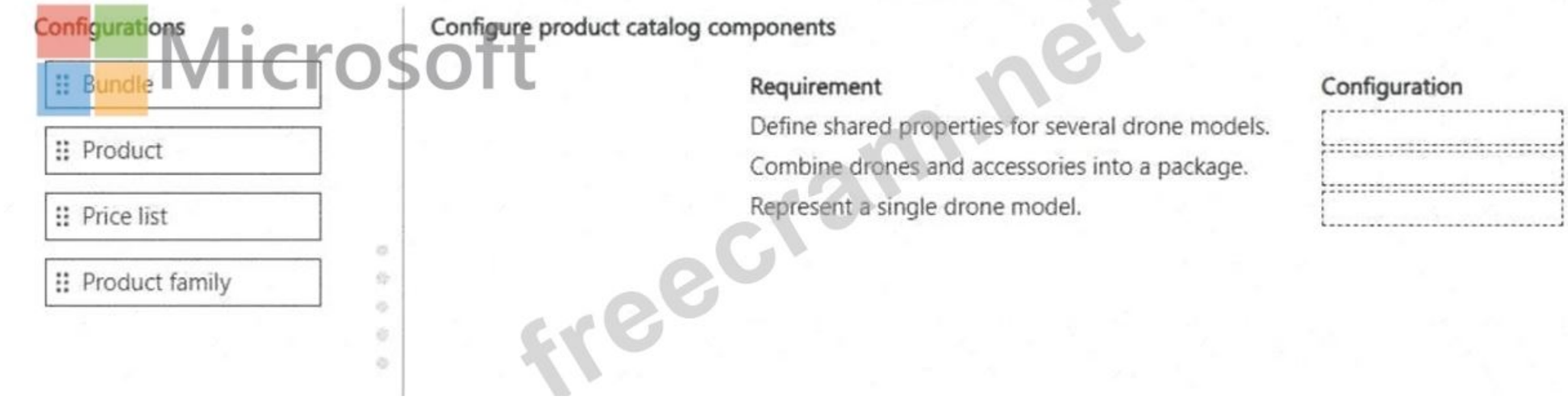
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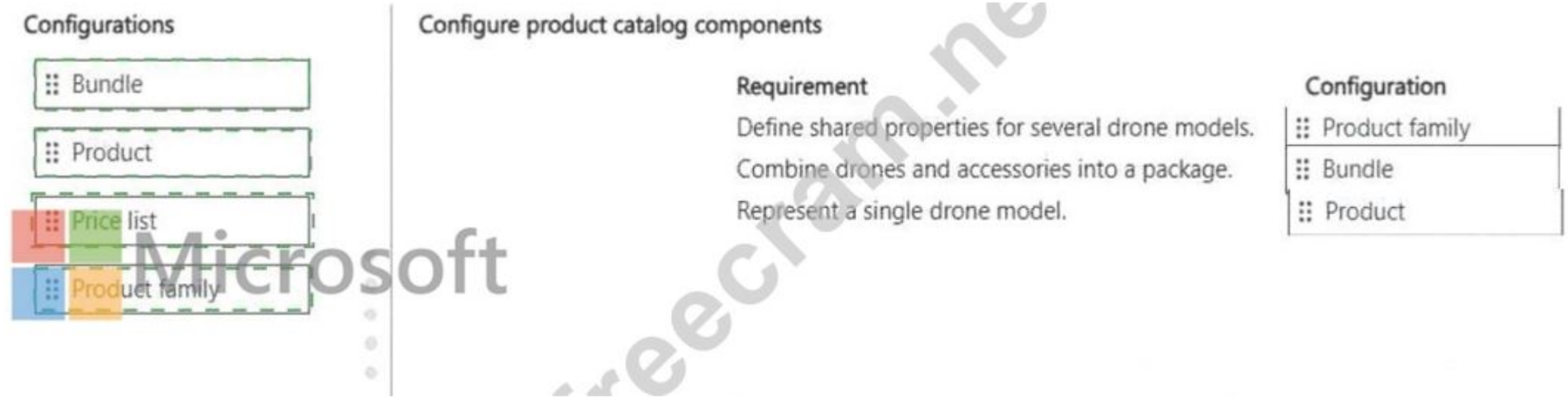
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Exam Name:	Accelerating Sales Pipelines with AI in Dynamics 365
Certification Provider:	Microsoft
Free Question Number:	34
Version:	v2026-10-23
# of views:	103
# of Questions views:	340
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NEW QUESTION: 1
A company is using Dynamics 365 Sales and Microsoft 365.
The company has the following requirements for sales representatives:
Must store opportunity files in a central location.
Must collaborate using chat conversations associated with sales records.
You need to configure the required integrations.
Which two integrations should you configure? Each correct answer presents part of the solution. Choose two.
NOTE: Each correct selection is worth one point.
A. Enable OneNote integration.
B. Configure SharePoint document management.
C. Configure server-side synchronization with Exchange Online.
D. Enable Teams conversation collaboration.
E. Enable conversation intelligence for collaboration.
Answer: (SHOW ANSWER)

NEW QUESTION: 2
You configure the product catalog for a company. The company sells drones, spare batteries, and accessories.
The company has the following requirements:
* Must define shared properties for several drone models.
* Must combine drones and accessories into a package.
* Must represent a single drone model.
You need to determine how product catalog elements should be configured.
Which catalog component should you use for each requirement? To answer, move the appropriate configurations to the correct requirements. You may use each configuration once, more than once, or not at all. You may need to move the split bar between panes or scroll to view content.
NOTE: Each correct selection is worth one point.



Answer:

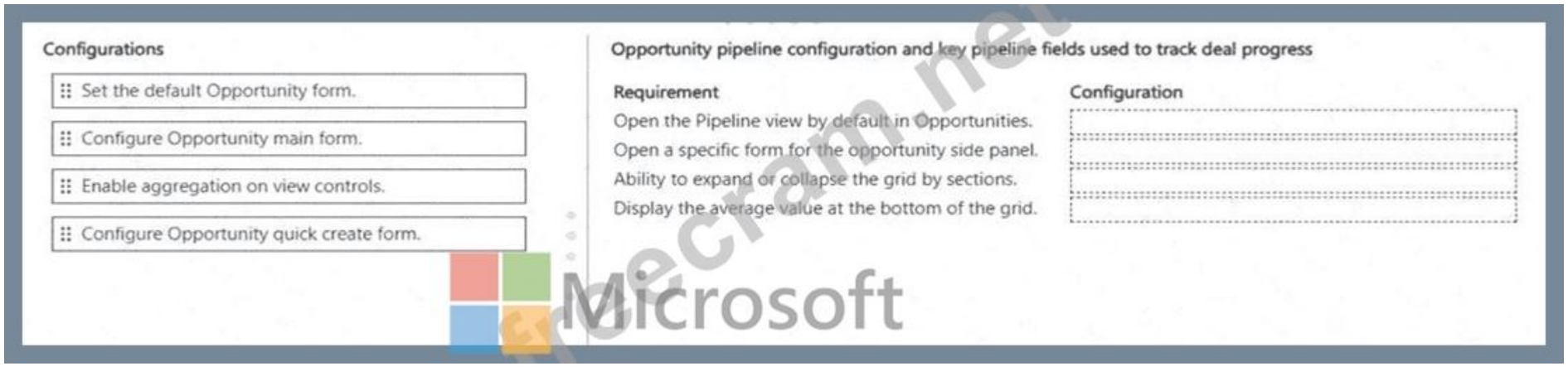


Explanation:
Requirement
Configuration
Define shared properties for several drone models
Product family
Combine drones and accessories into a package
Bundle
Represent a single drone model
Product
The correct configuration is based on the product catalog hierarchy in Dynamics 365 Sales. A Product family is used when several related products need to share common characteristics or inherited properties. For example, a drone product family can define shared attributes such as flight time, camera type, battery compatibility, or warranty tier, and individual drone models can inherit or specialize those attributes. This is exactly what the requirement means by defining shared properties for several drone models.
A Bundle is used when multiple sellable products are combined into one package. If the company wants to sell a drone together with spare batteries, propellers, carrying cases, or accessories, that package should be configured as a bundle. The seller can then add the bundle to an opportunity, quote, order, or invoice instead of manually selecting each component.
A Product represents a single sellable item, such as one specific drone model. Price list is not correct for any of these requirements because price lists define pricing structures and currencies; they do not define catalog hierarchy, shared product properties, or bundled offerings.

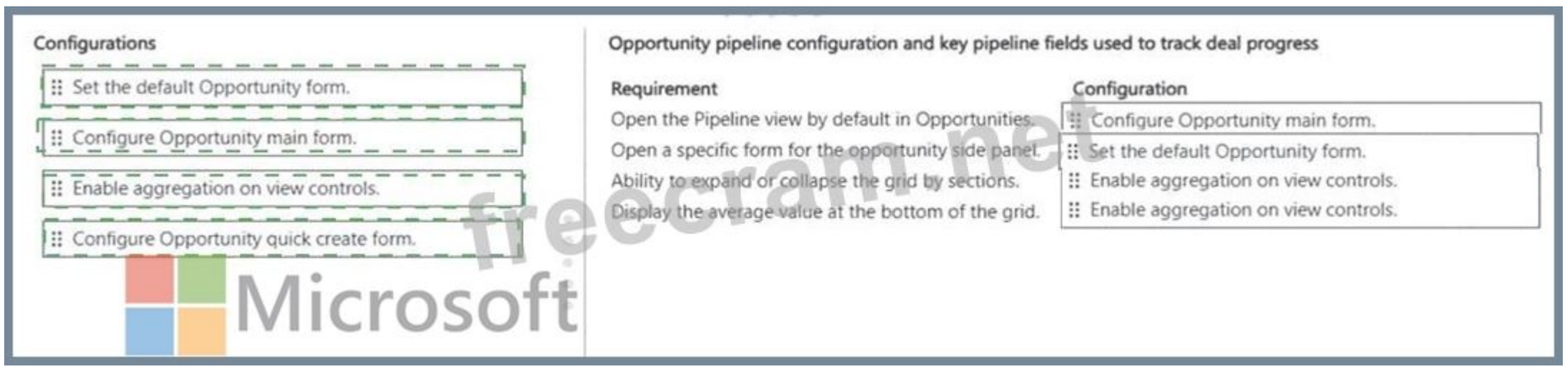
References/topics: Dynamics 365 Sales product catalog; product families; product bundles; products; product hierarchy and catalog configuration.

NEW QUESTION: 3
You are configuring Copilot capabilities in Dynamics 365 Sales for a company.
After enabling Copilot, sellers report that the summary insight banner on Opportunities, Leads, and Accounts is missing key business context and history.
You need to ensure that the missing information is displayed.
Which action should you perform?
A. Enable AI insight cards in the Power Platform environment.
B. Configure predictive scoring.
C. Configure table auditing.
D. Configure the opportunity pipeline view settings.
Answer: (SHOW ANSWER)
The correct action is Configure table auditing . Copilot summaries and recent-change context for Opportunities, Leads, and Accounts depend on audit history. Microsoft's Dynamics 365 Sales Copilot setup guidance states that when Copilot is enabled, administrators can turn on audit history for the Lead, Opportunity, and Account tables, and Copilot needs audit history to display recent changes for those records.
This issue is not solved by predictive scoring or opportunity pipeline settings. Predictive scoring ranks leads or opportunities based on likelihood, but it does not provide historical summary context. The opportunity pipeline view controls how opportunities are displayed and managed in the pipeline, not what Copilot can summarize. AI insight cards are separate guided insight notifications and are not the underlying data-history source for the missing Copilot summary banner context. Microsoft also documents that Copilot's recent changes list is generated from audit history, and if auditing is turned off, the recent changes configuration is unavailable until auditing is enabled. Therefore, table auditing is the required configuration to make key history available for Copilot-generated summaries and recent-change insights.
References/topics: Copilot in Dynamics 365 Sales; record summaries; recent changes; Dataverse table auditing; Lead, Opportunity, and Account tables.

NEW QUESTION: 4
A company tracks opportunities using the pipeline view.
The sales managers want pipeline stages configured so they can quickly identify deal progress.
The configuration must meet the following requirements:
. Open the Pipeline view by default in Opportunities.
. Open a specific form for the opportunity side panel.
. Provide the ability to expand or collapse the grid by sections, for example Owner or Account.
. Display the average value at the bottom of the grid.
You need to identify the opportunity configuration.
Which configuration should you apply for each requirement? To answer, move the appropriate configurations to the correct requirements. You may use each configuration once, more than once, or not at all. You may need to move the split bar between panes or scroll to view content.
NOTE: Each correct selection is worth one point



Answer:



Explanation:

Requirement

Configuration

Open the Pipeline view by default in Opportunities

Configure Opportunity main form

Open a specific form for the opportunity side panel

Set the default Opportunity form

Ability to expand or collapse the grid by sections

Enable aggregation on view controls

Display the average value at the bottom of the grid

Enable aggregation on view controls

To open the Pipeline view by default, configure the Opportunity main form by adding the Pipeline view control for Opportunities. Microsoft states that the read-only grid is the default view for opportunities, but administrators can set the Opportunities pipeline view as the default by customizing the Opportunity table form and adding the Pipeline view component. The configuration includes selecting the Opportunities table, choosing the opportunity view, and enabling grouping and aggregation.

To open a specific form in the opportunity side panel, use Set the default Opportunity form . Microsoft's configuration guidance states that when sellers open an opportunity from the pipeline view, the side panel displays opportunity details, and administrators can change the default side-panel form to the main opportunity form or a custom form.

For expanding/collapsing by sections such as Owner or Account and displaying average values at the bottom of the grid, enable aggregation/grouping behavior on the Pipeline view control. Microsoft states that Enable grouping and Enable aggregation allow sellers to group and aggregate opportunities in the pipeline view.

This supports sectioned grid behavior and aggregate values such as average, sum, or count. The quick create form is irrelevant because it controls record creation, not pipeline display behavior.

References/topics: Opportunity pipeline view; Opportunity main form; side panel default form; grouping and aggregation; pipeline grid configuration.

NEW QUESTION: 5
A company uses Dynamics 365 Sales to manage enterprise opportunities. The sales team enables the Sales Research Agent to generate research summaries for each opportunity.
Sales managers must determine whether opportunities have strong external indicators that support deal progression.
You need to analyze insights from the research canvas for evidence that a deal environment is favorable.
Which two research canvas insights should you provide to the sales managers? Each correct answer presents part of the solution. Choose two.
NOTE: Each correct selection is worth one point.
A. Seller activity and email response rates from CRM records.
B. Recent public developments that influence the account ' s business environment.
C. Record audit history and related activity creation timestamps.
D. Strategic landscape analysis relative to the seller ' s value proposition.
Answer: (SHOW ANSWER)
The correct insights are recent public developments and strategic landscape analysis relative to the seller' s value proposition . The question is asking for external indicators that show whether the account's deal environment is favorable. Sales Research Agent is designed to analyze business questions using sales and business data, generate a blueprint with analysis, recommendations, charts, and graphs, and allow users to add external data sources such as PDFs, Excel, or CSV files to augment research. Microsoft describes the blueprint as a research output containing findings, visualizations, and recommendations that can support evidence-based sales decisions.
Option B is correct because recent public developments can reveal external buying triggers, market pressure, expansion activity, regulatory change, funding, partnerships, or competitive movement that may support deal progression. Option D is correct because strategic landscape analysis connects those external conditions to the seller's value proposition, which is exactly what managers need to judge deal favorability. Option A is internal CRM engagement data, useful but not an external indicator. Option C is administrative audit metadata and does not indicate market fit, urgency, or strategic opportunity.
References/topics: Sales Research Agent; research canvas; AI-generated blueprint; external business context; opportunity research insights.

NEW QUESTION: 6
You are responsible for improving lead prioritization in Dynamics 365 Sales.
Sales managers report that predictive scores do not match current conversion trends.
You need to edit the predictive lead scoring model to improve accuracy based on recent lead data.
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.

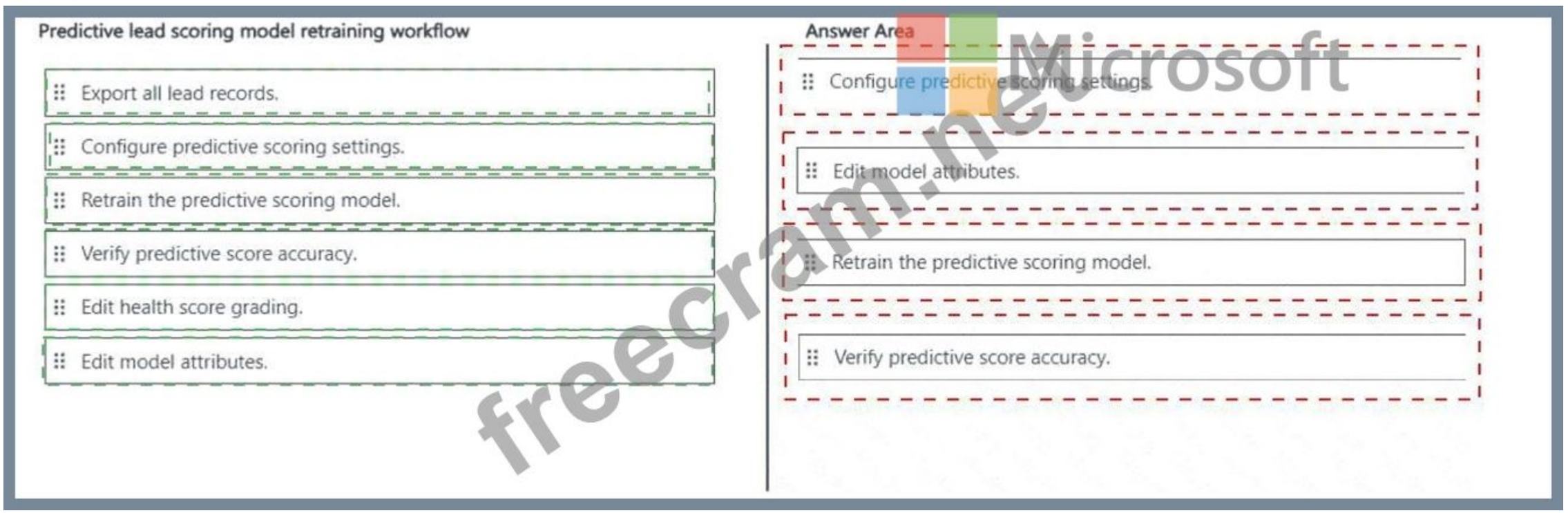
Predictive lead scoring model retraining workflow

- Export all lead records.
- Configure predictive scoring settings.
- Retrain the predictive scoring model.
- Verify predictive score accuracy.
- Edit health score grading.
- Edit model attributes.

Answer Area

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Answer:



Explanation:

The correct sequence starts by opening and configuring the predictive scoring settings for lead scoring. The administrator must access the predictive lead scoring configuration page before changing the model.

Microsoft's predictive scoring configuration guidance states that the Predictive lead scoring page is where administrators configure model settings, including model criteria and field behavior.

Next, the administrator should edit model attributes . This is the actual model-tuning step. Microsoft states that Edit model is used to update or add fields that affect the prediction accuracy score, especially when the organization wants the model to consider different fields or a unique business process.
After modifying the attributes, the model must be retrained . Retraining is required when prediction accuracy does not meet expectations or when recent data should be incorporated. Microsoft explains that retraining uses the latest leads in the organization so the model can provide more accurate scores.
Finally, the administrator must verify predictive score accuracy by reviewing the model accuracy and performance. Exporting all lead records is unnecessary, and editing health score grading applies to opportunity health scoring, not predictive lead scoring.
References/topics: Predictive lead scoring; model attributes; model retraining; scoring accuracy; lead prioritization in Dynamics 365 Sales.

NEW QUESTION: 7
You need to configure the new lead qualification experience in Dynamics 365 Sales for field sellers.
What should you configure?
A. Set related record creation to Seller.
B. Enable auto-create records for newly qualified leads.
C. Use the Lead to Opportunity Business Process Flow.
D. Allow Copilot to summarize key info.
E. Set related record creation to Automatic.
Answer: (SHOW ANSWER)
The correct configuration is to set related record creation to Seller. The case study states that sales leadership requires flexibility in how leads are converted: inside sales need automatic opportunity creation, but field sellers need the option to manually decide whether an opportunity should be created when a lead is qualified.
In the new lead qualification experience, Dynamics 365 Sales lets administrators control whether account, contact, and opportunity records are created automatically during lead qualification or whether sellers are prompted to choose which related records to create. Microsoft's lead qualification guidance confirms that when automatic creation is not enabled, sellers are prompted to select which records should be created during qualification.
Option B and option E are wrong for field sellers because automatic creation would remove the manual decision point required by the case study. Option C is relevant to guiding sellers through sales stages, but the existing Lead to Opportunity Business Process Flow does not control whether related records are automatically created when a lead is qualified. Option D is unrelated because Copilot summaries help sellers review record information; they do not configure lead conversion behavior. Therefore, the required configuration for field sellers is Seller-controlled related record creation.
References/topics: Lead qualification experience; lead-to-opportunity conversion; related account, contact, and opportunity creation; Dynamics 365 Sales lead management.

NEW QUESTION: 8
A company is using AI agents in Dynamics 365 Sales.
The company requires that the agent must do the following:
Research incoming leads and generate initial outreach email.
. Autonomously contact leads, follow up, and evaluate qualification during the process.
You need to identify which AI agent in Sales supports these requirements.
Which agent type should you use?
A. Sales Close Agent: Engage
B. Sales Qualification Agent: Research and engage
C. Sales Close Agent: Research
D. Sales Qualification Agent: Research-only
Answer: (SHOW ANSWER)

The correct agent type is Sales Qualification Agent: Research and engage . The requirement is specifically about inbound lead processing: researching incoming leads, generating outreach, autonomously contacting leads, following up, and evaluating qualification during the engagement process. Microsoft defines Sales Qualification Agent as the AI agent used to automate lead qualification in Dynamics 365 Sales, especially for high-volume inbound leads from sources such as websites, events, and webinars. In Research and engage mode, the agent researches the lead, evaluates fit using target customer profile and BANT criteria, sends personalized outreach emails, engages based on responses, sends follow-up emails, detects positive intent, and then hands promising leads to sellers.
Research-only mode is not enough because it generates a draft outreach email for seller review but does not send outreach emails or detect positive intent from responses. Microsoft's mode comparison explicitly shows that BANT checking, sending outreach, detecting positive intent, and follow-up emails are available in Research and engage mode, not Research-only mode. Sales Close Agent options are wrong because they apply to opportunity/deal execution, not initial lead qualification.
References/topics: Sales Qualification Agent; Research and engage mode; lead research; outreach automation; BANT qualification; AI-driven lead prioritization.

NEW QUESTION: 9
You are creating a pricing list in Dynamics 365 Sales. All prices must end in $.98.
You need to select the function that establishes this pricing requirement.
What should you use?
A. Percentage
B. Pricing Method
C. Rounding Amount
D. Rounding Policy
Answer: C (LEAVE A REPLY)
The correct answer is Rounding Amount . In Dynamics 365 Sales price list item configuration, rounding is used when calculated prices must follow a specific price-ending convention, such as ending in .98 or .99 .
Microsoft's pricing guidance explains that price list items can use rounding behavior so calculated product prices can be rounded and made to end in a specified amount, such as 99 cents. The value that defines the exact ending amount is the Rounding Amount . Therefore, to make all calculated prices end in $.98 , the administrator would configure the rounding amount as 0.98 .
Rounding Policy is not precise enough by itself. It controls the direction of rounding, such as rounding up, down, or to the nearest value, but it does not define the exact cents-ending requirement.
Pricing Method determines how the price is calculated, such as a currency amount, percentage of list price, markup, or margin. Percentage is used when a percentage-based pricing method is selected, but it does not force prices to end in $.98 . The requirement is explicitly about the final rounded price ending, so Rounding Amount is the correct function.
References/topics: Price lists; price list items; rounding amount; rounding policy; Dynamics 365 Sales product pricing.

NEW QUESTION: 10
Your company is preparing sellers for complex enterprise opportunities.
The company wants sellers to gather relevant insights before initial account engagement.
You need to determine when using the Sales Research Agent is appropriate.
In which two scenarios are you able to use the Sales Research Agent? Each correct answer is a complete solution. Choose two.
NOTE: Each correct selection is worth one point.
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A. Update opportunities with the results of the research that it does, including updating risk and importance criteria.
B. Analyze internal data sources only without querying the web if Bing search consent is disabled.
C. Analyze business performance by asking questions and receiving an AI-generated blueprint and then iterating using follow-up questions on the canvas.
D. Engage automatically through emails to request information to allow you to research and understand the account.
Answer: (SHOW ANSWER)

The correct scenarios are B and C . Sales Research Agent is designed for research and analysis, not autonomous record updates or email engagement. Microsoft describes the agent as an AI-powered research canvas that lets users solve complex business questions through natural language, generate research blueprints, review sales-data insights, and ask follow-up questions to refine the analysis. It can use Dynamics
365 Sales data, uploaded offline files such as CSV, Excel, or PDF, and connected data sources to support pipeline exploration and sales operations analysis.
Option B is correct because Microsoft states that Sales Research Agent may use Bing Search only when the Bing search consent setting is enabled. When Bing search is disabled, the agent operates only on internal data sources that the user already has permission to access. Option C is also correct because the agent generates a research blueprint with visualizations and a text overview, and users can continue iterating by asking follow- up questions or changing visualizations on the canvas. Option A is wrong because Sales Research Agent is analytical; it does not update opportunities with risk or importance values. Option D is wrong because automatic email engagement is the domain of sales/qualification engagement agents, not Sales Research Agent.
References/topics: Sales Research Agent; research canvas; AI-generated blueprints; Bing search consent; internal sales data analysis; intelligent opportunity research.

NEW QUESTION: 11
You manage Dynamics 365 Sales for a company.
A sales manager wants a weekly performance view of the Sales Close Agent in Research mode.
The sales manager also reports that a specific Opportunity stopped receiving automated outreach from the Sales Close Agent in Engage mode.
You need to do the following:
. Determine if the engagement for the opportunity record is pending, completed, or failed.
. Provide a performance view that includes the Last refreshed and the time period filter.
You need to identify the correct monitoring metrics for each requirement.
Which metrics should you review? To answer, select the appropriate options in the answer area.
NOTE: Each correct selection is worth one point.

Monitoring Sales Close Agent performance using research insights and opportunity metrics

Requirement	Component
Record engagement is pending, completed, or failed.	Sales Agent Runs table view Engage settings of the Sales Close Agent Insights and metrics for the Sales Close Agent
Weekly performance view of the Sales Close Agent in Research mode.	Opportunity pipeline view Sales Agent Runs table view Insights and metrics for the Sales Close Agent

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Answer:



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Explanation:
Requirement
Component
Record engagement is pending, completed, or failed
Sales Agent Runs table view
Weekly performance view of the Sales Close Agent in Research mode
Insights and metrics for the Sales Close Agent
For a specific opportunity that stopped receiving automated outreach, use the Sales Agent Runs table view .
Microsoft states that to resolve the engagement status of a specific record, administrators can go to the sales agent run record view and filter the Regarding column by the record of interest. The Status field shows whether the engagement is Active , Failure , or Completed ; Active means pending, Failure means the engagement failed, and Completed means it finished successfully.
For the manager's weekly performance requirement, use Insights and metrics for the Sales Close Agent .
That is the performance reporting surface for the agent, not the per-record run table. The requirement specifically mentions a weekly performance view plus Last refreshed and a time period filter , which maps to the agent's insights dashboard/metrics area. The Sales Agent Runs view is operational monitoring for individual records, while the insights and metrics view is for aggregate performance analysis such as engagement outcomes, response rates, and trend monitoring. Do not select Engage settings because settings configure how the agent behaves; they do not provide performance metrics. Opportunity pipeline view helps sellers manage opportunities, but it is not the agent performance monitoring dashboard.
References/topics: Sales Close Agent monitoring; Sales Agent Runs table; engagement status; Sales Close Agent insights and metrics; Research mode performance reporting.

NEW QUESTION: 12
A sales team contacts customers to promote and sell products.
You need the sales team to place outbound calls directly from Dynamics 365 Sales records using Microsoft Teams.
You need to enable calling directly from records.
What should you configure?
A. Configure phone numbers for outbound calling.
B. Enable the Microsoft Teams dialer.
C. Install the Dynamics 365 Sales mobile app.

D. Enable Microsoft Teams meeting integration.

Answer: (SHOW ANSWER)

The correct configuration is to enable the Microsoft Teams dialer . Microsoft's Dynamics 365 Sales documentation states that Microsoft Teams dialer brings Teams calling directly into Dynamics 365 Sales so sellers can make and receive calls without leaving the application. The documented setup path is to go to Sales Hub app settings, open Teams calls , and turn on Teams calls for the selected security roles and apps.

This matches the requirement precisely: the sales team must place outbound calls directly from Dynamics 365 Sales records using Microsoft Teams. Phone numbers and PSTN connectivity are prerequisites for Teams calling, but option A is not the Dynamics 365 Sales feature that enables record-level calling. The mobile app is irrelevant because the question asks for calling from Dynamics 365 Sales records, not mobile access. Teams meeting integration supports meetings and collaboration, but it does not enable click-to-call or Teams dialer calling from Sales records.

Therefore, the required feature is Microsoft Teams dialer .

References/topics: Microsoft Teams dialer; Teams calls in Dynamics 365 Sales; outbound calling from Sales records; Sales Hub Teams calls configuration.

NEW QUESTION: 13

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

A salesperson reviews their goals chart and observes the following:

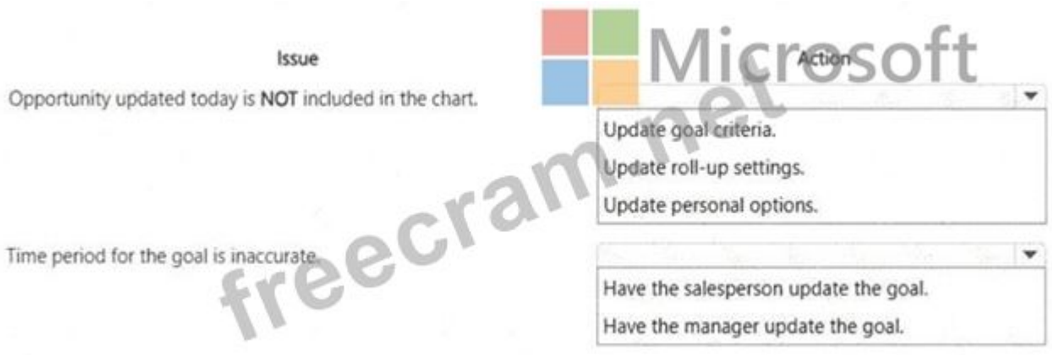
* An opportunity updated today is not included in the chart.
* The time period for the goal is not accurate.

You need to resolve these issues.

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

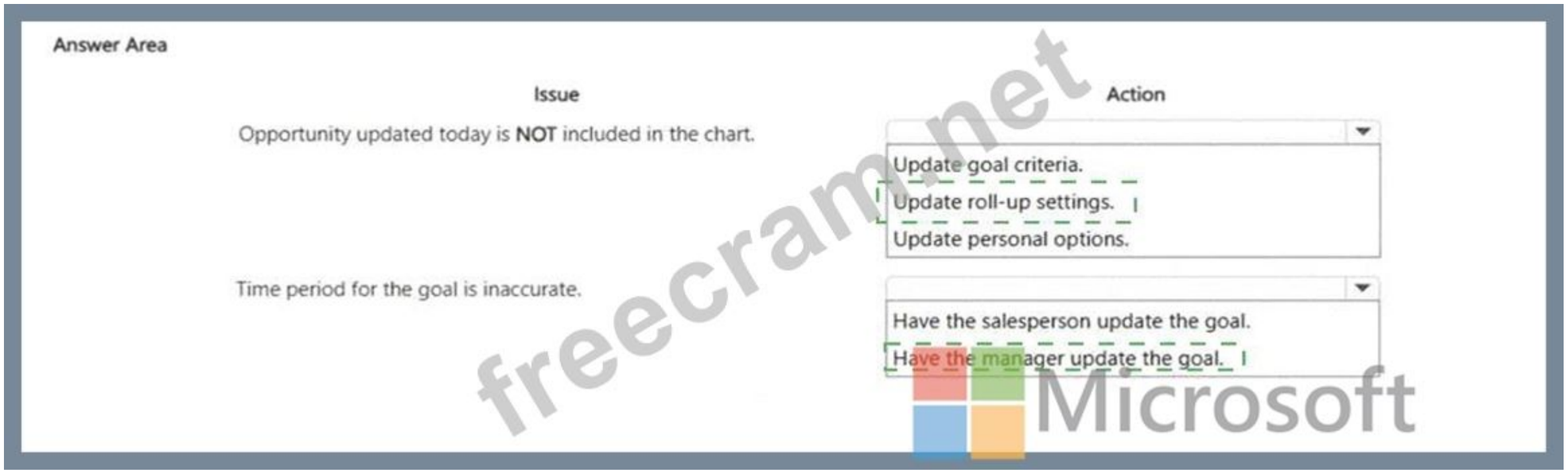
NOTE: Each correct selection is worth one point.

Answer Area



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Answer:



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Explanation:

Issue

Action

Opportunity updated today is NOT included in the chart

Update roll-up settings

Time period for the goal is inaccurate

Have the manager update the goal

For the opportunity updated today not appearing in the goals chart, the issue is the goal rollup timing , not the opportunity record itself. Dynamics 365 Sales goal actuals are calculated through rollup processing.

Microsoft states that automatic goal rollup duration and frequency are controlled from the Goals tab in system settings, and that manual rollup can also be performed when needed. Therefore, the correct action is to update the roll-up settings so goal charts reflect recent opportunity changes more appropriately. Microsoft also notes that selecting Recalculate updates goal actuals based on the latest data, confirming that goal charts depend on rollup recalculation rather than instant real-time updates.

For the inaccurate goal time period, the correct action is to have the manager update the goal . In Dynamics

365 Sales goal management, the goal manager is responsible for setting or modifying goal targets, adjusting the goal time period, and assigning the goal owner. The salesperson is typically the goal owner who is measured against the target, but the manager controls the goal definition and period.

References/topics: Dynamics 365 Sales goals; goal rollup settings; goal recalculation; goal manager responsibilities; opportunity target tracking.

NEW QUESTION: 14

The remote sales workforce of your organization has been using the integrated Teams chat to collaborate internally. To save time, you indicate to the sales leader that suggested contacts can be displayed when a seller starts a new connected chat.

The sales leader asked you to configure the ability to use suggested contacts.

Which three rules does Dynamics 365 provide as default options to use for suggesting contacts? Each correct answer presents a complete solution. Choose three.

NOTE: Each correct selection is worth one point.

A. The Record Owner of the initiating record.

B. The Record Owner of your linked business unit.

C. The system user who updated a timeline activity on the initiating record.

D. The Created By of the initiating record.
E. The Last Modified By of the initiating record.
F. The user assigned as your manager on your system user record.
Answer: A,D,F (LEAVE A REPLY)
The three default rule-style suggestions are the Record Owner of the initiating record , the Created By user of the initiating record , and the manager assigned on the seller's system user record .
Suggested contacts in Dynamics 365 Sales Teams chat are intended to help sellers quickly find coworkers who are relevant to the record they are working on. Microsoft states that administrators can enable suggested contacts when a seller starts a new connected chat, and that rules-based contact suggestions can be configured for supported Dynamics 365 record types.
The rule engine supports relational rules: Microsoft explains that a relational rule suggests a user who has a relationship with the linked record type or one of its related records, and administrators can select a user field directly on the record or through related entities. The record owner and created-by user are direct relational users on the initiating record. The seller's manager is reached through the system user relationship. The business-unit owner is not the default suggestion path for seller collaboration, and "last modified by" or a user who updated a timeline activity are not the default rule answers in this configuration set.
References/topics: Teams chat in Dynamics 365 Sales; suggested contacts; rules-based contact suggestions; relational suggestion rules; sales collaboration.

NEW QUESTION: 15
You need to allow sellers to view leads disqualified by the Sales Qualification Agent in production.
Which two actions should you perform? Each correct answer presents part of the solution. Choose two.
A. Upgrade the agent to research and engage mode.
B. Update the EnableRoleBasedSystemViews setting.
C. Update the agent look back period.
D. Assign organization level read on lead table to sellers.
Answer: (SHOW ANSWER)
The required fix is about visibility and security , not agent operating mode. In the scenario, production has EnableRoleBasedSystemViews set to true, which restricts system views based on role configuration. Because the business requirement says all sellers should be able to access disqualified leads , the role-based system view setting must be updated so sellers can access the view that exposes leads disqualified by the Sales Qualification Agent.
The second required action is to change Lead table permissions. The customized Salesperson role currently grants sellers read access only to leads they own. That is too restrictive because leads disqualified by the Sales Qualification Agent may not be owned by each seller. To let all sellers view those records, sellers need organization-level Read permission on the Lead table.
Option A is wrong because upgrading the agent to research and engage mode affects how the agent researches and interacts with leads; it does not solve seller access to disqualified records.
Option C is also wrong because the look-back period controls which historical leads the agent evaluates, not who can view disqualified leads.
References/topics: Sales Qualification Agent; role-based system views; Dataverse security roles; Lead table read access; AI-driven lead qualification.

NEW QUESTION: 16
A company uses the Sales Close Agent in Dynamics 365 Sales to help sellers close deals.
The sales managers want to ensure the agent is used only in specific scenarios.
You need to identify the behavior of the Sales Close Agent.
What should you use to review the agent ' s behavior?
A. Open the underlying opportunities from the Forecast section to access the agent ' s My top opportunities from the AI agent list.
B. Open the Sales agent runs table to review the opportunity research results and recommendations for the Sales Close Agent in Research mode.
C. Open a researched opportunity and choose See full research to open the Opportunity research page with complete agent insights and recommendations.
D. Configure the opportunity pipeline view under App settings to display the agent ' s See full research page in the side panel for every opportunity.
Answer: (SHOW ANSWER)

The correct answer is C . To review the Sales Close Agent behavior for an opportunity, you open an opportunity researched by the agent and select See full research . Microsoft's current Dynamics 365 Sales documentation describes this flow: sellers open the My top opportunities from AI agent view, open an opportunity, review the summary section, and then select See full research to open the Opportunity research page , which contains the complete research insights and recommendations.
This page is the right place to understand what the agent is surfacing and why it is helping progress deals. The Opportunity research page includes deal importance, deal risks and mitigations, deal overview, key signals, and other research-driven insights. Option A is incomplete and incorrectly starts from Forecast; the documented entry point is the Opportunities area and the AI-agent opportunity view. Option B is not the best answer because Sales Agent Runs is used for operational run records and permissions, not the seller-facing full research output. Option D is fabricated; there is no requirement to configure the opportunity pipeline view to force the full research page into every opportunity side panel.
References/topics: Sales Close Agent Research mode; Sales Opportunity Agent; Opportunity research page; See full research; AI-generated opportunity insights and recommendations.

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NEW QUESTION: 17
You are implementing an agent in Dynamics 365 Sales for a company.
The customer runs weekly webinars that generate thousands of inbound leads.
The sales team needs to automate the first part of qualification but transfer promising leads to sellers.
The marketing team needs to analyze lead information and determine qualification possibility. However, all outreach to prospects must be managed by human sellers due to compliance requirements.
You have the following requirements for the agent:
. The agent must research inbound leads and if they match the target customer profile.
. The agent must evaluate Budget, Authority, Need, and Timeline during early engagement before transferring to sellers.
. The agent must send the initial outreach email automatically, manage responses, and detect positive intent.
. The leads that do NOT match the target customer profile should be disqualified automatically, and sales supervisors should be notified.
. The qualified and positive intent leads should be transferred to sellers.
You need to determine which configuration should be used.
Which agent and mode should you use?
A. Sales Close Agent in Engage mode.
B. Sales Qualification Agent in Research-only mode and seller assignment rules.
C. Sales Qualification Agent in Research and engage mode.
D. Sales Qualification Agent in Research-only mode.
Answer: (SHOW ANSWER)
The correct configuration is Sales Qualification Agent in Research and engage mode . The question contains one conflicting sentence about human-managed outreach, but the explicit agent requirements require autonomous outreach, response handling, BANT evaluation, positive-intent detection, disqualification of poor- fit leads, supervisor notification, and seller handoff. Those capabilities map only to Research and engage mode.
Microsoft's Sales Qualification Agent documentation states that both modes can research leads and check target customer profile fit, but only Research and engage mode checks BANT criteria, sends outreach emails, detects positive intent, sends follow-up emails, and engages with leads based on their responses.
Microsoft's handoff criteria documentation also states that BANT criteria are only used by Research and engage mode, and that leads satisfying BANT and purchase-interest criteria are handed over to sellers, while leads that do not satisfy the configured criteria are disqualified and added for supervisor review.

Option B or D would be correct only if the controlling requirement were strictly "human sellers must manage all outreach." But the listed automation requirements go beyond Research-only mode, so the exam answer is C

.

References/topics: Sales Qualification Agent; Research and engage mode; target customer profile; BANT; purchase intent; lead handoff; supervisor review.

NEW QUESTION: 18

A company uses Dynamics 365 Sales to manage opportunities using a custom form.

Sellers spend significant time manually reviewing information about opportunities before contacting customers.

You need to reduce the time required for reviewing opportunities.

What should you add to the form?

A. Opportunity summary

B. Up next

C. Health score

D. Predictive opportunity scoring

E. Timeline highlights

Answer: (SHOW ANSWER)

The correct answer is Opportunity summary . The requirement is not to score the opportunity, show the next activity, or display health indicators; it is to reduce the seller's manual review effort before contacting the customer. Microsoft's Copilot capability for Dynamics 365 Sales provides AI-generated summaries for opportunity records so sellers can quickly understand key deal context, related activities, emails, and important history without reading the full timeline manually. Microsoft specifically states that Copilot record summarization generates concise summaries of key information from sales records such as opportunities, leads, and accounts.

Because the company uses a custom opportunity form , the opportunity summary widget must be added to that form. Microsoft's implementation guidance explicitly flags custom opportunity forms and asks whether the opportunity summary widget has been added, and the Copilot summary documentation notes that the opportunity summary widget is available by default on the standard form but must be added to custom forms.

Up next guides sellers to the next activity, Health score and Predictive opportunity scoring evaluate opportunity risk or likelihood, and Timeline highlights is narrower than the full AI-generated opportunity overview.

References/topics: Copilot opportunity summary; custom opportunity forms; AI-generated sales record summaries; seller productivity in Dynamics 365 Sales.

NEW QUESTION: 19

A company implements Dynamics 365 Sales.

The company has the following requirements:

Employees must have quarterly goals. The goals must calculate all deals won by quarter for each goal.

Managers must be able to look at the goals and calculations at any time.

The solution must use goal features WITHOUT customization.

You need to create the calculation.

What should you configure?

A. Rollup table

B. Drill-down table

C. Goal metric

D. Rollup query

Answer: (SHOW ANSWER)

Topic 2, Contoso Ltd Case Study

Background: Contoso Ltd. is a global technology distributor headquartered in Redmond, Washington. The company sells networking equipment, cloud infrastructure, and managed services to enterprise customers across North America and Europe.
Contoso Ltd. currently manages its sales operations by using Microsoft Dynamics 365 Sales and plans to enable Sales Insights in the future.
The leadership team wants to modernize the sales organization by introducing capabilities that help sellers prioritize leads, analyze opportunities, and accelerate deal closure.
The company has approximately 150 field sellers, 40 insider sellers, 20 sales managers, and a central IT team responsible for configuring the sales platform. Contoso Ltd. ' s executive leadership has defined the following goals for the new sales platform implementation:
* Improve seller productivity by reducing manual research and data entry.
* Use AI insights to prioritize leads and opportunities.
* Provide automated recommendations to sales representatives throughout the deal lifecycle.
* Improve collaboration between sellers and sales managers. Current Environment:
Sales platform
Contoso Ltd. uses Microsoft Dynamics 365 Sales integrated with Microsoft 365 services.
The following components are currently deployed:

Component	Status
Dynamics 365 Sales Enterprise	Deployed globally
Dynamics 365 Sales Insights	Planned
Outlook integration	Enabled
Teams	Used for internal collaboration
SharePoint	Used for storing sales documents
Power Automate	Used for simple approval flows

Data and lead management
Leads are important for driving new business at Contoso Ltd. They are generated from multiple sources including:
* Marketing automation campaigns
* Website registrations
* Partner referrals
* Trade show contact imports
Marketing teams import lead lists weekly into Dynamics 365 Sales by using spreadsheet imports. Sellers currently evaluate leads manually.
Sales managers report that this process results in inconsistent prioritization across regions.
Opportunity management
Opportunities are tracked in Dynamics 365 Sales through a defined qualification-to-opportunity lifecycle to ensure accurate reporting.
Sales leadership has requested the Contoso Ltd. IT team to evaluate the following capabilities:
* AI-generated summaries of opportunity records.
* AI-driven research for customer organizations.
* Automated recommendations for closing deals.
Business Requirement: Contoso Ltd. ' s executives have defined the following business requirements:
Lead management
* Inside sellers must use a seller engagement workspace that prioritizes leads automatically based on predicted likelihood to convert.
* All sellers are guided through a consistent set of qualification steps aligned to Contoso Ltd. ' s sales strategy.
* Leads cannot be advanced to the development stage until a decision maker has been confirmed.
* Sales leadership requires flexibility in how leads are converted. Inside sales need automatic opportunity creation. Field sellers need the option to manually decide whether an opportunity should be created when a lead is qualified.
* Lead scoring must be implemented to help sellers identify high potential leads automatically.
* Lead scoring must continuously improve based on historical sales outcomes.

Opportunity development

The opportunity flow must be improved by using AI-driven research and automated insights.

* Field sellers must be able to access contextual research about customers and competitors while working on opportunities.
* Opportunity records must display AI-generated summaries to reduce the time required to review historical activities.
* Field sellers must use the Opportunity pipeline view to visualize, prioritize, and manage opportunities.
* All opportunity revenue must be calculated using opportunity line items based on selected Contoso Ltd.
' s products and standard pricing.
* Sales managers must receive an external quarterly competitive intelligence brief to help with their research. This should be delivered as a PDF document.

Sales performance

Sales managers require improved pipeline and revenue forecasting capabilities. The managers need to report on their business performance and use insights, visuals, and recommended next actions.

The new solution must provide the following:

* Allow sales managers to configure forecasts for opportunity pipelines.
* Notify the seller ' s manager when a draft quote is created and requires approval.
* Allow leadership to track performance against revenue goals.
* Ask questions about Dynamics 365 Sales data to support executive analysis and decision making.
* Support data definitions used at Contoso Ltd. when reporting.

Technical Requirement:

Contoso Ltd. ' s IT department defines the following priorities for the sales platform.

AI capabilities

The platform must support the following AI features:

* Lead scoring to guide sellers to priority items.
* Opportunity research insights to prepare deal analysis.
* Copilot-generated summaries of sales records to help with decision making.
* AI-powered research and analytics to aid leadership reporting.
* When performing sales research, sales managers must be able to save their favorite prompts.

Automation

* Automation must be implemented to guide sellers through recommended next steps during the sales cycle.
* Any approvals must use the Power Automate Approvals connector.
* Field sellers use the existing Lead to Opportunity Business Process Flow to manage their leads.
* A Power Automate desktop flow is used to process orders into a partner ordering application that completes fulfillment.

Collaboration

All sellers must be able to collaborate by using Teams and store related sales documents in SharePoint.

AI-driven insights

The company is deploying the Sales accelerator to guide seller activities.

The Sales Research Agent

Sales managers will use the Sales Research Agent to gather intelligence about customer organizations.

The sales managers have the following requirements:

* Must be able to reuse visualizations after they are created; they don ' t want to recreate them.
* Must have a consistent method to quickly return to a blueprint that they frequently use.
* Must be able to retain a library of questions to receive consistent responses based on definitions approved by the company.

* Should have Bing search enabled on the environment for generative AI feature settings.

Platform extensions

The IT department plan to extend the platform by doing the following:

* Create Power Automate flows to automate seller tasks.
* Embed Power Apps components inside model-driven forms.
* Embed Power BI reports for sales analytics.

Testing

* The IT department is testing predictive lead scoring with a small group of sellers.
* The IT department edits the existing lead scoring model by adding new fields.

Issues:

Users have reported the following issues:

* Field sellers spend a significant amount of time researching customers before engaging with prospects.
* Sales managers cannot easily identify the most promising opportunities across regions.
* Lead prioritization varies significantly between sales teams.
* Testers report they cannot access the field changes in the lead score.
* A sales manager generated a blueprint but forgot the competitive intelligence brief.

NEW QUESTION: 20

A seller is reviewing an opportunity in Dynamics 365 Sales. The Sales Close Agent in Research mode generates a summary.

The seller must decide how to proceed with the opportunity. The seller plans to use the research insights to move the deal forward.

You need to identify the information that the agent provides.

Which agent-provided insights should you share with the seller?

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A. Financial health

B. Recommended actions

C. Budget, Authority, Need, and Timeline-based qualifications

D. Blueprints

Answer: (SHOW ANSWER)

The correct insight to share is Recommended actions . Sales Close Agent in Research mode is opportunity- focused: it helps sellers understand the state of a deal, identify risks, and decide what to do next. Microsoft explains that the opportunity agent provides critical insights and recommendations so sellers can ramp up on opportunities, engage the right stakeholders, and mitigate risks effectively. The Responsible AI FAQ also describes the agent as identifying deal risks early and providing recommended mitigation strategies based on historical data and communication analysis.

The question specifically says the seller must decide how to proceed and wants to move the deal forward.

That points directly to recommended actions, not static context. Financial health may be part of a broader opportunity view, but it is not the best answer for next-step guidance. Budget, Authority, Need, and Timeline is BANT qualification and belongs to lead qualification scenarios, especially Sales Qualification Agent, not opportunity research. Blueprints are generated by the Sales Research Agent on a research canvas for analytics-style exploration, not by the Sales Close Agent opportunity summary. Therefore, the correct insight category is Recommended actions .

References/topics: Sales Close Agent Research mode; opportunity recommendations; deal risk mitigation; Sales Opportunity Agent insights; opportunity progression.

NEW QUESTION: 21

You are implementing Dynamics 365 Sales for a company.

The company sells products globally and requires pricing to be managed for different currencies.

The company has the following requirements:
. Must define the quantities in which a product can be sold.
. Must group product pricing based on different currencies.
. Must identify the sale price of a product.
You need to configure the product catalog.
How should each pricing requirement be configured? To answer, select the appropriate options in the answer area.
NOTE: Each correct selection is worth one point.



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Answer:

Configure pricing components in Dynamics 365 Sales

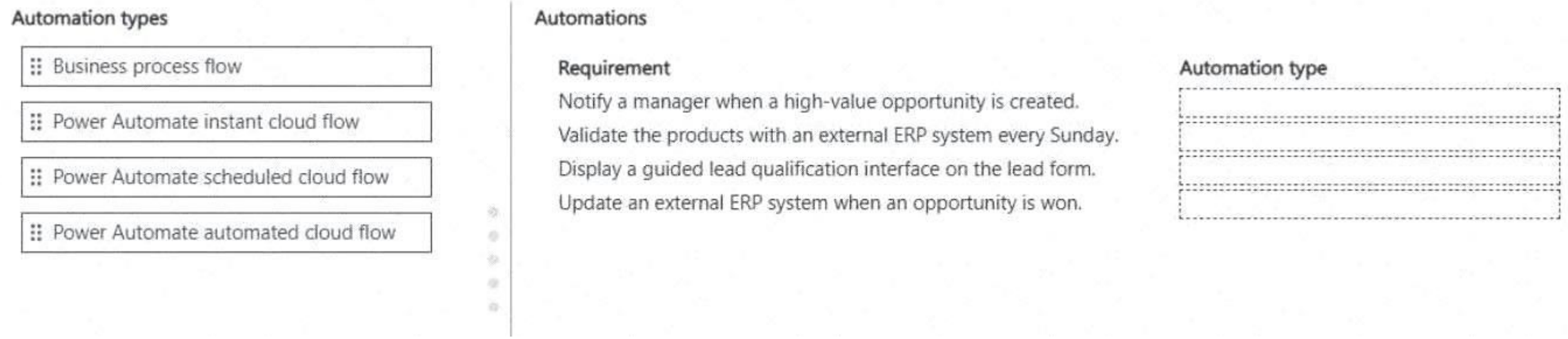


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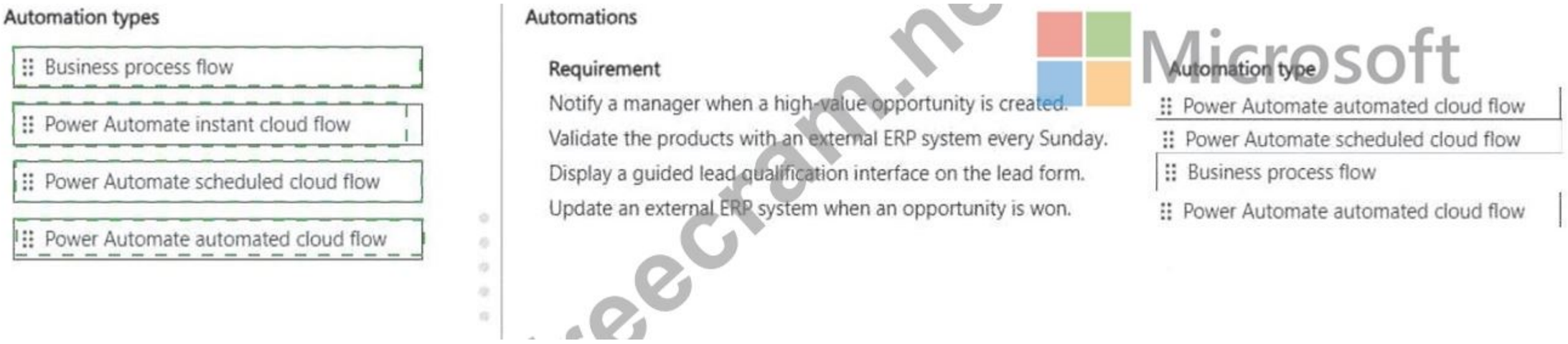
Explanation:
Requirement
Configuration
Quantities a product can be sold
Unit group
Group product pricing for different currencies
Price list
Sale price of a product
Price list item
The correct configuration uses Unit group , Price list , and Price list item because these are the core Dynamics 365 Sales product catalog pricing components. A Unit group defines the collection of units in which a product can be sold. For example, a product might be sold as each, box, case, or pallet. The unit group provides the available quantity structure, while a primary unit identifies the default or base unit inside that group. Therefore, the requirement to define the quantities in which a product can be sold maps to Unit group , not just Unit or Primary unit.
A Price list is used to group product pricing, and each price list is associated with a currency. For a global company selling in different markets, separate price lists can be maintained for currencies such as USD, EUR, or GBP. The Price list item defines the actual sale price of a specific product within a price list, including the product, unit, currency context, and pricing amount. A discount list only defines discount rules, and a product family organizes products, not pricing.
References/topics: Product catalog configuration; unit groups and units; price lists; price list items; global pricing and currency-based product pricing in Dynamics 365 Sales.

NEW QUESTION: 22
You are implementing a sales automation solution for a company.
The sales team wants to automate actions when new leads are created or when opportunities reach specific milestones. The company plans to use Power Automate to automate these actions.

The automation must meet the following requirements:
. Automatically notify a manager when a high-value opportunity is created.
. Validate the products with an external ERP system every Sunday.
. Display a guided lead qualification interface on the lead form.
. Update an external ERP system when an opportunity is won.
You need to identify which automation type to use for each requirement.
Which automation type should you use? To answer, move the appropriate automation types to the correct requirements. You may use each automation type once, more than once, or not at all.
You may need to move the split bar between panes or scroll to view content.
NOTE: Each correct selection is worth one point.



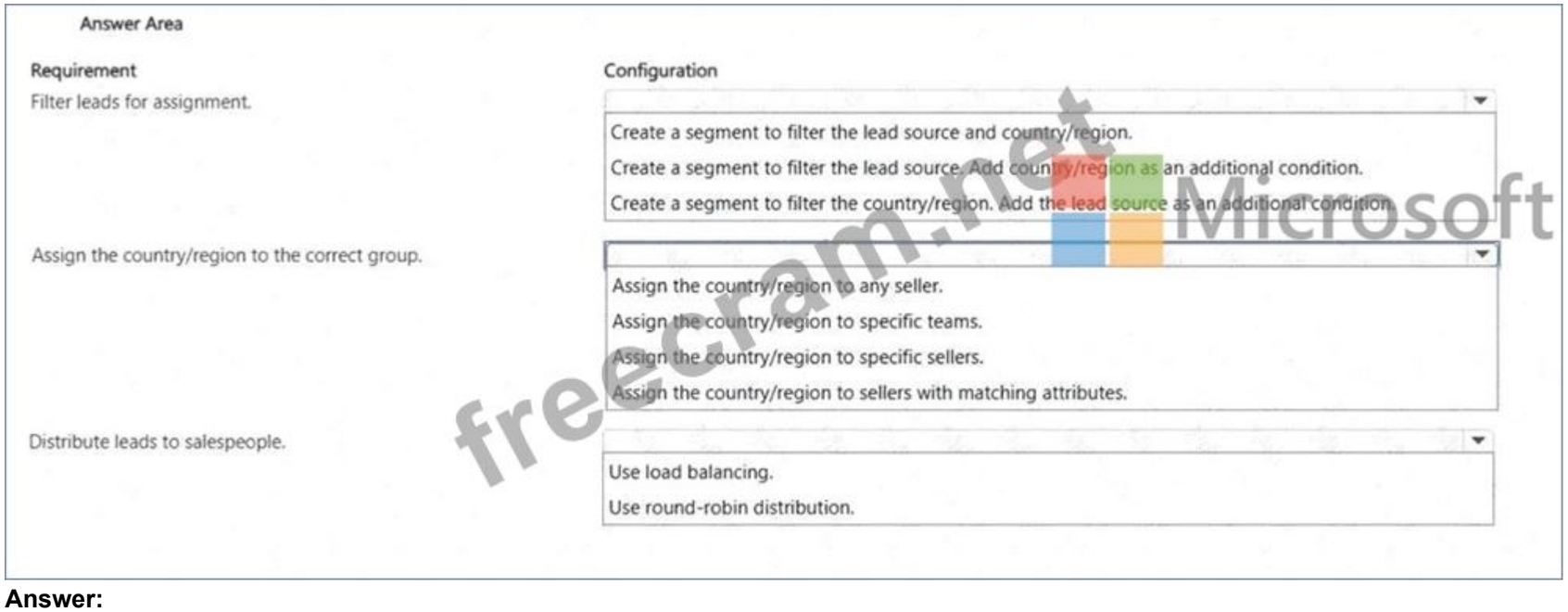
Answer:



Explanation:
Requirement
Automation type
Notify a manager when a high-value opportunity is created
Power Automate automated cloud flow
Validate the products with an external ERP system every Sunday
Power Automate scheduled cloud flow

Display a guided lead qualification interface on the lead form
Business process flow
Update an external ERP system when an opportunity is won
Power Automate automated cloud flow
A Power Automate automated cloud flow is the correct automation type when work must run automatically after a business event occurs. Microsoft describes cloud flows as flows that can perform actions automatically after an event triggers them, such as sending a notification after a triggering event occurs. Therefore, notifying a manager when a high-value opportunity is created and updating an external ERP system when an opportunity is won are both event-driven scenarios, so they should use automated cloud flows with Dataverse triggers.
A Power Automate scheduled cloud flow is correct for validating products with an external ERP system every Sunday. Microsoft states that a scheduled cloud flow runs at a specific time or recurring schedule, such as daily or weekly, and uses a recurrence trigger. That directly matches the weekly Sunday validation requirement.
A Business process flow is correct for displaying a guided lead qualification interface on the lead form.
Business process flows provide a streamlined user experience that guides users through defined processes, and Dynamics 365 Sales documentation explains that stages and steps display in a control at the top of a form.
Instant cloud flow is not used because none of the requirements ask for a manually triggered user action.
References/topics: Power Automate automated cloud flows; scheduled cloud flows; Dataverse triggers; Business process flows; Dynamics 365 Sales automation and extensibility.

NEW QUESTION: 23
A company generates leads from a webform. Salespeople manage leads by country/region. All salespeople are part of the same Dynamics 365 Sales team.
The sales manager requires the following functionality:
. Automate lead assignments.
. Ensure each seller can never have more than 20 open leads.
You create a country/region attribute for the process. You must simplify the process. You plan to use segments when possible.
You need to create a lead assignment rule for each country/region.
Which configurations should you use? To answer, select the appropriate options in the answer area.
NOTE: Each correct selection is worth one point.



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Answer:

Answer Area

Requirement	Configuration
Filter leads for assignment.	Create a segment to filter the lead source and country/region. **Create a segment to filter the lead source. Add country/region as an additional condition.** Create a segment to filter the country/region. Add the lead source as an additional condition.
Assign the country/region to the correct group.	Assign the country/region to any seller. Assign the country/region to specific teams. Assign the country/region to specific sellers. **Assign the country/region to sellers with matching attributes.**
Distribute leads to salespeople.	**Use load balancing.** Use round-robin distribution.

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Explanation:

Requirement

Configuration

Filter leads for assignment

Create a segment to filter the lead source. Add country/region as an additional condition.

Assign the country/region to the correct group

Assign the country/region to sellers with matching attributes.

Distribute leads to salespeople

Use load balancing.

The clean configuration is to create one reusable segment for webform leads, then add the varying country /region condition inside each country-specific assignment rule. Dynamics 365 Sales assignment rules are built by selecting the eligible segment first, then adding rule conditions to further filter records. Microsoft also recommends splitting conditions between segments and assignment rules to keep rules simpler and more efficient.

For routing to the correct sellers, use sellers with matching attributes . The scenario says salespeople manage leads by country/region and that a country/region attribute has been created. Assignment rules support assigning records to sellers who satisfy matching seller attributes or existing seller record fields, which avoids hardcoding individual sellers and is much easier to maintain as sellers change regions.

For distribution, use load balancing because the requirement is capacity-based: no seller should exceed 20 open leads. Dynamics 365 Sales load balancing distributes records based on seller workload/capacity, and seller capacity is calculated by subtracting active assigned records from the maximum configured capacity.

Round robin is weaker here because it primarily considers assignment order, not workload.

References/topics: Sales accelerator work assignment; segments; lead assignment rules; seller attributes; seller capacity; load balancing.

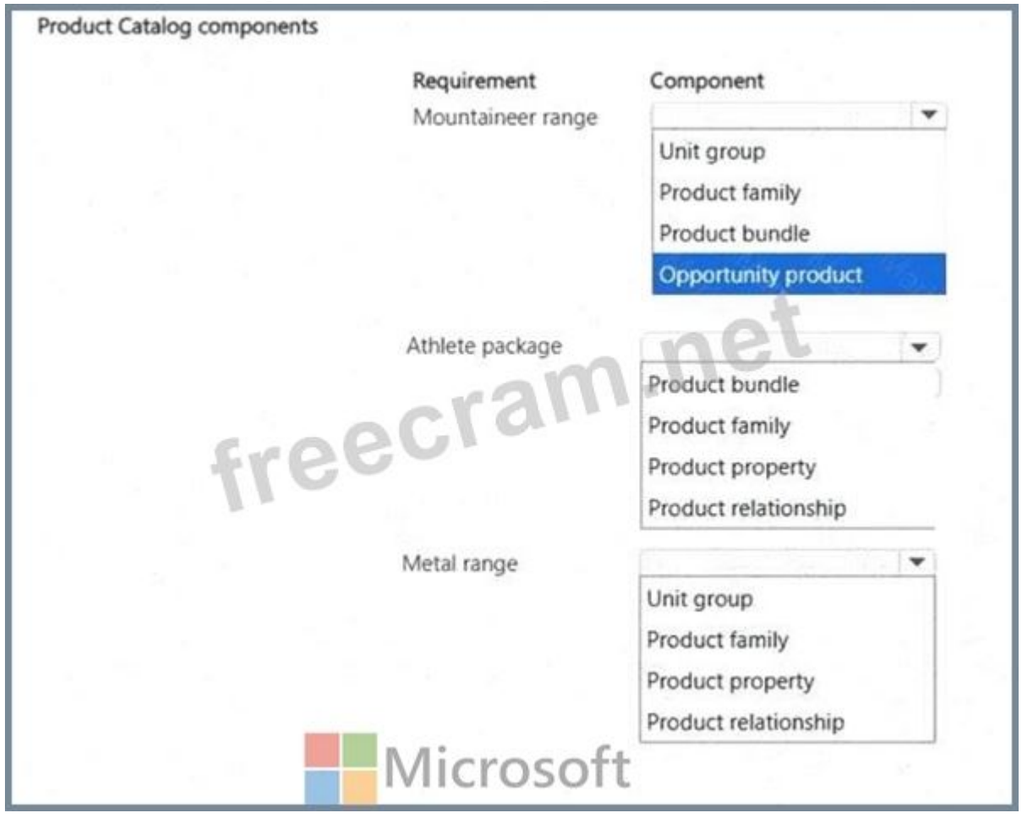
NEW QUESTION: 24
You configure Dynamics 365 Sales for a company.
The company plans to implement the Sales Close Agent in Research mode.
You need to identify the capabilities of the agent.
Which two capabilities should you identify? Each correct answer presents a complete solution. Choose two.
NOTE: Each correct selection is worth one point.
A. Guide customers through the sales funnel by running engagement sequences across the sales process.
B. Initiate follow-up communication with customer contacts using templates and customer data.
C. Analyze historical interaction data and generate opportunity insights.
D. Review deal signals, then record next actions based on risks and recommended mitigations.
E. Generate outreach tasks for sellers based on interaction signals and deal status changes.
Answer: (SHOW ANSWER)
The correct Research mode capabilities are analyzing historical interaction data to generate opportunity insights and reviewing deal signals with risks and recommended mitigations . Microsoft's Sales Opportunity Agent documentation describes the opportunity-focused agent as helping sellers focus on important opportunities by identifying high-value and at-risk deals, providing critical insights and recommendations, and helping sellers mitigate risks. Microsoft also states that the agent gathers information from multiple sources and provides a streamlined research experience, stakeholder and competitor intelligence, and actionable risk mitigation strategies.
Option C is correct because the agent uses opportunity context, CRM history, emails, meetings, and other available signals to generate deal insights. Option D is also correct because Microsoft's Responsible AI FAQ specifically identifies early risk detection and recommended mitigation strategies based on historical data and communication analysis. Options A and B describe customer engagement behavior: running sales sequences or initiating follow-up communication. That belongs to engagement automation, not Research mode. Option E is too workflow-task oriented; Research mode surfaces insights and recommendations, but it is not primarily a task-generation or outreach automation engine.
References/topics: Sales Close Agent Research mode; Sales Opportunity Agent; opportunity insights; deal signals; risk mitigation; intelligent opportunity research.

NEW QUESTION: 25
The required predictive scoring model cannot be created yet.
You need to inform the sales team how many more record types are needed before it can be configured.
What two actions on lead records are required? Each correct answer presents part of the solution. Choose two.
A. 40 more leads must be created.
B. 20 more leads must be disqualified.
C. 10 more leads must be qualified.
D. 20 more leads must be qualified.
E. 30 more leads must be disqualified.
Answer: (SHOW ANSWER)
For Dynamics 365 Sales predictive lead scoring, the model cannot be created unless there is enough historical lead outcome data in the selected training window. Microsoft's predictive lead scoring configuration requirement states that the organization must have at least 40 qualified leads and 40 disqualified leads in the selected training period. The official guidance specifically explains that if the model is trained with leads from the past three months, the organization needs "at least 40 qualified and 40 disqualified leads" created and closed during that period.
In the sandbox, AdventureWorks has 30 qualified leads and 20 disqualified leads. However, 10 of the qualified leads are older than three months, and the business requirement says predictive scoring must be enabled for leads created within the last three months. Therefore, only 20 qualified leads are usable for this model. The sandbox currently has 20 usable qualified leads and 20 disqualified leads. To meet the required threshold of 40 each, the company needs 20 more qualified leads and 20 more disqualified leads . Simply creating 40 new leads is not enough because predictive scoring requires outcome-classified leads, not merely open or newly created records.
References/topics: Configure predictive lead scoring; lead scoring model training data requirements; AI-driven lead prioritization in Dynamics 365 Sales.
Topic 1, AdventureWorks Case StudyBackgroundAdventureWorks

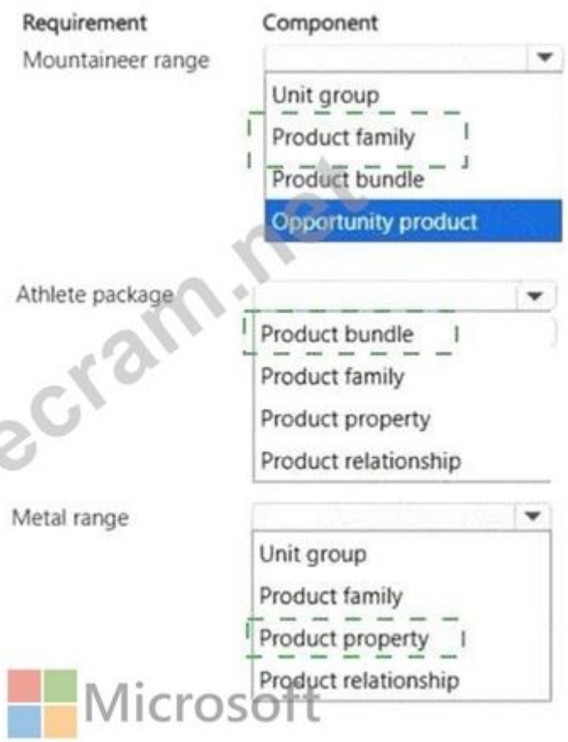
Cycles is a global manufacturer of high-performance bicycles
headquartered in Seattle. The company sells products through
distributors, specialty retailers, and a growing direct-to-consumer online channel. AdventureWorks Cycles recently expanded its product catalog to include the athlete package. This package includes a cycle, connected devices and subscription-based analytics services.
To support this expansion, the company wants to modernize its sales operations by implementing Microsoft Dynamics 365 Sales. The leadership team wants sellers to focus on building relationships with distributors and enterprise buyers rather than manually qualifying leads or assembling product packages.
The sales operations team is responsible for configuring the Dynamics 365 Sales environment. Their goal is to implement AI-driven processes that streamline the lead-to-cash workflow while ensuring that sellers can easily identify the most promising opportunities.
Current Environment AdventureWorks Cycles previously used a legacy CRM system that tracked leads and opportunities but lacked predictive intelligence or automated lead qualification. Sellers manually evaluate incoming leads, which creates delays and inconsistent prioritization.
The global sales team manages approximately 15,000 leads per month generated from marketing campaigns, trade shows, and partner referrals.
Product data is stored in multiple systems. Product managers maintain products and pricing in spreadsheets.
Information regarding custom
relationships, competitor analysis, and region-specific marketing content is stored in a SharePoint site called the sales portfolio.
The organization has identified several challenges they want to resolve with a new solution:
* Sellers often spend significant time researching leads that ultimately do not convert.
* Regional managers require in-depth reporting using information from the sales pipeline and seller activities, the point-of-sale solution, website analytics, and the accounting system.
* Multiple product offerings are difficult to manage because components are defined in different systems.
* Team leads require real-time information on active opportunities, as well as visibility of seller ' s appointments and phone calls, without needing to navigate into multiple views.
All sellers are assigned Dynamics 365 Sales Enterprise licenses, Also, the CFO has requested that Copilot message packs are pre-purchased by using the Copilot Studio subscription license.
A Dynamics 365 sales sandbox environment has been in use for six months. There are 60 leads records with
30 records that are qualified and 20 that are disqualified. Ten of the qualified leads are over three months old.
Business Requirements: AdventureWorks Cycles has defined the following business requirements for the production environment of Dynamics 365 Sales:
Sellers in all regions should be able to review the new mountaineer cycles. The cycles include economy and premium fittings. When creating opportunities, sellers should be able to select a metal type when adding a mountaineer cycle to an opportunity. The metal types include chrome, aluminum, and titanium.
* Pricing managers must be able to create deals for the same products in their own currencies and at their own prices, without reference to the cost of the product.
* Sellers must be able to quickly view their own opportunities by phase.
* Predictive scoring should be enabled for leads created within the last three months in the sandbox environment. This should provide seller training on the scoring ' s interpretation and usage.
* A segment of leads named Hot is needed that will contain all leads where the source is phone, employee referral or partner. Leads from this segment should be distributed to sellers by using a round robin method.
* Agents should not be able to take action on any data that is created in the production environment before they are started.
* All sellers should be able to access disqualified leads.
Technical Information and Requirements: The new Dynamics 365 Sales environment must meet the following technical requirements:
Agents must use a dedicated service identity to execute write actions with a controlled security role in Dataverse.
The sales operations team lead must be assigned the Power Platform administrator role.
The lead pricing manager must be assigned to the Microsoft 365 billing admin role.
The vice president of sales must be assigned the AI admin role.
* A sandbox and a production environment must be created. Both of the environments must be enabled for AI capacity, but usage should be capped on the sandbox environment.
* A trial environment must be created, with the Sales Qualification Agent configured to business requirements.
* Sellers must be assigned the security roles on the production environment only.
* All sellers must be assigned a customized version of the salesperson role. This role should grant read access only to the leads that the sellers own.

* The EnableRoleBasedSystemViews property must be set to true for the production environment.
No Azure subscriptions are available in the tenant.
Issues: During early testing, the sales operations team identify the following issues:
* The Sales Qualification Agent has disqualified several leads in the trial environment. The vice president of sales has requested to understand the reason for the disqualified leads.
* Sellers are unable to create agents in the production environment.
* Agent consumption has been unreliable. The company requires that AI capacity is always available to sellers.

NEW QUESTION: 26
You need to configure the AdventureWorks Cycles product catalog.
How should you configure the product catalog? To answer, select the appropriate options in the answer area.



Answer:



Explanation:
Requirement
Component
Mountaineer range
Product family
Athlete package
Product bundle
Metal range
Product property
The Mountaineer range should be configured as a Product family because it represents a product classification hierarchy. Dynamics 365 Sales uses product families to organize related products, child products, and bundles under a parent structure. Microsoft's product catalog guidance states that product families can contain child product families, products, and bundles in a hierarchy, which fits the mountaineer cycle range with economy and premium fitting variations.
The Athlete package should be configured as a Product bundle because it combines multiple sellable items:
a cycle, connected devices, and subscription-based analytics services. A bundle is used when multiple products are sold together as one commercial package. Dynamics 365 Sales allows products to be associated with a bundle, including quantities and required or optional components.
The Metal range should be configured as a Product property because sellers must choose a configurable attribute-chrome, aluminum, or titanium-when adding the mountaineer cycle to an opportunity. Product properties define product characteristics such as size, color, or component, and can be used at run time when adding products to opportunities, quotes, orders, or invoices.
References/topics: Product catalog setup; product families; product bundles; product properties; opportunity product configuration.

NEW QUESTION: 27
You are preparing to deploy AI agents for a company ' s sellers.
The company wants to ensure that AI capacity is available before agents begin operating.

You need to configure Dynamics 365 so AI agents can consume AI credits.
Which action should you perform?
A. Create a new Microsoft Power Platform environment for the agents.
B. Assign AI capacity to the Dynamics 365 environment.
C. Assign Copilot Studio author permissions to sellers.
D. Monitor Copilot Credit usage in the Microsoft Power Platform admin center.
Answer: (SHOW ANSWER)
The correct action is to assign AI capacity to the Dynamics 365 environment . AI agents and AI-powered features run inside a Power Platform/Dynamics 365 environment, and the environment must have available AI capacity or credits before those features can execute reliably. Microsoft's AI capacity guidance states that once acquired, AI credits can be allocated or assigned to a specific environment, and when an environment has access to the credits, AI features are enabled in that environment. It also states that if consumption exceeds available credits, some features may be blocked.
Option A is wrong because creating a new environment does not automatically provide AI capacity. The existing Dynamics 365 Sales environment can consume AI credits only when capacity is assigned or available to it. Option C is also wrong because Copilot Studio author permissions allow users to design or create agents; that is an authoring permission, not a capacity configuration. Option D is useful after deployment because administrators can monitor consumption in the Power Platform admin center, but monitoring does not make credits available. Microsoft also notes that AI Builder capacity is licensed as an add-on that must be allocated to a Power Platform environment by an administrator.
References/topics: AI capacity allocation; Copilot/AI credits; Power Platform environment capacity; Dynamics 365 Sales AI agents; agent deployment prerequisites.

NEW QUESTION: 28
You are configuring a Dynamics 365 Sales implementation for a company.
The company has the following requirements:
. Must enable guided sales qualifications.
. Must allow sellers to create multiple opportunities when qualifying a lead.
. Must display full related emails with images on opportunities.
. Must notify supervisors when leads are qualified.
You need to configure the lead-to-opportunity qualification process based on the company ' s requirements.
What should you configure? To answer, move the appropriate configurations to the correct requirements. You may use each configuration once, more than once, or not at all. You may need to move the split bar between panes or scroll to view content.
NOTE: Each correct selection is worth one point.



Answer:



Explanation:
Requirement
Configuration
Enable guided sales qualifications
Business process flow
Allow sellers to create multiple opportunities when qualifying a lead
Lead qualification experience
Display emails with images
Timeline
Notify supervisors when leads are qualified
Power Automate cloud flow
Guided sales qualification is handled by a Business process flow because BPFs define the sales stages and required steps sellers follow during lead-to-opportunity execution. Microsoft describes lead qualification as the movement of a lead through the sales process into an opportunity, and business process flows are the native model-driven mechanism for guided stage-based work.

Creating multiple opportunities during qualification is controlled by the Lead qualification experience .
Microsoft's lead qualification configuration allows administrators to customize how account, contact, and opportunity records are created when a lead is qualified, including seller-controlled conversion behavior.
Full related emails, including rich email content, belong in the Timeline because the timeline control displays activities related to a record, including emails, appointments, phone calls, notes, and tasks. Microsoft also states the enhanced email experience is available from the Timeline section of customer engagement apps.
Supervisor notification should be implemented with a Power Automate cloud flow . A Dataverse-triggered cloud flow can run when a lead row changes status or when a qualification process creates an opportunity, then notify the supervisor.
References/topics: Business process flows; lead qualification experience; Dynamics 365 Sales timeline; Power Automate Dataverse triggers; lead-to-opportunity qualification automation.

NEW QUESTION: 29
Sellers at a company require access to Dynamics 365 Sales from mobile devices.
Some sellers cannot access records after installing the sales mobile app.
You need to ensure that the sellers can use the mobile application.
Which two components should you configure? Each correct answer presents part of the solution. Choose two.
NOTE: Each correct selection is worth one point.
A. Configure the mobile offline profile.
B. Configure inbound and outbound profiles.
C. Configure mobile security roles.
D. Assign appropriate user licenses.
Answer: (SHOW ANSWER)
The correct components are mobile security roles and appropriate user licenses . Installing the mobile app alone does not grant access to Dynamics 365 Sales records. Microsoft's mobile setup guidance states that Dataverse security privileges control access to Dynamics 365 mobile apps, and the required mobile privilege is preconfigured for Sales roles but may need to be added to custom roles. It also states that the app must be shared with the security role assigned to the user, and users without the privilege can see an empty app list or an access error.
The license requirement is equally important. The Dynamics 365 Sales mobile experience exposes Sales Hub or Sales Professional according to the user's license, so sellers must have the correct Dynamics 365 Sales license assigned before they can access the appropriate Sales app and records. Mobile offline profiles are used for offline synchronization scenarios; they are not the base requirement for record access after app installation. Inbound and outbound profiles are unrelated to Sales mobile access and are not used to authorize sellers in the mobile application.
References/topics: Dynamics 365 Sales mobile app; Dataverse security roles; mobile access privilege; Sales Hub mobile access; Dynamics 365 Sales licensing.

NEW QUESTION: 30
You need to configure the required billing for Copilot and agent capabilities.
What should you use for each requirement? To answer, select the appropriate options in the answer area.

Portals

Requirement	Tool
Perform purchase required by CFO.	Azure portal Microsoft 365 admin center Power Platform admin center
Configure Sandbox billing.	Azure portal Microsoft 365 admin center Power Platform admin center
Configure Production billing.	Azure portal Microsoft Agent 365 Microsoft 365 admin center

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Answer:

Portals

Requirement	Tool
Perform purchase required by CFO.	Azure portal Microsoft 365 admin center Power Platform admin center
Configure Sandbox billing.	Azure portal Microsoft 365 admin center Power Platform admin center
Configure Production billing.	Azure portal Microsoft Agent 365 Microsoft 365 admin center

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Explanation:

Requirement

Tool
Perform purchase required by CFO
Microsoft 365 admin center
Configure Sandbox billing
Power Platform admin center
Configure Production billing
Microsoft 365 admin center
Why: Production requires reliable AI capacity so sellers are not blocked when prepaid Copilot capacity is depleted. The correct production setup is pay-as-you-go / billing policy configuration through the Microsoft
365 admin center . Azure portal is not the best answer here because the scenario says no Azure subscriptions are available , and Microsoft 365 admin center can be used for the billing policy workflow.
Microsoft Agent 365 is for agent management/governance, not billing configuration.

NEW QUESTION: 31
You need to configure AI capabilities that prioritize leads and improve scoring accuracy in Dynamics 365 Sales.
How should each requirement be configured? To answer, select the appropriate options in the answer area.



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Answer:



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Explanation:
Requirement
Configuration
Automatically prioritize leads based on conversion probability
Predictive lead scoring
Ensure the lead scoring improvement requirement is met
Automatically retrain model
The correct capability for automatically prioritizing leads based on conversion probability is Predictive lead scoring . Dynamics 365 Sales predictive lead scoring assigns scores to leads so sellers can prioritize the leads most likely to qualify or convert. Microsoft's Sales documentation states that predictive lead scoring helps sales teams prioritize leads based on scores and improve lead qualification outcomes. This directly matches Contoso's requirement to guide sellers toward high-potential leads and reduce inconsistent manual prioritization across regions.
To meet the requirement that lead scoring must continuously improve based on historical sales outcomes, configure the model to automatically retrain . Microsoft's predictive lead scoring guidance explains that retraining uses the latest leads in the organization to improve model accuracy, and automatic retraining allows the application to retrain the model every 15 days. This is the correct option because Contoso wants the scoring model to improve continuously as more closed lead outcome data becomes available.
"Lead scoring model" is too generic; the AI capability required is specifically predictive lead scoring.
"Relationship intelligence" supports relationship analytics and engagement insights, but it does not score leads by conversion probability. "Configure forecast" applies to pipeline forecasting, not lead scoring accuracy.
References/topics: Predictive lead scoring; lead prioritization; scoring model accuracy; automatic model retraining; AI-driven lead qualification.

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NEW QUESTION: 32
You configure Dynamics 365 Sales for a company.
Sales managers require sellers to use a structured lead qualification process before converting leads to opportunities.

You need to ensure sellers use a structured lead qualification process.
What should you configure?
A. Sales accelerator
B. Lead activity timeline
C. Lead assignment rules
D. Business process flow
E. Predictive lead scoring
Answer: (SHOW ANSWER)
The correct configuration is Business process flow . A structured lead qualification process requires sellers to move through defined stages and steps before a lead is converted into an opportunity. Microsoft describes business process flows as a way to guide users through stages of sales, marketing, or service processes toward completion. Business process flows can also include branching logic and defined steps, which makes them the correct mechanism for standardizing how sellers qualify leads before conversion.
The other options do not enforce a structured qualification path. Sales accelerator helps prioritize seller activities and guide daily work, but it is not the core process-control mechanism for lead qualification. Lead activity timeline displays activities, emails, notes, and interactions; it does not define qualification stages.
Lead assignment rules route leads to sellers or teams, but they do not structure the seller's qualification steps. Predictive lead scoring helps prioritize leads by likelihood to qualify, but it does not require sellers to complete a defined qualification process. Therefore, to make sellers follow a controlled lead qualification sequence before converting leads to opportunities, configure a Business process flow .
References/topics: Business process flows; lead qualification; structured sales process; lead-to- opportunity conversion; Dynamics 365 Sales process guidance.

NEW QUESTION: 33
Note: This question is part of a series of questions that present the same scenario. Each question in the series contains a unique solution that might meet the stated goals. Some question sets might have more than one correct solution, while others might not have a correct solution.
After you answer a question in this section, you will NOT be able to return to it. As a result, these questions will not appear on the review screen.
You are deploying AI agents for a company using Microsoft Dynamics 365 Sales.
The company wants to ensure that AI usage is tracked and billed monthly.
The company requires that AI billing uses pre-paid credits.
You need to configure the billing based on the requirements.
Solution: Configure capacity overages to the billing plan on the Dynamics 365 Sales environment.
Does the solution meet the goal?
A. Yes
B. No
Answer: (SHOW ANSWER)
The solution does not meet the goal. The requirement is explicit: AI billing must use pre-paid credits .
Microsoft's Dynamics 365 Sales billing guidance separates Copilot and agent billing into two models:
prepaid capacity and pay-as-you-go . Prepaid capacity uses Copilot Studio message pack subscriptions that are purchased in advance, while pay-as-you-go bills for the actual number of messages consumed during the month.
Configuring capacity overages to a billing plan is not the prepaid-credit model. Overages are tied to consumption beyond allocated capacity and are handled through billing-plan/pay-as-you-go behavior. That conflicts with the requirement to use pre-purchased credits. For prepaid billing, the correct approach is to purchase Copilot Studio message packs or capacity packs and assign that prepaid capacity to the Dynamics
365/Power Platform environment. Microsoft's Power Platform capacity guidance states that prepaid capacity can be assigned to environments, and when prepaid capacity is exhausted, administrators must reallocate capacity, purchase more credits, or enable pay-as-you-go billing.
Therefore, configuring overages may support monthly usage billing, but it does not satisfy the stated requirement that billing must use prepaid credits.

References/topics: Dynamics 365 Sales consumption-based billing; prepaid capacity; Copilot Studio message packs; Copilot credit capacity; pay-as-you-go overage handling.

NEW QUESTION: 34
A sales team uses Dynamics 365 Sales to manage leads and opportunities.
Sales managers must be able to ensure that every qualified lead results in a follow-up task for the opportunity owner.
You need to create an automated solution by using Power Automate.
Which type of trigger should you use to start the flow?
A. Scheduled
B. Automated
C. Instant
Answer: (SHOW ANSWER)
The correct trigger type is Automated . The requirement is event-driven: when a lead is qualified and an opportunity is created or updated, the system must automatically create a follow-up task for the opportunity owner. In Power Automate, this is implemented as an automated cloud flow that starts when a Dataverse event occurs, such as when a row is added, modified, or deleted.
Microsoft's Dataverse trigger documentation states that the When a row is added, modified or deleted trigger runs a flow whenever a selected Dataverse table row is created or changed.
A scheduled trigger is wrong because the requirement is not time-based. Running the process hourly or daily would delay task creation and could miss the intended immediate follow-up behavior.
An instant trigger is also wrong because it requires a user to manually start the flow. Microsoft describes instant cloud flows as manually triggered flows, while automated flows run after an event triggers them. For this case, the flow should listen for the qualifying lead or opportunity event in Dataverse, then create the follow-up task and assign it to the opportunity owner.
References/topics: Power Automate automated cloud flows; Dataverse row triggers; lead qualification; opportunity follow-up task automation; Dynamics 365 Sales extensibility.

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