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NEW QUESTION: 1

A company plans to move their headquarters from the United States to Europe.

You need to round all currency values to four decimal places and display the correct currency symbol.

Solution: Change the currency code and symbol so that both are displayed.

Does the solution meet the goal?

- A. No
- B. Yes

Answer: ([SHOW ANSWER](#))

NEW QUESTION: 2

You need to create a chart for the athletic director.

What should you do?

- A. Use purchaser, markup, and margin on the X-axis. Use amount of sales on the Y-axis.
- B. Use the ticket type as the X-axis. Use amount of sales on the Y-axis
- C. Use the ticket type on the X-axis. Use margins multiplied by cost on Y-axis
- D. Use discount price on the X-axis. Use the number of tickets for groups on the Y-axis.

Answer: ([SHOW ANSWER](#))

Explanation

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).

NEW QUESTION: 3

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

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

From which sources 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.

Source entity

Source

Quote



Order

Invoice

	▼
Lead	
Opportunity	
Quote	
Order	

	▼
Lead	
Opportunity	
Quote	
Order	

	▼
Lead	
Opportunity	
Quote	
Order	

Answer:

Source entity	Source
Quote	▼ Lead Opportunity Quote Order
Order	▼ Lead Opportunity Quote Order
Invoice	▼ Lead Opportunity Quote Order

Explanation

Source entity

Source

Quote

▼
Lead
Opportunity
Quote
Order

Order

▼
Lead
Opportunity
Quote
Order

Invoice

▼
Lead
Opportunity
Quote
Order

NEW QUESTION: 4

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.

Actions

Pick items and ship order

Create a new order for the customer

Add customer address and shipping information

Create a new customer account in Dynamics 365 for Sales

Add products from inventory for the sale

Answer Area

 Microsoft

Answer:

Actions

Pick items and ship order

Create a new order for the customer

Add customer address and shipping information

Create a new customer account in Dynamics 365 for Sales

Add products from inventory for the sale

Answer Area

Create a new customer account in Dynamics 365 for Sales

Create a new order for the customer

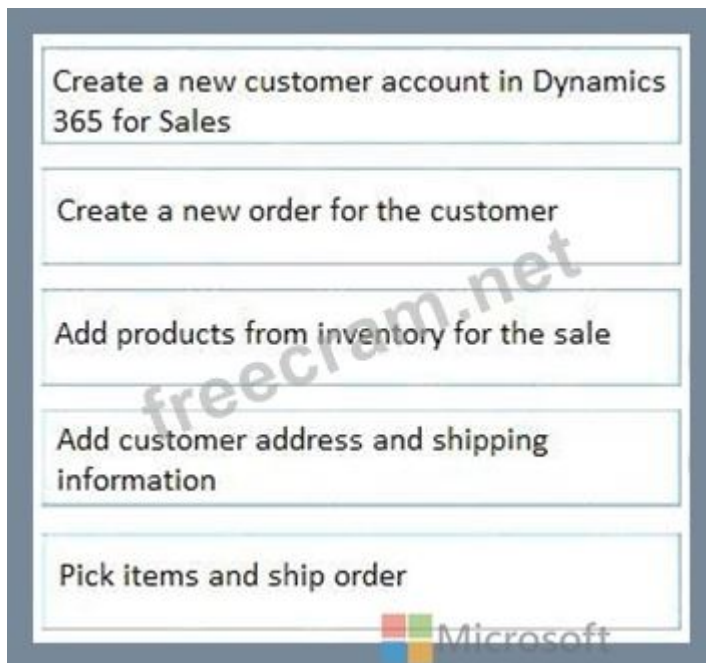
Add products from inventory for the sale

Add customer address and shipping information

Pick items and ship order

 Microsoft

Explanation



Reference:

<https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/create-edit-order-sales#create-an-order>

NEW QUESTION: 5

You manage a Dynamics 365 for Sales environment.

You need to automatically create records for salespeople when they complete phone call activities.

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.

Actions	Answer Area
Open Settings Open Data Management Open Business Management Open Service Management Configure Automatic Record Creation and Update Rules	← → ↑ ↓

Answer:

Actions

Open Settings

Open Data Management

Open Business Management

Open Service Management

Configure Automatic Record
Creation and Update Rules

Answer Area

Open Settings

Open Service Management

Configure Automatic Record
Creation and Update Rules

Explanation



References:

<https://docs.microsoft.com/en-us/dynamics365/customer-engagement/customer-service/set-up-rules-toautomatica>

NEW QUESTION: 6

You need to implement dashboards.

Which URL should you use?

- A. <https://bellowscollege.com.dynamics.com>
- B. <http://bellowscollege.com.dynamics.com>
- C. <https://crm.bellowscollege.dynamics.com>
- D. <https://bellowscollege.dynamics.com>

Answer: ([SHOW ANSWER](#))

Topic 2, Humongous insuranceCase Study

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

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

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

To start the case study

To display the first question in this case study, click the button. Use the buttons in the left pane to explore the content of the case study before you answer the questions. Clicking these buttons displays information such as business requirements, existing environment and problem statements. If the case study has an All Information tab, note that the information displayed is identical to the information displayed on the subsequent tabs. When you are ready to answer a question, click the Question button to return to the question.

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 mettlles need lo 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 clients" 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 'or 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 theirmanagers 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 dull down toleads 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 eachproduct every time they have to Quote a customer on a product
- * UserA is unable to quality 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.

NEW QUESTION: 7

You are a Dynamics 365 Sales system customizer.

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

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

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

Actions

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

Answer Area

Microsoft

Answer:

Actions

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

Answer Area

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

Microsoft

Explanation

ACTIONS

- Open the Main View.
- Delete the filter criteria Status Equals Open.

Answer Area

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

Microsoft

NEW QUESTION: 8

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.

Modifications

- Modify the Close Opportunity form.
- Modify the Opportunity entity and Opportunity Close entity fields.
- Modify the Leads entity form.
- Modify the Opportunity entity field.

Answer Area

Microsoft

Addition

- Add sales manager
- Add lost reasons

Modification

- Modification
- Modification

Answer:

Modifications

- Modify the Close Opportunity form.
- Modify the Opportunity entity and Opportunity Close entity fields.
- Modify the Leads entity form.
- Modify the Opportunity entity field.

Answer Area

Microsoft

Addition

- Add sales manager
- Add lost reasons

Modification

- Modify the Opportunity entity field.
- Modify the Close Opportunity form.

Explanation

Modifications Modify the Close Opportunity form. Modify the Opportunity entity and Opportunity Close entity fields. Modify the Leads entity form. Modify the Opportunity entity field.	Answer Area Addition Add sales manager Add lost reasons Modification Modify the Opportunity entity field. Modify the Close Opportunity form.
---	---

NEW QUESTION: 9

You run an Account Overview report for Fourth Coffee. The following results are displayed.

Account Overview as of: 11/13/2018		Status	Acct#
Fourth Coffee (sample)		Active	ABSS4G45

Basic Profile Parent Account: Relationship: Industry: Location: Renton, Tx Category: Website: http://www.fourthcoffee.com/ Ownership: Ticker Symbol:	Opportunity Summary Active opportunities by probability All opportunities by current state No Data No Data <table> <tr> <td>Active Opportunities</td> <td>Amount</td> <td>Prob</td> <td>Weighted</td> </tr> <tr> <td>Other</td> <td></td> <td></td> <td></td> </tr> <tr> <td>Total</td> <td></td> <td></td> <td>0</td> </tr> </table>	Active Opportunities	Amount	Prob	Weighted	Other				Total			0
Active Opportunities	Amount	Prob	Weighted										
Other													
Total			0										

Primary Contact Yvonne McKay (sample) Title: Purchasing Manager Location: Redmond, WA Business Phone: 555-0100 Mobile Phone: Home Phone: Fax: Pager: Email: someone_a@example.com	Service Summary Satisfaction (all closed cases) Status Reason (all cases)
--	---

Additional Contacts Yvonne McKay (sample) - Purchasing Manager - (555-0100)

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.

Question	Answer choice
Why is the satisfaction area blank?	▼ There are no closed cases Users are not completing the satisfaction field The Reporting Service is down Cases with the problem solved have not been closed
Which type of account is Fourth Coffee?	▼ Active Parent Account Inactive Child Account

Answer:

Question	Answer choice
Why is the satisfaction area blank?	▼ There are no closed cases Users are not completing the satisfaction field The Reporting Service is down Cases with the problem solved have not been closed
Which type of account is Fourth Coffee?	▼ Active Parent Account Inactive Child Account

Explanation

Question	Answer choice
Why is the satisfaction area blank?	▼ There are no closed cases Users are not completing the satisfaction field The Reporting Service is down Cases with the problem solved have not been closed
Which type of account is Fourth Coffee?	▼ Active Parent Account Inactive Child Account

NEW QUESTION: 10

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.

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:

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.

Explanation

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.

NEW QUESTION: 11

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.

Components

Discount list
Product family
Unit groups
Price lists

Answer Area

Create Order

First
Second
Third
Fourth

Component

Component
Component
Component
Component

Answer:

Components	Answer Area
Discount list	Create Order
Product family	First
Unit groups	Second
Price lists	Third
	Fourth
	Component
	Discount list
	Unit groups
	Product family
	Price lists

Explanation

Create Order	Component
First	Discount list
Second	Unit groups
Third	Product family
Fourth	Price lists

Reference:

<https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/set-up-product-catalog-walkthrough>

NEW QUESTION: 12

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

Answer: ([SHOW ANSWER](#))

NEW QUESTION: 13

You manage a default Dynamics 365 for Sales environment. You are configuring a sales dashboard.

You need to create an interactive dashboard.

Which three entities can you use? Each correct answer presents a complete solution.

NOTE: Each correct selection is worth one point.

- A. Queue Item
- B. Opportunity
- C. Knowledge Article
- D. Case
- E. Invoice

Answer: ([SHOW ANSWER](#))

Explanation

References:

<https://docs.microsoft.com/en-us/dynamics365/customer-engagement/customize/configure-interactive-dashboards>

NEW QUESTION: 14

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.

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

- Price lists
- Competitor list

Action

- Action
- Action

Answer:

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

- Price lists
- Competitor list

Action

- Add the manager's user ID to the correct business unit
- Export the list to a file

Explanation

Information

- Price lists
- Competitor list

Action

- Add the manager's user ID to the correct business unit
- Export the list to a file

NEW QUESTION: 15

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

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

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

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

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

NOTE: Each correct selection is worth one point.

Parameter

Option

Entity

	▼
Lead	
Quote	
Opportunity	
Invoice	

Date field

	▼
Actual Close Date	
Created on Date	
Final Decision Date	



Revenue field

	▼
Total Amount	
Budget Amount	
Actual Revenue	

Answer:

Parameter	Option										
Entity	<table border="1"><tr><td></td><td>▼</td></tr><tr><td colspan="2">Lead</td></tr><tr><td colspan="2">Quote</td></tr><tr><td colspan="2">Opportunity</td></tr><tr><td colspan="2">Invoice</td></tr></table>		▼	Lead		Quote		Opportunity		Invoice	
	▼										
Lead											
Quote											
Opportunity											
Invoice											
Date field	<table border="1"><tr><td></td><td>▼</td></tr><tr><td colspan="2">Actual Close Date</td></tr><tr><td colspan="2">Created on Date</td></tr><tr><td colspan="2">Final Decision Date</td></tr></table>		▼	Actual Close Date		Created on Date		Final Decision Date			
	▼										
Actual Close Date											
Created on Date											
Final Decision Date											
Revenue field	<table border="1"><tr><td></td><td>▼</td></tr><tr><td colspan="2">Total Amount</td></tr><tr><td colspan="2">Budget Amount</td></tr><tr><td colspan="2">Actual Revenue</td></tr></table>		▼	Total Amount		Budget Amount		Actual Revenue			
	▼										
Total Amount											
Budget Amount											
Actual Revenue											

Explanation

Parameter	Option
Entity	▼ Lead Quote Opportunity Invoice
Date field	▼ Actual Close Date Created on Date Final Decision Date
Revenue field	▼ Total Amount Budget Amount Actual Revenue

NEW QUESTION: 16

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

Answer: ([SHOW ANSWER](#))

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.

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NEW QUESTION: 17

You are a Dynamics 365 for Sales environment.

You need to implement the Social Selling Assistant.

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

NOTE: Each correct selection is worth one point.

Requirement

Install and configure additional required software.

Ensure that Social Assistant can be used on a dashboard

Technology or feature

	▼
Social engagement	
Dynamics 365 AI for Sales	

	▼
Relationship Assistant	
Search topics	

Answer:

Requirement

Install and configure additional required software.

Ensure that Social Assistant can be used on a dashboard

Technology or feature

	▼
Social engagement	
Dynamics 365 AI for Sales	

	▼
Relationship Assistant	
Search topics	

Explanation

Requirement

Install and configure additional required software.

Ensure that Social Assistant can be used on a dashboard

Technology or feature

	▼
Social engagement	
Dynamics 365 AI for Sales	

	▼
Relationship Assistant	
Search topics	

NEW QUESTION: 18

You manage the Dynamics 365 environment for Contoso, Ltd. A rule automatically creates a lead associated with an email when an email is sent to sales@contoso.com.

You need to ensure that the marketing manager receives an email each time an email request is sent to sales@contoso.com.

How should you configure the rule? To answer, drag the appropriate actions to the correct requirements. 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.

Actions

Create a business process flow

Create a child workflow

Create a real-time workflow

Answer Area

Requirement

Create an email.

Send the email.

Action

Action

Action

Answer:

Actions

Create a business process flow

Create a child workflow

Create a real-time workflow

Answer Area

Requirement

Create an email.

Send the email.

Action

Create a real-time workflow

Create a child workflow

Explanation

Requirement

Create an email.

Send the email.

Action

Create a real-time workflow

Create a child workflow

NEW QUESTION: 19

An organization uses Dynamics 365 for Sales.

You need to create a quote template in Microsoft Word for use in the organization.
What should you do?

- A. Create a flow
- B. Enable dynamic content in Microsoft Word
- C. Enable the Developer tab in Microsoft Word
- D. Enable VBA in Microsoft Word

Answer: ([SHOW ANSWER](#))

Explanation

References:

<https://docs.microsoft.com/en-us/dynamics365/customer-engagement/admin/using-word-templates-dynamics-365>

NEW QUESTION: 20

An organization uses Dynamics 365 Sales to manage customer relationships.

When a potential customer submits an email inquiry, the system must create a lead record and send a response.

You need to ensure that a lead record is created for the potential customer and a reply email is sent.

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

NOTE Each correct selection is worth one point.

Answer Area

Requirement	Action
Ensure an auto response is sent.	☐ Configure a record creation and update rule. ☐ Configure a business process flow.
Create a lead.	☐ Specify auto-response settings. ☐ Specify conditions for record creation.

Answer:

Answer Area

Requirement	Action
Ensure an auto response is sent.	☒ Configure a record creation and update rule. ☐ Configure a business process flow.
Create a lead.	☐ Specify auto-response settings. ☒ Specify conditions for record creation.

Explanation

Requirement	Action
Ensure an auto response is sent.	☒ Configure a record creation and update rule ☐ Configure a business process flow
Create a lead	☐ Specify auto-response settings ☒ Specify conditions for record creation

NEW QUESTION: 21

You are a Dynamics 365 for Sales administrator.

You need to implement Versium Predict with custom views.

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.

Actions

- Add custom views using Versium Predict solution
- Authenticate Versium Predict
- Install Versium Predict from the Dynamics 365 Administration Center
- Install Versium Predict from Microsoft AppSource
- Add custom views using web resources

Answer Area



Answer:

Actions

- Add custom views using Versium Predict solution
- Authenticate Versium Predict
- Install Versium Predict from the Dynamics 365 Administration Center
- Install Versium Predict from Microsoft AppSource
- Add custom views using web resources

Answer Area



Explanation

Install Versium Predict from Microsoft AppSource

Authenticate Versium Predict

Add custom views using web resource



NEW QUESTION: 22

You need to create and configure access to the Orders report and the Discounts by Number of Employees report.

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

NOTE: Each correct selection is worth one point.

Report type	Option
Orders	▼ SQL Server Reporting Services Fetch-based Reporting Services
Discounts by Number of Employees	▼ SQL Server Reporting Services Fetch-based Reporting Services

Answer:

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

Explanation

Report type	Option
Orders	▼ SQL Server Reporting Services Fetch-based Reporting Services
Discounts by Number of Employees	▼ SQL Server Reporting Services Fetch-based Reporting Services

NEW QUESTION: 23

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

Answer: ([SHOW ANSWER](#))

NEW QUESTION: 24

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.

Requirement	Configuration
Send quotes in a read-only format	☐ Use PDF ☐ Use XML ☐ Use RTP ☐ Use CSV
Create a standardized quote that can be re-used	☐ Create a Word template ☐ Create a Fetch XML report ☐ Create a PowerBI app

Answer:

Modifications	Addition	Modification
Modify the Close Opportunity form.	Add sales manager	Modify the Opportunity entity field.
Modify the Opportunity entity and Opportunity Close entity fields.	Add lost reasons	Modify the Close Opportunity form.
Modify the Leads entity form.		
Modify the Opportunity entity field.		

Explanation

Requirement	Configuration
Send quotes in a read-only format	Use PDF
Create a standardized quote that can be re-used	Create a Word template

NEW QUESTION: 25

You use business process flows for all Dynamics 365 opportunities.

Some opportunities are closed before business process flow durations are calculated.

You need to ensure that business process flow duration values are calculated.

Solution: At any stage in the business process flow prior to the final stage, select Finish.

Does the solution meet the goal?

A. Yes

B. No

Answer: ([SHOW ANSWER](#))

NEW QUESTION: 26

You use Dynamics 365 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.

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:

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

Explanation

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

NEW QUESTION: 27

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.

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:

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

Explanation

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

NEW QUESTION: 28

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.

You use business process flows for all Dynamics 365 opportunities.

Some opportunities are closed before business process flow durations are recalculated.
 You need to ensure that business process flow duration values are calculated.
 Solution: When closing an opportunity, use the Close as Won dialog.

Does the solution meet the goal?

A. No

B. Yes

Answer: ([SHOW ANSWER](#))

NEW QUESTION: 29

You need to create a discount list for ticket sales.

Which pricing methods should you use? To answer, select the appropriate method in the dialog box in the answer area.

NOTE: Each correct selection is worth one point.

Ticket price	Method
Alumni	☐ Percent Markup – Current Cost ☐ Percent Margin – Current Cost ☐ Percent Margin – Standard Cost
Non-alumni	☐ Percent Markup – Current Cost ☐ Percent Margin – Current Cost ☐ Percent Margin – Standard Cost

Answer:

Requirement	Action
Ensure an auto response is sent.	☐ Configure a record creation and update rule. ☐ Configure a business process flow.
Create a lead.	☐ Suspend auto-response settings. ☐ Specify conditions for record creation.

Explanation

Answer Area

Ticket price	Method
Alumni	Percent Markup – Current Cost
Non-alumni	Percent Margin – Current Cost

NEW QUESTION: 30

You need to configure the system for incoming email to support creation of leads from email requirements.

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

NOTE: Each correct selection is worth one point.

Requirement

Action

Create leads from incoming emails

Create a Queue and Record Creation Rule
Create a Workflow for incoming emails
Create an Action to trigger a plug-in

Do not create contacts from emails from unknown senders



Microsoft

Disable Create records for emails from unknown senders
Enable duplicate detection rules for emails
Disable duplicate detection rules for leads
Enable Create Lead in email tracking

Answer:

Solutions

- Free Sales Insights only
- Advanced Sales Insights only
- Free Sales Insights or Advanced Sales Insights

Answer Area

Analysis

- Email messages
- Relationship between accounts
- Communication between customer and representative

Solution

- Free Sales Insights only
- Advanced Sales Insights only
- Free Sales Insights or Advanced Sales Insights

Explanation

Requirement

Create leads from incoming emails

Do not create contacts from emails from unknown senders

Action

Create a Queue and Record Creation Rule
Create a Workflow for incoming emails
Create an Action to trigger a plug-in

Disable Create records for emails from unknown senders
Enable duplicate detection rules for emails
Disable duplicate detection rules for leads
Enable Create Lead in email tracking

Reference:

<https://docs.microsoft.com/en-us/dynamics365/customer-service/set-up-rules-to-automatically-create-or-update-r>

NEW QUESTION: 31

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

Answer: (SHOW ANSWER)

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NEW QUESTION: 32

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.

Type	Action
Existing email	Track the email from Advanced Find Set the regarding field on the email from Dynamics 365 App for Outlook
New email	Add an email from Lead Timeline Insert a Lead email template

Answer:

Type

Existing email

New email

Action
Track the email from Advanced Find Set the regarding field on the email from Dynamics 365 App for Outlook
Add an email from Lead Timeline Insert a Lead email template

Explanation

Type

Existing email

New email

Action

Action
Track the email from Advanced Find Set the regarding field on the email from Dynamics 365 App for Outlook
Add an email from Lead Timeline Insert a Lead email template

NEW QUESTION: 33

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.

Components

Products Price Lists

Discount Lists Unit Groups

Answer Area

Entry description

Drink flavors list

Four or more cases

Combination of flavors

One can

Component

Component

Component

Component

Answer:

Components

Products Price Lists

Discount Lists Unit Groups

Answer Area

Entry description

Drink flavors list

Four or more cases

Combination of flavors

One can

Component

Unit Groups

Discount Lists

Discount Lists

Products

Explanation

Components

Products Price Lists

Discount Lists Unit Groups

Answer Area

Entry description

Drink flavors list

Four or more cases

Combination of flavors

One can

Component

Unit Groups

Discount Lists

Discount Lists

Products

NEW QUESTION: 34

You are a Dynamics 365 administrator.

You need to configure action cards in Relationship Assistant.

Which action card should you enable for each scenario? To answer, drag the appropriate action cards to the correct scenarios. Each action card 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.

Action cards

Base
Email from Microsoft Exchange
Email engagement
Today

Answer Area

Scenario	Action card
Upcoming meeting reminder	Action card
An email is opened	Action card



Answer:

Action cards

Base
Email from Microsoft Exchange
Email engagement
Today

Answer Area

Scenario	Action card
Upcoming meeting reminder	Email from Microsoft Exchange
An email is opened	Email engagement



Explanation

Scenario

Action card

Upcoming meeting reminder

Email from Microsoft Exchange

An email is opened

Email engagement



Microsoft

References:

<https://community.dynamics.com/crm/b/crmpowerobjects/archive/2018/12/31/enable-and-configure-relationship->

NEW QUESTION: 35

You need to determine the cause of the error for approved quotes.

Why does the error occur?

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

D. The opportunity is in Active state.

Answer: ([SHOW ANSWER](#))

NEW QUESTION: 36

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

Answer: ([SHOW ANSWER](#))

Explanation

References:

<https://docs.microsoft.com/en-us/dynamics365/customer-engagement/developer/convert-opportunity-quotesales->

NEW QUESTION: 37

You are a sales manager at an international company using Dynamics 365Sales.

You need to set up the product catalog.

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.

Actions

Add the product grid on order forms.
Translate product names.
Create product families.
Add price list items.
Revise a product.
Create price lists.
Create a unit group.

Answer area

Microsoft

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Answer:

Actions

Add the product grid on order forms.
Translate product names.
Create product families.
Add price list items.
Revise a product.
Create price lists.
Create a unit group.

Answer area

Create a unit group.
Create product families.
Create price lists.
Add price list items.

Microsoft

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Explanation

ACTIONS

Add the product grid on order forms.

Translate product names.

Revise a product.

Answer area

1 Create a unit group.

2 Create product families.

3 Create price lists.

4 Add price list items.



Microsoft

**NEW QUESTION: 38**

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.

Components	Answer Area
Product Bundle	
Product Family	
Product	
Properties	

Answer:

Components	Answer Area
Product Bundle	Product
Product Family	Product Family
Product	Properties
Properties	

Explanation

Components	Answer Area
Product Bundle	1 Product
	2 Product Family
	3 Properties

NEW QUESTION: 39

You are a Dynamics 365 administrator for a company. The company's fiscal year is April 1 through March 31.

You need to create a system view for all users that displays data for the current fiscal year by default.

What should you do?

- A. Set up fiscal year settings and create a view in the default solution
- B. Set up fiscal year settings and create a view from the advanced find

- C. Use date ranges to create a view in the default solution
D. Use date ranges to create a view from the advanced find

Answer: ([SHOW ANSWER](#))

NEW QUESTION: 40

You use opportunities with products and price lists in Dynamics 365 for Sales.

You need to add products that 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.

Requirement	Action
Add the products to the opportunity.	Add both price 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

Answer:

Requirement	Action
Add the products to the opportunity.	Add both price 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

Explanation

Add the products to the opportunity.	Add both price 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

NEW QUESTION: 41

A company uses Dynamics 365 Sales Professional.

A new enterprise sales team must be created. The sales manager will be responsible for adding members and removing members from the team.

You need to create the new sales team.

Which two values must you configure? Each correct answer presents part of the solution.

NOTE: Each correct selection is worth one point.

- A. Team administrator
- B. Business unit name
- C. Team description
- D. Team name
- E. Team channel name

Answer: ([SHOW ANSWER](#))

NEW QUESTION: 42

You are working a list of leads in Dynamics 365 Sales.

You have a custom security role that contains the following privileges:

- * create and edit user-level privileges on the lead and note entities
- * business unit-level append, append to, and assign privileges on the lead and note entities
- * organization-level share privileges on the lead and note entities

You need to perform the following actions on leads:

- * Add notes to leads
- * Assign leads to other users

How should you manage leads? To answer, select the appropriate options in the answer area.

NOTE: Each correct selection is worth one point.

Scenario	Privilege
Add notes to leads	Leads owned by people in your business unit only Leads owned by you only Leads owned by anyone in your organization
Assign leads to other users	Leads owned by your business unit and its child business units only Leads owned by people in your business unit only Leads owned by anyone in your organization

Answer:

Scenario	Privilege
Add notes to leads	Leads owned by people in your business unit only Leads owned by you only Leads owned by anyone in your organization
Assign leads to other users	Leads owned by your business unit and its child business units only Leads owned by people in your business unit only Leads owned by anyone in your organization

Explanation

Scenario	Privilege
Add notes to leads	Leads owned by you only
Assign leads to other users	Leads owned by anyone in your organization

NEW QUESTION: 43

You send a quote to a client. The client calls and negotiates a better price.

You need to send a revised quote to the client.

What is required to modify the quote? To answer, select

NOTE: Each correct selection is worth one point.

Question

Which action should you perform?

Response

	▼
Edit	
Close Quote	
Deactivate	
Reopen Quote	

What is the resulting status for the quote after you perform the action?

	▼
Draft	
Revised	
In Progress	
Open	

Answer:

Question

Which action should you perform?

Response

	▼
Edit	
Close Quote	
Deactivate	
Reopen Quote	

What is the resulting status for the quote after you perform the action?

	▼
Draft	
Revised	
In Progress	
Open	

Explanation

Question

Response

Which action should you perform?

▼

Edit

Close Quote

Deactivate

Reopen Quote

What is the resulting status for the quote after you perform the action?

▼

Draft

Revised

In Progress

Open

NEW QUESTION: 44

You manage a Dynamics 365 environment. You introduce a new product. Opportunities with the product are created.

You need to find all opportunities that include the product.

What should you use?

- A. Quick Find
- B. Advanced find
- C. Relevance Search
- D. Categorized Search

Answer: ([SHOW ANSWER](#))

NEW QUESTION: 45

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.

Scenario	Action
Products are associated with a quote record	▼ Manually add the products to the opportunity Use the Get Products option Associate the quote with the opportunity
Add a product bundle to the opportunity	▼ Add a write-in product Add an existing product Add the product bundle price list

Answer:

Scenario	Action
Products are associated with a quote record	▼ Manually add the products to the opportunity Use the Get Products option Associate the quote with the opportunity
Add a product bundle to the opportunity	▼ Add a write-in product Add an existing product Add the product bundle price list

Explanation

Scenario	Action
Products are associated with a quote record	▼ Manually add the products to the opportunity Use the Get Products option Associate the quote with the opportunity
Add a product bundle to the opportunity	▼ Add a write-in product Add an existing product Add the product bundle price list

NEW QUESTION: 46

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.

Quantity	Discount type parameter
10	☐ Begin Quantity ☐ End Quantity ☐ Percentage
20	☐ Begin Quantity ☐ End Quantity ☐ Percentage
42	☐ Begin Quantity ☐ End Quantity ☐ Percentage

Answer:

Action cards	Answer Area						
Base Email from Microsoft Exchange Email engagement Today	<table border="1"> <thead> <tr> <th>Scenario</th> <th>Action card</th> </tr> </thead> <tbody> <tr> <td>Upcoming meeting reminder</td> <td>Email from Microsoft Exchange</td> </tr> <tr> <td>An email is opened</td> <td>Email engagement</td> </tr> </tbody> </table>	Scenario	Action card	Upcoming meeting reminder	Email from Microsoft Exchange	An email is opened	Email engagement
Scenario	Action card						
Upcoming meeting reminder	Email from Microsoft Exchange						
An email is opened	Email engagement						

Explanation

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

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NEW QUESTION: 47

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

Answer: (SHOW ANSWER)

NEW QUESTION: 48

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

Answer: (SHOW ANSWER)

Reference:

<https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/use-properties-describe-product>

NEW QUESTION: 49

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

Answer: ([SHOW ANSWER](#))

Explanation

References:

<https://docs.microsoft.com/en-us/dynamics365/customer-engagement/developer/convert-opportunity-quotesales-order-invoice>

NEW QUESTION: 50

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

Answer: ([SHOW ANSWER](#))

Explanation

References:

<https://docs.microsoft.com/en-us/dynamics365/customer-engagement/sales-professional/create-unit-groupadd-un>

NEW QUESTION: 51

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.

You are a Dynamics 365 Sales system administrator.

The sales team wants to use automated conversation starters.

You need to ensure that the controls are available to developers.

Solution: Create a subscription to Microsoft Relationship Sales and enable JavaScript and pop-up blockers.

Does the solution meet the goal?

A. Yes

B. No

Answer: ([SHOW ANSWER](#))

NEW QUESTION: 52

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

Answer: (SHOW ANSWER)

Reference:

<https://docs.microsoft.com/en-us/dynamics365/customerengagement/on-premises/customize/add-ready-use-busin>

NEW QUESTION: 53

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

Answer: C (LEAVE A REPLY)

NEW QUESTION: 54

You are a Dynamics 365 for Sales administrator. You have an interactive experience leads dashboard.

You need to create a filtered view of the dashboard.

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

NOTE: Each correct selection is worth one point.

Action	Option
View the required charts.	Select Open Views Select Show Visual Filter Select Show Global Filter
Save the dashboard filters.	Use Visual Filter Use Global Filter

Answer:

 **Action**
View the required charts.

Save the dashboard filters.

Option

	▼
Select Open Views	
Select Show Visual Filter	
Select Show Global Filter	
	▼
Use Visual Filter	
Use Global Filter	

Explanation

Action

View the required charts.

Save the dashboard filters.



Option

	▼
Select Open Views	
Select Show Visual Filter	
Select Show Global Filter	
	▼
Use Visual Filter	
Use Global Filter	

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