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NEW QUESTION: 1
A company uses Dynamics 365 Sales. You have administrator privileges. The sales manager plans to require the sales team to track emails from Microsoft Outlook. You need to direct users to where they can deploy their own App for Outlook instance. To where should you direct them?
A. Advanced settings
B. Email settings
C. Microsoft AppSource
D. Dynamics 365 App for Outlook area
Answer: (SHOW ANSWER)

NEW QUESTION: 2
You need to ensure that a user named User1 can assign salespeople to sales territories. The solution must use the principle of least privilege. To which security role should you assign User1?
A. CEO - Business Manager
B. Salesperson
C. Marketing Professional
D. Common Data Service
Answer: (SHOW ANSWER)

NEW QUESTION: 3
You need to create invoices for all customers.
Which products should you use? To answer, select the appropriate options in the answer area.
NOTE: Each correct selection is worth one point.
Answer:

NEW QUESTION: 4

You manage a Dynamics 365 Sales environment. Many activities are associated with opportunities.
Managers must be able to determine how the relationship with customers is trending for each opportunity.
You need to implement a solution.
Which solution should you implement?
A. Sales Insights
B. Dynamics 365 for Sales content pack for Microsoft Power BI
C. LinkedIn Sales Navigator
D. Relationship Assistant
E. Social Selling Assistant
Answer: (SHOW ANSWER)

NEW QUESTION: 5
You are a Dynamics 365 Sales consultant for a food service company. The company caters for client companies.
The company wants to set up a product bundle so that the sales staff does not forget items when they create an opportunity.
The lunch bundle is created at $200.00. It will include the following.
You need to explain how the sales staff should manage the product bundle in the opportunity.
What should they do for each scenario? To answer, select the appropriate options in the answer area.
NOTE: Each correct selection is worth one point.
Answer:
Reference:
https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/pricing-product-bundles

NEW QUESTION: 6
A company uses Dynamics 365 for Sales. The company has not made changes to any of the default security roles.
You need to ensure that users can assign salespeople to sales territories.
Which security role can you use?
A. Delegate
B. Sales Manager
C. Sales Person
D. System Customizer
Answer: (SHOW ANSWER)

NEW QUESTION: 7
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.

Answer:

1 - Create a new customer account in Dynamics 365 for Sales
2 - Create a new order for the customer
3 - Add products form inventory for the sale
4 - Add customer address and shipping information
5 - Pick items and ship order

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

NEW QUESTION: 8

A company is using Relationship Analytics. The company emails customers three times a month. To increase customer loyalty, the company is adding a policy that requires sales representatives to meet with customers two times a quarter as well.

You need to update the settings.

What should you configure?

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

Answer: (SHOW ANSWER)

NEW QUESTION: 9

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.

Answer:

NEW QUESTION: 10

You need to set up the required sales tracking for multinational customers.
C? Each correct answer presents part of the solution.
NOTE: Each correct selection is worth one point.

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

Answer: (SHOW ANSWER)

NEW QUESTION: 11

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

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

Answer: (SHOW ANSWER)

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

NEW QUESTION: 12

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

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

Answer: (SHOW ANSWER)

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

NEW QUESTION: 13

You are creating a new account form for Inside sales. The company name is in the account name field. Company employees are entered as contacts.
The form must meet the following requirements with minimal additions:
* List employee names.
* include the street address, city, and state as one field.
* Include columns to allow for entry of three separate email addresses.

* Ensure that users can only edit the phone number and email columns.
You need to configure the form.
Which option should you use? To answer, select the appropriate options in the answer area.
NOTE: Each correct selection is worth one point.
Answer:

NEW QUESTION: 14
You need to resolve the sales manager's issue regarding private box customers.
What should you do?
A. Convert the sales manager's emails lo opportunities.
B. Convert the sales manager's emails to leads.
C. Convert the dean's phone call to an opportunity.
D. Convert all incoming phone calls to leads.
Answer: (SHOW ANSWER)

NEW QUESTION: 15
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.
Answer:
1 - Install Versium Predict from Microsoft AppSource
2 - Authenticate Versium Predict
3 - Add custom views using web resources

NEW QUESTION: 16
A company uses Microsoft 365 and Dynamics 365 Sales. The company sets up server-side synchronization in preparation for mailbox configuration.
A new business manager must be able to approve mailboxes for users.
You need to assign roles to the business manager by using the principle of least privilege.
Which roles should you assign? To answer, select the appropriate option in the answer area.
NOTE: Each correct selection is worth one point.
Answer:

NEW QUESTION: 17
Note: This question is part of a series of questions that present the same scenario. Each question in the series contains a unique solution that might meet the stated goals. Some question sets might have more than one correct solution, while others might not have a correct solution.
After you answer a question, you will NOT be able to return to it. As a result, these questions will not appear in the review screen.
A company uses Dynamics 365 Sales.
You create a playbook to send documents to new sales managers.
You need to configure the system to record all activity associated with each playbook.
Solution: Enable the playbook in Playbook settings.
Does the solution meet the goal?
A. Yes
B. No
Answer: B (LEAVE A REPLY)
Activity tracking is enabled in the Playbook template.
Reference:
https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/track-playbook-activities

NEW QUESTION: 18
You need to determine the cause of the issue with desktop users and business cards.
What is the cause of the issue?
A. The AI Builder Business Card control needs to be configured for the field on the form.
B. A business rule needs to be set up to show the field.
C. Show image on the form is not selected in Form Properties.
D. The field needs to be added to the form.
E. The users do not have the appropriate permissions.
Answer: C (LEAVE A REPLY)

NEW QUESTION: 19
You work for a company using Dynamics 365 for Sales.
When customers call the company, they must provide their quote number. Customers report that quote numbers are too long.
You need to shorten quote numbers to the minimum possible length.
What should you do?
A. Change the field type from auto number to decimal number
B. Reduce the auto number prefix to one character
C. Reduce the suffix length to four characters
D. Ensure that the prefix setting is read-only

Answer: (SHOW ANSWER)
Reference:
https://docs.microsoft.com/en-us/dynamics365/customer-engagement/admin/change-auto-number-prefixcontract- case-article-quote-order-invoice-campaign-category-knowledge-articles

NEW QUESTION: 20
A company implements Dynamics 365 Sales Insights.
You must implement predictive forecasting.
You need to confirm that fields are populated prior to deployment.
Which field must you populate? To answer, drag the appropriate fields to the correct requirements. Each field 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.
Answer:

NEW QUESTION: 21
You are creating orders from quotes in Dynamics 365.
In some circumstances, customers no longer require an order. In other circumstances, your company delivers the order.
You need to ensure that closed orders use existing functionality to reflect the circumstances.
Which two methods of closing an order are available out of the box? Each correct answer presents a complete solution.
NOTE: Each correct selection is worth one point.
A. Cancel
B. Activate
C. Accept
D. Fulfill
Answer: (SHOW ANSWER)
Reference:
https://docs.microsoft.com/en-us/dynamics365/customer-engagement/sales-enterprise/create-edit-order-sales

NEW QUESTION: 22
You cancel an order in Dynamics 365 Sales by mistake.
You need to mark the order status as fulfilled instead of cancelled.
What should you do?
A. Change the order status fulfilled.
B. Activate the order and change the order status to fulfilled.
C. Recreate the order.
D. Add the products back in to the original order.
Answer: (SHOW ANSWER)

Reference:
https://docs.microsoft.com/en-us/dynamics365/sales-professional/create-orders-sp

NEW QUESTION: 23

You are using a forecast template. You must configure the forecast by territory. You need to configure the forecast parameters. Which parameter should you configure?

A. Hierarchy entity

B. Hierarchy relationship

C. Rollup entity

D. Top of hierarchy

Answer: (SHOW ANSWER)

NEW QUESTION: 24

You need to configure the RFQ Won/Loss chart.

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

NOTE: Each correct selection is worth one point.

Answer:

Topic 5, Liberty's Delightful Sinful Bakery & Cafe

Discounts

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

* 10 percent off for 10-19 items
* 20 percent off for 20-49 items
* 30 percent off for more than 50 items

Job roles

EmployecA:

* Manages the Commercial territory
* Will also manage the new Retail terntory starting next month
* Responsible for all sales functions, including forecasting and product management EmployeeB:
* Hired for retail sales only
* Must create new accounts and contacts but should not be able to create or edit products

EmployeeC:

* Serves as a Liberty's executive
* Requires read-only access to Contacts and Accounts tables in Dynamics 365 Sales Employee:
* Serves as an operations manager, responsible for managing orders and deliveries General
* With the acquisition of the retail company, new bread types must be added. These bread types must apply to loaves and buns.
* A lead must be generated from an activity record.
* Liberty's wants to improve accuracy about Accounts and Contacts but does not want to track messages generated outside of the system.

* With the addition of the retail branch. Liberty's must create a forecasting model to estimate the revenue for the next quarter.
* If a phone call is received from a new potential customer, a lead must be generated from the activity record.
* Liberty's must automatically maintain current account and contact information.
* The system must be able to rate the health of an opportunity based on the following scale:
o 1 = Good
o 2 = Fair
o 3 = Poor
* The health rating must include all conversations and interactions, including those on social media.
Issues
* A duplicate detection rule is set up, and the flag to check for duplicates is turned on; however, duplicates still exist.
* EmployeeB and other employees notice that all their opportunities are rated as Good, but when reviewing the activities, they see that the rating should be Poor.
* User1 complains that the user's message responses to leads in LinkedIn are missing.
* TesterA cannot find the model-driven app to test.
* Liberty's receives an email with a customer order. When the customer calls to pay with a credit card over the phone, Liberty's cannot find the customer order.

NEW QUESTION: 25
You are a sales representative and use Dynamics 365 Sales.
You are working with the following lead record:
Use the drop-down menus to select the answer choice that answers each question based on the information presented in the graphic.
NOTE: Each correct selection is worth one point.
Answer:

NEW QUESTION: 26
You need to increase efficiency and consistency for ticket sales to meet company requirements.
What should you create?
A. a Microsoft Flow workflow
B. a playbook
C. a Lifecycle Services (LCS) package
Answer: (SHOW ANSWER)
Enforce repeatable steps to promote and increase efficiency and consistency for ticket sales across all sports and venues.
Reference:
https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/enforce-best-practices-playbooks

NEW QUESTION: 27

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 an End Date for the Price List to ensure the Price List is expired

B. Set the Invoice Product to Override Price

C. Set the Invoice Product to Use Default

D. Set an End Date for the Price List to ensure the Price List is not expired

Answer: (SHOW ANSWER)

NEW QUESTION: 28

Sales representatives at an organization have access to the contact records in their business unit.

You need to ensure that sales representatives can access contact records in all business units that are subordinate to their business unit. Sales representatives must not have access to other records in the organization.

Which access level should you assign to the Contact entity?

A. User

B. Organization

C. Parent: Child Business Unit

D. Business Unit

Answer: (SHOW ANSWER)

Reference:

https://docs.microsoft.com/en-us/power-platform/admin/security-roles-privileges

NEW QUESTION: 29

A company plans to close early on the last day of the month for an employee celebration.

You need to configure Dynamics 365 to prevent scheduling of sales support resources for that day.

Which feature should you use?

A. Events

B. Business closure

C. Fiscal calendar

D. Time off request

Answer: (SHOW ANSWER)

Reference:

https://docs.microsoft.com/en-us/dynamics365/customer-engagement/customer-service/set-when-businessclosed-csh

NEW QUESTION: 30

You need to resolve the issues on the ticket's dashboard.

Which configurations should you change? To answer, select the appropriate options in the answer area.
NOTE: Each correct selection is worth one point.
Answer:

NEW QUESTION: 31
You need to implement dashboards.
Which URL should you use?
A. https://bellowscollege.crm.dynamics.com
B. http://bellowscollege.crm.dynamics.com
C. https://bellowscollege.dynamics.com
D. https://crm.bellowscollege.dynamics.com
Answer: (SHOW ANSWER)
Topic 2, Humongous insurance
To start the case study
To display the first question in this case study, click the Next 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 ate 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.
* Salesperson! 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 mettles 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 their managers keep track of where they are in the sales process.
* Use out-of-the-box reports where possible.
* Generate invoice numbers automatically.
* Begin invoice numbers with the letters INV.
* Allow managers to be able to view a diagram and dull down to leads converted in the last 30 days.
Issues
* Salespeople cannot identify the sales process stage process for each customer.
* Updated products are not easily updated within the product groups.
* There is no pricing tool.
* Salespeople must research each product every time they have to Quote a customer on a product
* UserA is unable to 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: 32
You need to configure pricing for the Contoso, Ltd. invoice.
What should you do?
A. Set the Invoice Product to Override Price
B. Configure an end date for the price list
C. Set the Invoice Product to Use Default
Answer: (SHOW ANSWER)

NEW QUESTION: 33
A company uses Dynamics 365 Sales. The company uses their organizational structure to determine how to aggregate forecasts for each year.
The company divides a business unit into three separate units. Each unit will have a new manager.
You need to update the quotas for each user for the current fiscal year's forecast.
Which two actions should you perform? Each correct answer presents part of the solution.
NOTE: Each correct selection is worth one point.
A. Update the target goal amount for each user.
B. Adjust the forecast values directly.
C. Assign the users to their new managers.
D. Create and assign users to new resource groups for each manager.
E. Upload the new quota amounts for each user.
Answer: (SHOW ANSWER)

NEW QUESTION: 34
You need to resolve the issue reported by User1.
Which three actions should you perform? Each correct answer presents part of the solution.
NOTE: Each correct selection is worth one point.
A. Enable CRM sync and activity writeback.
B. install Linkedin Sales Navigator and enable it.
C. Create a tab for LinkedIn Sales Navigator and make it visible.
D. Configure LinkedIn Sales Navigator Lead lookup control.
E. Configure the connection graph.
Answer: (SHOW ANSWER)

NEW QUESTION: 35

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 in the review screen.

You are configuring Dynamics 365 Sales for a US-based company as follows:

Utah to California is the West territory

Illinois to Colorado is the Central territory.

Maine to Indiana is the East territory.

The company wants the territories set up as follows:

Salespersons 1 and 2 sell in the West territory.

Salespersons 5 and 6 sell in the Central territory.

Salespersons 3 and 4 sell in the East territory.

Postal code for each state used as the location.

You need to set up the territories.

Solution:

Create the West territory, add the manager.

Add members for each territory and save.

Repeat for the Central and East territories.

Add connections to each territory.

Does the solution meet the goal?

A. Yes

B. No

Answer: (SHOW ANSWER)

Reference:

https://docs.microsoft.com/en-us/dynamics365/customerengagement/on-premises/admin/set-up-sales-territories-organize-business-markets-geographical-area?view=op-9-1

https://docs.microsoft.com/en-us/dynamics365/field-service/set-up-territories

NEW QUESTION: 36

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.

Answer:

NEW QUESTION: 37

You are a Dynamics 365 system customizer. You create a price list with related products. Sales team members use the list to generate opportunities, quotes, and orders.
You need to create a product family.
What should you do?
A. Add a new product family to an existing product family
B. Delete the existing price list and create a new one
C. Create a unit group for use with the product family
D. Add a parent product family to an existing product family
Answer: (SHOW ANSWER)
Reference:
https://docs.microsoft.com/en-us/dynamics365/customer-engagement/sales-enterprise/create-product-family

NEW QUESTION: 38
You are a Dynamics 365 Sales administrator for a medical office. The office provides a new service for doctors to consult with patients online on a first come, first served basis. Patients are created as Contacts. Doctors can only view patient records for patients in their care.
The doctors need to see a graph of all interactions with each patient.
You need to create an entity to log online interactions.
How should you configure the entity? To answer, select the appropriate options in the answer area NOTE: Each correct selection is worth one point.
Answer:

NEW QUESTION: 39
A company uses Dynamics 365 Sales with assignment rules. The assignment rules use a segment to filter the lead records.
A sales manager wants to automatically add a series of tasks by using the same criteria as the assignment rules.
You need to create the tasks and assign the tasks to the lead records.
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.
Answer:
1 - Connect the existing segment to the sequence.
2 - Create a sequence.
3 - Add tasks to the sequence.
4 - Activate the sequence.

NEW QUESTION: 40
A company is evaluating Dynamics 365 Sales licenses. The sales manager wants the following features:
* knowledge management

* sequence designer
* predictive forecasting

You need to recommend sales plans that provide the full feature capabilities in the most cost-effective manner.

Which sales plans should you recommend? To answer, drag the appropriate sales plans to the correct features. Each sales plan may be used once, more than once, or not at all. You may need to drag the spirt bar between panes or scroll to view content.

Answer:

NEW QUESTION: 41

You manage a Dynamics 365 Sales environment.

You need to email the sales manager when salespeople update their 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.

Answer:

1 - Open Settings.

2 - Open Business Management

3 - Configure Automatic Record Creation and Update Rules.

NEW QUESTION: 42

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

A. Communication frequency

B. Exchange data

C. Health score grading

D. Activity influence

Answer: (SHOW ANSWER)

NEW QUESTION: 43

A company uses Dynamics 365 App for Outlook for all Dynamics 365 Sales users.

Some salespeople want to automatically trade and link emails to Dynamics 365 Sales records.

You need to assist salespeople with automatic email tracking.

What should you do?

A. Ask an administrator to enable the automatic tracking setting.

B. In the Dynamics 365 App for Outlook, set up tracking in personal options.

C. Ensure that the email recipient address is the same as the one in Dynamics 365 Sales.

D. Set up tasks in Outlook.

Answer: (SHOW ANSWER)

NEW QUESTION: 44

You need to resolve the missing credit card order.

Which two actions should you perform? Each correct answer presents part of the solution.

NOTE: Each correct selection is worth one point.
A. Convert the email.
B. Create the order.
C. Create a contact
D. Qualify a lead.
Answer: (SHOW ANSWER)

NEW QUESTION: 45
You are a Dynamics 365 administrator for a dental office.
You need to create a process in Sales Hub to ensure that team members perform the following actions:
Call patients to remind them about upcoming appointments.
Update patient contact information.
What should you create?
A. a calendar
B. an on-demand workflow
C. a task flow
D. a business rule
Answer: (SHOW ANSWER)

NEW QUESTION: 46
You create an invoice with products and services for a customer.
You need to add pricing for a product that is not available in the product catalog.
What should you do?
A. Add the product to the order and use Get Products
B. Add a write-in product
C. Add an existing product and change the name and price
D. Add the product to the quote and use Get Products
Answer: (SHOW ANSWER)
Reference:
https://docs.microsoft.com/en-us/dynamics365/customer-engagement/sales-enterprise/add-product-quoteorder-invoice

NEW QUESTION: 47
A sates manager needs to add a new business closure.
You need to configure a new business closure schedule.
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.
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 aproduct 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
You are a Dynamics 365 Sales administrator for an organization.
The organization is no longer going to sell a product in the product catalog.
You need to ensure that the product is no longer available for selection by sales staff.
What should you do?
A. Delete the product
B. Edit the name
C. Retire the product
Answer: (SHOW ANSWER)
Reference:
https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/retire-product

NEW QUESTION: 50
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.

Answer:

Reference:

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

NEW QUESTION: 51

A company uses Dynamics 365 Sales to manage product lines.

You need to set up a catalog of products.

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.

NOTE: More than one order of answer choices is correct. You will receive credit for any of the correct orders you select.

Answer:

1 - Set up discount lists.

2 - Set up measurements.

3 - Set up products.

4 - Set up pricing.

5 - Set up price lists and default pricing.

NEW QUESTION: 52

You have a dashboard that shows the number of completed calls and cancelled calls in a chart.

Sales Representatives mark completed calls by using one of the following values: Wrong Number, Left Message, or Connected.

You need to update the dashboard to display wrong phone numbers.

How should you make the modification? To answer, select the appropriate options in the answer area.

NOTE: Each correct selection is worth one point.

Answer:

NEW QUESTION: 53

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 even lead distribution among salespeople.

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.

Answer:

NEW QUESTION: 54

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

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

Answer: (SHOW ANSWER)

NEW QUESTION: 55

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 calculated.
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. Yes
B. No

Answer: (SHOW ANSWER)

NEW QUESTION: 56

A company enables sales accelerator in Microsoft Dynamics 365 Sales. All salespeople use a custom customer form. A salesperson observes that a work list displays TaskA instead of TaskB for a customer. The salesperson requires the following setup:
* Display only TaskB in the work list.
* View the task on the customer record as a visual cue.
You need to recommend changes to meet the requirements.
What should you do? To answer, select the appropriate options in the answer area.

Answer:

NEW QUESTION: 57

Please wait while the virtual machine loads. Once loaded, you may proceed to the lab section. This may take a few minutes, and the wait time will not be deducted from your overall test time.

When the Next button is available, click it to access the lab section. In this section, you will perform a set of tasks in a live environment. While most functionality will be available to you as it would be in a live environment, some functionality (e.g., copy and paste, ability to navigate to external websites) will not be possible by design.
Scoring is based on the outcome of performing the tasks stated in the lab. In other words, it doesn't matter how you accomplish the task, if you successfully perform it, you will earn credit for that task.
Labs are not timed separately, and this exam may have more than one lab that you must complete. You can use as much time as you would like to complete each lab. But, you should manage your time appropriately to ensure that you are able to complete the lab(s) and all other sections of the exam in the time provided.
Please note that once you submit your work by clicking the Next button within a lab, you will NOT be able to return to the lab.
A sales manager requests to view all the closed opportunities by source campaigns. The manager wants the visual formatted as a stacked bar comparison of which closed opportunities are won versus lost.
You need to configure your environment to provide access to the visual. You must name the visual Opportunities Won vs. Lost by Campaign.
To complete this task, sign in to the Dynamics 365 portal.
Answer:
Create a new chart.
Select bar chart.
Name the chart Opportunities Won vs. Lost by Campaign.
Select the Opportunities view to be used by the chart.
Configure the Legend Entries for Opportunities Won and Opportunities Lost by source campaigns.
Click Save & Close.

NEW QUESTION: 58
You are Dynamics 365 for Sales administrator.
Sales representatives must enter estimated revenue only as an exception.
You need to ensure that estimated revenue for opportunities is automatically calculated.
What should you do?
A. In Personalization settings for each user, change the default revenue type to System Calculated
B. In the System Settings sales tab, change the default revenue type to System Calculated
C. In Opportunities, change the default value of the revenue type to System Calculated
D. In custom controls, change the default revenue setting to System Calculated
Answer: (SHOW ANSWER)

NEW QUESTION: 59

Note: This question is part of a series of questions that present the same scenario. Each question in the series contains a unique solution that might meet the stated goals. Some question sets might have more than one correct solution, while others might not have a correct solution.
After you answer a question, you will NOT be able to return to it. As a result, these questions will not appear in the review screen.
A company uses Dynamics 365 Sales.
You create a playbook to send documents to new sales managers.
You need to configure the system to record all activity associated with each playbook.
Solution: Enable auditing on for the Playbook Activity entity.
Does the solution meet the goal?
A. Yes
B. No
Answer: B (LEAVE A REPLY)
Activity tracking is enabled in the Playbook template.
Reference:
https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/track-playbook-activities

NEW QUESTION: 60
You are a Dynamics 365 Sales system customizer.
You need to create Product Bundles and Product Families.
What should you create? To answer, select the appropriate options in the answer area.
NOTE: Each correct selection is worth one point.
Answer:
Reference:
https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/create-product-bundles-sell-multiple-items-together

NEW QUESTION: 61
A company plans to movetheir 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 meetthe goal?
A. No
B. Yes
Answer: (SHOW ANSWER)

NEW QUESTION: 62
You run an Account Overview report for Fourth Coffee. The following results are displayed.
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.
Answer:
:

NEW QUESTION: 63
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.
Answer:

NEW QUESTION: 64
A company sells telephones. The company has a list of telephone colors that customers can choose.
For one month, the company wants to sell a red phone at a special price.
You need to set up the red phone for the sales team.
How should you configure the product and price list items? To answer, select the appropriate options in the answer area.
NOTE: Each correct selection is worth one point.
Answer:
Reference:
https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/create-price-lists-price-list-items-define-pricing-products

NEW QUESTION: 65
You need to choose which product's solution fits the analysis needed.
Which solutions should you use? To answer, drag the appropriate solutions to the correct analyses. Each solution may be used once, more than once, or not at all You may need to drag the split bar between panes or scroll to view content.

NOTE: Each correct selection is worth one point.

Answer:

Topic 4, Contoso Ltd.

Background

Contoso, Ltd. manufactures electronic components for robotic assembly machines. The company specializes in wiring harnesses that are made to customer specifications.

The company's corporate office and a manufacturing plant are in Detroit. The company also has offices and manufacturing plants in the following countries:

China

Germany

Mexico

United Kingdom (UK)

Current environment

Sales

Customers who have operations in more than one country are managed by the sales team within the country from which a request originated. However, it is difficult to get information about sales for these customers.

Each salesperson manually creates customer quotes using Microsoft Word and Excel templates. This causes pricing inconsistencies, which is affecting profitability.

Customers who have total sales over $1,5M per year receive special Preferred Customer discount pricing on products and services.

Costs, pricing, and product availability vary greatly by country.

Sales teams

Each office has a dedicated sales team. Sales are managed by a global team in countries without a sales office.

Each sales team has a projected revenue target that is tied to the factory capacity in their country, except for the global team. The global team's projected revenue target is derived using a percentage of their actual sales from the previous year.

Each sales team maintains a spreadsheet in which they record customer requests for quotes (RFQs). The spreadsheets are stored on a network drive.

Sales team revenue targets are set yearly based on manufacturing capacities at each plant.

Individual sales targets are based on product lines by quarter.

Current RFQ process

The company defines the following process for processing RFQs:

Requirements

General setup

Standard functionality must be used when possible.

All open RFQs must be imported into the solution.

All information must be accessible to the entire executive management team.

Country-specific sales information must be accessible only to sales representatives assigned to those teams.

Sales and quote processes must be standardized across all sales divisions.
Sales territories must be set up for each country as well as for a global territory.
The global team will take over the management of RFQs for customers who have operations in more than one region.
Due to regulatory considerations, the solution must be able to limit the kinds of products that can be sold by region.
RFQ management
New RFQs must be entered initially into the system as Leads until they are reviewed.
The default forecast categories must be used.
Standardized quote formats and product pricing must be enforced across all sales offices.
All tasks and follow-up activities with customers to close RFQs must be associated directly with the RFQs.
Credit and reference checks
All new customers must undergo credit and reference checks before estimates are created for any RFQs. This information will be recorded in a new custom field called Credit Check that has a Yes/No value.
The finance manager must be assigned the credit and reference review when an RFQ is ready for review.
If a customer's credit and reference review is unfavorable, the finance manager must follow up with the customer and the sales representative by phone.
The customer's credit report must be added to the RFQ as a permanent record and for audit purposes.
The solution must provide both a sample script that the finance manager can use as well as a checklist of how to perform the check.
Reporting
The sales manager dashboard must show the following data:
Projected revenue and profitability per country by month and fiscal year.
Projected and current product sales per country by month and fiscal year.
RFQ Won/Loss revenue comparison by fiscal quarter.
RFQ status by sales representative within their territory.
RFQs that are awaiting management approval and how long they have been waiting.
Sales lost to competitors month over month.
Managers must also be able to track how long an RFQ has been awaiting credit and reference checks, and how many RFQs have had unfavorable results from credit or reference checks.
Issues
PreferredCustomerA, who has factories in Germany, the UK, and Canada, reports that their sales representatives give different pricing and discounts to customers depending on the country in which the RFQ is initiated.
Several RFQs that have passed management review but failed standard credit checks have been issued quotes. To prevent this, credit checks must now be done before the management approval meeting.

Several imported RFQs contain quotes for discontinued products. Updated quotes with current product offers need to be sent to customers.
CompanyB needs pricing for harnesses for their plants in Germany, the UK, and Argentina.
CompanyC received a quote for harnesses for their US home office. They need the products for their Canadian plant.
CompanyD wants sales orders and shipments sent directly to VendorZ, who manufactures several subassemblies for them. VendorZ also builds components for other customers as well as for Contoso, Ltd.
The chief financial officer (CFO) is concerned about the amount of work that the new credit and reference checks will create. Therefore, a time-study needs to be initiated for that work to see whether an additional person needs to be hired.

NEW QUESTION: 66
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 In the review screen.
You are a Dynamics 36S Sales system administrator.
The sales team warns to use automated conversation starters.
You need to ensure that the controls are available to developers.
Solution: Disable JavaScript and disable pop-up blockers.
Does the solution meet the goal?
A. No
B. Yes
Answer: (SHOW ANSWER)

NEW QUESTION: 67
A company uses Dynamics 365 Sales. You have administrator privileges. The salespeople require the following functionality:
* Display all email correspondence between salespeople and customers in the timeline of the customer.
* View when customers open emails sent from Dynamics 365 Sales by a salesperson.
You need to configure the system.
Which features should you configure? To answer, drag the appropriate features to the correct requirements. Each feature may be used once, more than once, or not at all. You may need to drag the split bar between panes or scroll to view content.
NOTE: Each correct selection is worth one point.
Answer:

NEW QUESTION: 68

Note: This question is part of a series of questions that present the same scenario. Each question in the series contains a unique solution that might meet the stated goals. Some question sets might have more than one correct solution, while others might not have a correct solution.
After you answer a question, you will NOT be able to return to it. As a result, these questions will not appear in the review screen.
A 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: Add a new currency and configure the currency precision and symbol.
Does the solution meet the goal?
A. Yes
B. No
Answer: (SHOW ANSWER)

NEW QUESTION: 69
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.
Answer:
:

NEW QUESTION: 70
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 default currency.
Does the solution meet the goal?

A. No
B. Yes
Answer: (SHOW ANSWER)

NEW QUESTION: 71
You are a Dynamics 365 for Sales system customizer.
You need to set up LinkedIn Sales Navigator Lead (member profile) on the Lead form.
Solution: Add the LinkedIn Sales Navigator Contact (member profile) control.
Does the solution meet the goal?
A. Yes

B. No

Answer: (SHOW ANSWER)

Reference:
https://docs.microsoft.com/en-us/dynamics365/customer-engagement/linkedin/add-sales-navigator-controlsforms

NEW QUESTION: 72

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

A. Change Est. Revenue to Actual amount

B. Set the Status reason to Won.

C. Change Est. Close Date to Actual close date.

D. Change the Actual Revenue to Actual amount.

Answer: (SHOW ANSWER)

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

NEW QUESTION: 73

A company based in Mexico is setting up Dynamics 365 Sales. All price lists are in US dollars (USD).
A sales representative sells products to customers in the United Kingdom and Spain.
You need to determine the currency for the quote.
Which currency will the quote use?

A. Pound sterling

B. Euro

C. USD

D. Peso

Answer: C (LEAVE A REPLY)

Reference:
https://blog.magnetismsolutions.com/blog/colinmaitland/2019/05/20/dynamics-365-currency-configuration-forprice-list-items

NEW QUESTION: 74

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

A. Price list

B. Product
C. Price list item
D. Product family
Answer: ([SHOW ANSWER])
Reference:
https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/create-price-lists-price-list-items-define-pricing-products

NEW QUESTION: 75
A company is evaluating Dynamics 365 Sales to replace an existing customer relationship management (CRM).
An IT manager observes that the company requires 20 custom tables. The company wants the most cost-effective solution.
You need to recommend a license type to the company.
What should you recommend?
A. Sales Enterprise
B. Microsoft Relationship Sales
C. Sales Professional
D. Sales Premium
Answer: ([SHOW ANSWER])

NEW QUESTION: 76
A salesperson has an active quote for a customer.
The customer wants to add one product to the quote and remove one product from the quote.
You need to make the changes.
What should you do? To answer, select the appropriate options in the answer area.
NOTE: Each correct selection is worth one point.
Answer:
Reference:
https://neilparkhurst.com/2019/06/27/mb-210-microsoft-dynamics-365-for-sales-quotes/

NEW QUESTION: 77

You manage a Dynamics 365 Sales environment for an organization.
You need to edit the display name of a business process flow.
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.
Answer:

NEW QUESTION: 78
You are a Dynamics 365 Sales system customizer.
Salespeople report that they cannot search for open and closed opportunities using the search tool in the 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.
Answer:
1 - Expand the Opportunity entity.
2 - Open the Quick Find View.
3 - Change the filter criteria to Status Does Not Equal Open.

NEW QUESTION: 79
You need to set up goals for the salespeople.
How should you set up the configurations? To answer, select the appropriate options in the answer area.
NOTE: Each correct selection is worth one point.
Answer:
Reference:
https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/goals-overview

NEW QUESTION: 80
A company manually assigns leads to salespeople.
The sales manager requires automated lead assignment rules. An administrator enables the feature.
However, you are unable to access the Assignment rules area.
You need to request access from the administrator.
Which security role should you request?

A. Sales Manager
B. Vice President of Sales
C. Ptaybook Manager
D. Sequence Manager
Answer: (SHOW ANSWER)

NEW QUESTION: 81

You need to configure the system to handle all ticket sales.
What should you configure?
A. Discount Lists
B. Product Bundles
C. Product Catalog Settings
D. Goals
Answer: (SHOW ANSWER)
Reference:
https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/set-up-discount-list

NEW QUESTION: 82
A company uses Dynamics 365 Sales.
You need to configure the Sales Insights sales accelerator.
What should you create?
A. Communication frequency
B. Insight cards
C. Leads
D. Sequences
Answer: (SHOW ANSWER)

NEW QUESTION: 83
Please wait while the virtual machine loads. Once loaded, you may proceed to the lab section. This may take a few minutes, and the wait time will not be deducted from your overall test time.
When the Next button is available, click it to access the lab section. In this section, you will perform a set of tasks in a live environment. While most functionality will be available to you as it would be in a live environment, some functionality (e.g., copy and paste, ability to navigate to external websites) will not be possible by design.
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Labs are not timed separately, and this exam may have more than one lab that you must complete. You can use as much time as you would like to complete each lab. But, you should manage your time appropriately to ensure that you are able to complete the lab(s) and all other sections of the exam in the time provided.
Please note that once you submit your work by clicking the Next button within a lab, you will NOT be able to return to the lab.
Your company wants every lead record to be rated as Cold when the record is created.
You need to configure the instance and validate your changes by creating and saving a new lead record named New roof for a user named Sam Smith.
To complete this task, sign in to the Dynamics 365 portal.
Answer:

Go to Settings > Customizations.
Select Customize the System.
Under Components, expand Entities, and then select the Lead entity.
Select Fields.
Select the Rating field and click Edit.
Set the Default Value to Cold.
Click Save and Close.
Click Publish All Customizations.
In the site map, select Leads.
Select New.
Enter New Roof in the Topic field.
Enter Sam Smith in the Name fields.
Verify that the Rating is Cold.
Save the Lead record.

NEW QUESTION: 84
You close a lost opportunity. The company you lost the opportunity to is a competitor with whom you do business. The company is already set up with an account and competitor record in the system.
You want to track the lost opportunity without having to reopen the opportunity.
You need to track the company to the opportunity.
What should you do?
A. Add the account to the opportunity.
B. Add the competitor to the opportunity.
C. Add the opportunity to the competitor.
D. Add the opportunity to the account.
Answer: (SHOW ANSWER)
Reference:
https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/create-edit-competitor-record-sales

NEW QUESTION: 85
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)

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.

NEW QUESTION: 86
A company uses Dynamics 365 Sales.
A sales manager wants a salesperson to send an email activity to a marketing list. The manager wants to track the successes and failures of the emails in one view. The salesperson must be limited to sending only this email activity to the marketing list You need to recommend which feature the manager should use.
What should you recommend?
A. direct email
B. campaign
C. customer Journey
D. quick campaign
Answer: (SHOW ANSWER)

NEW QUESTION: 87
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: C (LEAVE A REPLY)
Reference:
https://docs.microsoft.com/en-us/dynamics365/customer-engagement/admin/using-word-templates-dynamics-365

NEW QUESTION: 88
The product development team for a toy company creates a new remote-control toy.
You need to create the necessary records and record relationships to sell the product.
Which five records and/or components should you configure in sequence? To answer, move the appropriate records and/or components from the list of records and components to the answer area and arrange them in the correct order.
NOTE: More than one order of answer choices is correct. You will receive credit for any of the correct orders you select.
Answer:
1 - units groups
2 - units

3 - products
4 - price list items
5 - price lists

NEW QUESTION: 89
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)
Reference:
https://docs.microsoft.com/en-us/dynamics365/customer-engagement/sales-professional/create-unit-groupadd-units

NEW QUESTION: 90
You manage a Dynamics 365 Sales environment.
You need to configure the default status for each lead.
Which status reason should you associate to each scenario? To answer, select the appropriate options in the answer area.
NOTE: Each correct selection is worth one point.
Answer:

NEW QUESTION: 91
A company that sells products in multiple regions uses Dynamics 365 Sales.
The company has different product offerings in each region.
The system must be set up to send the latest product information to each region every month.
You need to set up the distribution of product information for the regions.
What should you set up?
A. guided selling
B. territories
C. relationship intelligence
D. dynamic marketing lists
Answer: (SHOW ANSWER)

NEW QUESTION: 92
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: 93
An organization implements Dynamics 365 Sales.
A consultant is adding new controls to existing application forms.
You need to ensure that Linkedin information appears on the Sales form.
Which form sections should you use? To answer, select the appropriate options m the answer area?
NOTE: Each correct selection is worth one point.
Answer:

NEW QUESTION: 94
You are a salesperson working with Dynamics 365. Your role includes working with opportunities.
You need to close opportunities.
Which actions should you perform? To answer, select the appropriate options in the answer area.
NOTE: Each correct selection is worth one point.
Answer:

NEW QUESTION: 95
Note: This question is part of a series of questions that present the same scenario. Each question in the series contains a unique solution. Determine whether the solution meets the stated goals.
Some question sets might have more than one correct solution, while others might not have a correct solution.
After you answer a question in this section, you will NOT be able to return to it. As a result, these questions will not appear in the review screen.

You configure forecasts for a clothing manufacturer.
A salesperson updates an opportunity and wants to refresh the forecast.
You need to show the salesperson how to refresh the forecast.
Proposed solution: Recalculate the forecast.
Does the solution meet the goal?
A. Yes
B. No
Answer: (SHOW ANSWER)
Reference:
https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/keep-forecast-data-up-to-date

NEW QUESTION: 96
You need to resolve the issue UserA is experiencing.
Where should you add UserA?
A. Team
B. Office 365 group
C. Business Unit
D. Field Security Profile
Answer: (SHOW ANSWER)

NEW QUESTION: 97
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 m the answer area.
NOTE Each correct selection is worth one point.
Answer:

NEW QUESTION: 98
A company uses Dynamics 365 Sales. The company does not use any custom views or forms.
You select a customer and create an appointment for the next day.
You need to find the appointment.
Which two places will display the appointment? Each correct answer presents a complete solution.
NOTE: Each correct selection is worth one point.
A. My Active Accounts view
B. Account Timeline feed
C. Account Files tab

D. My Activities view
E. Contact Timeline feed
Answer: (SHOW ANSWER)

NEW QUESTION: 99
You are an administrator for Dynamics 365 for Sales.
You need to ensure that a user can install and configure the Social Selling Assistant.
Which two actions should you perform? Each correct answer presents part of the solution.
NOTE: Each correct selection is worth one point.
A. Grant the user the sales manager role
B. Assign the user a license for Microsoft Dynamics 365 (online) or Microsoft Social Engagement
C. Assign the user a license for both Microsoft Dynamics 365 (online) and Microsoft Social Engagement
D. Grant the user the system administrator or system customizer role
Answer: (SHOW ANSWER)
Reference:
https://docs.microsoft.com/en-us/previous-versions/dynamicscrm-2016/administering-dynamics-365/mt793319(v=crm.8)

NEW QUESTION: 100
A company uses Dynamics 365 for Sales.
You need to change the description field on the quote.
Which state allows you to make the change?

A. Draft
B. Active
C. Won
D. Closed
Answer: (SHOW ANSWER)

NEW QUESTION: 101
Please wait while the virtual machine loads. Once loaded, you may proceed to the lab section. This may take a few minutes, and the wait time will not be deducted from your overall test time.
When the Next button is available, click it to access the lab section. In this section, you will perform a set of tasks in a live environment. While most functionality will be available to you as it would be in a live environment, some functionality (e.g., copy and paste, ability to navigate to external websites) will not be possible by design.
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manage your time appropriately to ensure that you are able to complete the lab(s) and all other sections of the exam in the time provided.
Please note that once you submit your work by clicking the Next button within a lab, you will NOT be able to return to the lab.
Your company plans to generate a report to provide reasons for the disqualification of leads.
You need to add a reason of Cannot meet timeline for delivery and then apply the reason to a Sales Lead named Brian LaMee.
To complete this task, sign in to the Dynamics 365 portal.
Answer:
Navigate to Settings > Customization > Customize the System.
Expand the Entities menu.
Scroll down and expand Leads, then click on Fields.
Double click on the Status Reason field.
Change status to Disqualified.
Click Add.
Type in the new status reason: Cannot meet timeline for delivery
Click OK.
Click Publish All Customizations.
Open the lead named Brian LaMee.
From the command bar, click Disqualify and select the new status reason.
Reference:
https://www.azamba.com/2018/08/16/how-to-add-a-reason-to-disqualify-a-lead-in-microsoft-dynamics-365-for-sales-crm/

NEW QUESTION: 102
You are updating a price list item in Dynamics 365 Sales.
You need to manually enter. The price of a product for a price list item.
Which pricing method should you use?
A. Percent Markup - Current Cost
B. Currency Amount____________
C. Percent of List
Answer: (SHOW ANSWER)
Percent Margin - Standard Cost

NEW QUESTION: 103
You need to create new leads from activities.
What should you do? To answer, drag the appropriate actions to the correct activity types. Each action may be used once, more than once, or not at all. You may need to drag the split bar between panes or scroll to view content.
NOTE: Each correct selection is worth one point.
Answer:

NEW QUESTION: 104

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

A. Add User2 to the Sales team.
B. Instruct User2 to follow the record.
C. Add User2 to the Owner team.
D. Add User2 to an Access team.

Answer: (SHOW ANSWER)

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

NEW QUESTION: 105

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

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

Answer: (SHOW ANSWER)

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

NEW QUESTION: 106

You are implementing Dynamics 365 Sales for a company.
The company wants to use features that do the following:
* Provide a salesperson with up-to-date information on email, meetings, and more in Dynamics 365.
* Retrieve information from emails about customers in Microsoft Dataverse without manual data entry.

* Track read receipts to customers in Dataverse.
You need to configure the correct component.
What should you configure? To answer, drag the appropriate components to the correct requirements. 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.

Answer:

NEW QUESTION: 107

A company uses Dynamics 365 Sales.
A sales manager wants to send an email to all contacts who live in a specific city. The manager does not want to create an email template or reuse the list of contacts. The email must be created and sent automatically.
You need to configure the system to send the email.
Which three actions should you recommend be performed in sequence? To answer, move the appropriate actions from the list of actions to the answer area and arrange them in the correct order.
NOTE: Each correct selection is worth one point.

Answer:

1 - Filter the Contacts view to show only contacts from the specific city.
2 - Create a quick campaign.
3 - Create a direct email.

NEW QUESTION: 108

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

NEW QUESTION: 109
Please wait while the virtual machine loads. Once loaded, you may proceed to the lab section. This may take a few minutes, and the wait time will not be deducted from your overall test time. When the Next button is available, click it to access the lab section. In this section, you will perform a set of tasks in a live environment. While most functionality will be available to you as it would be in a live environment, some functionality (e.g., copy and paste, ability to navigate to external websites) will not be possible by design.
Scoring is based on the outcome of performing the tasks stated in the lab. In other words, it doesn't matter how you accomplish the task, if you successfully perform it, you will earn credit for that task.
Labs are not timed separately, and this exam may have more than one lab that you must complete. You can use as much time as you would like to complete each lab. But, you should manage your time appropriately to ensure that you are able to complete the lab(s) and all other sections of the exam in the time provided.
Please note that once you submit your work by clicking the Next button within a lab, you will NOT be able to return to the lab.
You need to create a new opportunity record that contains the following information:
Topic: New window installation
Contact: Jay Orth
Account: Fabrikam West
Purchase timeframe: This quarter
Estimated budget: $6,400.00
To complete this task, sign in to the Dynamics 365 portal.
Answer:
In the site map, select Opportunities.
Click New.
In the Topic field, enter New window installation
In the Contact field, select Jay Orth.
In the Account field, select Fabrikam West
In the Purchase Timeframe field, select This quarter.
In the Budget Amount field, enter $6,400.00
Click Save to save the opportunity record.
Reference:
https://docs.microsoft.com/en-us/dynamics365/sales/create-edit-opportunity-sales

NEW QUESTION: 110

A company sells products and services. The company sales team uses the leads form to track all prospects. The team uses The following columns on the form:
The company wants to avoid custom development where possible.
The sales team requires only the following functionality to appear:
* Type when Timeframe Equals Less than 6 months
* Product when Type Equals Products
* Other Product when Product contains the product Other
You need to update the form.
What should you configure for each scenario? To answer, drag the appropriate views to the correct scenarios. Each view 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.
Answer:

NEW QUESTION: 111
You manage Dynamics 365 Sales. You have a sales territory named SalesTerritoryA which has an associated manager.
You need to create a new sales territory named SalesTerritoyB and assign the SalesTerritoryA manager to SalesTerritoryB.
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.
NOTE: More than one order of answer choices is correct. You will receive credit for any of the correct orders you select.
Answer:

NEW QUESTION: 112
A company implements the Microsoft Relationship Sales Solution.
You need to configure synchronization settings.
What should you configure?
To answer, select the appropriate options in the answer area.
NOTE: Each correct selection is worth one point.
Answer:

NEW QUESTION: 113
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. stakeholder
C. record owner
D. dean

Answer: A (LEAVE A REPLY)
Reference:
https://docs.microsoft.com/en-us/dynamics365/customerengagement/on-premises/basics/add-phone-call-task-email-appointment-activity-case-record

NEW QUESTION: 114
You manage Dynamics 365 Sales. You have a sales territory named SalesTerritoryA, which has an associated manager.
You need to create a new sales territory named SalesTerritoryB and assign the SalesTerritoryA manager to SalesTerritoryB.
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.
NOTE: More than one order of answer choices is correct. You will receive credit for any of the correct orders you select.
Answer:
1 - Replace the manager from Sales TerritoryA with another manager.
2 - Create a new sales territory.
3 - Associate the manager from Sales TerritoryA.
4 - Add members.
Reference:
https://docs.microsoft.com/en-us/power-platform/admin/set-up-sales-territories-organize-business-markets-geographical-area

NEW QUESTION: 115
You use opportunities with products and price lists in Dynamics 365 for Sales.
You need to add products than exist in PriceListA and PriceListB to an opportunity.
Which actions should you perform? To answer, select the appropriate options in the answer area.
NOTE: Each correct selection is worth one point.
Answer:

NEW QUESTION: 116
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.
Answer:

NEW QUESTION: 117

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 in the review screen.
A company uses Dynamics 365 Sales.
You create a playbook to send documents to new sales managers.
You need to configure the system to record all activity associated with each playbook.
Solution: Edit the playbook template and set the value of the Track Progress option to yes.
Does the solution meet the goal?

A. Yes

B. No

Answer: (SHOW ANSWER)
Activity tracking is enabled in the Playbook template.
Reference:
https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/track-playbook-activities

NEW QUESTION: 118
A company uses Dynamics 365 Sales. You add the Kanban control to the Opportunity entity.
You plan to implement Kanban views in the system. The implementation must accomplish the following:
Set up opportunities so they are visible in Kanban views.
Ensure that the default view displays the opportunities in the sales cycle.
Ensure that users know how to change the status in the Kanban status view without opening the full record.
You need to complete the Kanban setup.
What should you do? To answer, select the appropriate options in the answer area.
NOTE: Each correct selection is worth one point.

Answer:
Reference:
https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/opportunity-kanban-view

NEW QUESTION: 119
You need to ensure that employees have the appropriate territory set up.
What should you do? To answer, select the appropriate option in the answer area.
NOTE: Each correct selection is worth one point.

Answer:

NEW QUESTION: 120

You are configuring Dynamics 365 Sales for a US-based company as follows:
* Utah to California is the West territory.
* Illinois to Colorado is the Central territory.
* Maine to Indiana is the East territory.
The company wants the territories set up as follows:
* Salespersons 1 and 2 sell in the West territory
* Salespersons 5 and 6 sell in the Central territory.
* Salespersons 3 and 4 sell in the East territory.
* Postal code for each state used as the location.
You need to set up the territories.
Solution:
* Create the West territory and add the manager.
* Add members and save.
* Repeat for the Central and East territories.
Does the solution meet the goal?

A. No

B. Yes

Answer: (SHOW ANSWER)

NEW QUESTION: 121

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

Answer:

1 - Install the Power BI template app.
2 - Connect your Dynamics 365 Sale organization to the Power BI template app.
3 - Publish the application within your organization.

NEW QUESTION: 122

A company is implementing Dynamics 365 Sales. The company has ten products and four territories.
Each territory must have a price list specific for the territory and must use these prices as default product prices.
You need to configure the price lists for the territories.
What should you do?
A. Create a product family with each product list four times. Include the territory price for each product list.
B. Create a price list with a discount list for each territory.
C. Create a price list for each territory and add a territory relationship record.
D. Create one price list and margin for each territory.
Answer: (SHOW ANSWER)
Reference:
https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/create-price-lists-price-list-items-define-pricing-products

NEW QUESTION: 123
You are consulting for a company that is installing Microsoft Power BI to work with a Dynamics 365 Sales application.
The administrator must configure each required option to successfully integrate the Sales Analytics template for use in Dynamics 365 Sales.
You need to identify which option to select.
Which option should you use? To answer, select the appropriate option in the answer area.
NOTE: Each correct selection is worth one point.
Answer:

NEW QUESTION: 124
You manage Dynamics 365 environments for client organizations.
A client suspects they are losing business. The client must be able to capture reasons each time an opportunity is lost.
You need to configure Dynamics 365 to ensure that you can capture the required information.
Which field should you configure?
A. Opportunity status reason
B. Opportunity close status
C. Opportunity status
D. Opportunity close status reason
Answer: (SHOW ANSWER)

NEW QUESTION: 125
You need to implement the time study.
What should you create?

A. business rule
B. insight cards with Sales Insights
C. custom activity type
D. new data step in the business process flow
Answer: (SHOW ANSWER)
Reference:
https://docs.microsoft.com/en-us/dynamics365/customerengagement/on-premises/basics/work-with-activities?view=op-9-1

NEW QUESTION: 126
A company sends PDF quotes to customers.
A salesperson wants to revise the look of a quote after selecting the Export to PDF button.
You need to modify the template for the PDF.
Where should you modify the template?
A. Microsoft Excel
B. a report
C. Microsoft Word
D. the PDF document
Answer: C (LEAVE A REPLY)
Reference:
https://docs.microsoft.com/en-us/dynamics365/sales-professional/create-quote-pdf-sales-professional

NEW QUESTION: 127
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)
Reference:
https://docs.microsoft.com/en-us/dynamics365/customer-engagement/developer/convert-opportunity-quotesales- order-invoice

NEW QUESTION: 128
You are a Dynamics 365 Sales administrator for a company that has locations in five regions.
The company's owner wants regional managers to update their own forecasts. The owner wants full transparency for all forecasts to all current and future employees.

You need to allow users to see the forecasts for every region.
What should you do?
A. Add the view privilege to each user's security role.
B. Grant all security roles access in the forecast configuration.
C. Add each security role to the forecast configuration.
D. Grant users permission to view the Forecast Category field.
Answer: (SHOW ANSWER)

NEW QUESTION: 129
A company uses Dynamics 365 for Sales.
You create a new quote and associate an opportunity to the quote.
You need to display all your items from the opportunity in the quote.
What should you do?
A. Select Get Products from the command bar in the Quote entity
B. Select Recalculate from the command bar on the Opportunity entity
C. Select Add Line Items on the Opportunity entity
D. Activate the quote
Answer: (SHOW ANSWER)

NEW QUESTION: 130
A company uses Dynamics 365 for Sales.
You need to reduce the number of pre-sales support days that are available based on the days the company is closed for public holidays.
How should you configure the schedule? To answer, select the appropriate options in the answer area.
NOTE: Each correct selection is worth one point.
Answer:
:

NEW QUESTION: 131
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, enable JavaScript, and disable pop-up blockers.
Does the solution meet the goal?

A. Yes
B. No
Answer: (SHOW ANSWER)

NEW QUESTION: 132
You are a Dynamics 365 Sales administrator. You set the fiscal year to begin in January.
A sales manager needs a monthly forecast for the next three years that starts in August of the next year.
You need to configure the forecast using the fewest number of forecasts.
How should you configure each requirement? To answer, select the appropriate options in the answer area.
NOTE: Each correct selection is worth one point.
Answer:

NEW QUESTION: 133
You work for a company using Dynamics 365 for Sales.
When customers call the company, they must provide their quote number. Customers report that quote numbers are too long.
You need to shorten quote numbers to the minimum possible length.
What should you do?
A. Reduce the auto number prefix to one character
B. Reduce the auto number prefix to two characters
C. Reduce the suffix length to four characters
D. Ensure that the prefix setting is read-only
Answer: (SHOW ANSWER)
Reference:
https://docs.microsoft.com/en-us/dynamics365/customer-engagement/admin/change-auto-number-prefix-contract-case-article-quote-order-invoice-campaign-category-knowledge-articles

NEW QUESTION: 134
A quote is accepted by a customer. A salesperson creates an order from the quote. The customer contacts the salesperson to request a repeat of the same order. The salesperson wants to create another order from the same quote. You need to create the order. What should you do?
A. Create the order from the quote because it is in a Won status.
B. Revise the quote and create the order from Draft status.
C. Create the order from the quote because it is in a Closed status.
D. Revise the quote and create the order from the Active status.
Answer: (SHOW ANSWER)

NEW QUESTION: 135
You manage Dynamics 365 Sales.

A sales representative must identify and track internal support resources. The resources may assume different roles for each opportunity.
You need to display the support resources with the appropriate role in the opportunity.
What should you do?
A. Add a new access team.
B. On the Opportunity form, select the sales team subgrid, open the properties, and add the new custom roles.
C. On the System Settings sales tab, add the new custom roles in the Sales Team Roles list.
D. Add a new connection role.
E. Add a new relationship role.
Answer: (SHOW ANSWER)

NEW QUESTION: 136
A company uses Dynamics 365 Sales.
You need to change the description field on the quote.
Which state allows you to make the change?
A. Closed
B. Won
C. Active
D. Draft
Answer: (SHOW ANSWER)

NEW QUESTION: 137
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.
Answer:
Reference:

https://community.dynamics.com/crm/b/crmpowerobjects/archive/2018/12/31/enable-and-configurerelationship-assistant

NEW QUESTION: 138

A company uses Dynamics 365 Sales.

You are setting up the product catalog for customers. Pricing must be set up as follows:

* 1 can - $5.00
* 6 cans - $28.00
* 1 case = S1O0.0O

Partial orders are allowed. A customer wants to buy 2.5 cases of a product. The customer receives a system error when trying to enter the quantity. You need to resolve the issue. What should you modify?

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

Answer: (SHOW ANSWER)

NEW QUESTION: 139

You are a Dynamics 365 Sales administrator. The sales team has questions about competitor tracking.

You need to provide answers to the questions from the sales team.

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

NOTE: Each correct selection is worth one point.

Answer:

Reference:

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

NEW QUESTION: 140

You are the Dynamics 365 administrator for a group of financial advisors.

Advisors must use one business process flow to guide them through the standard lead to invoice process.

Each entity has the following number of stages and steps:

You need to modify the business process flow to make it valid.

A. total number of steps
B. number of steps per stages
C. number of entities
D. total number of stages

Answer: (SHOW ANSWER)

The total number of stages here would be 50 which is more than the maximum limit of 30.

Reference:

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

NEW QUESTION: 141

A company uses Dynamics 365 Sales.

You need to add an email activity to both a contact and its corresponding account without setting the Regarding field.

Where should you add the email activity?

A. Account record only

B. Quick Create form

C. Contact record only

D. Dynamics 365 App for Outlook

Answer: (SHOW ANSWER)

NEW QUESTION: 142

A company uses Dynamics 365 Sales.

You need to associate a competitor with each closed opportunity for reporting.

What should you do?

A. Select the Follow option for the competitor.

B. Add the competitor to the opportunity close record.

C. Create a user post for the competitor.

D. Enable auditing for the competitor entity.

Answer: (SHOW ANSWER)

Reference:

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

NEW QUESTION: 143

A company uses Dynamics 365 Sales.

Sales representatives for the company want changes to the data entry page for new customers. Much of the information on the page is not required. The representatives request fewef tab entries to get to required data entry areas.

You need to simplify data entry for the sales representatives.

What should you do?

A. Remove unnecessary columns from the form.

B. Remove unnecessary columns from the view.

C. Create a Microsoft Power BI dashboard that contains only the relevant information.

D. Edit the site map so only the main form is available.

Answer: A (LEAVE A REPLY)

NEW QUESTION: 144

You are a Dynamics 365 Sales administrator.

You need to ensure that each salesperson can perform the following tasks when new leads are added to the system:
* Create an appointment
* Add documentation.
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.
Answer:
1 - Choose Business process Flow
2 - Add a stage
3 - Add steps to stage
4 - Activate Processes

NEW QUESTION: 145
You use Dynamics 365 Sales. You create a quote and send it to a customer.
You need to add a product to the quote and make the modified quote available to the customer.
Which three actions should you perform in sequence? To answer, move the appropriate actions from the list of actions to the answer area and arrange them in the correct order.
Answer:
1 - Revise the quote.
2 - Add existing products from the products subgrid.
3 - activate the quote.

NEW QUESTION: 146
A salesperson must complete an opportunity by verifying the existing products and adding a new product from the product list. The product list has standard pricing. The salesperson observes the following issues with the products:
The price per unit for each item in the product list is $0.00.
Some of the existing product lines use a default price and have an incorrect price per unit.
You need to complete the opportunity.
What should you do? To answer, select the appropriate options in the answer area.
NOTE: Each correct selection is worth one point.
Answer:
Reference:
https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/create-price-lists-price-list-items-define-pricing-products

NEW QUESTION: 147
You are configuring Dynamics 365 Sales for a U.S.-based company. The company has two territories that are divided as follows:
* West territory: California to Texas

* East territory; Missouri to Maine
The sales territories should be configured as follows:
You need to set up the sales territories.
Which five actions should you perform in sequence? To answer, move the appropriate actions from the list of actions to the answer area and arrange them in the correct order.

Answer:

1 - Navigate to the App Settings area.
2 - Select Sales Territories and create a new territory.
3 - Add the manager.
4 - Select Related.