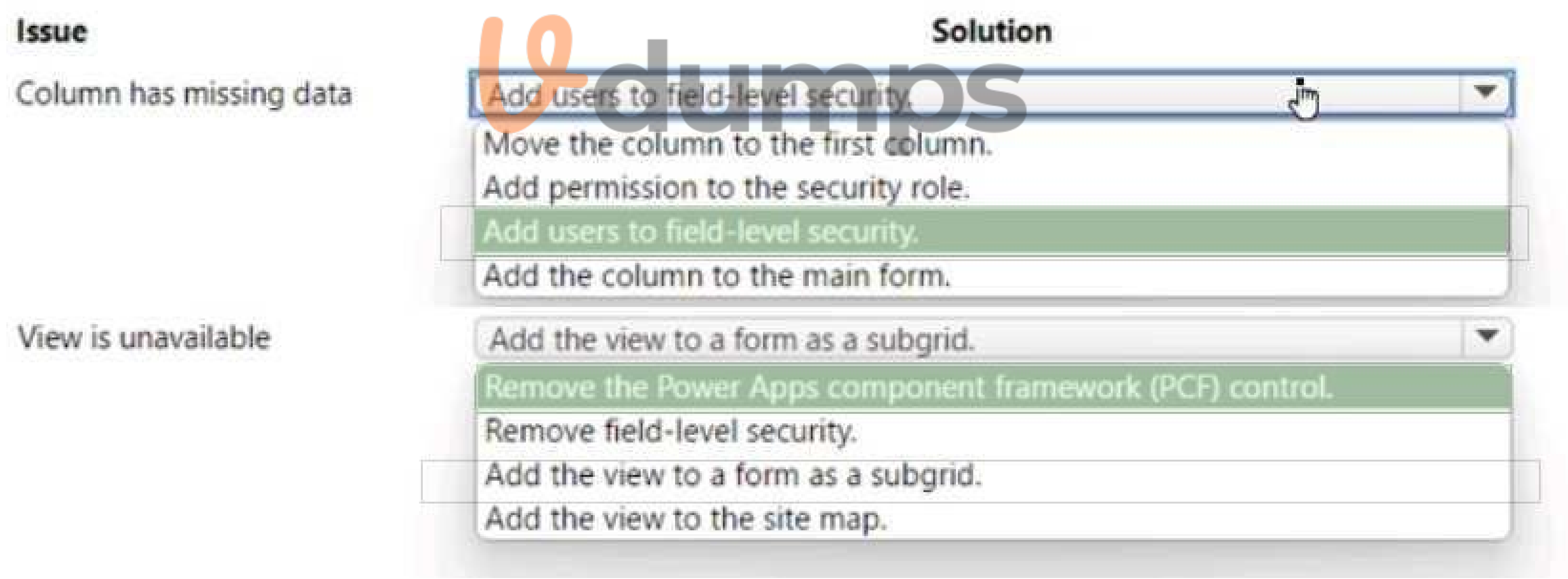
Section:
Explanation:

QUESTION 35
HOTSPOT
You implemented Dynamics 365 Sales for a company.
Users experience the following issues:
• Salespeople can display a view of all accounts. The account phone number column, which is the last column, displays only the header with no data. • The company creates a system view named Salesperson customer for last 90 days. This view is unavailable for the salespeople. You need to resolve the issues.
What should you do? To answer, select the appropriate options in the answer area.
NOTE: Each correct selection is worth one point.

Hot Area:
Answer Area



Answer Area:
Answer Area



Section:
Explanation:

QUESTION 36
A company uses Dynamics 365 Sales. You are redesigning the main form.
Sales representatives for the company require a slider for a probability column when they enter a customer's opportunity. The sales representatives want to avoid custom development. You need to configure the form.
What should you do?

A. Change the column type to calculated.
B. Create a business rule.
C. Embed a Power BI report in the form.

D. Add a Power Apps component framework (PCF) control to the form.
E. Add JavaScript.

Correct Answer: C
Section:

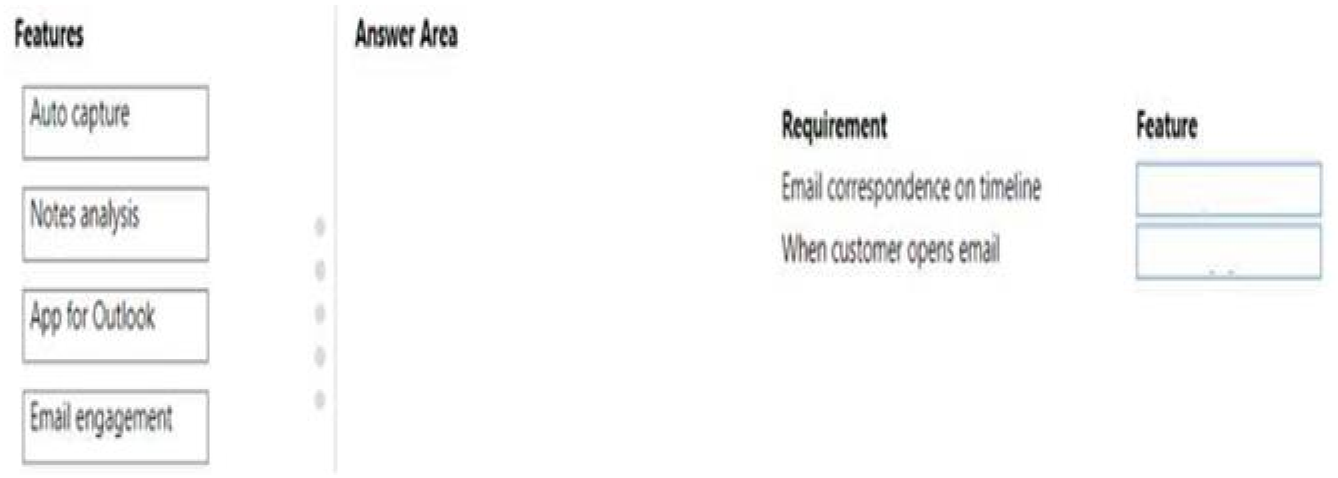
QUESTION 37
A company manually assigns leads to salespeople.
The sales manager requires automated lead assignment rules. An administrator enables the feature.
However, you are unable to access the Assignment rules area.
You need to request access from the administrator.
Which security role should you request?

A. Vice President of Sales
B. Playbook Manager
C. Sequence Manager
D. Sales Manager

Correct Answer: D
Section:

QUESTION 38
DRAG DROP
A company uses Dynamics 365 Sales. You have administrator privileges. The salespeople require the following functionality:
• Display all email correspondence between salespeople and customers in the timeline of the customer. • View when customers open emails sent from Dynamics 365 Sales by a salesperson.
You need to configure the system.
Which features should you configure? To answer, drag the appropriate features to the correct requirements. Each feature may be used once, more than once, or not at all. You may need to drag the split bar between panes or scroll to view content.
NOTE: Each correct selection is worth one point.

Select and Place:



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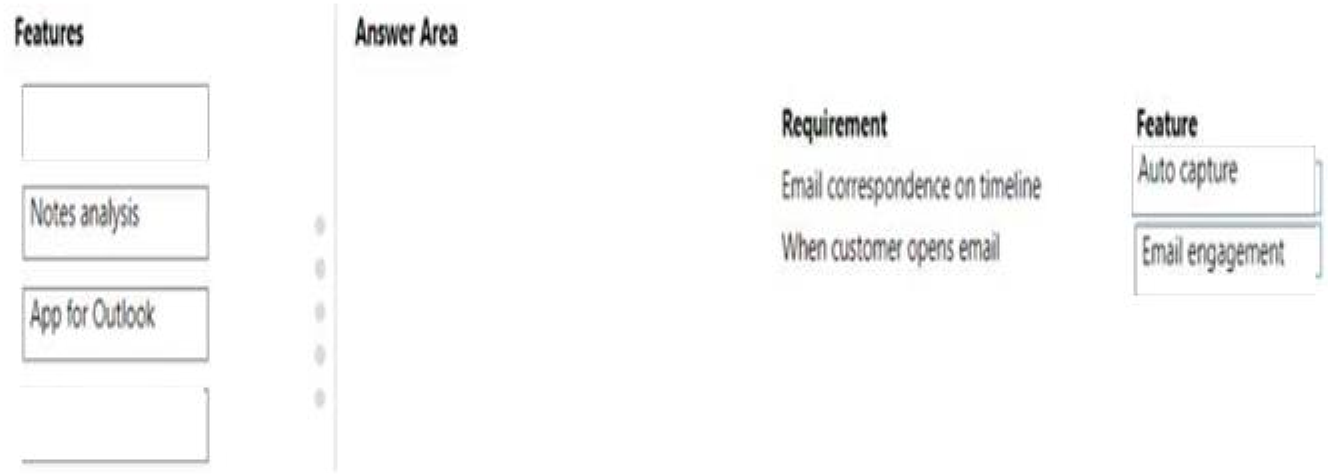


Section:
Explanation:

QUESTION 39
DRAG DROP
A company uses Dynamics 365 Sales Insights to follow up on leads and opportunities.
The company requires a customized workspace and guidance with the following functionality:
• View only unopened work items.
• Create a set of ordered activities when a new lead comes in.
You need to configure the system.
Which feature needs to be configured? To answer, drag the appropriate configurations to the correct requirements. Each configuration may be used once, more than once, or not at all. You may need to drag the split bar between panes or scroll to view content.
NOTE: Each correct selection is worth one point.

Select and Place:

Correct Answer:

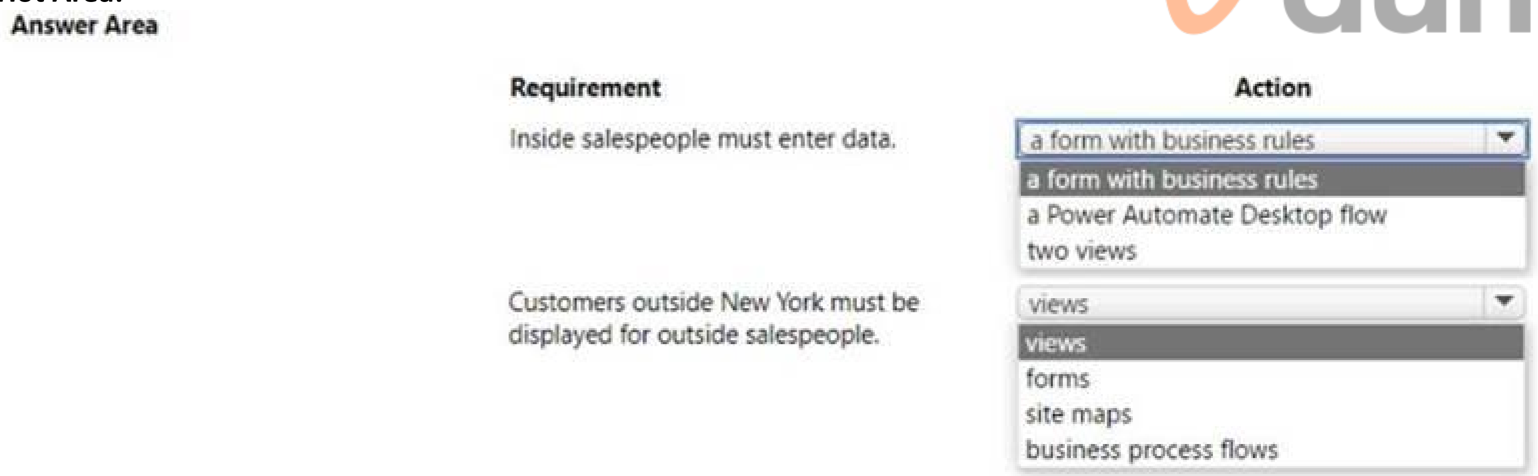
Section:
Explanation:

QUESTION 40
A company is using Dynamics 365 Sales without any customizations.
A customer orders four products to be delivered to three locations. Two of the locations are in the United States and one is in Canada. You must ensure that the order is tracked properly.
You need to create the minimum number of orders to deliver to the locations.
How many orders should you create?

A. two
B. three
C. one
D. four

Correct Answer: C
Section:

QUESTION 41
HOTSPOT
You implement Dynamics 365 Sales for a company in New York that sells gym equipment. The company has two types of salespeople: inside sales and outside sales. The inside salespeople must enter the following data in leads:
• First and last name
• Phone number
• Full address
o If the address is not in New York, the customer's driver's license number must be entered.
o If the address is in New York, the driver's license option should not appear.
The outside salespeople must be able to see leads and visit clients based on the following customer location:
• Customers with an address outside of New York
• Customers with an address inside New York
You need to assist the salespeople by using a minimum number of components.
What should the salespeople create? To answer, select the appropriate options in the answer area.
NOTE: Each correct selection is worth one point.

Hot Area:


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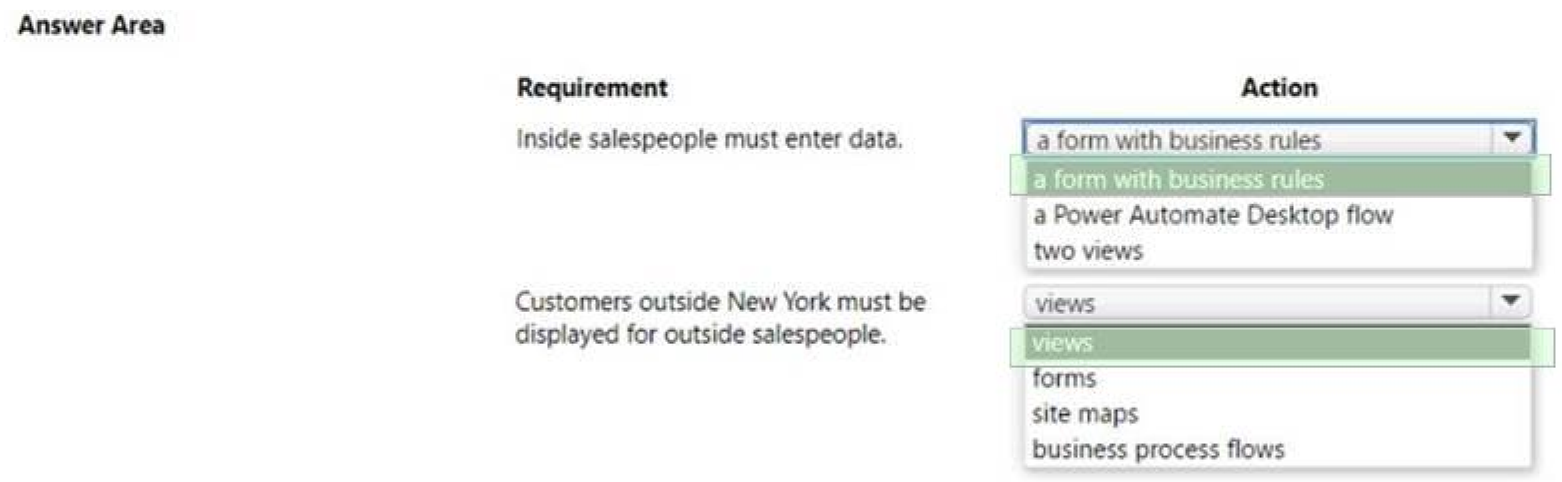


Section:
Explanation:

QUESTION 42
You modify the default form for salespeople in Dynamics 365 Sales. A US Citizen column has a type option of Yes or No. The salespeople require a country/region column to appear only if the US Citizen column is set to No. You need to enable the column to appear when the condition is met. What should you configure?

A. business process flow
B. column with type as Choices
C. business rule
D. column with type as Calculated

Correct Answer: C
Section:

QUESTION 43
A company's human resources director wants a solution that improves consistently for the process of onboarding new staff. The company wants to use playbooks for the solution. You need to create a playbook template to track the staff onboarding. In which entity must you create records for staff members?

A. Resources
B. User
C. Custom entity
D. Contact

Correct Answer: D
Section:

QUESTION 44
A sales manager creates a marketing list that includes all contacts from a specific city. The manager plans to use the list in a campaign. The manager forgot to filter out contacts who have a credit hold.
You need to create a campaign with the updated contacts. What should you do?

A. Create a new dynamic marketing list by using different purpose and source fields. Then add both marketing lists to the campaign.

B. Remove the contacts from the marketing list by using Advanced Find. Then add the marketing list to the campaign.

C. Copy the original marketing list to static and remove the contacts by using Advanced Find. Add both marketing lists to the campaign.

D. Remove the contacts from the marketing list by using a Lookup. Then add the marketing list to the campaign.

Correct Answer: C
Section:

QUESTION 45
HOTSPOT
A customer plans to track external individuals who influence an opportunity.
The sales manager wants to add a new role named influencer to identify these individuals.
You need to create the role.
How should you configure the system? To answer, select the appropriate options in the answer area.
NOTE: Each correct selection is worth one point.

Hot Area:

Answer Area:

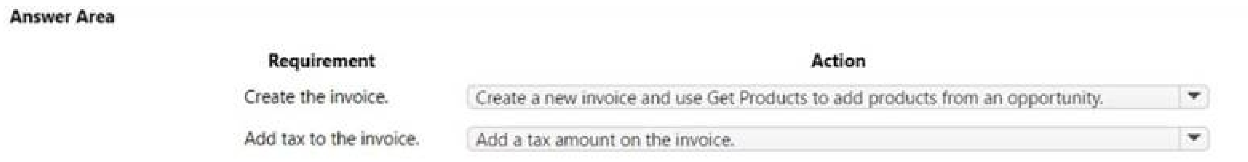
Section:
Explanation:

QUESTION 46
You are creating a forecast.
You want to include only opportunities that sell more than 100 units.
You need to configure this within the system.
What should you configure?

A. additional filters
B. multiple columns
C. advanced features
D. premium forecasting
E. separate views

Correct Answer: A
Section:

QUESTION 47
HOTSPOT
A salesperson closes an opportunity for a customer as lost. The customer reconsiders and asks the salesperson to create an invoice for the opportunity. The salesperson wants an invoice that meets the following requirements:
• Create the invoice without making changes to the original opportunity.
• Add tax to the invoice.
You need to create the invoice.
What should you do? To answer, select the appropriate options in the answer area.
NOTE: Each correct selection is worth one point.



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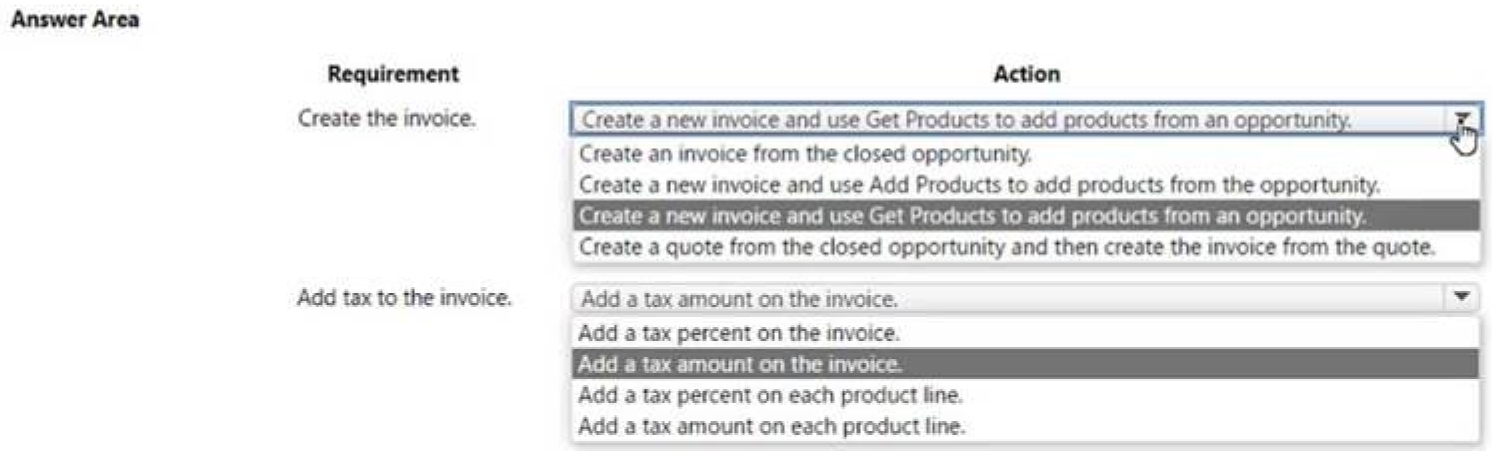
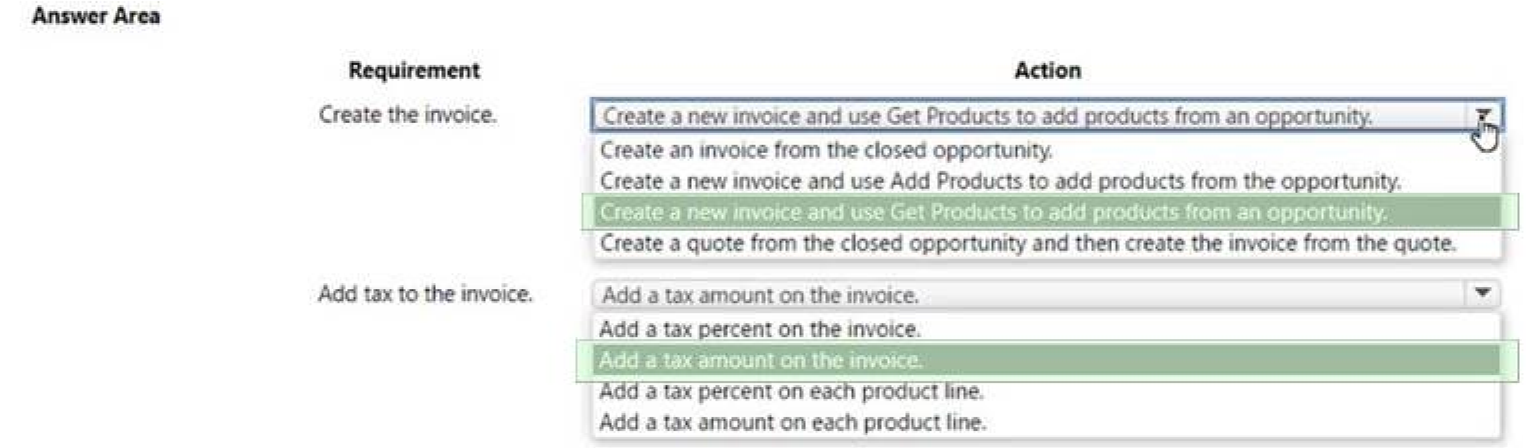


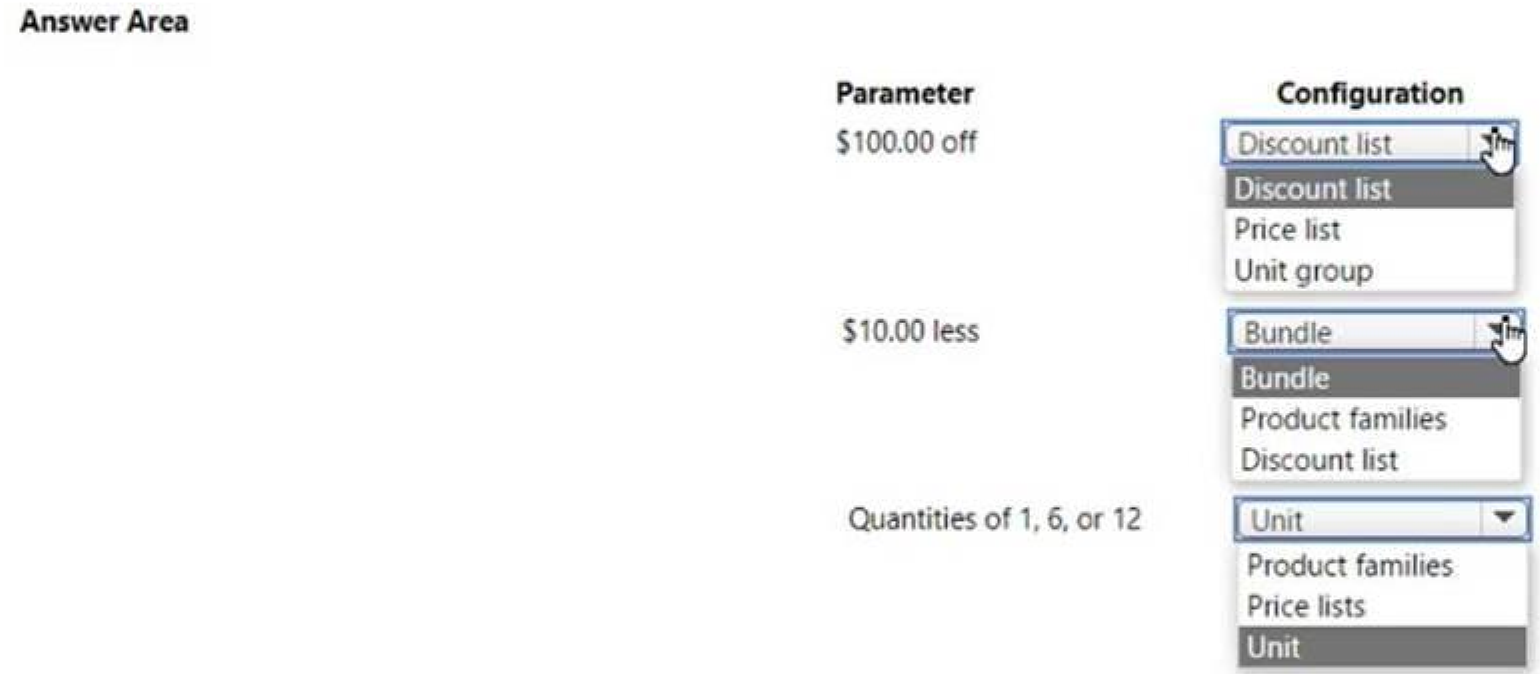
Answer Area:



Section:
Explanation:

QUESTION 48
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.

Hot Area:



Answer Area:

Section:
Explanation:

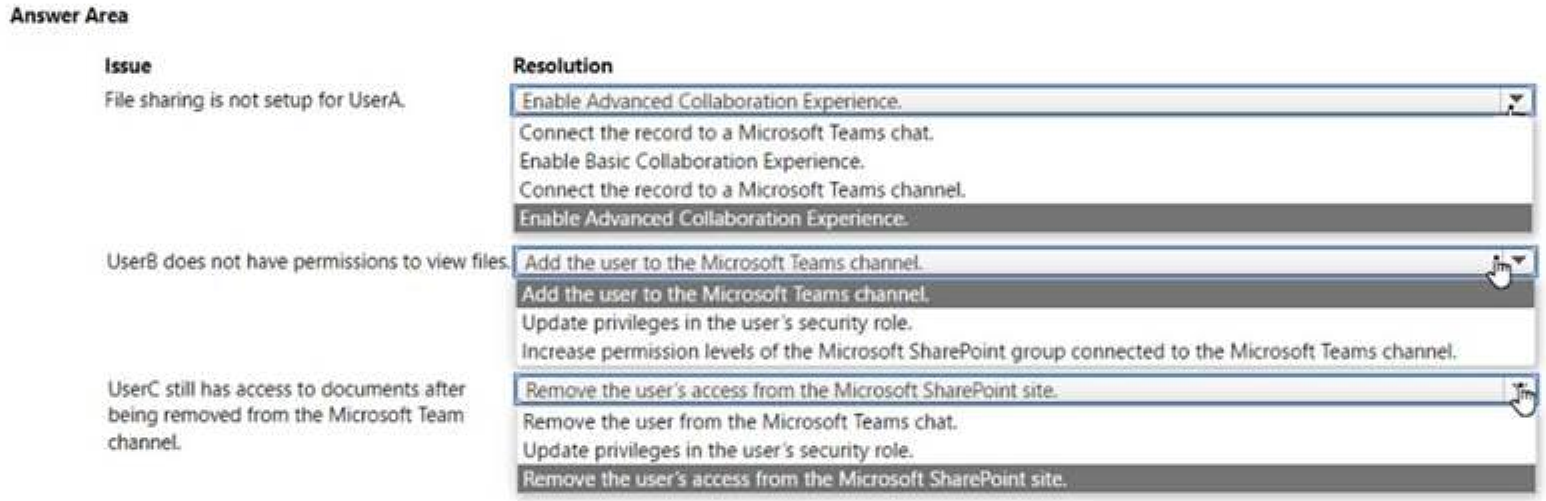
QUESTION 49
A company uses Microsoft SharePoint document management in Dynamics 365 Sales to store contracts.
The company wants only the contracts team to have access to the documents. The contracts team has a custom security role.
You need to restrict privileges to secure the documents.
What should you do?

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

Correct Answer: D
Section:

QUESTION 50
HOTSPOT
A company is connecting Dynamics 365 Sales records to Microsoft Teams.
Users experience the following issues on different lead records when they try to access documents in Dynamics 365 Sales:
• UserA receives an error that states file sharing is not setup.
• UserB receives an error that states the user does not have permissions to view files.
• UserC is still able to view documents after the user was removed from the Microsoft Teams channel.
You need to resolve the issues.
What should you do for each issue? To answer, select the appropriate options in the answer area.
NOTE: Each correct selection is worth one point.

Hot Area:



Answer Area:

Section:
Explanation:

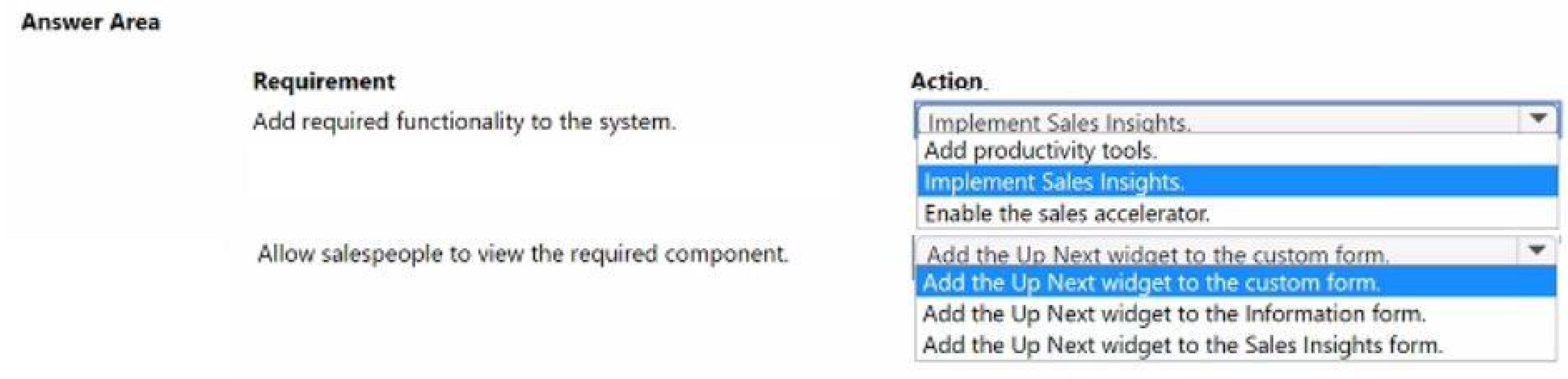
QUESTION 51
You need to help the new salesperson resolve the access issue.
What should you change?

A. Salesperson role to a Sales Manager role
B. Team member license to a Dynamics 365 Sales Enterprise license
C. Dynamics 365 Sales Enterprise license to a Dynamics 365 Sales Premium license
D. Sales Team Member role to a Salesperson role

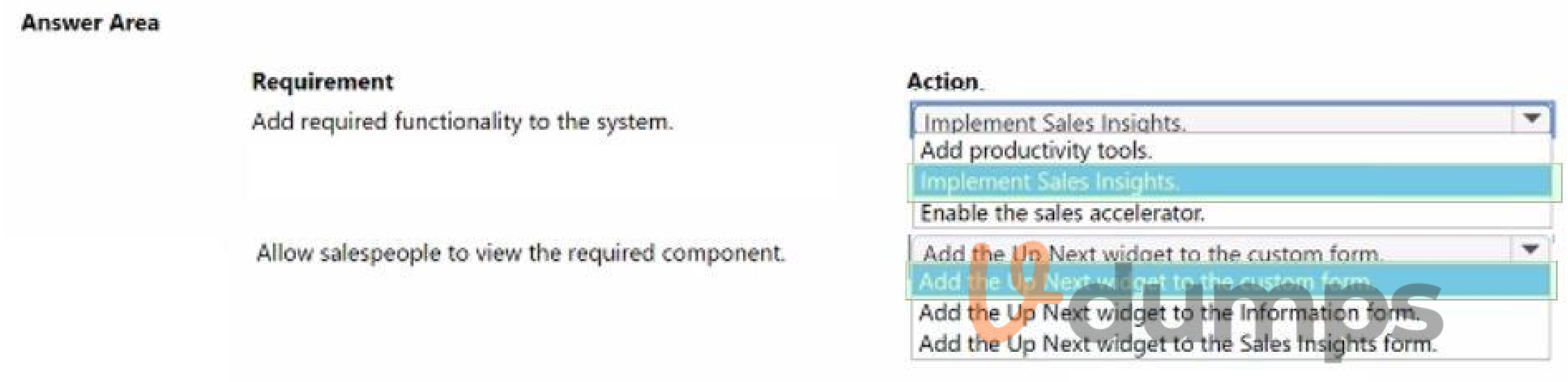
Correct Answer: B
Section:

QUESTION 52
HOTSPOT
You need to help the salespeople prioritize their tasks
What should you do? To answer, select the appropriate options in the answer area.
NOTE: Each correct selection is worth one point.

Hot Area:



Answer Area:



Section:
Explanation:

QUESTION 53
You are using the Dynamics 365 Sales mobile app. You need to identify the actions you can perform with the app.
Solution: Receive push notifications.
Does the solution meet the goal?

A. Yes
B. No

Correct Answer: A
Section:

QUESTION 54
You are using the Dynamics 365 Sales mobile app. You need to identify the actions you can perform with the app.
Solution: Create notes.
Does the solution meet the goal?

A. Yes
B. No

Correct Answer: A
Section:

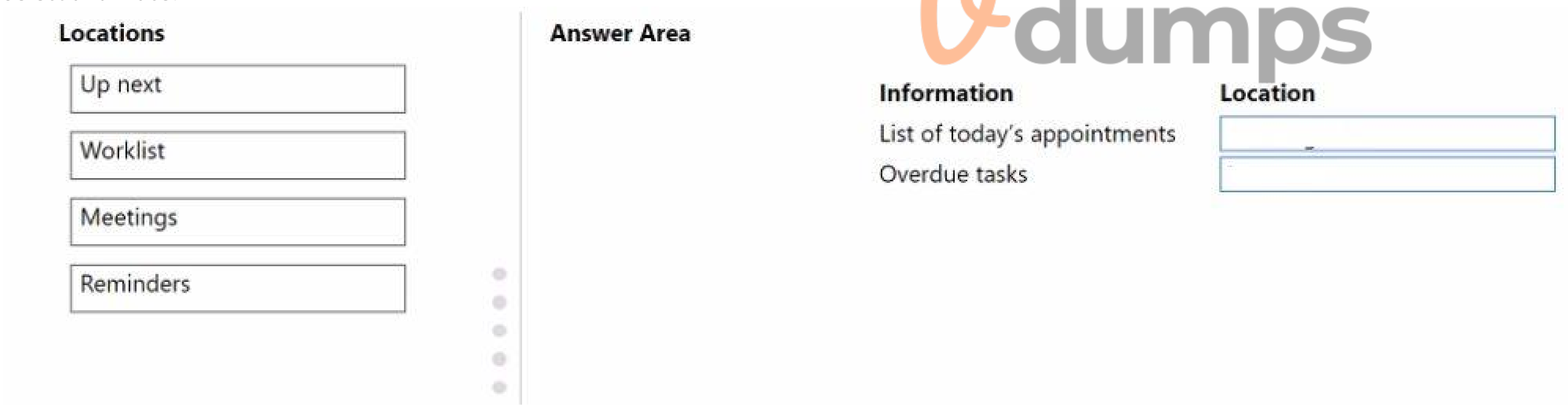
QUESTION 55
You need to ensure that the salespeople can access all their meetings when they travel.
What should you recommend the salespeople use?

A. Dynamics 365 Sales Insights
B. Dynamics 365 for phones and tablets app
C. Dynamics 365 Sales mobile app
D. Dynamics 365 for Outlook

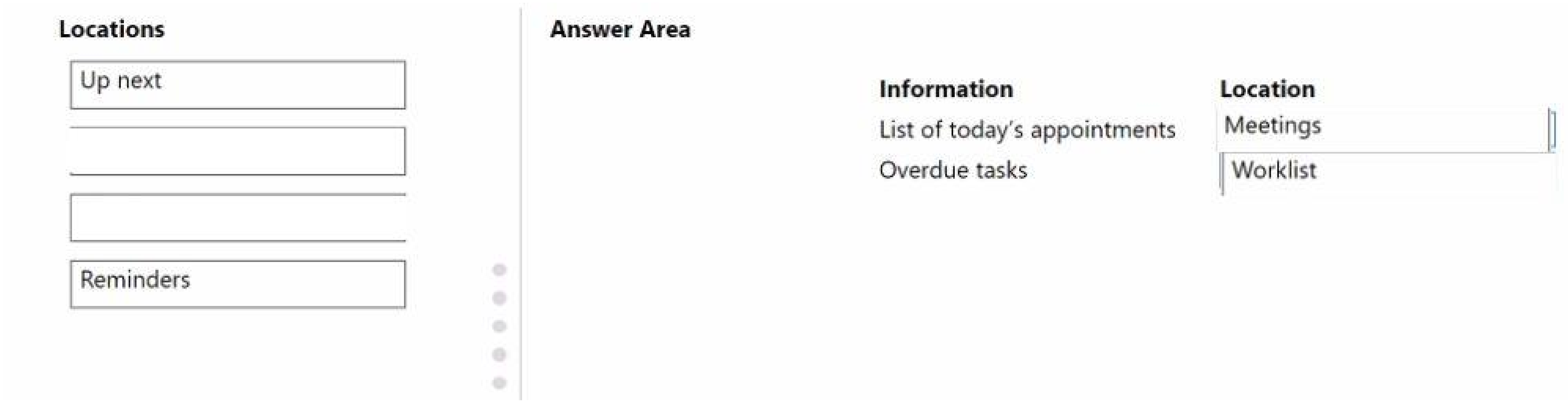
Correct Answer: C
Section:

QUESTION 56
DRAG DROP
You need to explain to a salesperson where to find information in the mobile app.
Which location should you direct them to for the information?
To answer, drag the appropriate locations to the correct information required. Each location may be used once, more than once, or not at all. You may need to drag the split bar between panes or scroll to view content
NOTE: Each correct selection is worth one point.

Select and Place:



Correct Answer:



Section:
Explanation:

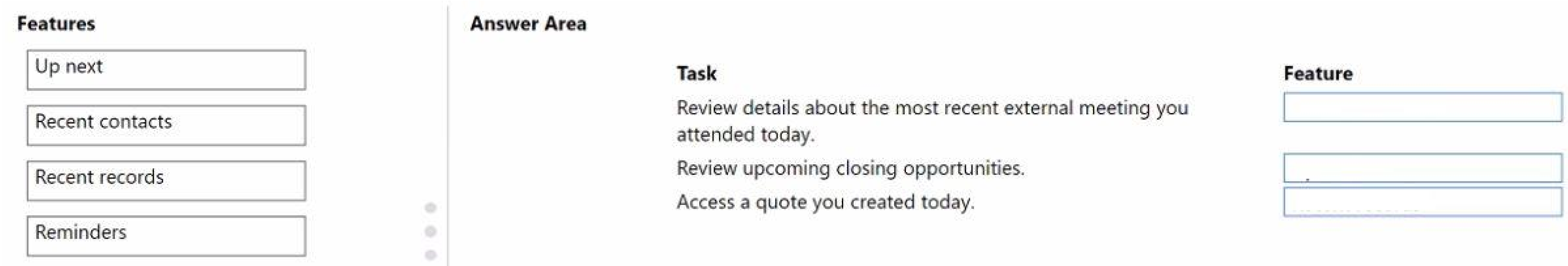
QUESTION 57
A company is implementing the Dynamics 365 Sales mobile app.
The company requires setup of several push notifications for sellers who use the app.
You need to create the push notifications.
Which feature should you use?

A. Plug-in
B. Classic Dataverse workflow
C. Cloud flow

Correct Answer: C
Section:

QUESTION 58
DRAG DROP
Salespeople must learn how the Dynamics 365 Sales mobile app operates.
You need to explain how the mobile app can be used to complete common daily tasks.
Which feature should be used for each task? To answer, drag the appropriate features to the correct tasks. Each feature may be used once, more than once, or not at all. You may need to drag the split bar between panes or scroll to view content.
NOTE: Each correct selection is worth one point.

Select and Place:



Correct Answer:

Features

Reminders

Answer Area

Task	Feature
Review details about the most recent external meeting you attended today.	Recent contacts
Review upcoming closing opportunities.	Up next
Access a quote you created today.	Recent records

Section:

Explanation: