Microsoft.MB-210.v2023-09-28.q157

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Exam Name:	Microsoft Dynamics 365 Sales Functional Consultant
Certification Provider:	Microsoft
Free Question Number:	157
Version:	v2023-09-28
# of views:	432
# of Questions views:	19074
https://www.freecram.net/torrent/Microsoft.MB-210.v2023-09-28.q157.html	

NEW QUESTION: 1

You are setting up the product catalog in Dynamics 365 Sales.

The following promotions must be set up in the product catalog:

* Customers receive a free mug with the purchase of one can of soda.
* Customers receive a five percent price decrease on the purchase of 12 cases of soda.
* Soda has various prices based on whether the purchase is for one can, one six-pack, or a case.

You need to choose which feature to set up in the product catalog.

Which feature should you use? 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:

Explanation

NEW QUESTION: 2

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

A. Select Enable Dynamics 365 for mobile.

B. Log out and log back in to view non-production apps.

C. Select Apps from the non-production apps.

D. Customize the mobile app to match the model-driven app.

Answer: (SHOW ANSWER)

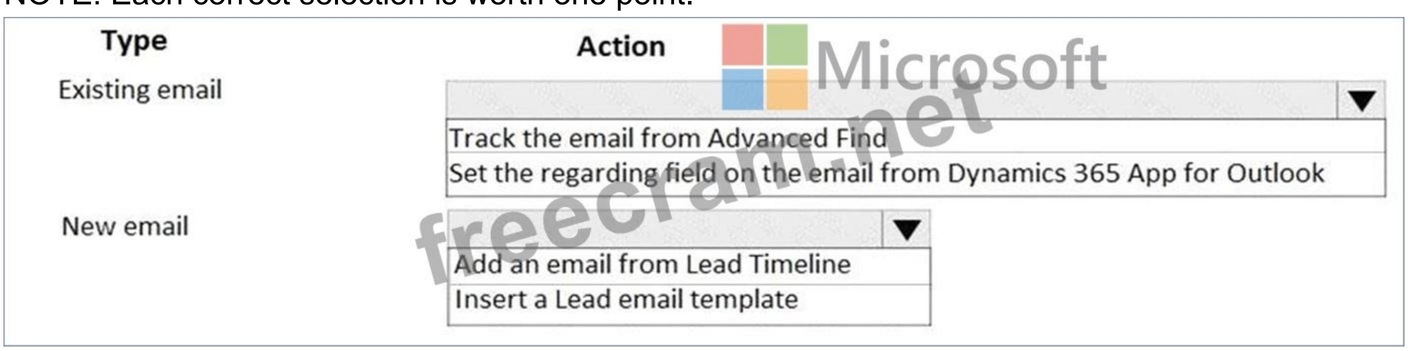
NEW QUESTION: 3

You implement the Dynamics 365 App for Outlook.

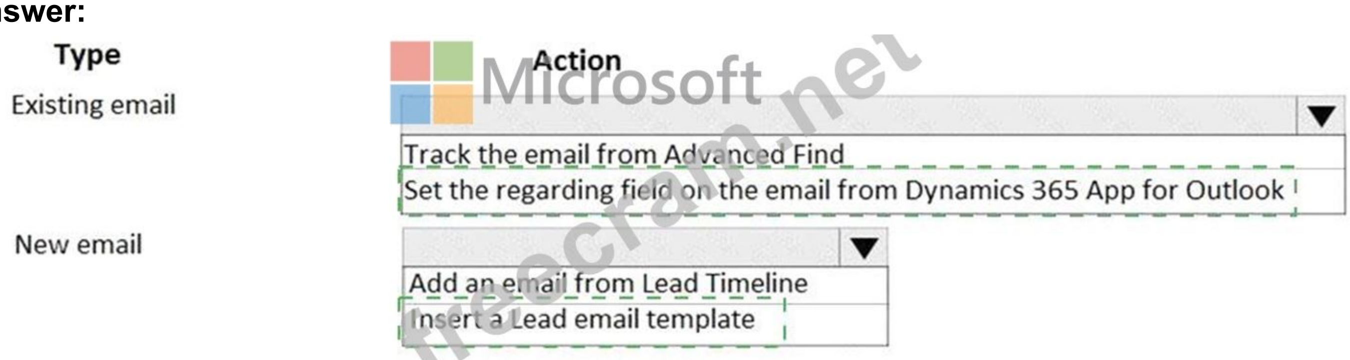
You need to associate emails to lead records.

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

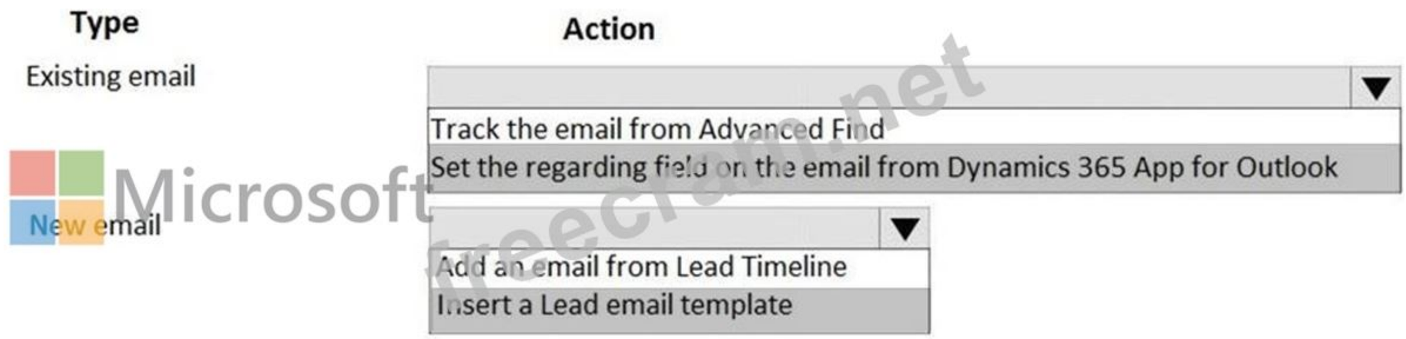
NOTE: Each correct selection is worth one point.



Answer:



Explanation



NEW QUESTION: 4

A company uses Dynamics 365 Sales. You are redesigning the main form.

Sales representatives for the company require a slider for a probability column when they enter a customer's opportunity. The sales representatives want to avoid custom development.

You need to configure the form.

What should you do?

A. Add JavaScript.

B. Embed a Power BI report in the form.

C. Change the column type to calculated.

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

E. Create a business rule.

Answer: (SHOW ANSWER)

NEW QUESTION: 5

A company is using Dynamics 365 Sales Premium with Linkedin Sales Navigator.

You must configure the following process steps:

* Set up a meeting and notify the manager if a quote is sent for over a million dollars.

* Enable the salesperson to view Linkedin customer profiles and manually add info to records without leaving the view.

* Ensure that the sequence is added to existing quotes.

You need to enforce this process.

Which feature should you use? To answer, drag the appropriate features to the correct 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.

Answer:

Explanation

NEW QUESTION: 6

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 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)

Reference:

https://www.itaintboring.com/dynamics-crm/dynamics-how-process-duration-is-calculated/

NEW QUESTION: 7

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: Change the opportunity to an inactive state.

Does the solution meet the goal?

A. No

B. Yes

Answer: (SHOW ANSWER)

NEW QUESTION: 8

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. Yes

B. No

Answer: (SHOW ANSWER)

NEW QUESTION: 9

A company uses special pricing for bulk purchases of products.
A sales team member cannot create pricing lists for preferred customers.
You need to set up a discount price list.
What are three possible security roles that can be used? Each correct answer presents a complete solution.
NOTE: Each correct selection is worth one point.

A. Sales Team Member

B. Vice President of Sales

C. Sales Manager

D. CEO-Business Manager

E. President of Sales

Answer: (SHOW ANSWER)

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

NEW QUESTION: 10

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. Talking points

B. Conversation intelligence

C. Health score

D. Communication frequency

Answer: (SHOW ANSWER)

NEW QUESTION: 11

You are configuring Dynamics 365 Sales Insights.
You need to configure the system to meet the following requirements:
Use artificial intelligence (AI) to rate all open leads on whether they will convert to an opportunity.
Use AI to improve expected future sales numbers over the fiscal year.
Create a sequence of activities for each lead to help the salespeople improve sales.
Which feature should you configure? To answer, drag the appropriate features to the correct requirements.

Each feature may be used once, more than once, or not at all. You may need to drag the split bar between panes or scroll to view content.

NOTE: Each correct selection is worth one point.

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

Answer:

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

Explanation

Graphical user interface, text, application Description automatically generated

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

Reference:

https://docs.microsoft.com/en-us/dynamics365/ai/sales/configure-predictive-lead-scoring

https://docs.microsoft.com/en-us/dynamics365/ai/sales/configure-premium-forecasting

https://docs.microsoft.com/en-us/dynamics365/ai/sales/enable-configure-sales-accelerator

NEW QUESTION: 12

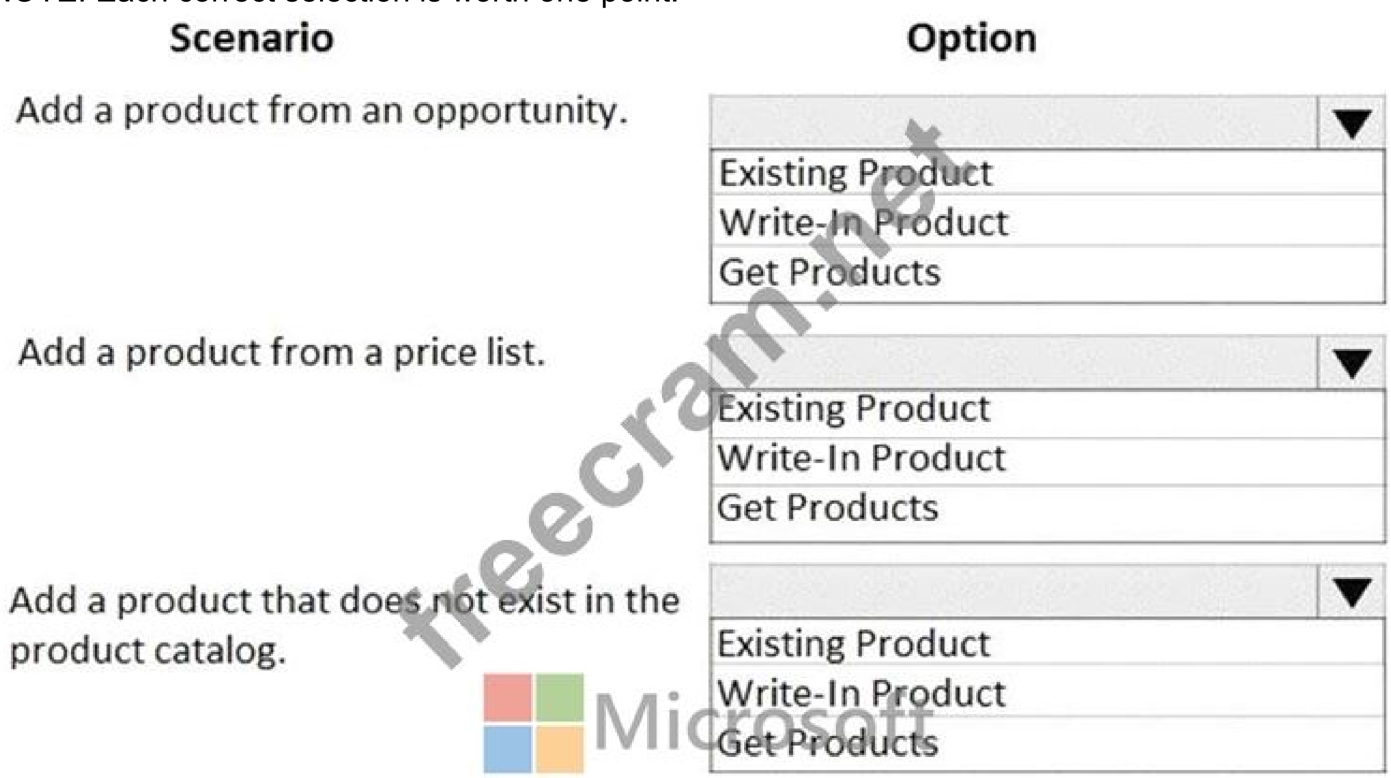
A company uses Dynamics 365 Sales.

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. customer Journey
C. quick campaign
D. campaign
Answer: A (LEAVE A REPLY)

NEW QUESTION: 13
You use Dynamics 365 for Sales.
You need to add products to an invoice.
Which options should you use? To answer, select the appropriate options in the answer area.
NOTE: Each correct selection is worth one point.



Answer:

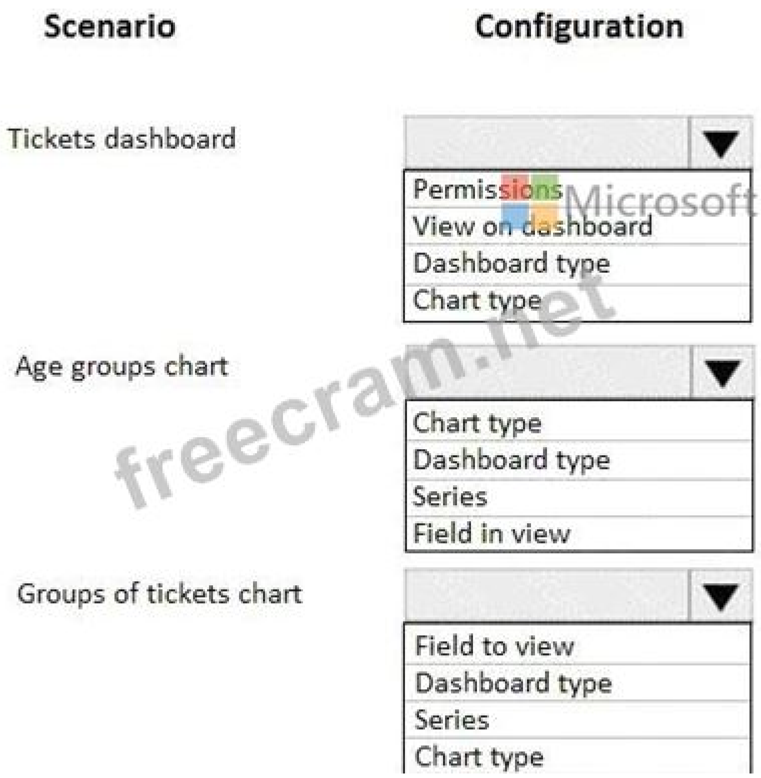
Explanation

NEW QUESTION: 14

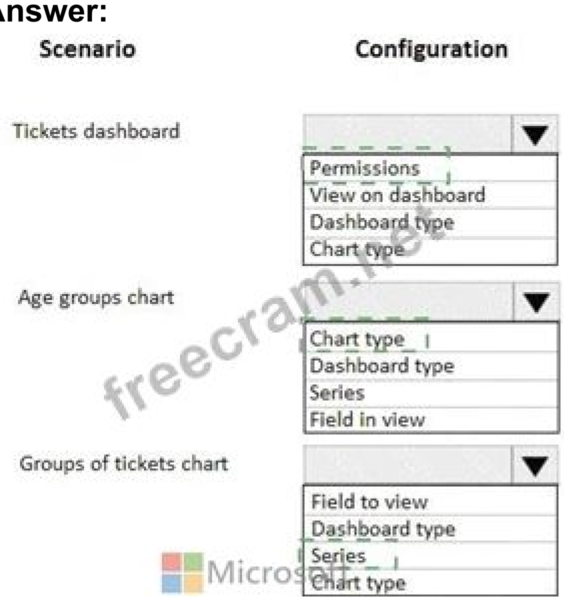
You need to resolve the issues on the ticket's dashboard.

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

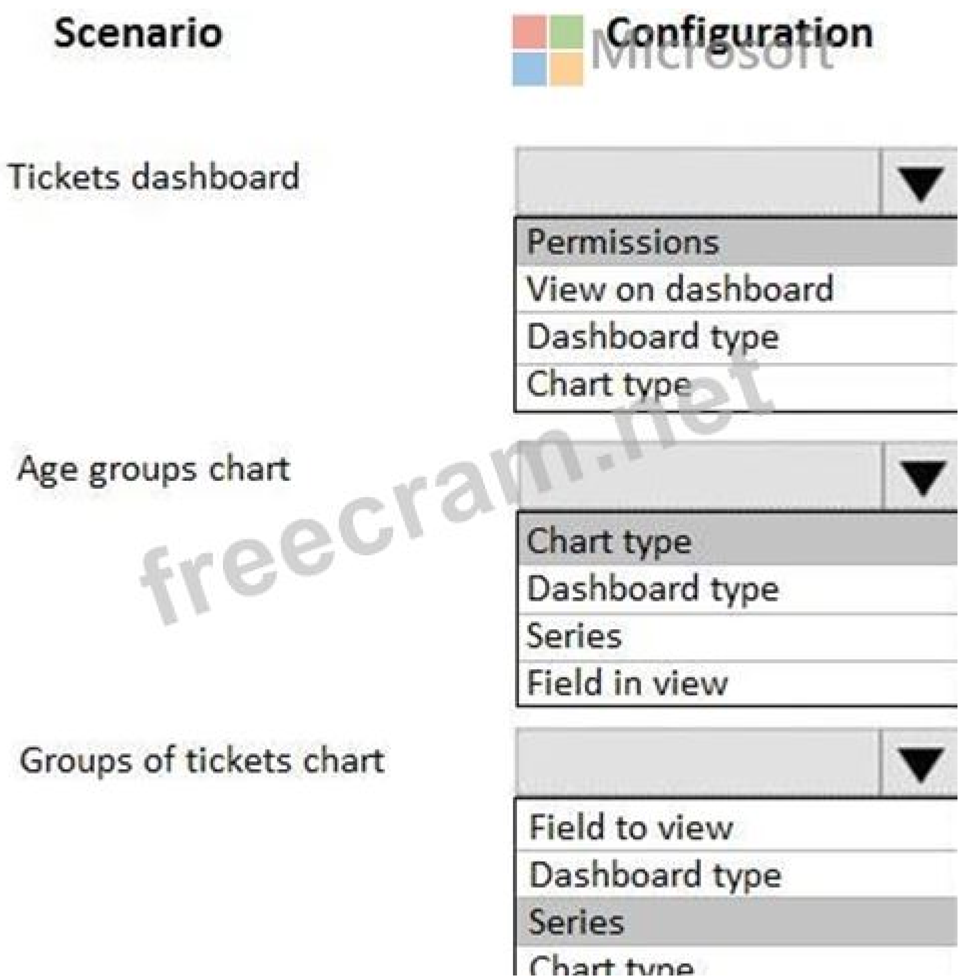
NOTE: Each correct selection is worth one point.



Answer:



Explanation



NEW QUESTION: 15

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 the System Settings sales tab, change the default revenue type to System Calculated

B. In Opportunities, change the default value of the revenue type to System Calculated

C. In custom controls, change the default revenue setting to System Calculated

D. In Personalization settings for each user, change the default revenue type to System Calculated

Answer: (SHOW ANSWER)

NEW QUESTION: 16

You need to configure forecasting according to the requirements.

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

NOTE: Each correct selection is worth one point.

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

Answer:

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

Explanation

Text Description automatically generated with medium confidence

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

Reference:

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

NEW QUESTION: 17

You manage a Dynamics 365 environment. Salespeople use a template from the Sales Hub to create quotes.

A member of the sales team requests that you change the order in which columns display in customer quotes.

You need to modify the quote template.

What should you use?

A. Report Wizard

B. Microsoft Word template

C. template editor

D. mail merge template

Answer: (SHOW ANSWER)

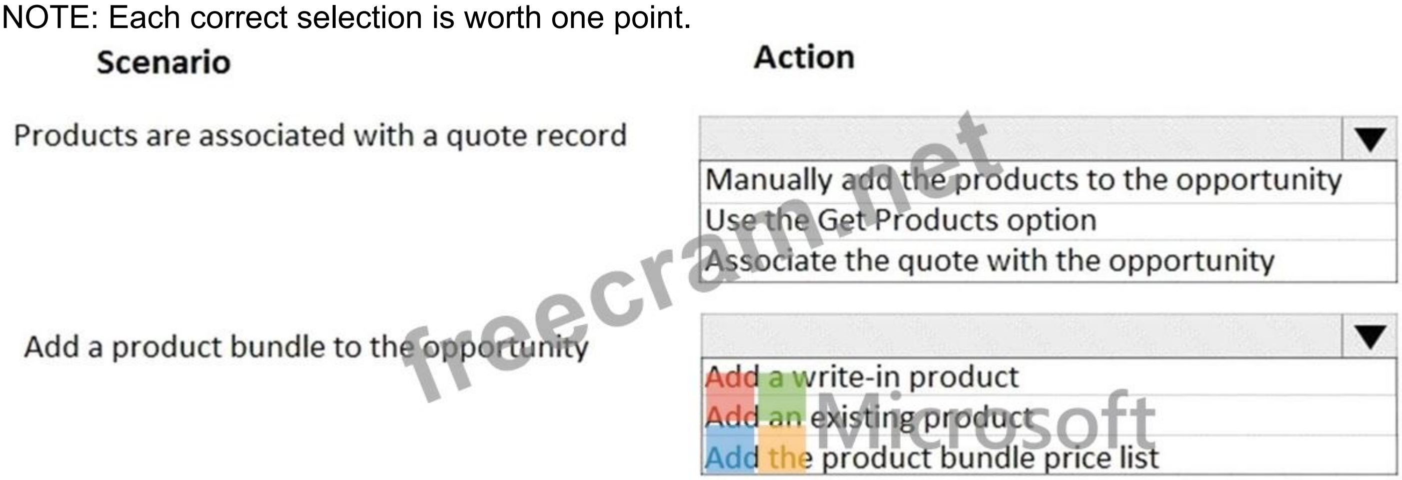
NEW QUESTION: 18

You use Dynamics 365 for Sales.

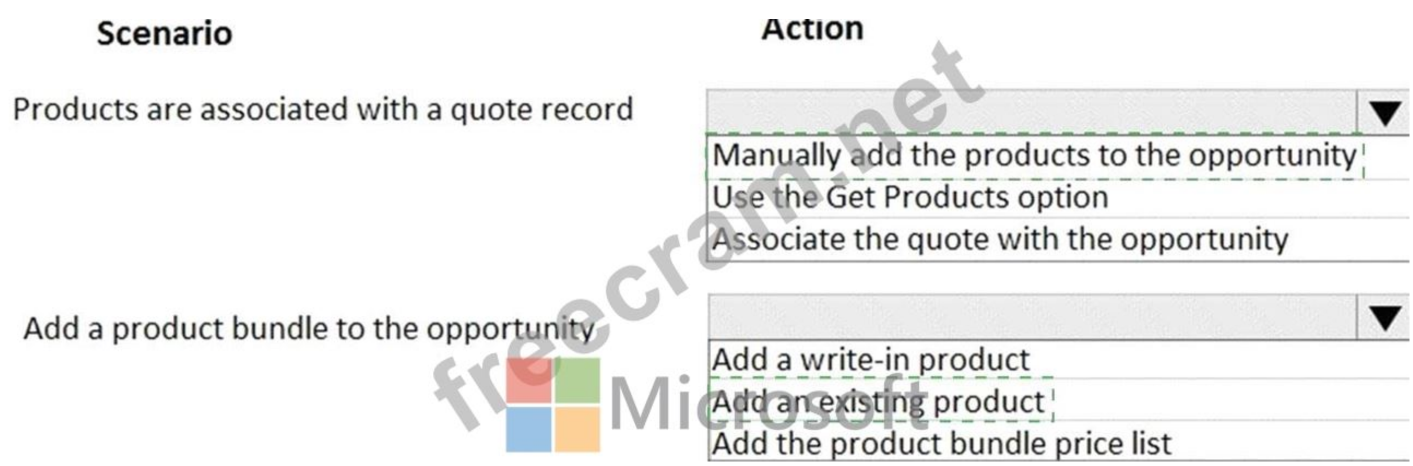
You need to add products to an opportunity.

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

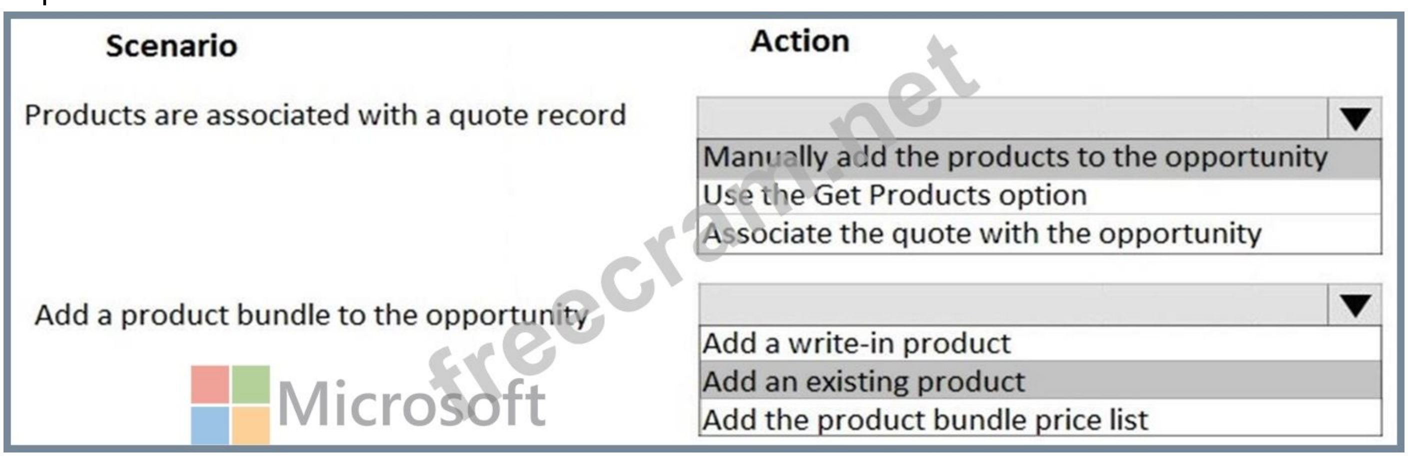
NOTE: Each correct selection is worth one point.



Answer:



Explanation



NEW QUESTION: 19

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.

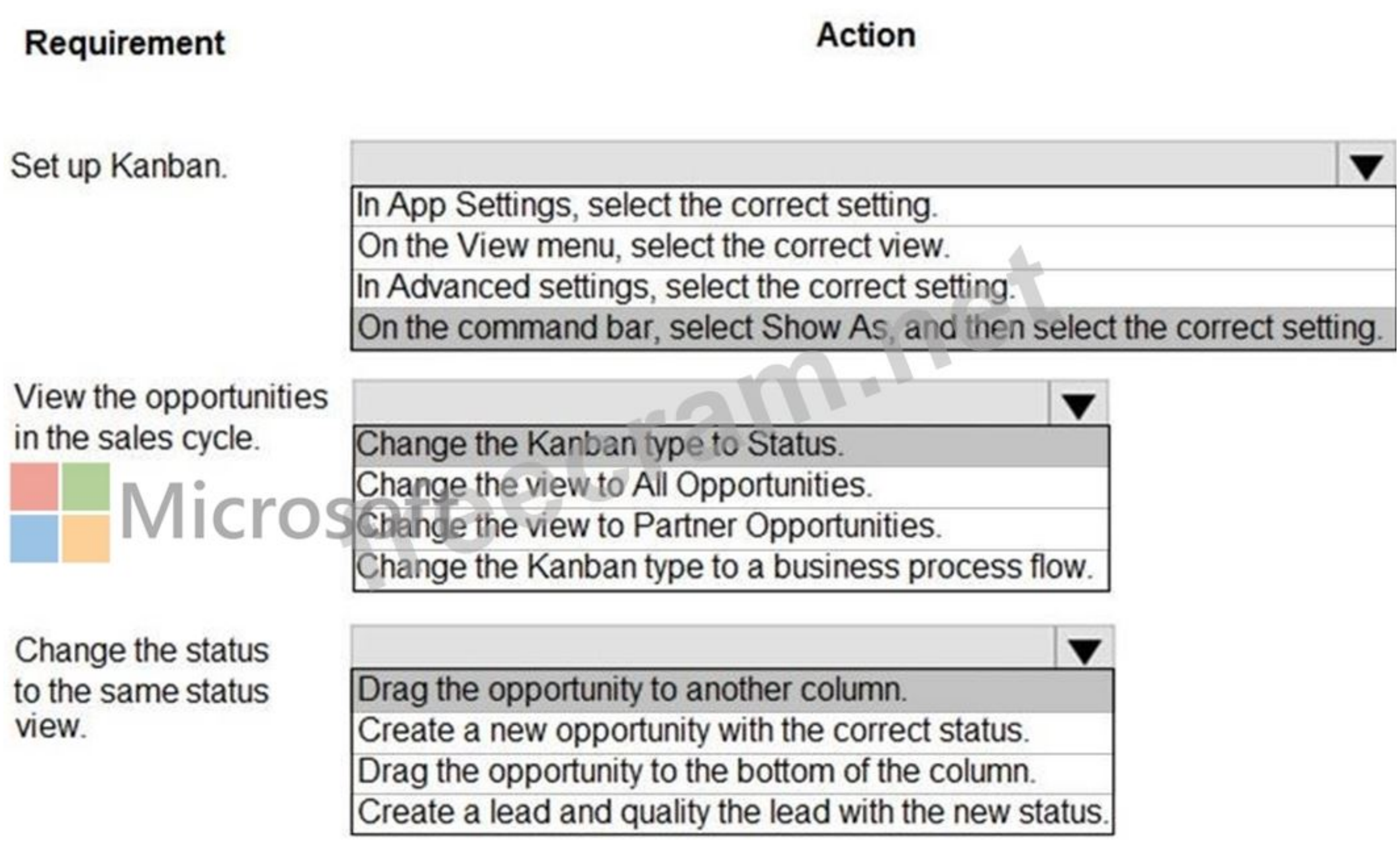
Requirement	Action
Set up Kanban.	In App Settings, select the correct setting. On the View menu, select the correct view. In Advanced settings, select the correct setting. On the command bar, select Show As, and then select the correct setting.
View the opportunities in the sales cycle.	Change the Kanban type to Status. Change the view to All Opportunities. Change the view to Partner Opportunities. Change the Kanban type to a business process flow.
Change the status to the same status view.	Drag the opportunity to another column. Create a new opportunity with the correct status. Drag the opportunity to the bottom of the column. Create a lead and quality the lead with the new status.

Answer:

Requirement	Action
Set up Kanban.	In App Settings, select the correct setting. On the View menu, select the correct view. In Advanced settings, select the correct setting. On the command bar, select Show As, and then select the correct setting.
View the opportunities in the sales cycle.	Change the Kanban type to Status. Change the view to All Opportunities. Change the view to Partner Opportunities. Change the Kanban type to a business process flow.
Change the status to the same status view.	Drag the opportunity to another column. Create a new opportunity with the correct status. Drag the opportunity to the bottom of the column. Create a lead and quality the lead with the new status.

Explanation

A picture containing graphical user interface Description automatically generated



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

NEW QUESTION: 20

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

A. Status Reason and Competitor

B. Status and Contact

C. Status Reason and Description

D. Status and Stakeholders

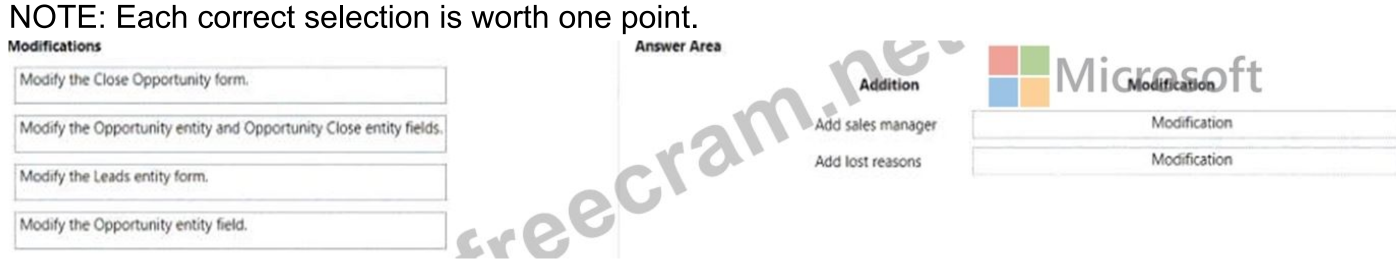
Answer: (SHOW ANSWER)

NEW QUESTION: 21

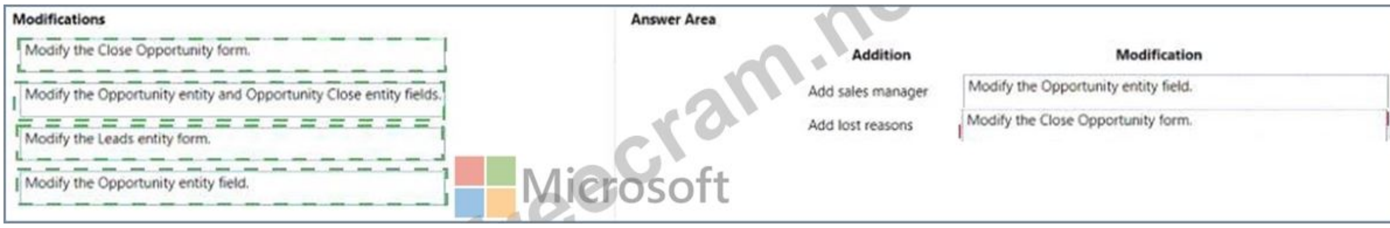
You need to determine which configuration changes to make to address closed and lost opportunities.

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.

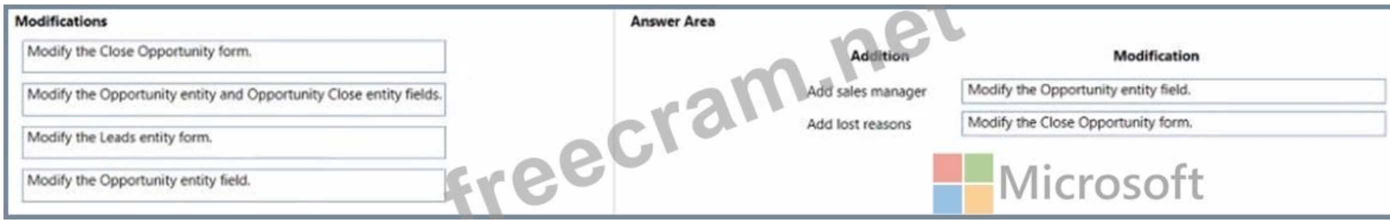
NOTE: Each correct selection is worth one point.



Answer:



Explanation



NEW QUESTION: 22

A company uses Dynamics 365 Sales to track activities. The sales department plans to use leads.

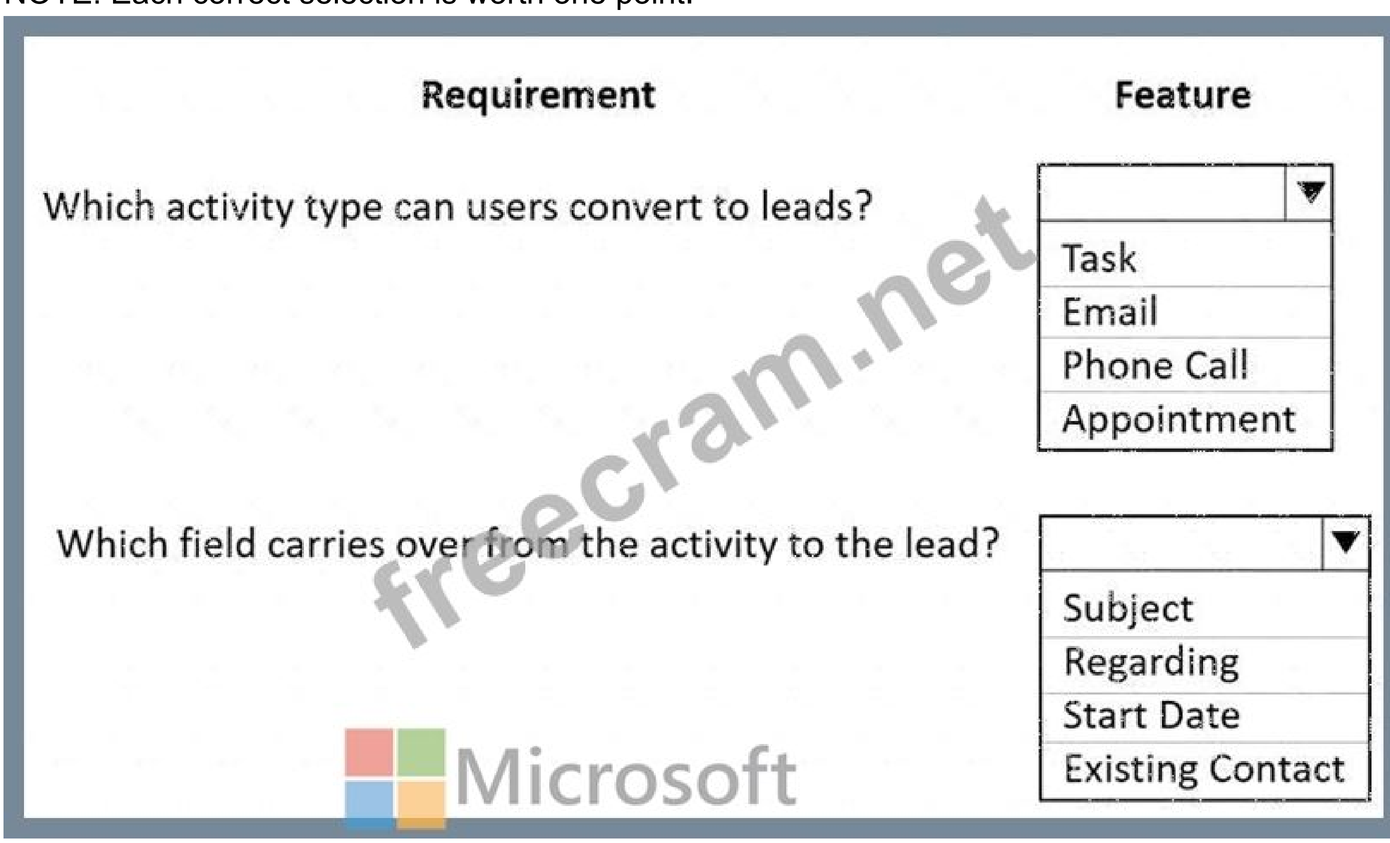
You need to determine:

Which activities convert to leads.

Which field carries over from the activity to the lead.

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

NOTE: Each correct selection is worth one point.



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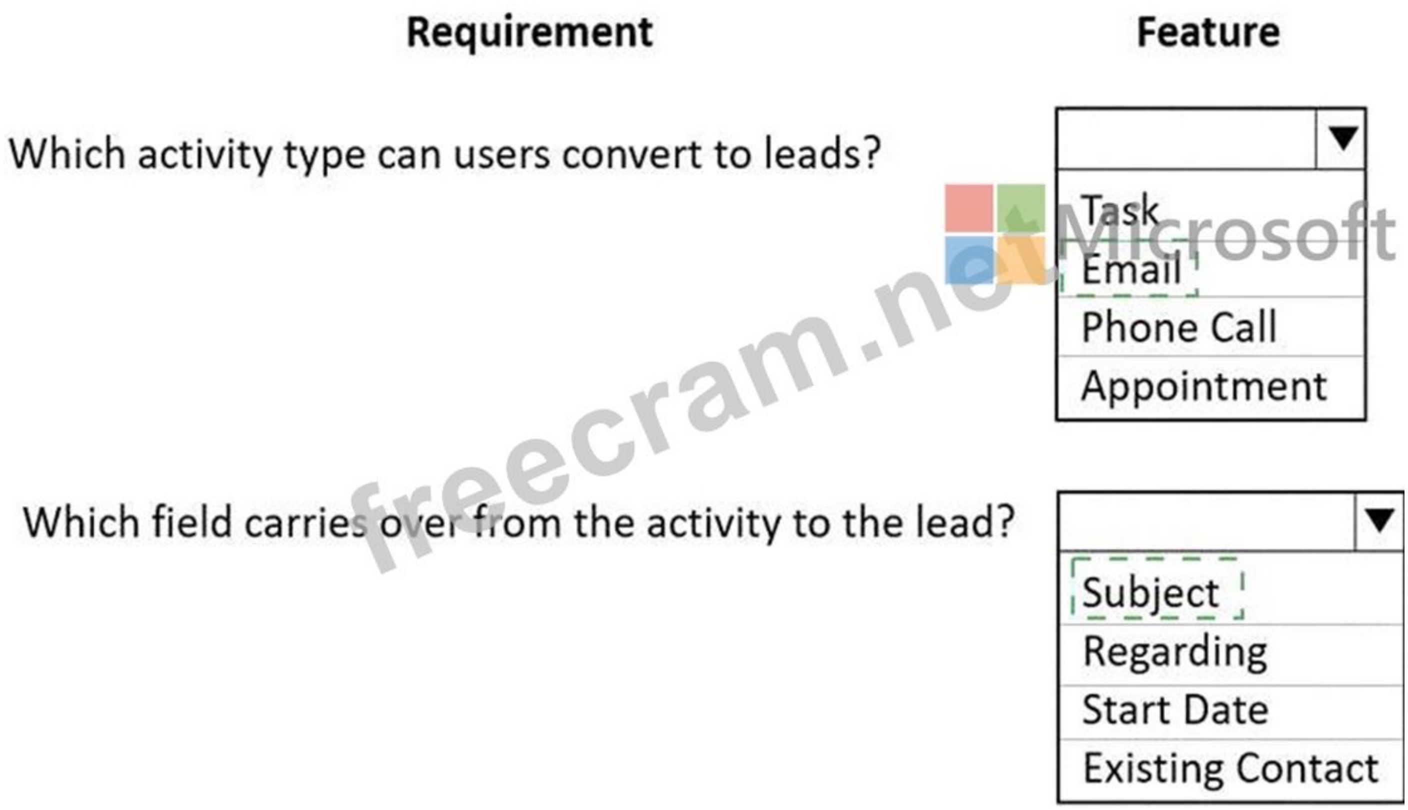

Explanation

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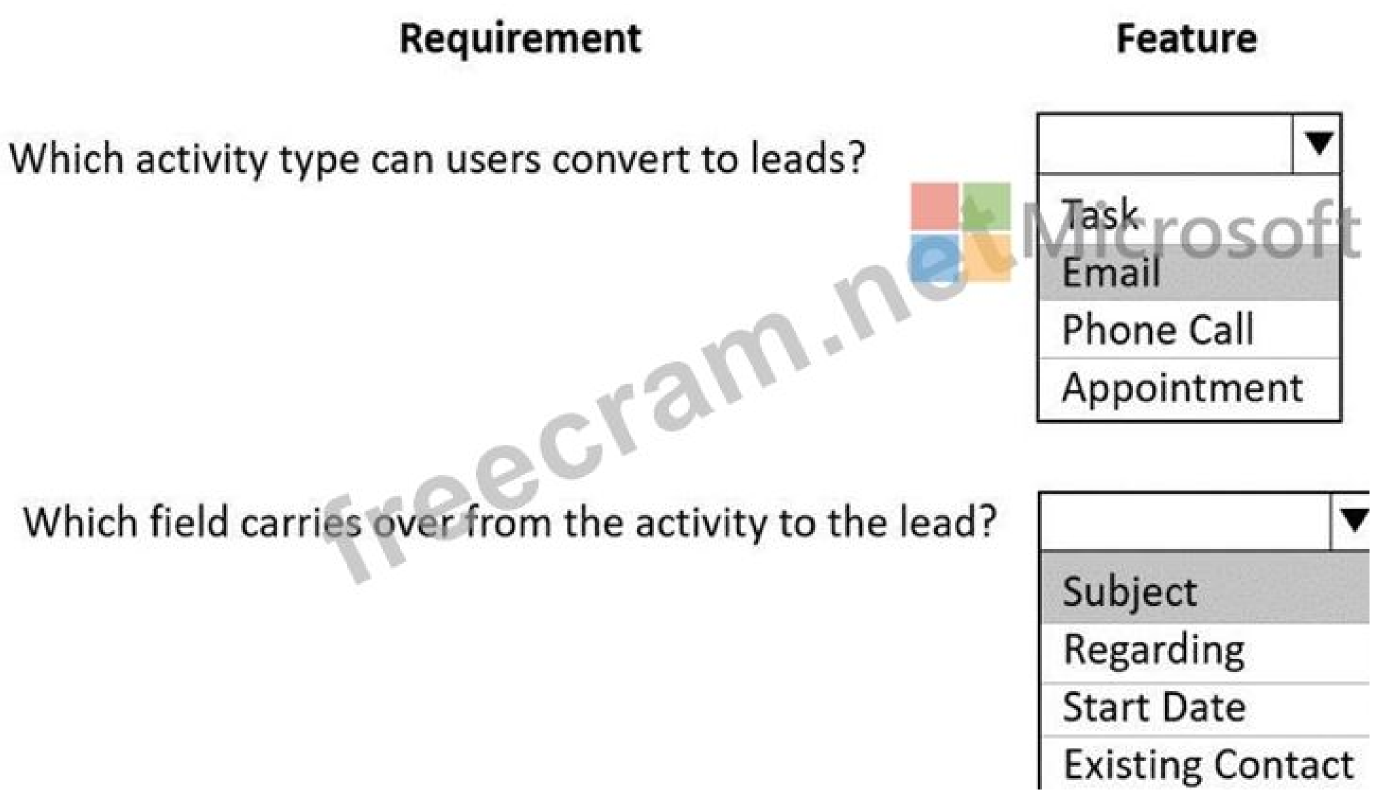


Reference:

https://community.learnmsdynamics.com/post/how-to-create-leads-in-microsoft-dynamics-365-5f157032469b48

NEW QUESTION: 23

You need to ensure that sales numbers reflect the accounting calendar.
What should you configure?

A. Rollup Queries
B. Business Closures
C. Fiscal Year Settings
D. Sales Territories

Answer: (SHOW ANSWER)

NEW QUESTION: 24

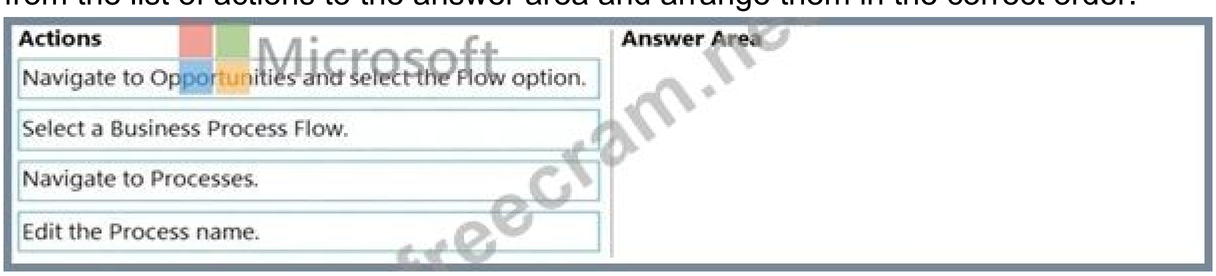
You are a salesperson using Dynamics 365 for Sales.
You need to be able to modify the product price on an active invoice that uses current pricing.
What should you do?

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

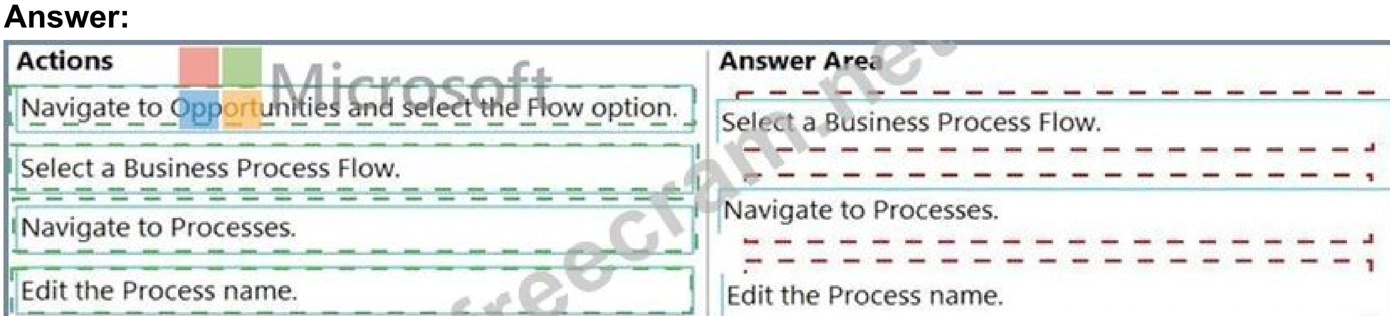
Answer: (SHOW ANSWER)

NEW QUESTION: 25

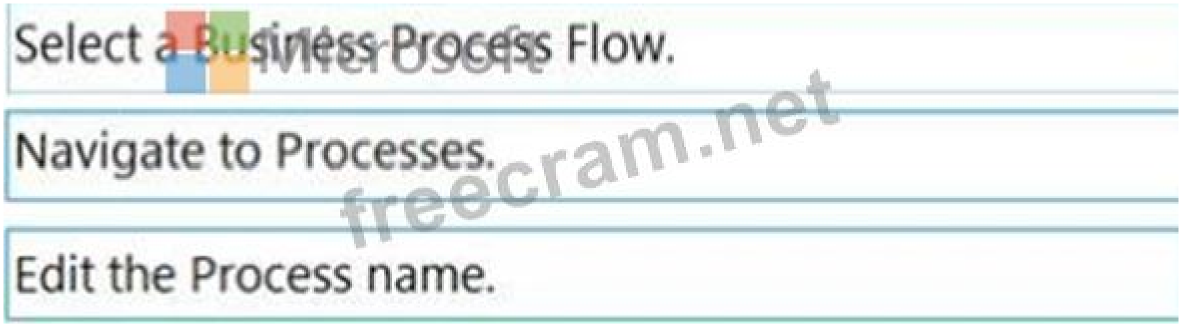
You manage a Dynamics 365 Sales environment for an organization.
You need to edit the display name of a business process flow.
Which three actions should you perform in sequence? To answer, move the appropriate actions from the list of actions to the answer area and arrange them in the correct order.



Answer:



Explanation
Graphical user interface, text, application, email Description automatically generated



https://docs.microsoft.com/en-us/dynamics365/customerengagement/on-premises/customize/create-business-pro

NEW QUESTION: 26
You need to resolve the issue UserA is experiencing.
Where should you add UserA?
A. Team
B. Field Security Profile
C. Office 365 group
D. Business Unit
Answer: (SHOW ANSWER)
Topic 3, group of theaters Case 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 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
A company owns a group of theaters that stage live performances. Tickets to shows are sold by individual representatives by using a mobile app.
Each theater has a manager. The managers rotate between theaters every six months.

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

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

Representatives create Microsoft Word documents to use as invoices. Pricing for tickets is often inconsistent.
Ticket sales are often lost because customers go to other shows.
Requirements
Business cards
* The business card of every group sales customer must be scanned and the image saved with the contact record.
* A customer's business card must be scanned even if the customer has been to the theater before.
* Business cards must show up on all contact forms.
Salespeople
* Each salesperson needs to sell a certain amount of tickets per month.
* The number of tickets each salesperson sells must be totaled only at the end of the month, before the monthly meeting between the salesperson and their manager.
* Salespeople must not be able to check the quantity sold in the system daily.
Opportunities
* The name of the sales manager must be added to opportunity records when sales representatives close opportunities.
* Opportunities that are lost must include the reasons other show and not interested.
* Some of the opportunities who order a large quantity of tickets every week want quotes quickly on various quantities. They want it broken down as follows:
*Price breakout by ticket
*Quantity discount amount
*Original ticket price
Orders
* Customers who buy a large quantity of tickets to a show must always get a quote first.
* Orders must always be created from the Quote record when it is a large purchase.
* Customers who buy a smaller quantity of tickets that do not have quotes must have an invoice sent to them.
Data Analysis
* Analyze email messages that pertain to ticket sales of the shows.
* Analyze relationships to help with potential sales of friends and coworkers for potential ticket buyers.
* Analyze accounts and assess the account representative's relationship with the customer to gauge the level of communication.

Visuals
A Tickets dashboard for all cashiers must be created that contains the following bar Charts:
* all the tickets sold for each show
* all the tickets available for each show
* accounts that have purchased groups of 10 or more tickets
* purchased tickets by age groups
Shows
* Representatives must track which shows customers go to when they do not purchase the tickets to their shows. This information must be entered in the records.
* Every time a potential large sale is lost, the representative needs to ask the customer which show ticket was purchased instead of their show.
* Shows at other theaters must be updated on a monthly basis.
* Quantity discounts and bulk purchase for different shows must be consistent.
Issues
* The Tickets dashboard has eight sections. The dashboard includes a line chart that displays data about age groups. The dashboard also has a chart that group ticket sales. The chart shows 10 or more tickets sold but is missing accounts that purchased more than 20 tickets.
* Cashiers report that they cannot see two specific area of the Tickets dashboard. Salespeople report that they can see all areas of the dashboard.
* Representative 1 is unable to scan business cards.
* Some users do not see the business cards when using their desktop machines, but they see them from their tablets and mobile phones.
* There are no business card images in the system.
* Duplicate contacts are being created with business card scans.

NEW QUESTION: 27
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: A (LEAVE A REPLY)
Reference:
https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/set-up-discount-list

NEW QUESTION: 28
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. Ptaybook Manager

C. Sequence Manager

D. Vice President of Sales

Answer: (SHOW ANSWER)

NEW QUESTION: 29

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. Dynamics 365 for Sales content pack for Microsoft Power BI

B. Relationship Assistant

C. Social Selling Assistant

D. LinkedIn Sales Navigator

E. Sales Insights

Answer: (SHOW ANSWER)

NEW QUESTION: 30

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. Amount

C. Quantity Selling Option

D. Discount List

Answer: (SHOW ANSWER)

NEW QUESTION: 31

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-contrac

NEW QUESTION: 32
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: (SHOW ANSWER)
Reference:
https://docs.microsoft.com/en-us/dynamics365/customerengagement/on-premises/basics/add-phone-call-task-em
Topic 1, Bellows College Case 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.
lo 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 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.

Overview

Background

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

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

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

Sales team

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

Dynamics 365

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

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

* Enforce repeatable steps to promote and increase efficiency and consistency for ticket sales across all sports and venues.
* Calculate sales margins based on base ticket prices with discounts for group and alumni sales.
* Maximize private box sales.
* Provide visibility into all potential and pending sales.
* Track and report follow up activities performed by all sales representatives.

Current processes

Ticket sales

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

Ticket sales tor existing customers will be entered as new opportunities for tracking and reporting purposes.

To facilitate timely follow-up (end sales representative accountability), a phone can activity will be auto-generated every time a new opportunity is created.
Ticket sales feu new customers will be entered in the solution as leads. Leads will have the following statuses:
Open Qualified, and Disqualified. Status values cannot be customized. Status reasons can be customized.
Ticket prices
The standard ticket price for all sporting events is 550. Non-alumni whet purchases are priced based on the standard rate. Alumni ticket purchases ate priced at the current cost. This season the current cost is $35 per ticket. All sports are priced on a markup, except for football. Football is priced based on a hard profit. The college has the following markup and margin policies for the three categories of ticket purchasers:

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

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

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

Private box seats
Because of the limited number of private box seats, private box seats sell out quickly. These seats are offered to current renters first then alumni. Remaining box seat tickets are made available to others from year to year.
The dean of the college has expressed the desire to personally call the CEOs or primary decision makers of groups to thank them for renewing their private box rentals.
Private box sales for existing customers win be entered as opportunities and converted to orders when finalized. Private box and group sales for new customers will be entered as leads and will follow a standardized sales process. To support reporting, pending new customer sales will go through a verification process using the stages New, Pending Approval. Approved.
Requirements
Accounting
Budgets and taxes must be tracked over an annual accounting period. The name of the accounting period must be displayed based upon the July 1 date. The accounting period must support abbreviations and must be divisible into four quarters.
Invoices must Include:
* Price List Products: Products tied to a price list
* Non-catalog Products: Existing products not part of the product catalog

* Opportunity Products: Products from a previously created opportunity
* Product prices on the invoice can be changed at the salespersons discretion.

System configuration

The system must be set up as follows:

* Individual cash and credit cards sales will be entered as orders in the system.
* New opportunities will automatically generate a required phone call activity for the assigned sales representative to be completed within 5 days. Valid outcomes of the call will be set to Connected. Left Message, and Wrong Number when closed.
* Non-renewals of private box rentals should be designated with the following outcomes for tracking and reporting purposes: Not interested. Budget cuts, No Longer in business. Other. It Other is chosen, the sales representative must provide additional information in the provided text box.

Tickets

The ticket manager must be able to create discounts for volume purchases of tickets for either groups or bundles of games.

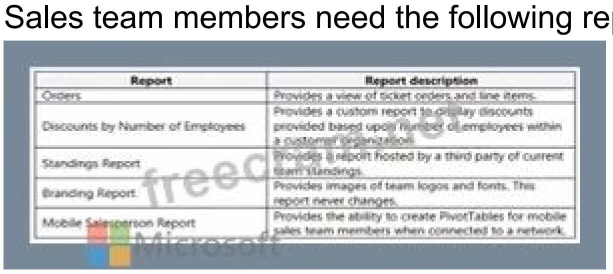
The ticket manager must be able to calculate the best margins for ticket sales. They need to calculate prices as percentage of costs.

Reporting

The school's athletic director needs a fiscal yea' report that includes specific formatting based on a defined template. The report must contain a chart that displays the type of ticket purchaser (alumni, non-alumni, and student).

All tales reporting must be completed by using Dynamics 365 foe Sales. Bellows College has purchased the online version o' the Sales Content Pack for Power BI to allow for visualizations and the creation of dashboards 'or ticket sales. The sales team needs to use a secured connection to access the Bellows College Power Bi dashboard.

Sales team members need the following report types to meet reporting needs:



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

Problem Statements

The sales manager is concerned with the tack of sates from one of the sales representatives in comparison to the other sales representatives- The legacy system does not provide enough data to allow the manage* to give proper feedback or guidance.

The sales manager has received emails from a potential private box customer named Contoso. Ltd. confirming that they have not had any contact from any sales representative even though they are ready to purchase group tickets.

NEW QUESTION: 33

An organization uses Dynamics 365 for Sales.

You need to create a quote template in Microsoft Word foruse 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-36

NEW QUESTION: 34

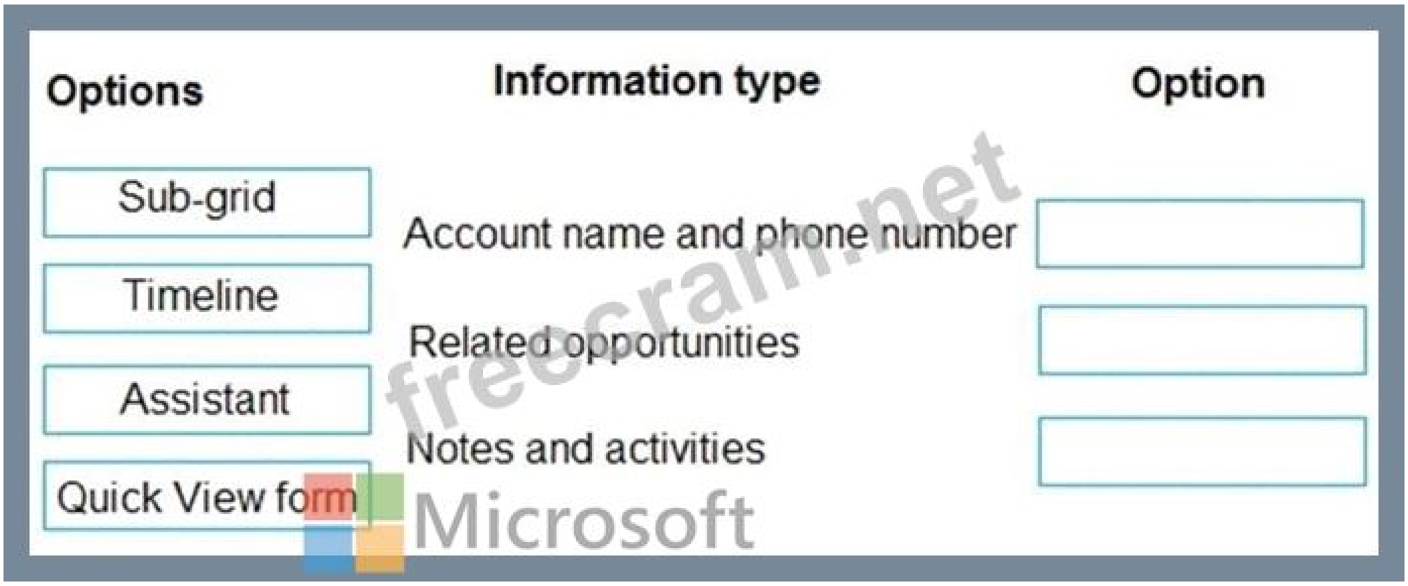
Note: This question is part of a series of questions that present the same scenario. Each question in the series contains a unique solution that might meet the stated goals. Some question sets might have more than one correct solution, while others might not have a correct solution.
After you answer 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: On the last stage of the business process flow, select Finish.
Does the solution meet the goal?

A. No
B. Yes

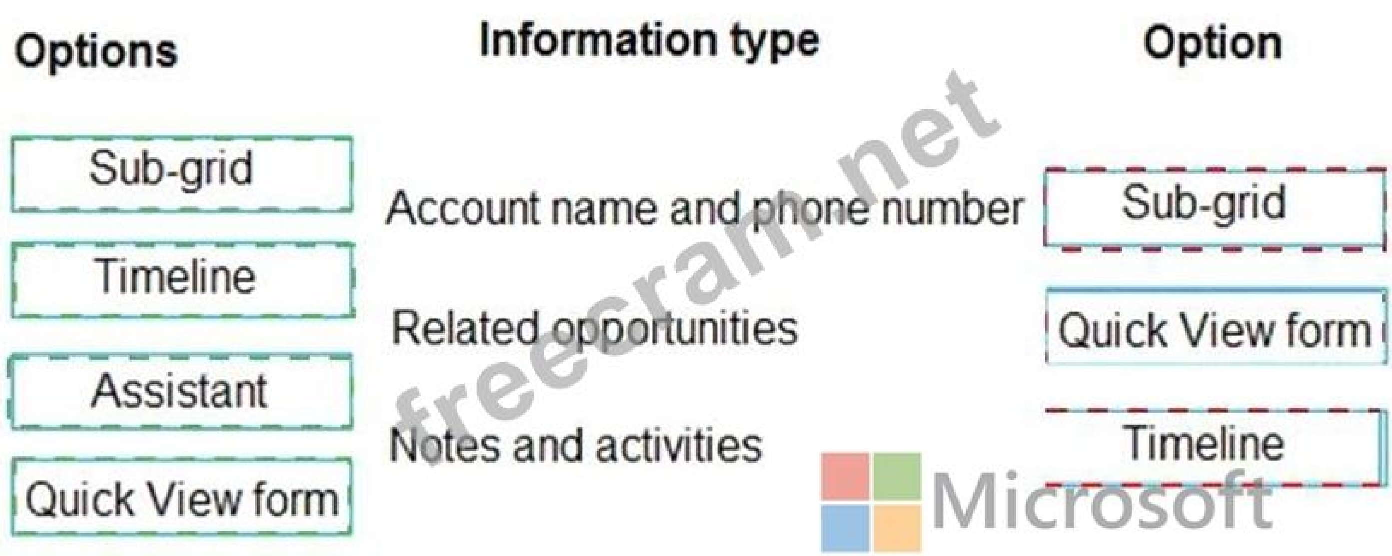
Answer: (SHOW ANSWER)

NEW QUESTION: 35

You are a Dynamics 365 Sales consultant.
A customer asks you to create a main form for contacts. The form must include the following information:
account name and phone number
related opportunities
notes and activities
You need to configure the form.
Which options should you use? To answer, drag the appropriate options to the correct information. Each option 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.

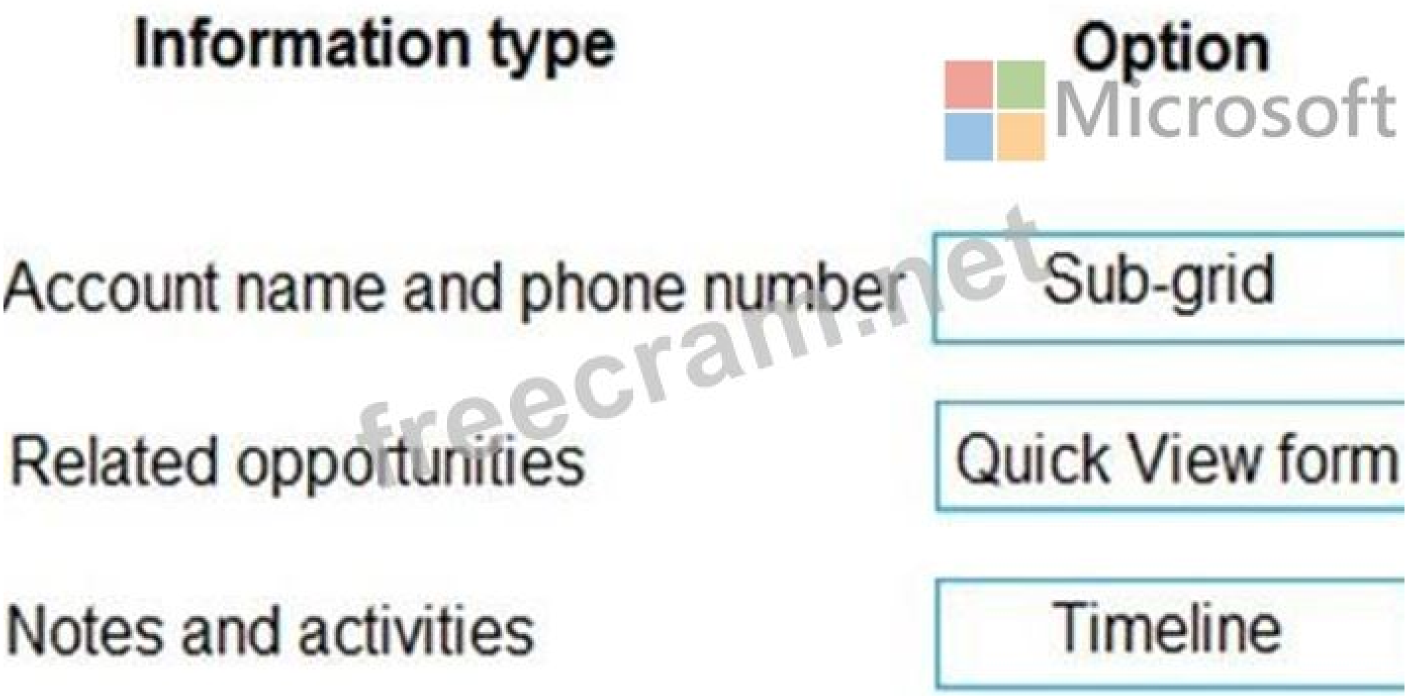


Answer:



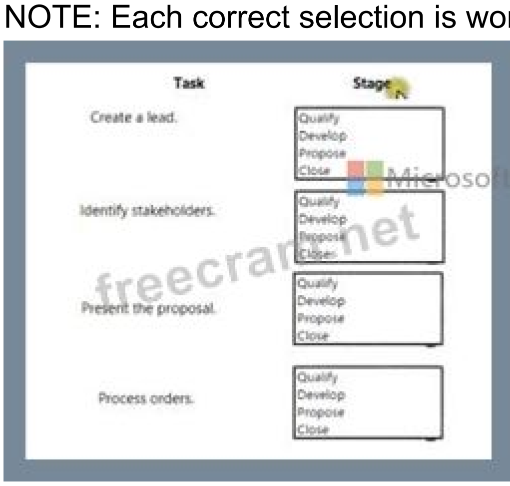
Explanation

Graphical user interface, text, application Description automatically generated

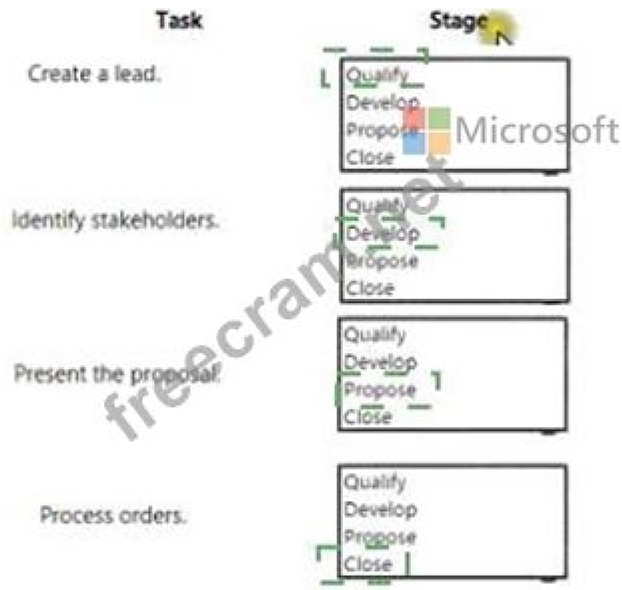


Reference:
https://docs.microsoft.com/en-us/powerapps/maker/model-driven-apps/quick-view-control-properties-legacy
https://docs.microsoft.com/en-us/powerapps/maker/model-driven-apps/set-up-timeline-control

NEW QUESTION: 36
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.



Answer:



Explanation

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

NEW QUESTION: 37

A customer uses Dynamics 365 Sales and Sales insights sales accelerator. The company wants to use an automatic activity generator. You need to set up the generator.

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

NOTE: Each correct selection is worth one point.

Answer:

Explanation

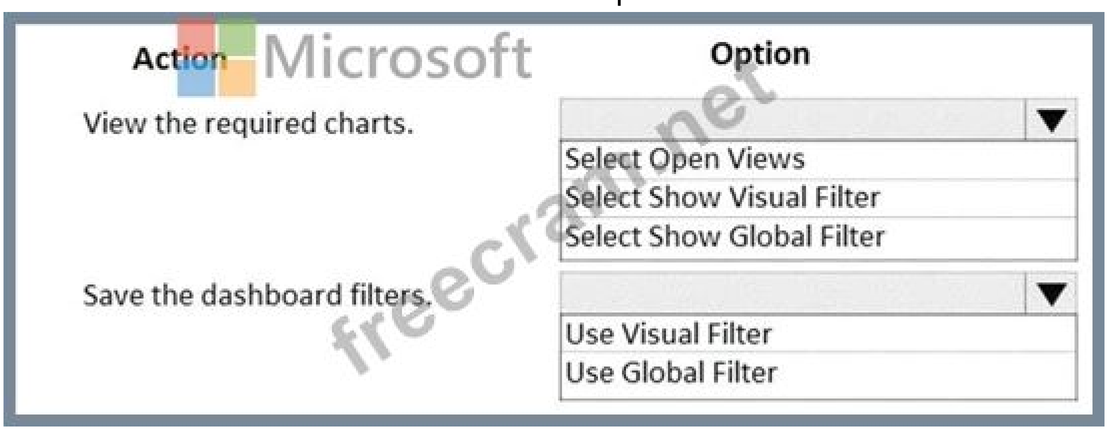
NEW QUESTION: 38

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

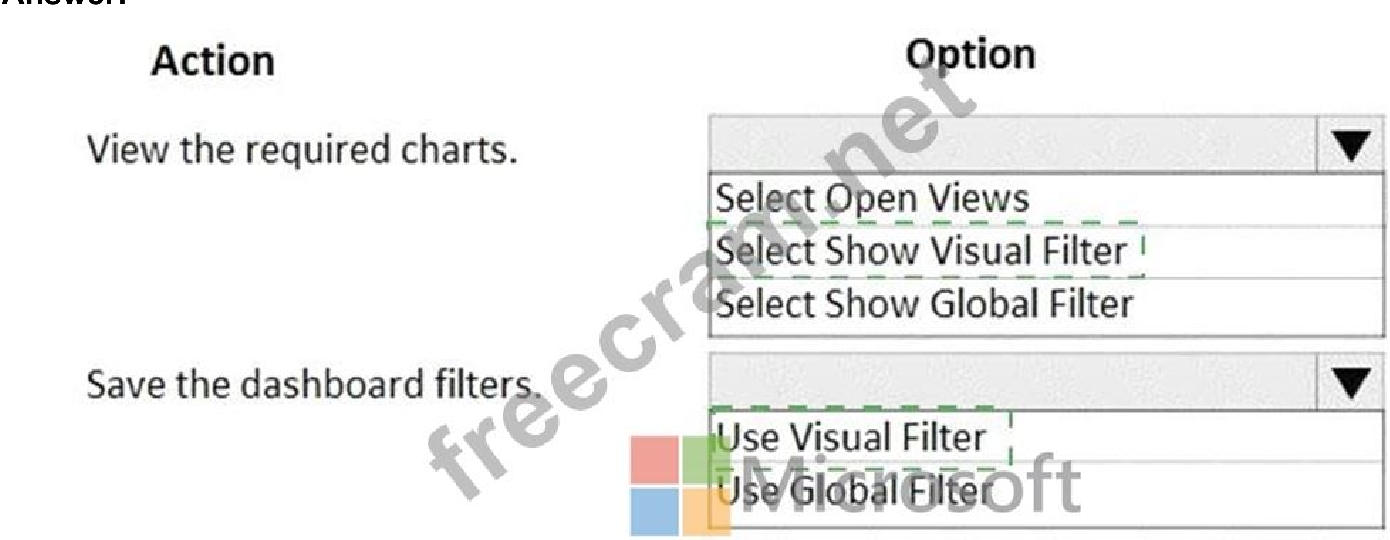
You need to create a filtered view of the dashboard.

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

NOTE: Each correct selection is worth one point.



Answer:



Explanation

NEW QUESTION: 39

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: Remove any subscriptions associated with Microsoft Relationship Sales and disable JavaScript.

Does the solution meet the goal?

A. Yes

B. No

Answer: (SHOW ANSWER)

NEW QUESTION: 40

You need to configure the system for all the large quantity pricing requirements.

What should you do?

A. Create a workflow for price list

B. Create a quote with a write-in product

C. Create an opportunity.

D. Create a product catalog

Answer: (SHOW ANSWER)

Reference:

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

NEW QUESTION: 41

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. Upload the new quota amounts for each user.

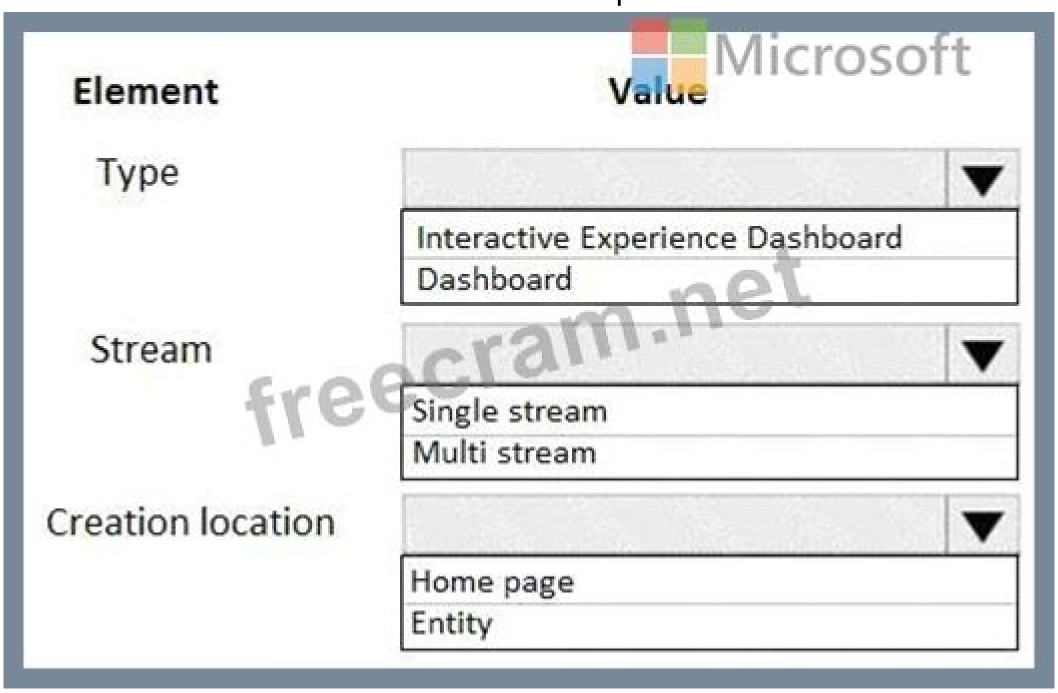
B. Update the target goal amount for each user.

C. Create a new relationship between sites.

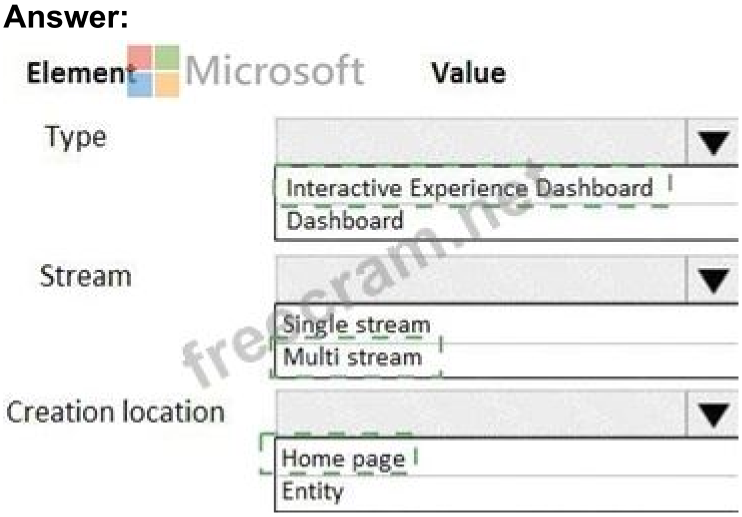
D. Create and assign users to new resource groups for each manager.

E. Assign the users to their new managers.
F. Adjust the forecast values directly.
Answer: (SHOW ANSWER)

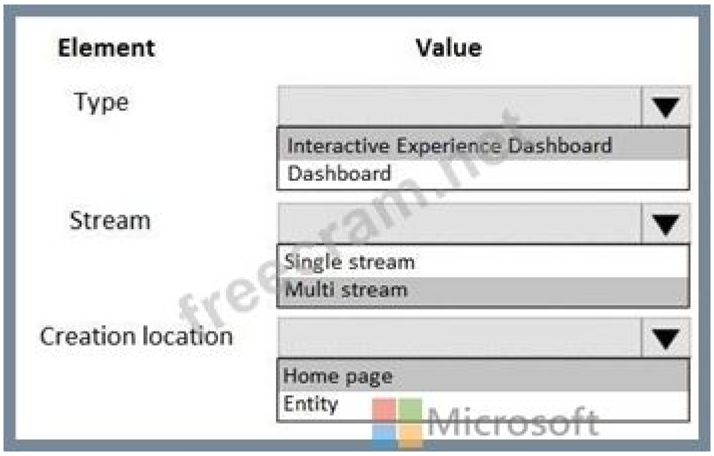
NEW QUESTION: 42
You manage a Dynamics 365 Sales environment.
You need to create a dashboard that lists customers and their activities. The dashboard must include tiles that are permanently displayed.
How should you configure the dashboard? To answer, select the appropriate options in the answer area.
NOTE: Each correct selection is worth one point.



Answer:



Explanation



Reference:
https://docs.microsoft.com/en-us/dynamics365/customerengagement/on-premises/customize/configure-interactiv

NEW QUESTION: 43

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. Revise the quote and create the order from Draft status.
B. Create the order from the quote because it is in a Closed status.
C. Revise the quote and create the order from the Active status.
D. Create the order from the quote because it is in a Won status.

Answer: (SHOW ANSWER)

NEW QUESTION: 44

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

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.

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

- Forecast Category option set
- Forecast view
- Layout column settings
- Preview grid

Where should you delete the Lost column for this forecast?

- Forecast configuration
- Forecast configuration filter data
- Forecast Category option set value
- Forecast view

Answer:

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

- Forecast Category option set
- Forecast view
- Layout column settings
- Preview grid

Where should you delete the Lost column for this forecast?

- Forecast configuration
- Forecast configuration filter data
- Forecast Category option set value
- Forecast view

Explanation

Graphical user interface, text, application, chat or text message Description automatically generated

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

- Forecast Category option set
- Forecast view
- Layout column settings
- Preview grid

Where should you delete the Lost column for this forecast?

- Forecast configuration
- Forecast configuration filter data
- Forecast Category option set value
- Forecast view

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

NEW QUESTION: 45
You need to create a component for deliveries. What should you create?
A. scheduled flow
B. custom activity table
C. business process flow
D. booking alert
Answer: (SHOW ANSWER)

NEW QUESTION: 46
A company uses Dynamics 365 Sales. You qualify a lead record.
Which record is created when you quality a lead? To answer, drag the appropriate record types to the correct leads. Each record type may be used once, more than once, or not at all. You may need to drag the split bar between panes or scroll to view content.
NOTE: Each correct selection is worth one point.

Answer:

Explanation

Graphical user interface, text, application Description automatically generated

Reference:

https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/qualify-lead-convert-opportunity-sales

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

NEW QUESTION: 47
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. Edit the site map so only the main form is available.
B. Remove unnecessary columns from the form.
C. Remove unnecessary columns from the view.
D. Create a Microsoft Power BI dashboard that contains only the relevant information.
Answer: (SHOW ANSWER)

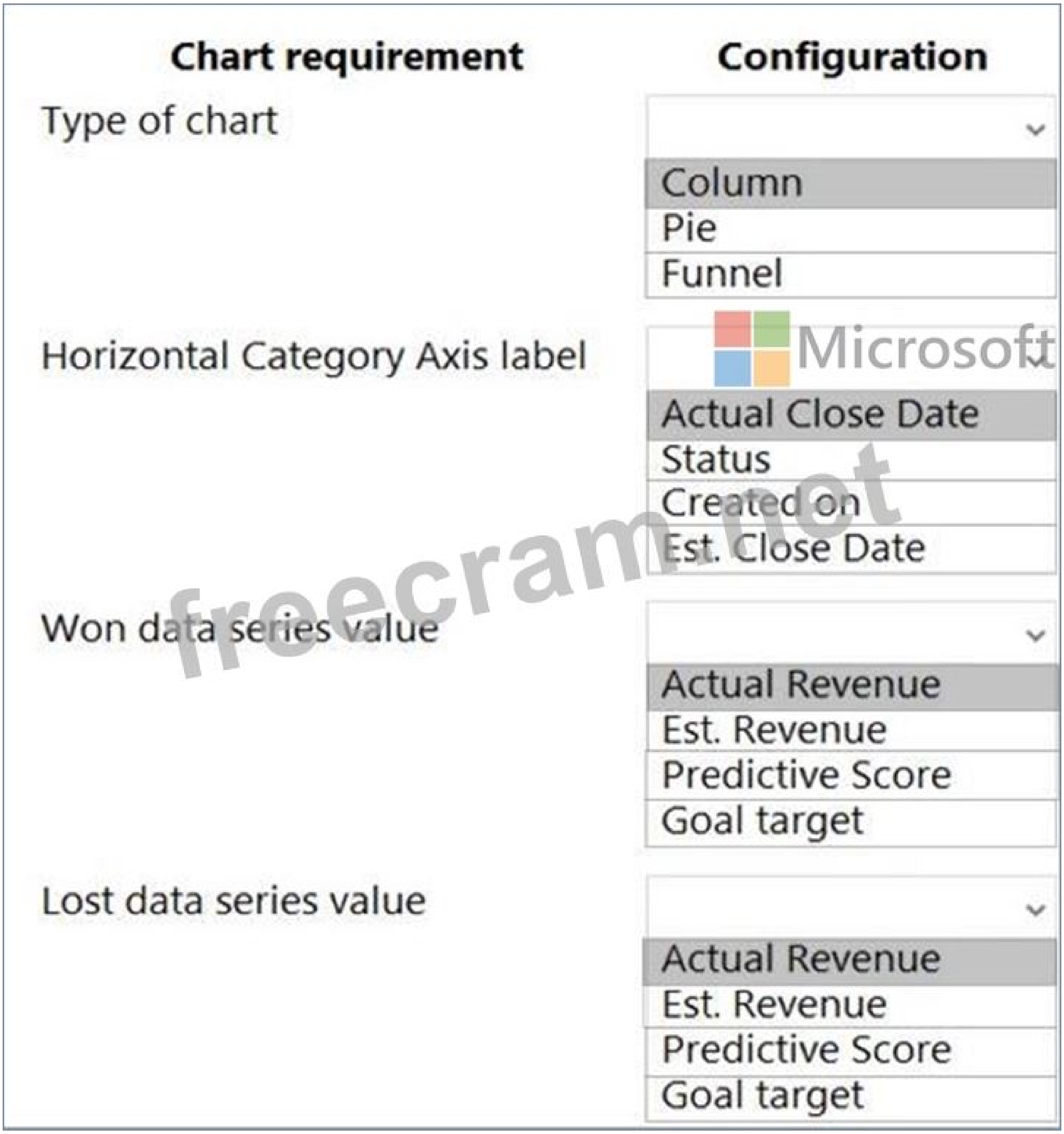
NEW QUESTION: 48
You need to configure the RFQ Won/Loss chart.
How should you configure the chart? To answer, select the appropriate options in the answer area.
NOTE: Each correct selection is worth one point.

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

Answer:

Explanation

Graphical user interface, text, application, email Description automatically generated



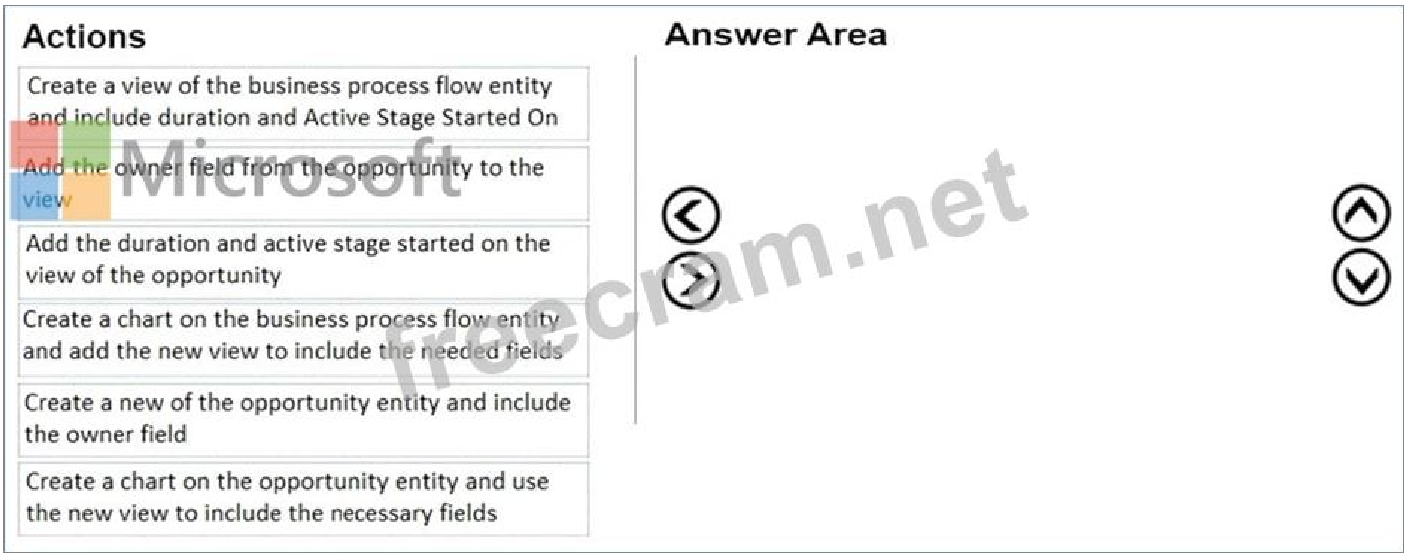
NEW QUESTION: 49

You use opportunities with business process flows in Dynamics 365.

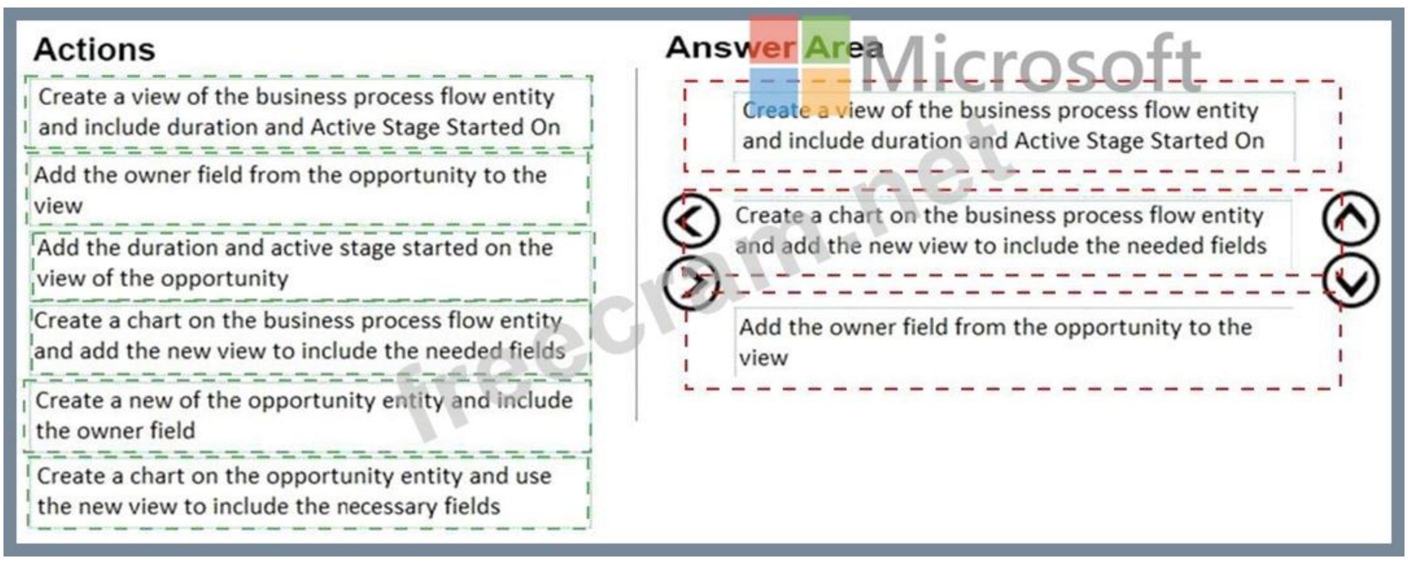
You do not have insight into the amount of time spent per process and when the last stage became active.

You need to create views and charts that give you this insight and that allow you to track by the owner of the opportunity.

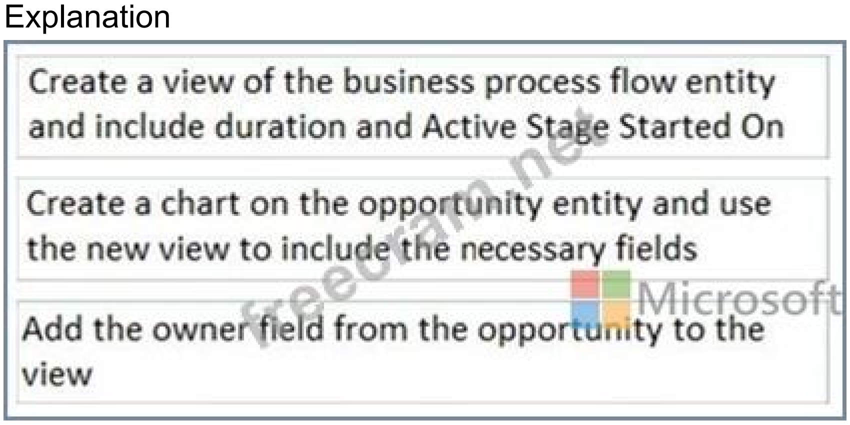
Which three actions should you perform in sequence? To answer, move the appropriate actions from the list of actions to the answer area and arrange them in the correct order.



Answer:



Explanation

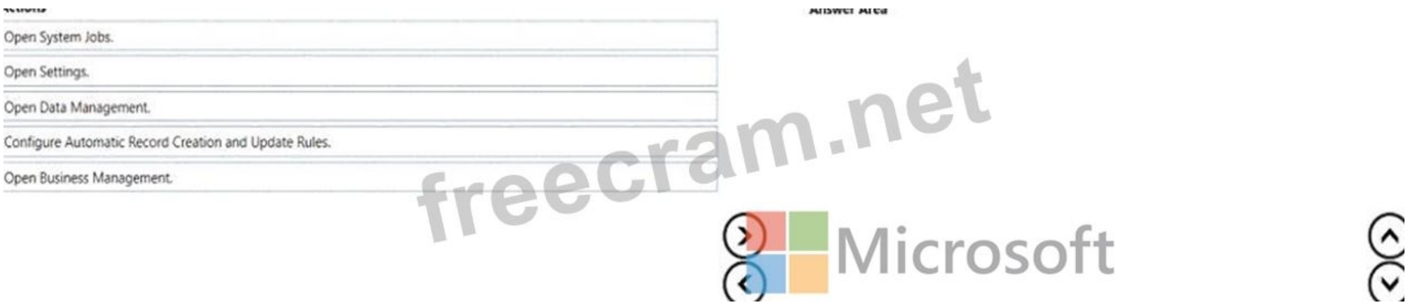


NEW QUESTION: 50

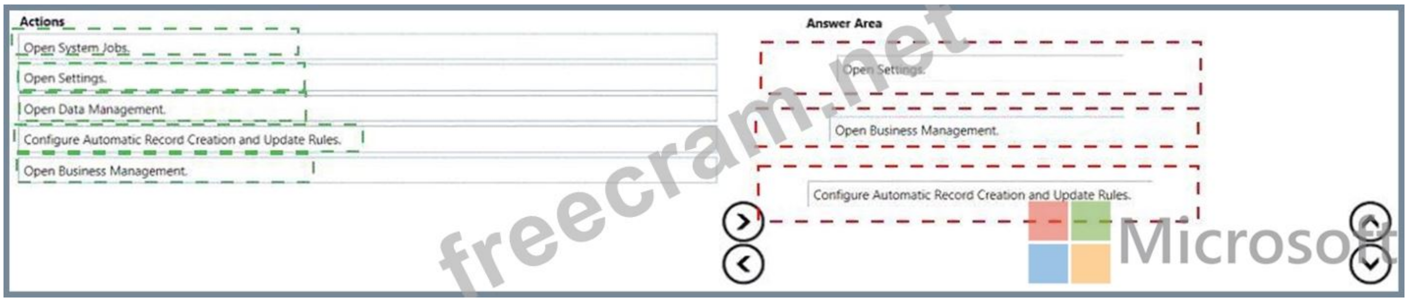
You manage a Dynamics 365 Sales environment.

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:



Explanation

Graphical user interface, text, application, chat or text message Description automatically generated

NEW QUESTION: 51

You implement Dynamics 365 Sales for a company in New York that sells gym equipment. The company has two types of salespeople: inside sales and outside sales. The inside salespeople must enter the following data in leads:

* First and last name
* Phone number
* Full address

o If the address is not in New York, the customer's driver's license number must be entered.

o If the address is in New York, the driver's license option should not appear.

The outside salespeople must be able to see leads and visit clients based on the following customer location:

* Customers with an address outside of New York
* Customers with an address inside New York

You need to assist the salespeople by using a minimum number of components.

What should the salespeople create? To answer, select the appropriate options in the answer area.

NOTE: Each correct selection is worth one point.

Answer:

Explanation

NEW QUESTION: 52

You create a discount list for a company.

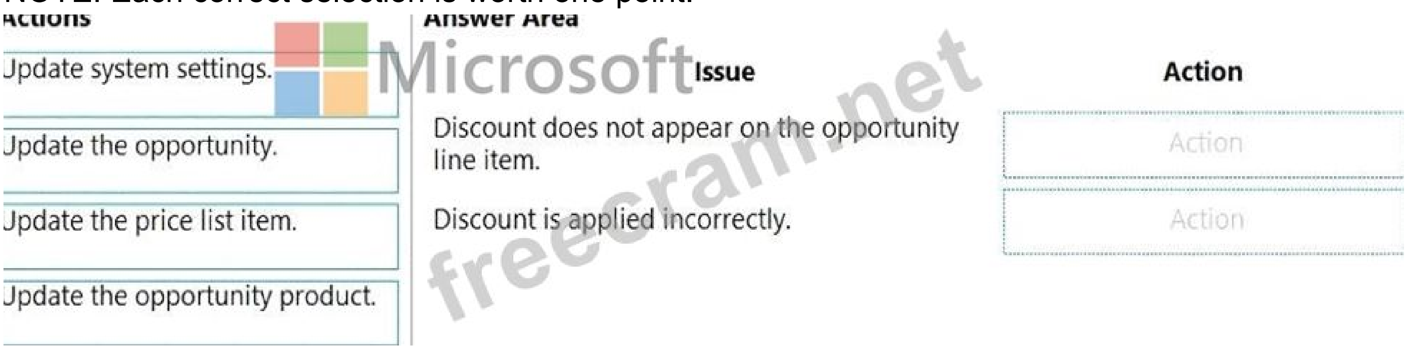
Two salespeople encounter the following issues when they create opportunities:

Salesperson1 does not see the discount on the opportunity line item.

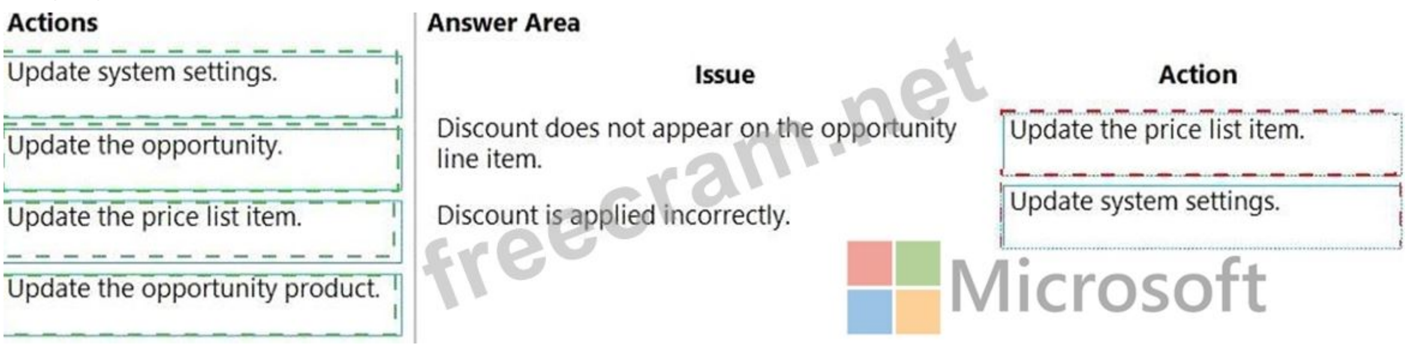
Salesperson2 sees the discount applied to the line total instead of the unit price.

You need to ensure that discounts are applied properly.

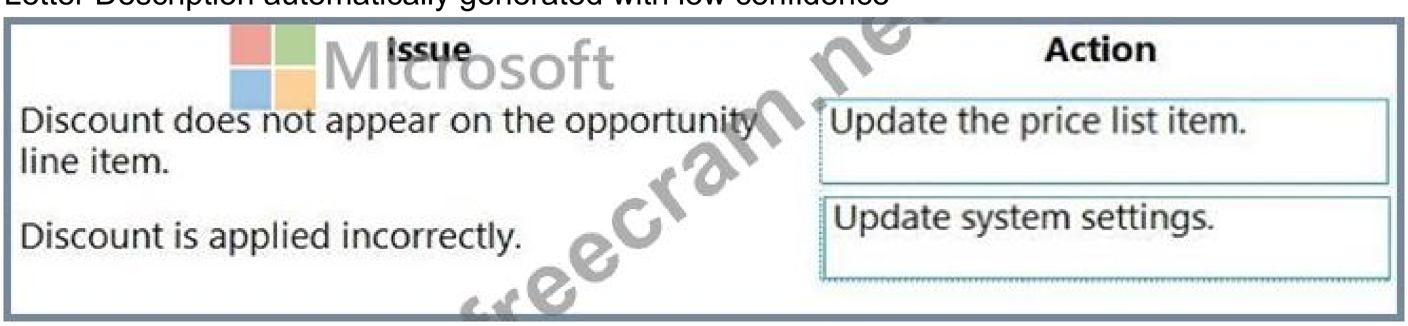
What should you do? To answer, drag the appropriate actions to the correct issues. Each action may be used once, more than once, or not at all. You may need to drag the split bar between panes or scroll to view content.
NOTE: Each correct selection is worth one point.



Answer:



Explanation
Letter Description automatically generated with low confidence



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

NEW QUESTION: 53
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:

Explanation

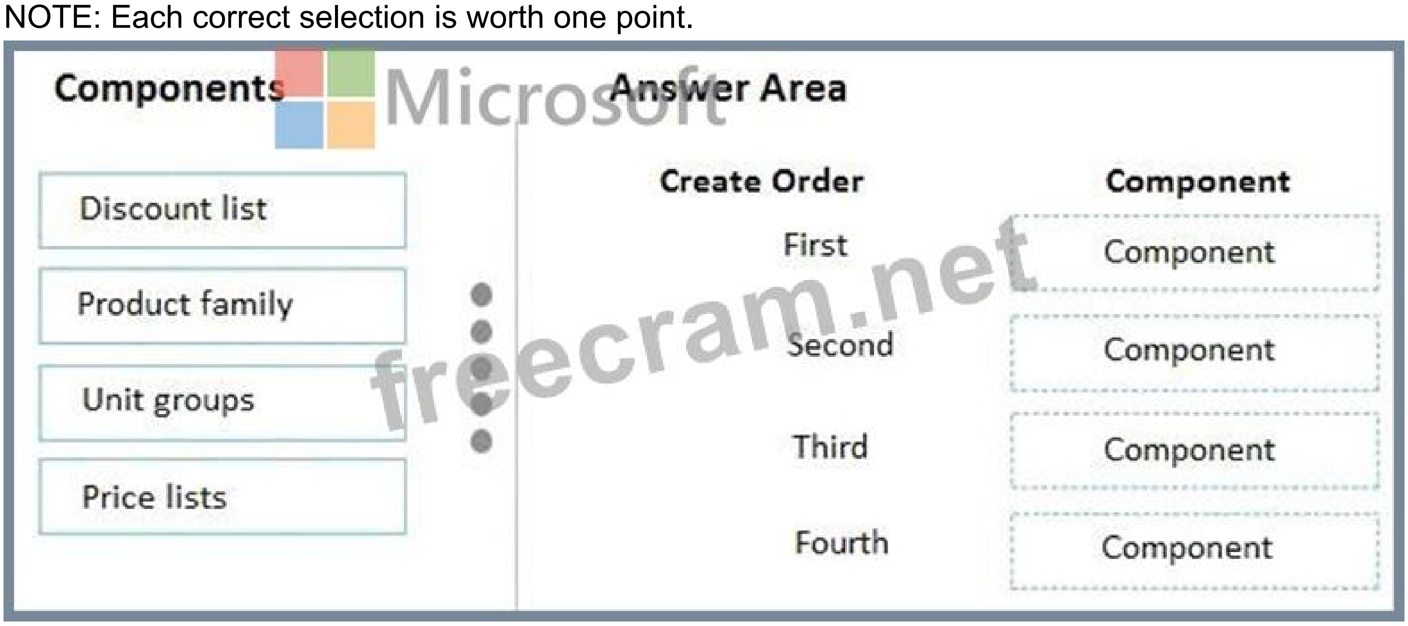
NEW QUESTION: 54

You are setting up a product catalog in Dynamics 365 Sales.

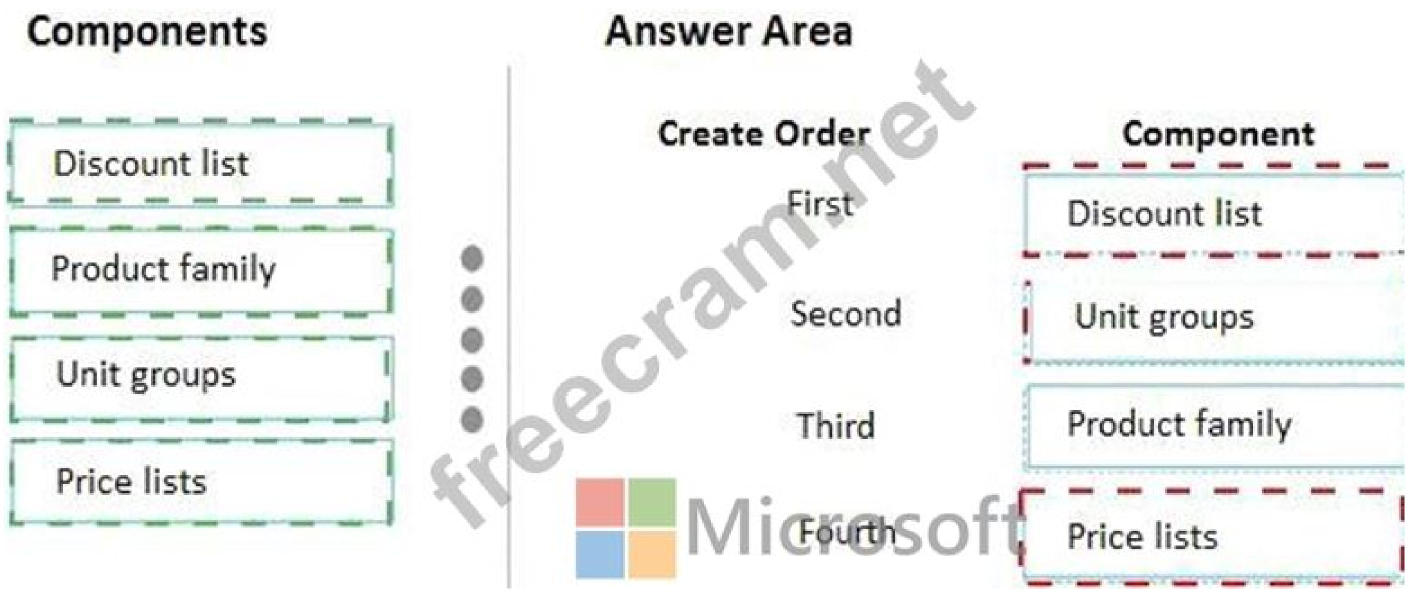
You need to set up the catalog using the least amount of effort.

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:



Explanation

Reference:

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

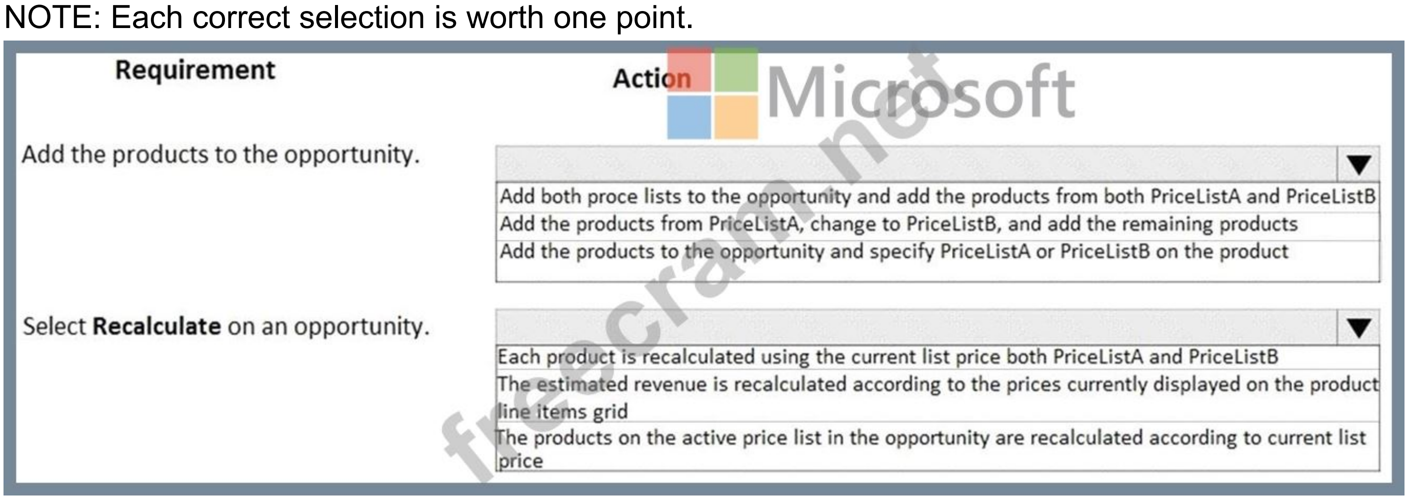
NEW QUESTION: 55

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

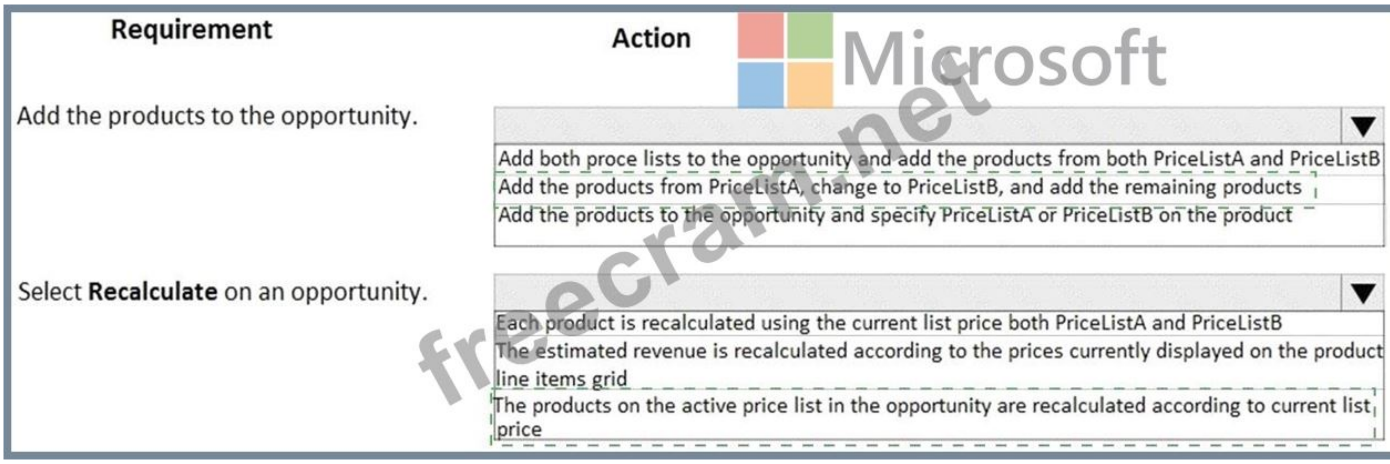
You need to add products than exist in PriceListA and PriceListB to an opportunity.

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

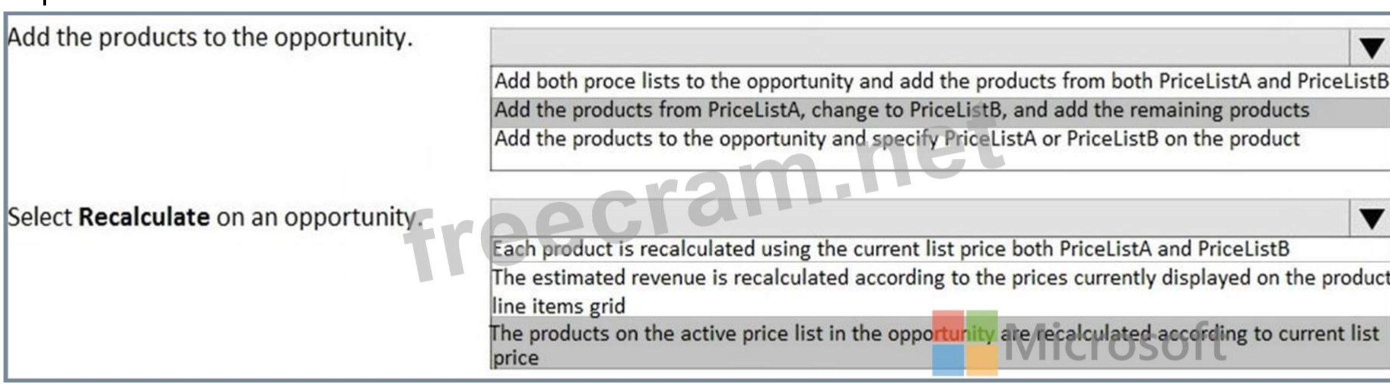
NOTE: Each correct selection is worth one point.



Answer:



Explanation



NEW QUESTION: 56

A company uses Dynamics 365 Sales. The default currency for the company is US dollars (USD). The company does business in the United States, Mexico, and the United Kingdom. The company sells 10 types of products.

Each product requires its own pricing structure.

You need to create price lists by using the local currency across countries and regions.

How many price lists should you create?

A. 1

B. 3

C. 10

D. 30

Answer: (SHOW ANSWER)

Reference:

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

NEW QUESTION: 57

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

A. one price list item, one discount list

B. one price list item, three discount lists

C. three price list items, one discount list

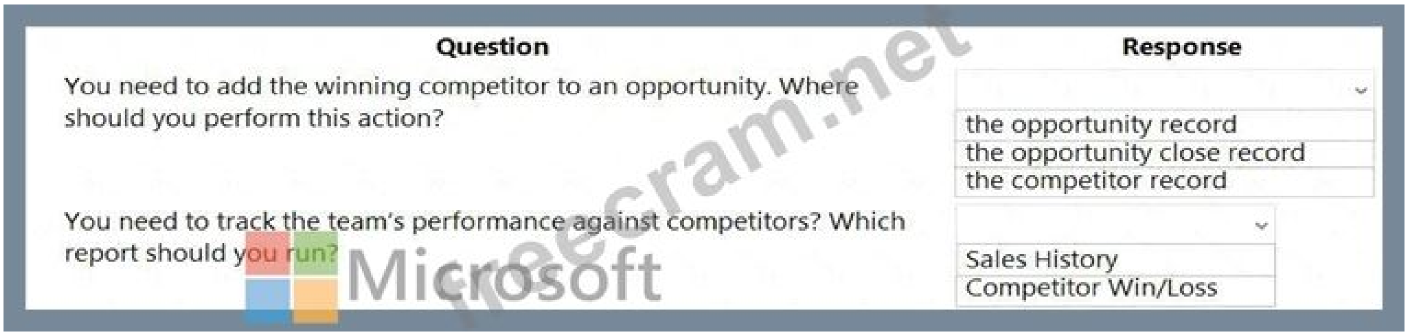
D. three price list items, no discount lists

Answer: (SHOW ANSWER)
Topic 6, Contoso, Ltd (An Appliance Company)
background
Contoso, Ltd. is an appliance company that sells appliances to various regions. The company uses First Up Consultants, an external sales company, to manage opportunities in areas where they do not have salespeople.
The First Up Consultants personnel do not have Dynamics 365 Sales licenses. The internal sales team generates about 500 tradeshow leads per month.
Contoso, Ltd. uses Dynamics 365 Sales with no additional features enabled. The company currently uses only custom forms and the Sales Hub app.
The company recently hired a sales manager. The sales manager plans to improve processes and must keep costs as low as possible. A hands-off approach means the sales manager will view information in Dynamics
365 Sales but will not add entries. The sales manager identified the following areas that require major improvement
* Leads process
* Opportunity process
* Marketing process
* General company collaboration and communication
Leads Process
* Leads created at The head office must be automatically distnbuted to salespeople in a cyclical order.
Tradeshow leads are created by salespeople and do not need to be redistributed.
* Lead assignments are often delayed because other tasks become a priority.
* To help prioritize tasks, the salespeople require the Up Next widget for the Lead form.
* The salespeople require a task that reminds them to call the lead one week after the tradeshow.
* The salespeople are excellent at meeting leads at tradeshows. One day after the tradeshow, they manually send a follow up email, but that is often where the communication stops.
* Salespeople often forget to track customer emails to their leads when they are in Microsoft Outlook.
Opportunity Process
* The contracts team must review all contracts uploaded in Dynamics 365 Sales for opportunities, but they do not have access to Dynamics 365 Sales.
* Opportunities are often transferred to different child or parent accounts, so contracts should not be filed by account.
* First Up Consultants must track the progress of the opportunity in Dynamics 365 Sales.
Marketing Process
* The contracts team must review all contracts uploaded in Dynamics 365 Sales for opportunities, but they do not have access to Dynamics 365 Sales.
* Opportunities are often transferred to different child or parent accounts, so contracts should not be filed by account.

o Pop-up sale emails must only go to a manually selected group of cont<365 Sales.,
* Tradeshow
o The sales administrator must send marketing materials to specific leads collected from the tradeshow when the tradeshow ends. The sales administrator must manually select the leads from all the leads collected.
* Flyers
o The sales administrator must send a quarterly sales flyer to leads in the local area. These leads are collected from the website. The leads must be automatically added or removed throughout the quarter.
General Issues
* Salespeople often travel to visit customers. Currently, the salespeople connect to Dynamics 365 Sales through a browser on their phones. The Dynamics 365 Sales forms are often small and difficult to use.
* The salespeople require availability of the following features on their phone:
o Receive an alert that notifies them of a new lead assignment even when they are not using Dynamics 365 Sales. o View all meetings and appointments from Outlook and Dynamics 365 Sales in one view. o Generate a SQL Server Reporting Services (SSRS) quote for a customer.
* Salespeople require emails to appear on Dynamics 365 Sales records so they can associate the email to the record without needing to navigate to another app.
* A new salesperson can open records but cannot access the app. The salesperson has been granted the same app access as all other salespeople.
You need to help the sales administrator identify leads generated from the tradeshow and website.

NEW QUESTION: 58
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. Common Data Service
B. System Customizer
C. Sales Manager
D. Knowledge Manager
Answer: (SHOW ANSWER)

NEW QUESTION: 59
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:

Explanation

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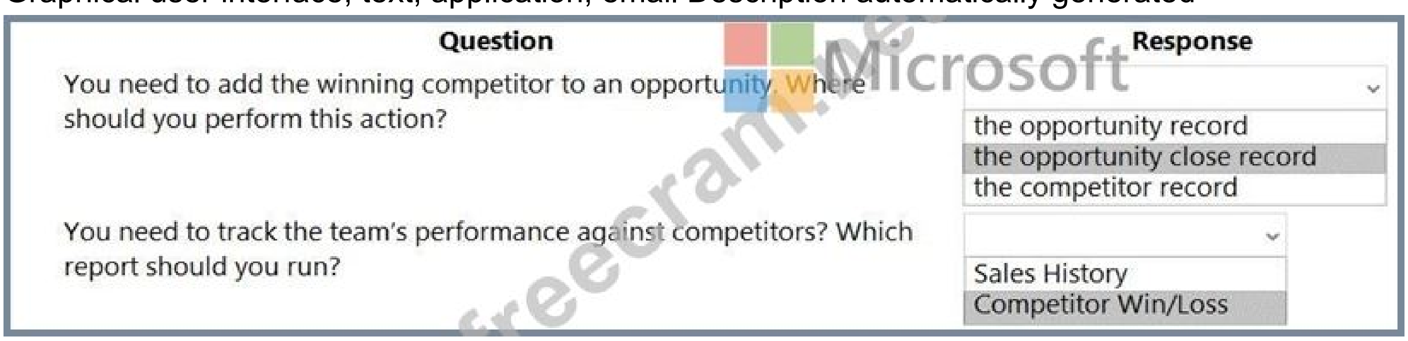


Reference:

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

NEW QUESTION: 60

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 S5.00
* A dozen cans cost S55.O0.
* 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.

Answer:

Explanation

NEW QUESTION: 61

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 each country sales territory as a sub-territory of 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 assign it to the global territory.

D. Associate the customer accounts for each country with the primary account.

E. Create a primary account for the customer and contacts for each country of operation.

Answer: (SHOW ANSWER)

NEW QUESTION: 62
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: (SHOW ANSWER)
Reference:
https://docs.microsoft.com/en-us/dynamics365/sales-professional/create-quote-pdf-sales-professional

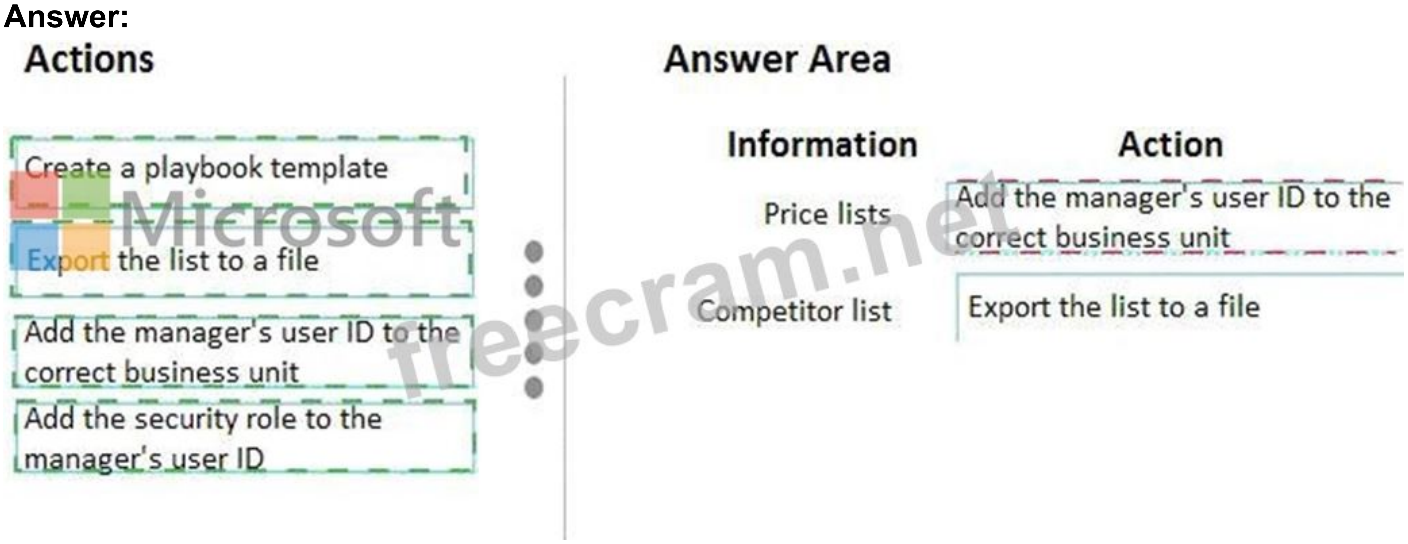
NEW QUESTION: 63
A company uses Dynamics 365 Sales with Microsoft Exchange and server-side synchronization All users have approved mailboxes. Some users report that emails will not send. You need to resolve the Issue. What should you do?
A. Turn on automatic tracking.
B. Add the email address to the email profile.
C. Disable impersonation mode.
D. Test and enable the mailboxes.
Answer: D (LEAVE A REPLY)

NEW QUESTION: 64
A company uses Dynamics 365 Sales.
A user cannot find the option to view activities in the Kanban view or rearrange the activities.
You need to make the Kanban view available to the user.
What should you do?
A. Instruct the user to create a personal view.
B. Add the control to the Activity table.
C. Add the user to the correct security role.
D. Create a new system view.
Answer: (SHOW ANSWER)

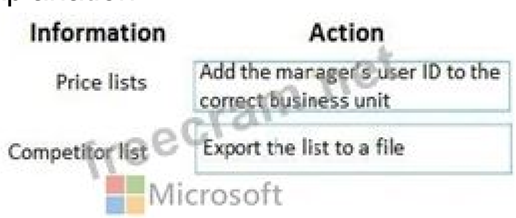
NEW QUESTION: 65

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.

Answer:



Explanation



NEW QUESTION: 66

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

A. Update personalization settings.

B. Create a personal view.

C. Update system settings.

D. Create a public view.
Answer: (SHOW ANSWER)

NEW QUESTION: 67
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. No
B. Yes
Answer: A (LEAVE A REPLY)

NEW QUESTION: 68
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. Set up tasks in Outlook.
B. In the Dynamics 365 App for Outlook, set up tracking in personal options.
C. Ask an administrator to enable the automatic tracking setting.
D. Ensure that the email recipient address is the same as the one in Dynamics 365 Sales.
Answer: (SHOW ANSWER)

NEW QUESTION: 69
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. Amount
B. Quantity Selling Option
C. Discount List

D. Price List

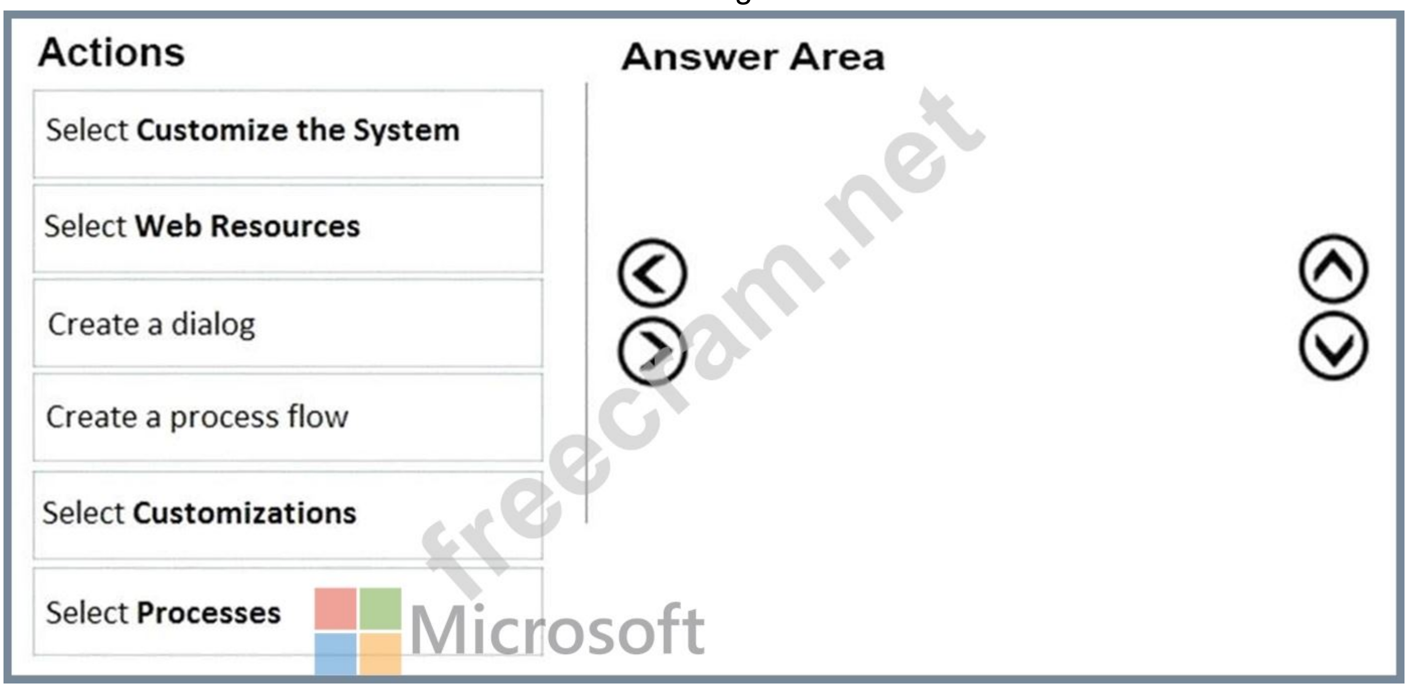
Answer: (SHOW ANSWER)

NEW QUESTION: 70

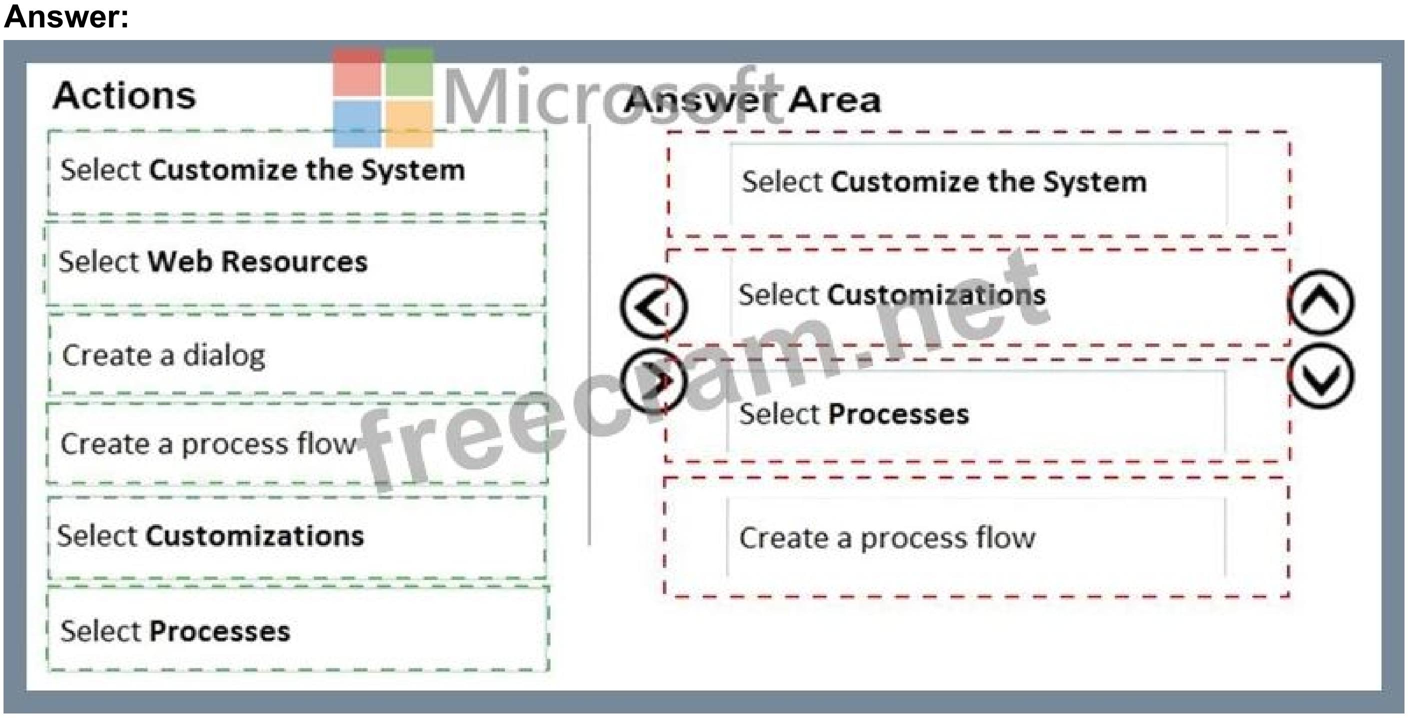
You are configuring Dynamics 365 for Sales. Your organization has a five-stage sales process comprised of leads, opportunities, client validation, quotes, and orders.

You need to ensure that salespeople can move through the sales process and view progress.

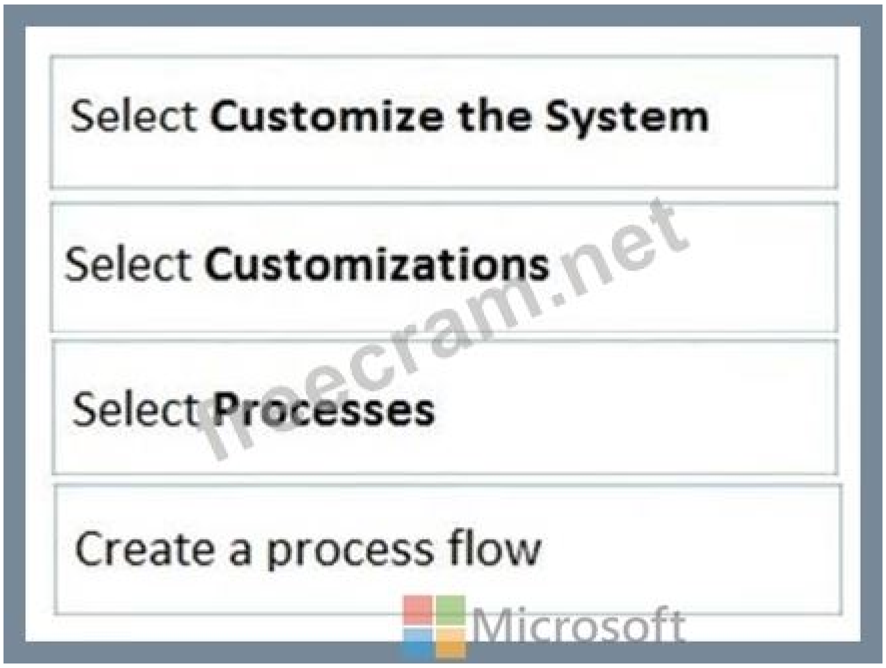
Which four actions should you perform in sequence? To answer, move the appropriate actions from the list of actions to the answer area and arrange them in the correct order.



Answer:



Explanation



NEW QUESTION: 71
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 Activities view
B. My Active Accounts view
C. Account Timeline feed
D. Account Files tab
E. Contact Timeline feed
Answer: (SHOW ANSWER)

NEW QUESTION: 72
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. Categorized Search
B. Relevance Search
C. Advanced find
D. Quick Find
Answer: (SHOW ANSWER)

NEW QUESTION: 73

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. an on-demand workflow
B. a business rule
C. a task flow
D. a calendar
Answer: C ([LEAVE A REPLY]())

NEW QUESTION: 74
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: B ([LEAVE A REPLY]())
Explanation
References:
https://docs.microsoft.com/en-us/dynamics365/customer-engagement/sales-enterprise/add-product-quoteorder-in

NEW QUESTION: 75
You need to manage existing RFQs.
What should you do? To answer, select the appropriate options in the answer area.
NOTE: Each correct selection is worth one point.

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

Answer:

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

Explanation

Graphical user interface, text, application, email Description automatically generated

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

Reference:

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

NEW QUESTION: 76
A company's human resources director wants a solution that improves consistently for the process of onboarding new staff. The company wants to use playbooks for the solution. You need to create a playbook template to track the staff onboarding. In which entity must you create records for staff members?
A. Custom entity
B. Contact
C. Resources
D. User
Answer: (SHOW ANSWER)

NEW QUESTION: 77
A company uses Dynamics 365 Sales.
You need to configure the Sales Insights sales accelerator.
What should you create?
A. Insight cards
B. Communication frequency
C. Leads
D. Sequences
Answer: D (LEAVE A REPLY)

NEW QUESTION: 78
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:

Explanation

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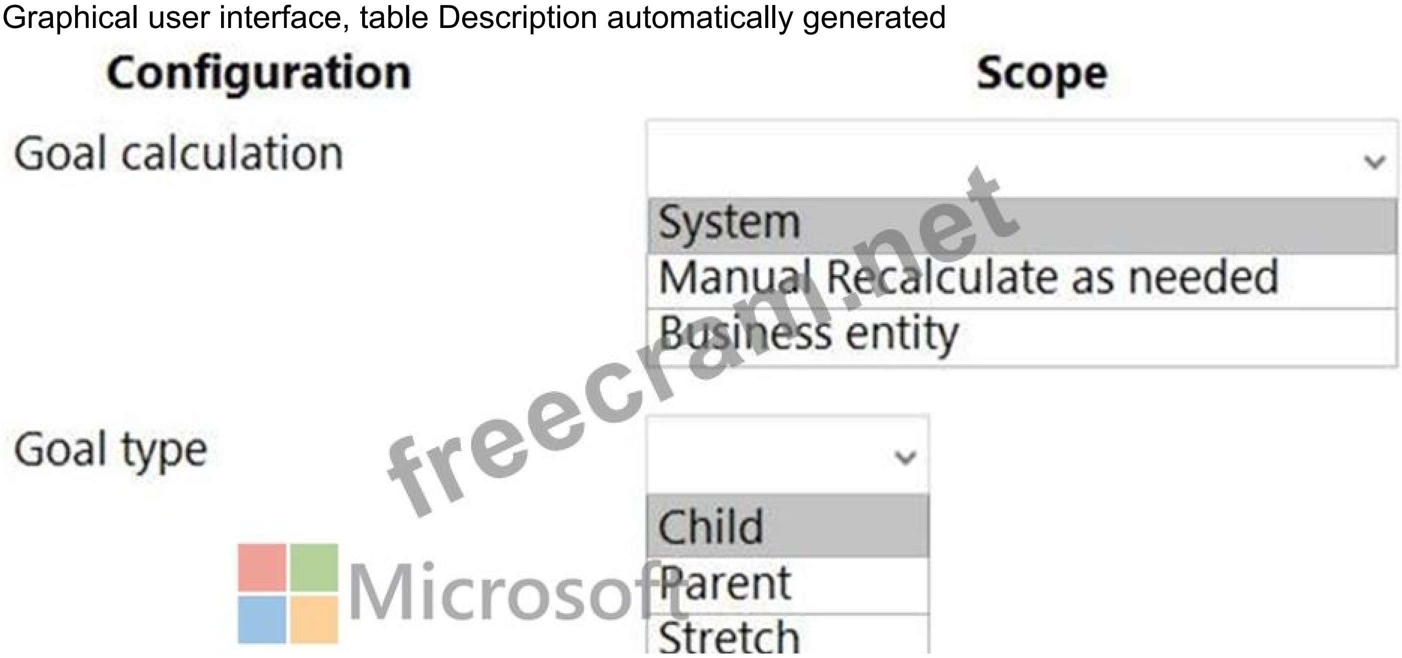
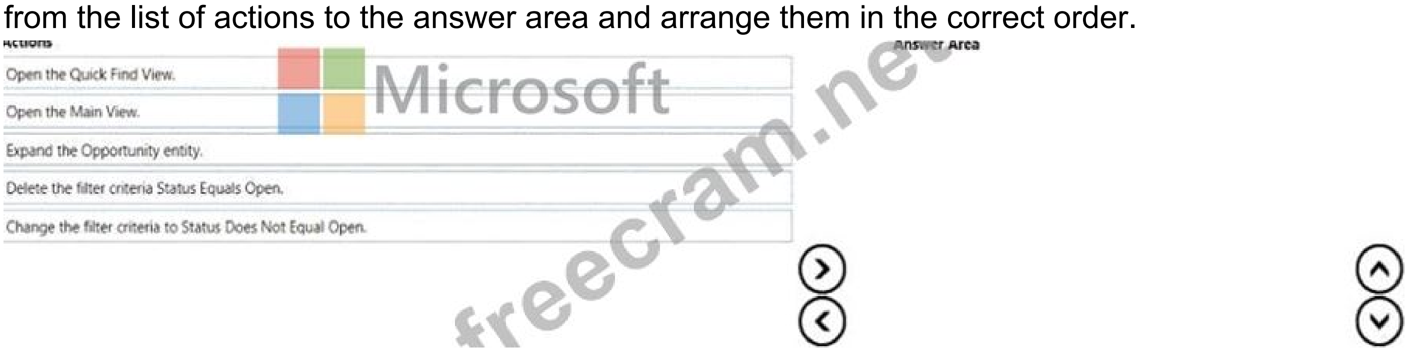


Reference:

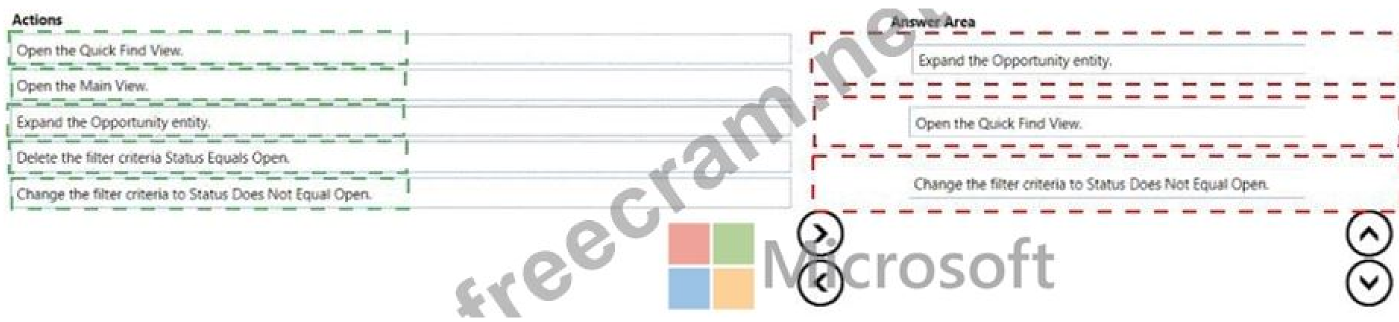
https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/goals-overview

NEW QUESTION: 79
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?vie

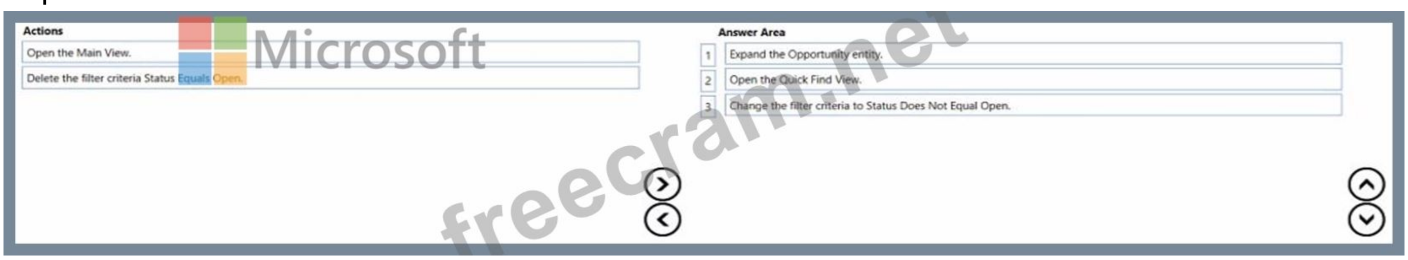
NEW QUESTION: 80
You are creating a forecast.
You want to include only opportunities that sell more than 100 units.
You need to configure this within the system.
What should you configure?
A. multiple columns
B. advanced features
C. additional filters
D. separate views
E. premium forecasting
Answer: (SHOW ANSWER)

NEW QUESTION: 81
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:



Explanation



NEW QUESTION: 82

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)

Explanation

References:

https://docs.microsoft.com/en-us/dynamics365/customer-engagement/sales-enterprise/create-edit-order-sales

NEW QUESTION: 83

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

A. Retrain the model.

B. Change the business process flow that it is referencing.

C. Refresh the data.

D. Add a new model.

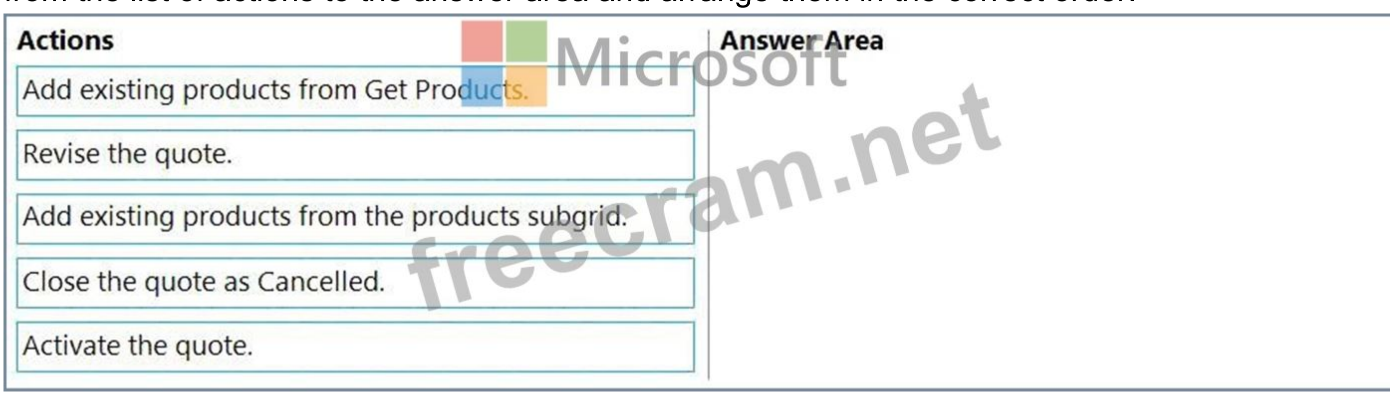
Answer: A (LEAVE A REPLY)

NEW QUESTION: 84
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 gather information from a prospect named Cat Francis to qualify the prospect as a new sales opportunity.
You need to identify the prospect, complete all the required fields, and qualify the prospect in the sales process.
To complete this task, sign in to the Dynamics 365 portal.
Answer:
See explanation below.
Explanation
You need to create a lead and qualify the lead.
Navigate to Leads.
Click New.
In the Qualify stage of the process bar, select the contact named Cat Francis. When you select an existing contact while creating a lead record, the following information is automatically populated in the Lead form: First Name, Last Name, Job Title, Business Phone, Mobile Phone and Email.
Click Save.
In the Lead record, click the Qualify button in the toolbar. This will convert the lead to an opportunity.
Reference:
https://docs.microsoft.com/en-us/dynamics365/sales/create-edit-lead-sales

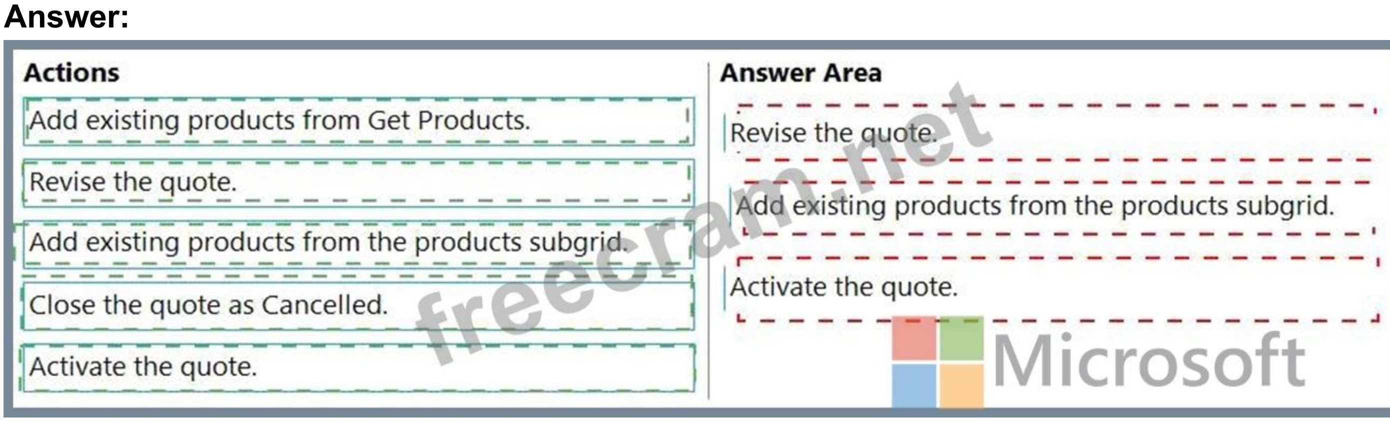
NEW QUESTION: 85
You manage a Dynamics 365 Sales environment.
You need to ensure that all possible activities are automatically converted to leads by using the record creation rule.

Which three activities can you convert to leads? Each correct answer presents a complete solution.
NOTE: Each correct selection is worth one point
A. Phone call
B. Task
C. Service activity
D. Email
E. Custom activity
Answer: (SHOW ANSWER)

NEW QUESTION: 86
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:



Explanation
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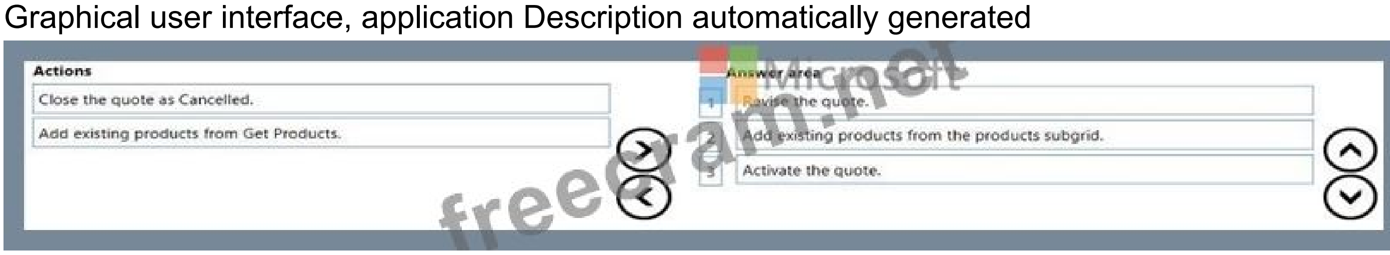


NEW QUESTION: 87
You need to resolve the sales manager's issue regarding private box customers.

What should you do?

A. Convert all incoming phone calls to leads.

B. Convert the sales manager's emails lo opportunities.

C. Convert the dean's phone call to an opportunity.

D. Convert the sales manager's emails to leads.

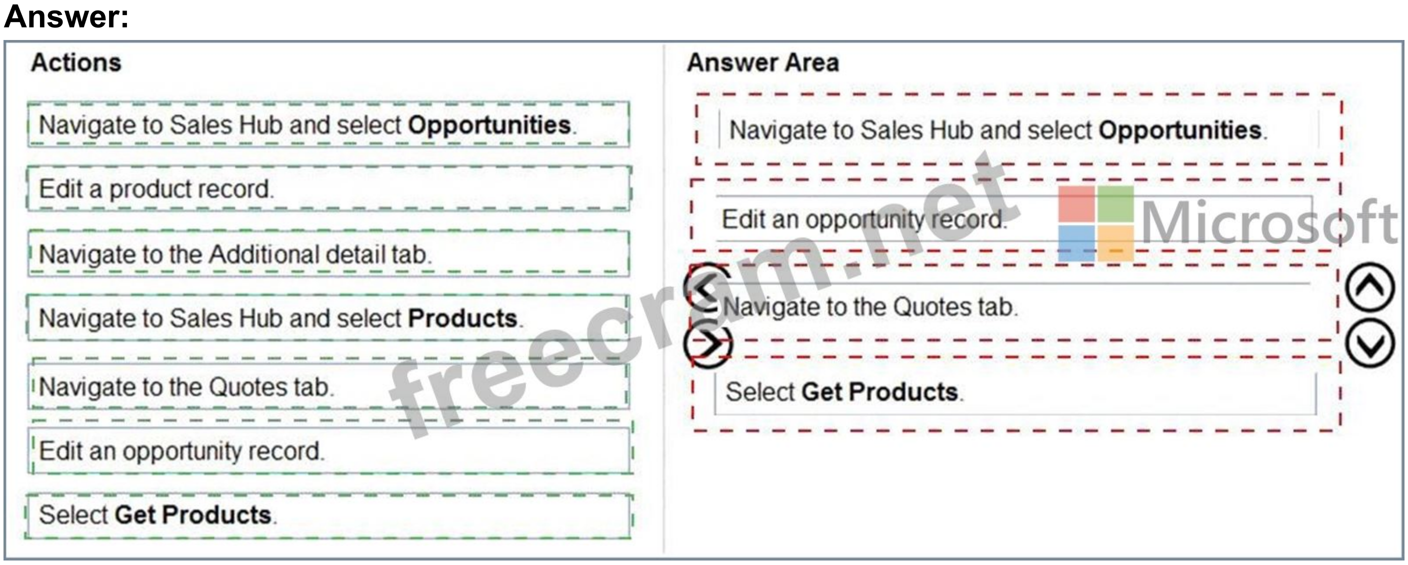
Answer: (SHOW ANSWER)

NEW QUESTION: 88

You need to handle large quantity opportunities.

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

Answer:



Explanation

Navigate to Sales Hub and select **Opportunities**.

Edit an opportunity record.

Navigate to the Quotes tab.

Select **Get Products**

Reference:

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

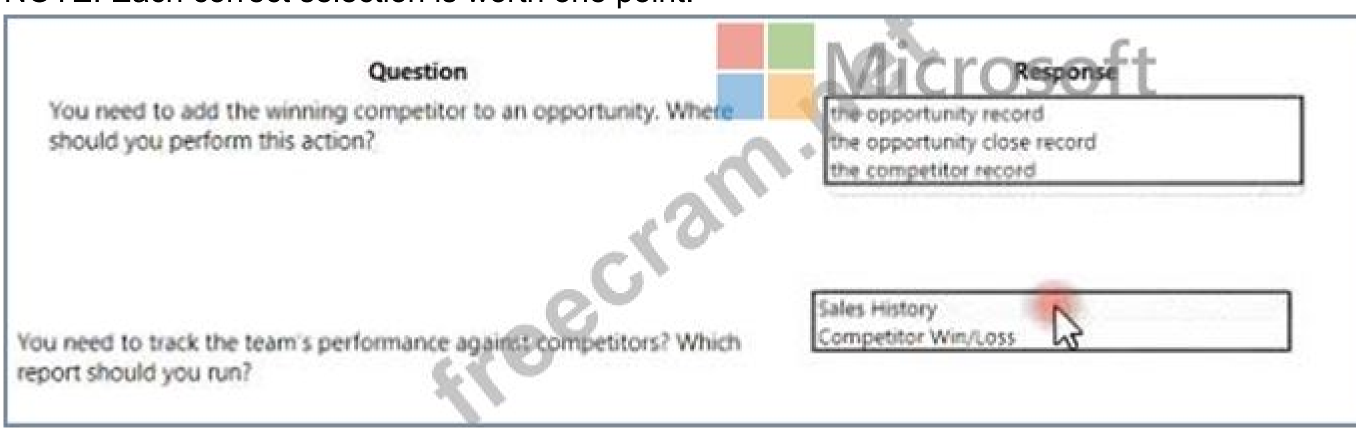
NEW QUESTION: 89

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.

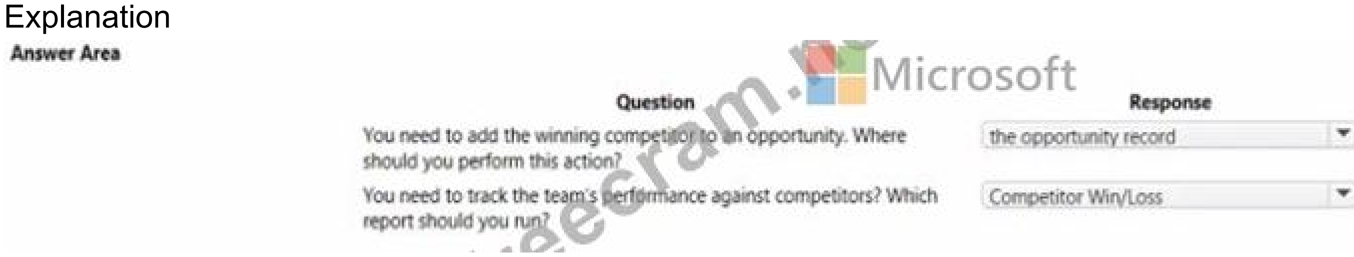
How should you respond? To answer, select the appropriate options in the answer area.

NOTE: Each correct selection is worth one point.



Answer:

Explanation



NEW QUESTION: 90

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: 91
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.
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:
See explanation below.
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:

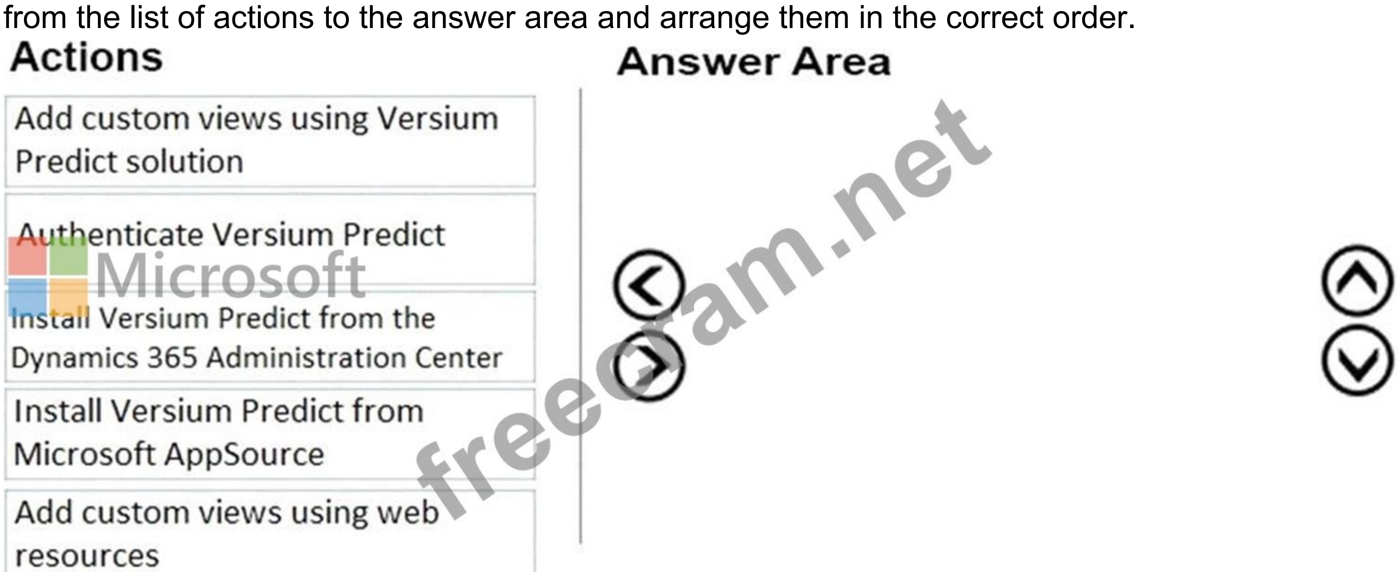
https://www.azamba.com/2018/08/16/how-to-add-a-reason-to-disqualify-a-lead-in-microsoft-dynamics-365-for-s

NEW QUESTION: 92

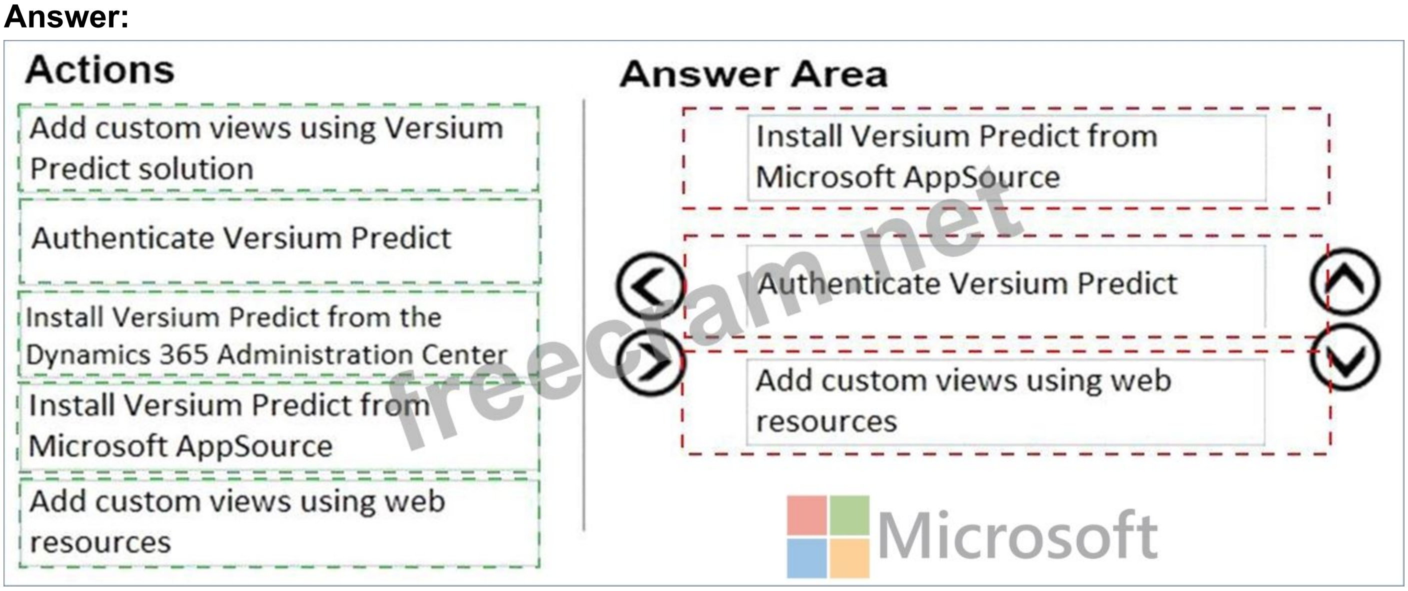
You are a Dynamics 365 for Sales administrator.

You need to implement Versium Predict with custom views.

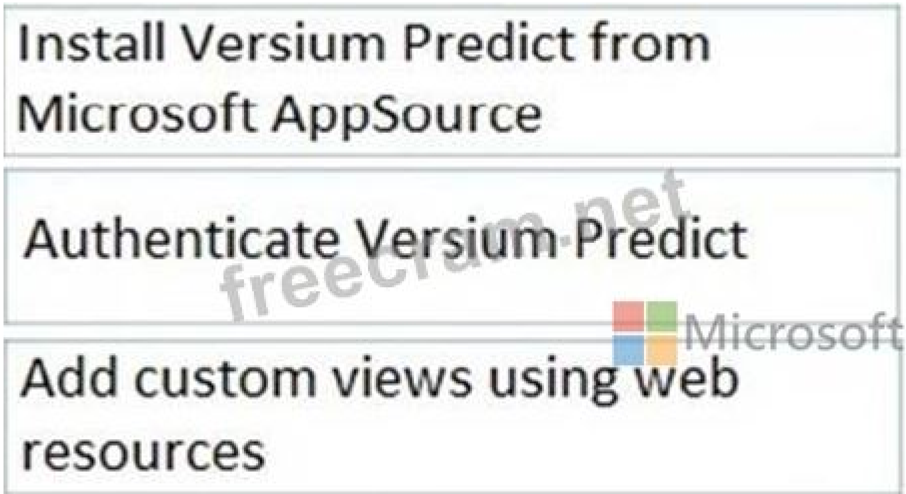
Which three actions should you perform in sequence? To answer, move the appropriate actions from the list of actions to the answer area and arrange them in the correct order.



Answer:



Explanation



NEW QUESTION: 93

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 listed in the quote

B. The write-inoption was not used

C. The product is missing required information

D. The product was not published

Answer: (SHOW ANSWER)

NEW QUESTION: 94

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. Currency Amount___________

B. Percent of List

Percent Margin - Standard Cost

C. Percent Markup - Current Cost

Answer: (SHOW ANSWER)

NEW QUESTION: 95

You need to resolve the issue reported by User1.

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

NOTE: Each correct selection is worth one point.

A. Configure LinkedIn Sales Navigator Lead lookup control.

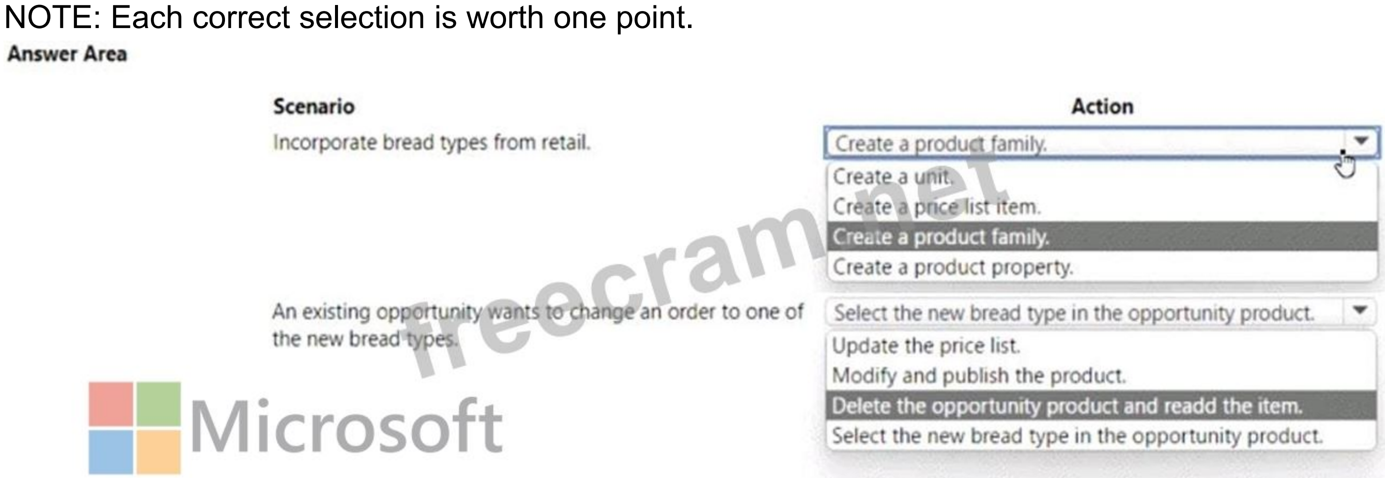
B. install Linkedin Sales Navigator and enable it.

C. Configure the connection graph.

D. Create a tab for LinkedIn Sales Navigator and make it visible.
E. Enable CRM sync and activity writeback.
Answer: (SHOW ANSWER)

NEW QUESTION: 96
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)
Explanation
References:
https://docs.microsoft.com/en-us/dynamics365/customer-engagement/customer-service/set-when-businessclosed

NEW QUESTION: 97
You need to add the new types to the product catalog.
What should you do for each scenario? To answer, select the appropriate options in the answer area.
NOTE: Each correct selection is worth one point.



Answer:

Explanation

NEW QUESTION: 98

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. Qualify a lead.

B. Create the order.

C. Convert the email.

D. Create a contact

Answer: (SHOW ANSWER)

NEW QUESTION: 99

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

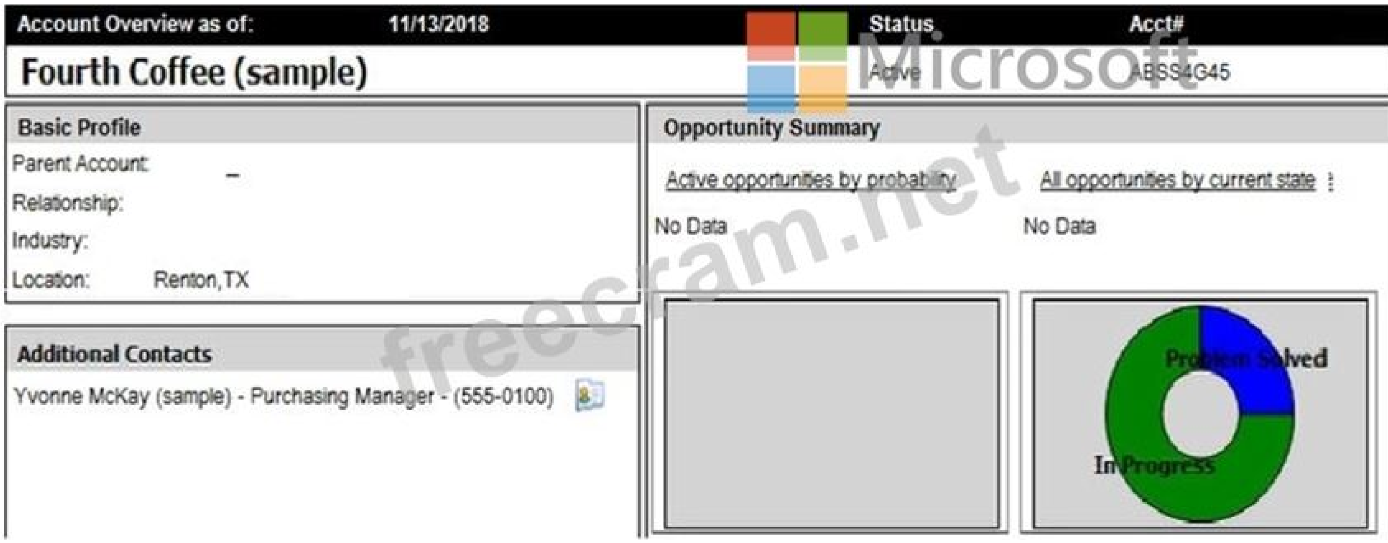
Answer: C (LEAVE A REPLY)

Reference:

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

NEW QUESTION: 100

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



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

NOTE: Each correct selection is worth one point.

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: 101

You use Dynamics 365 for Sales system customizer.

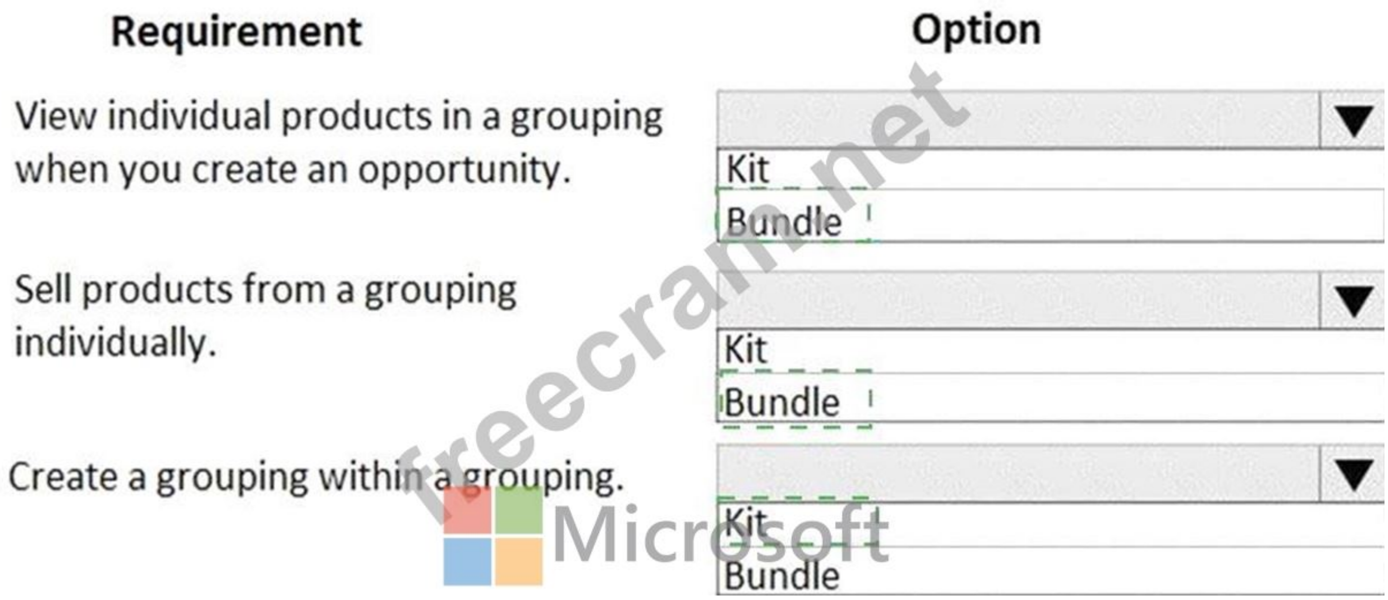
You need to create product kits and bundles.

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

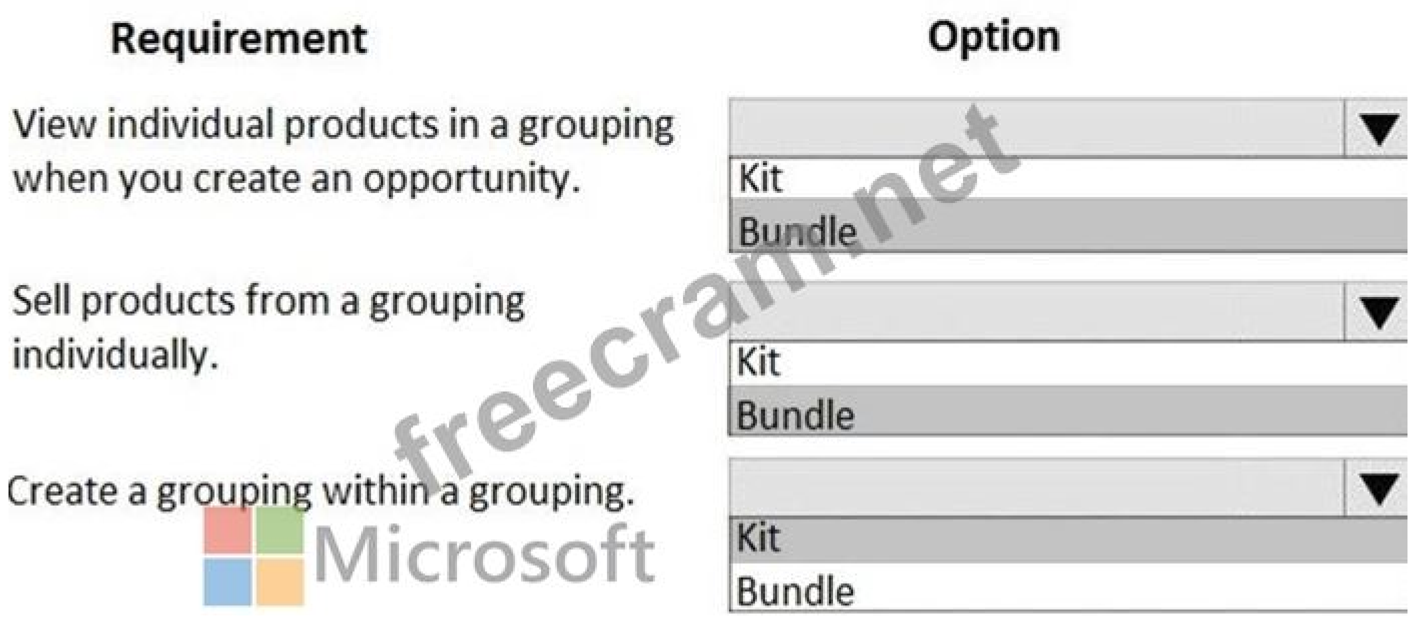
NOTE: Each correct selection is worth one point.

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

Answer:



Explanation



References:
https://docs.microsoft.com/en-us/dynamics365/customer-engagement/sales-enterprise/create-productbundles-sell

NEW QUESTION: 102
A company uses Dynamics 365 Sales.
You need to implement the Microsoft Relationship Sales solution.
Which add-on should you install?
A. Sales Insights
B. Customer Insights
C. Sales Navigator
D. Sales accelerator
Answer: (SHOW ANSWER)

NEW QUESTION: 103

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.

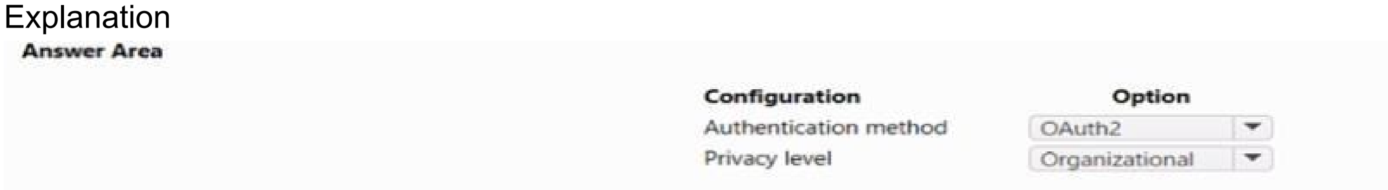
You need to identify which option to select.

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

NOTE: Each correct selection is worth one point.

Answer:

Explanation



NEW QUESTION: 104

You are a salesperson using Dynamics 365 for Sales.

You need to revise an active quote.

What happens to the original quote record?

A. The quote is deleted

B. The quote is converted into an order and a copy of the quote is put in draft mode for modification

C. The quote is closed, and a copy of the quote is put in draft mode for modification

D. The original quote is put in draft mode for modification

Answer: (SHOW ANSWER)

NEW QUESTION: 105

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: 106

You need to determine how notes and attachments are handled in converted leads.

How are they handled?

A. moved to the account after the lead is qualified

B. deleted after the lead is qualified

C. stay with the inactive lead after the opportunity is qualified

D. automatically moved to the opportunity after the lead is qualified

Answer: (SHOW ANSWER)

Reference:

https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/qualify-lead-convert-opportunity-sales

NEW QUESTION: 107

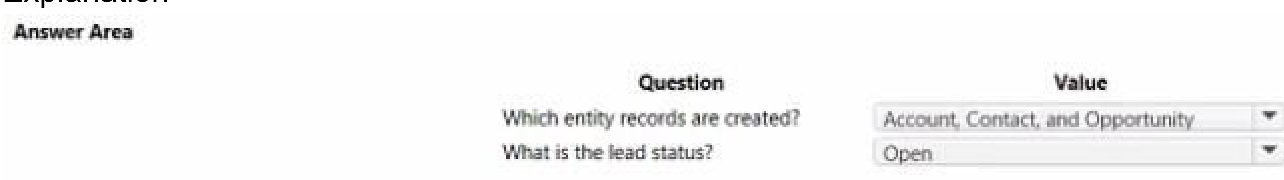
You are converting a lead for the manufacturing manager from Contoso, Ltd. Neither the company nor the manufacturing manager are in your Dynamics 365 system.

You need to ensure that the lead record a correctly convened.

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

Answer:

Explanation

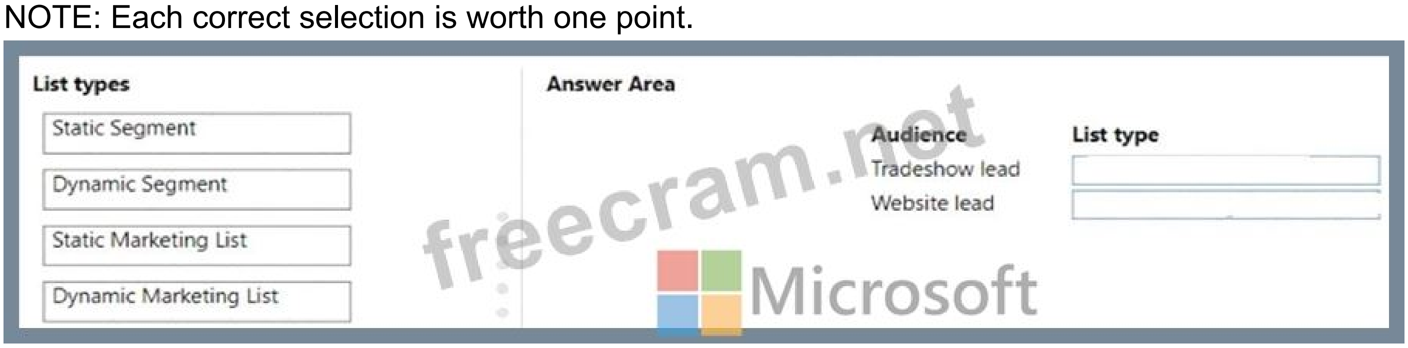


NEW QUESTION: 108

What should you create for each audience? To answer, drag the appropriate list types to the correct audiences.

Each list type may be used once, more than once, or not at all. You may need to drag the split bar between panes or scroll to view content.

NOTE: Each correct selection is worth one point.



Answer:

Explanation

A white background with black text Description automatically generated with low confidence

NEW QUESTION: 109

You need to implement dashboards.

Which URL should you use?

A. https://crm.bellowscollege.dynamics.com

B. https://bellowscollege.dynamics.com

C. http://bellowscollege.crm.dynamics.com

D. https://bellowscollege.crm.dynamics.com

Answer: (SHOW ANSWER)

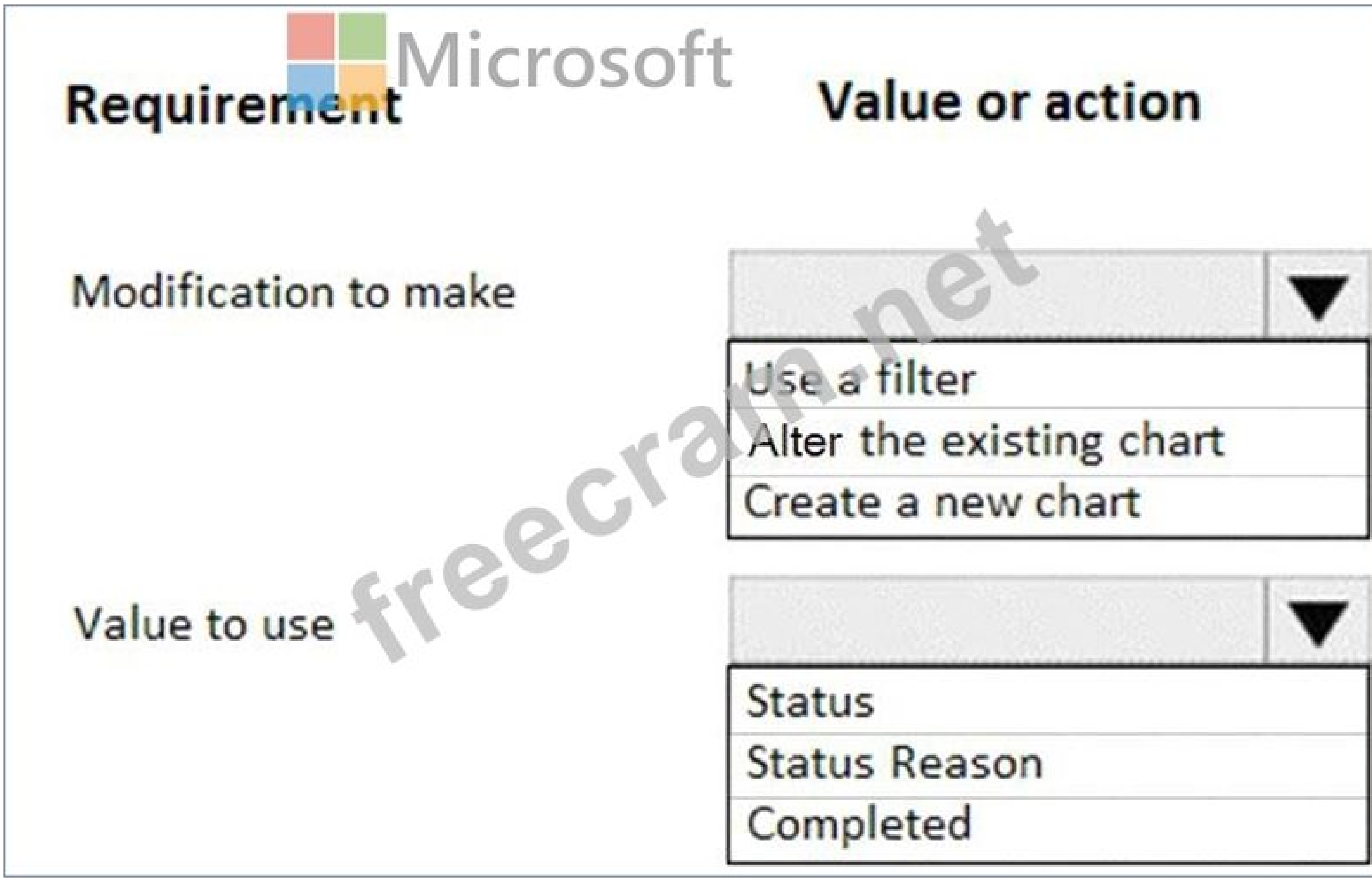
NEW QUESTION: 110

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.

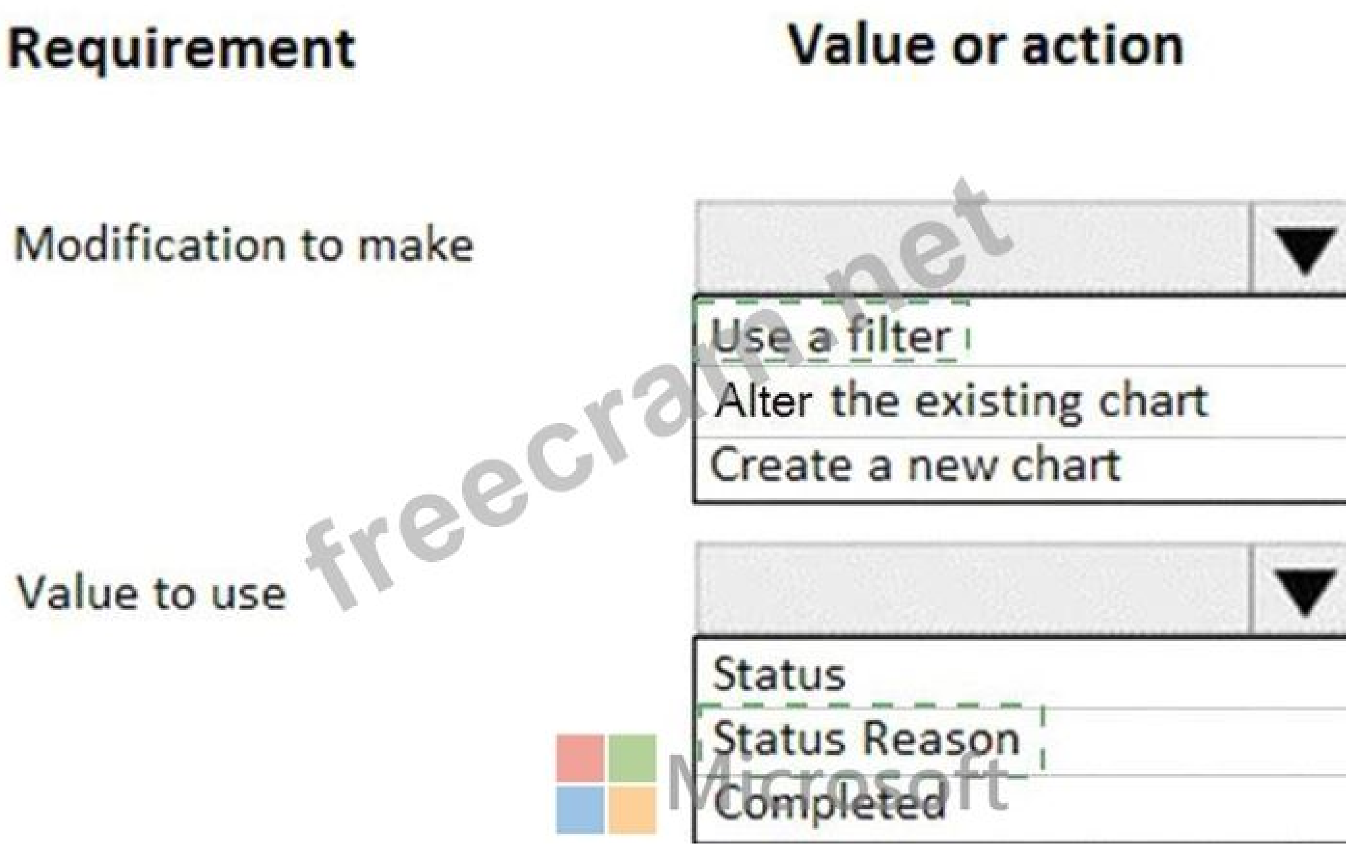
You need to update the dashboard to display wrong phone numbers.

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

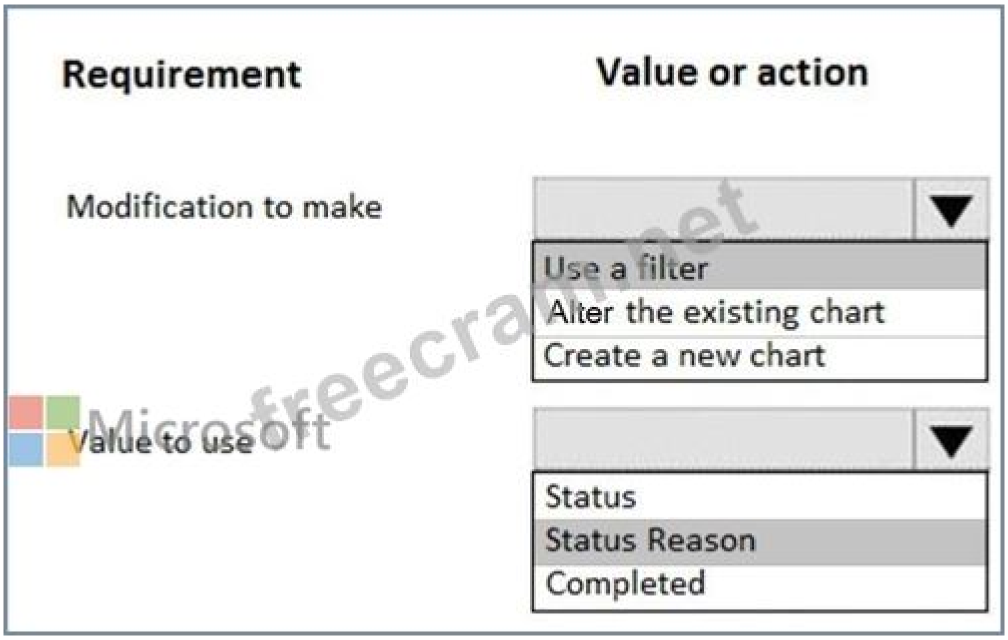
NOTE: Each correct selection is worth one point.



Answer:



Explanation



NEW QUESTION: 111

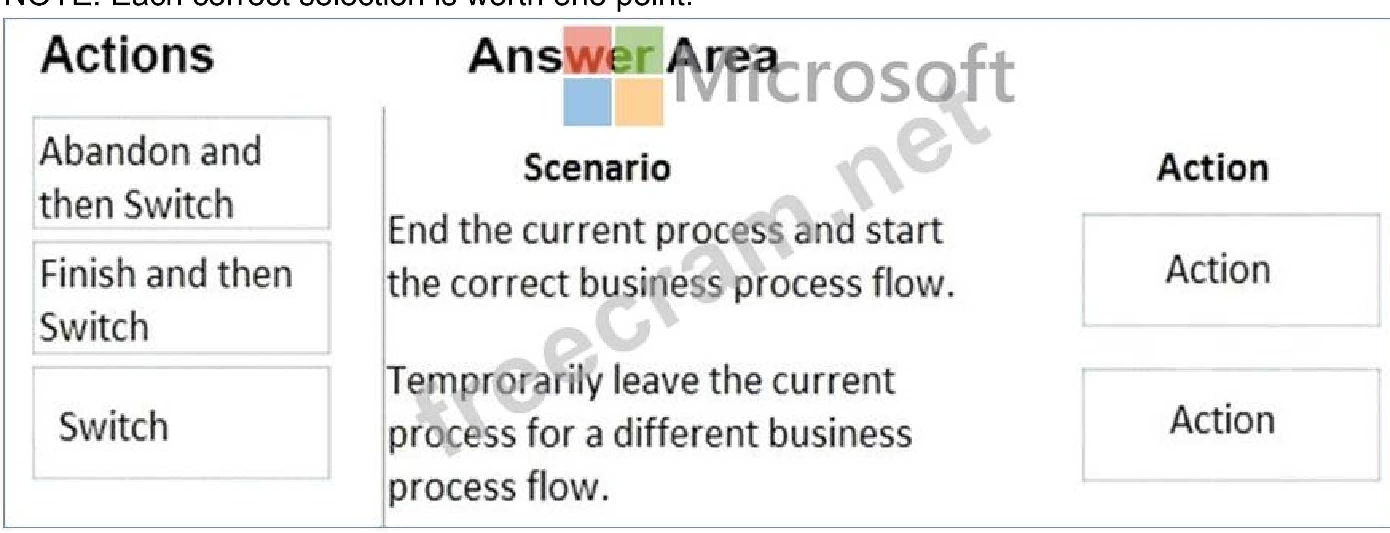
You use Dynamics 365 for Sales.

You are in stage two of business process flow that has five stages.

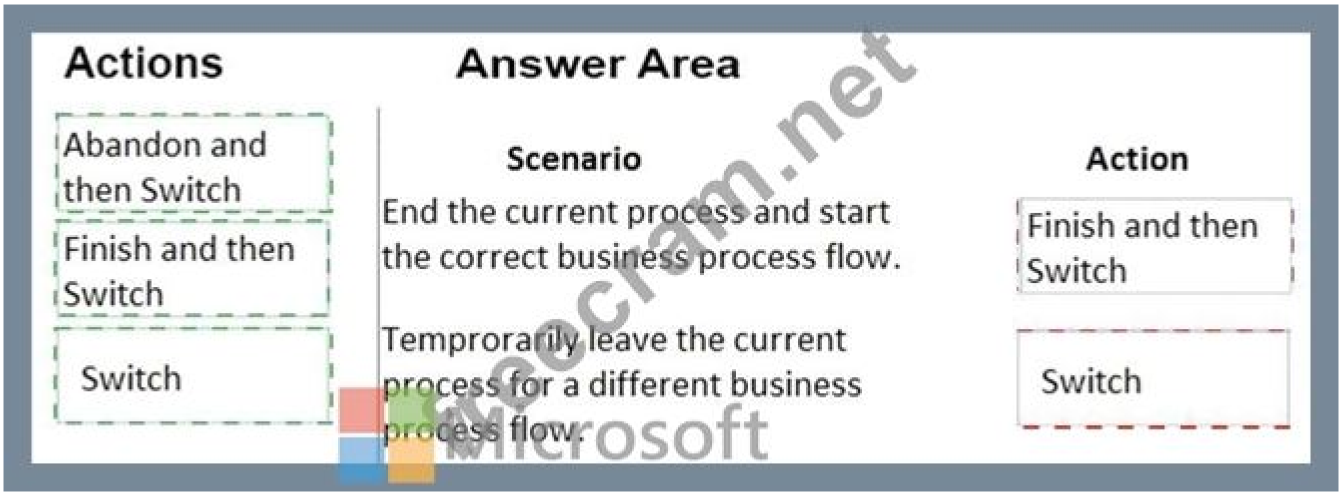
You need to use multiple business process flows.

Which actions should you perform? To answer, drag the appropriate actions to the correct scenarios. 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:



Explanation

NEW QUESTION: 112

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, and save.

* Repeat for the Central and East territories.
* Add members for each territory.
* Select Related under each territory and select the postal codes applicable for each terriority.
Does the solution meet the goal?

A. No

B. Yes

Answer: (SHOW ANSWER)

Reference:

https://docs.microsoft.com/en-us/dynamics365/customerengagement/on-premises/admin/set-up-sales-territories-o

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

NEW QUESTION: 113

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)

Explanation

References:

https://docs.microsoft.com/en-us/dynamics365/customer-engagement/sales-enterprise/create-product-family

NEW QUESTION: 114

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:

Explanation

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.

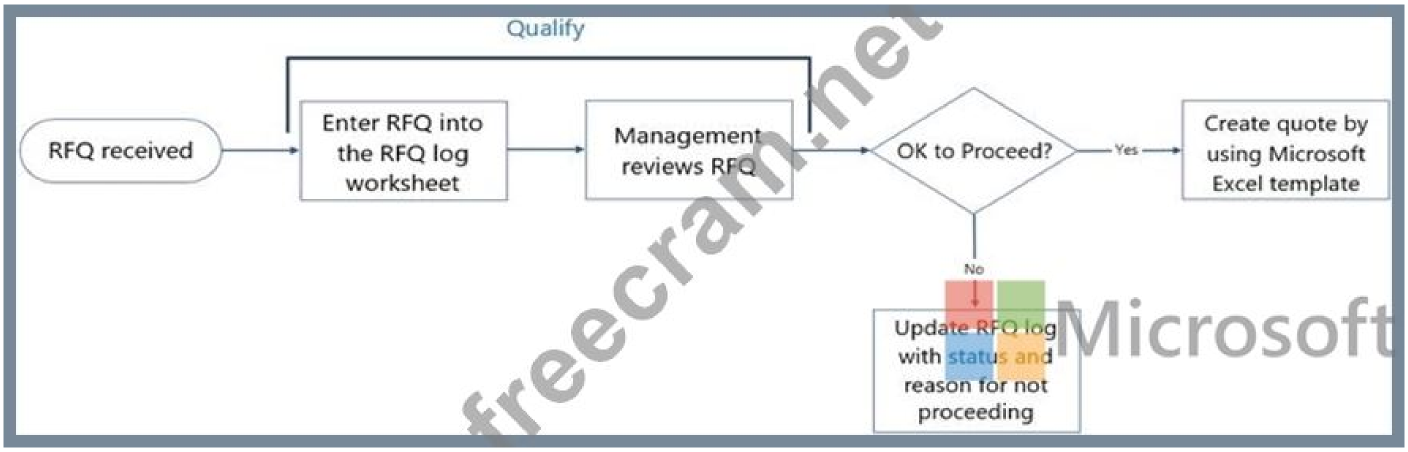
Each sales team maintains a spreadsheet in which they record customer requests for quotes (RFQs). The spreadsheets are stored on a network drive.

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.

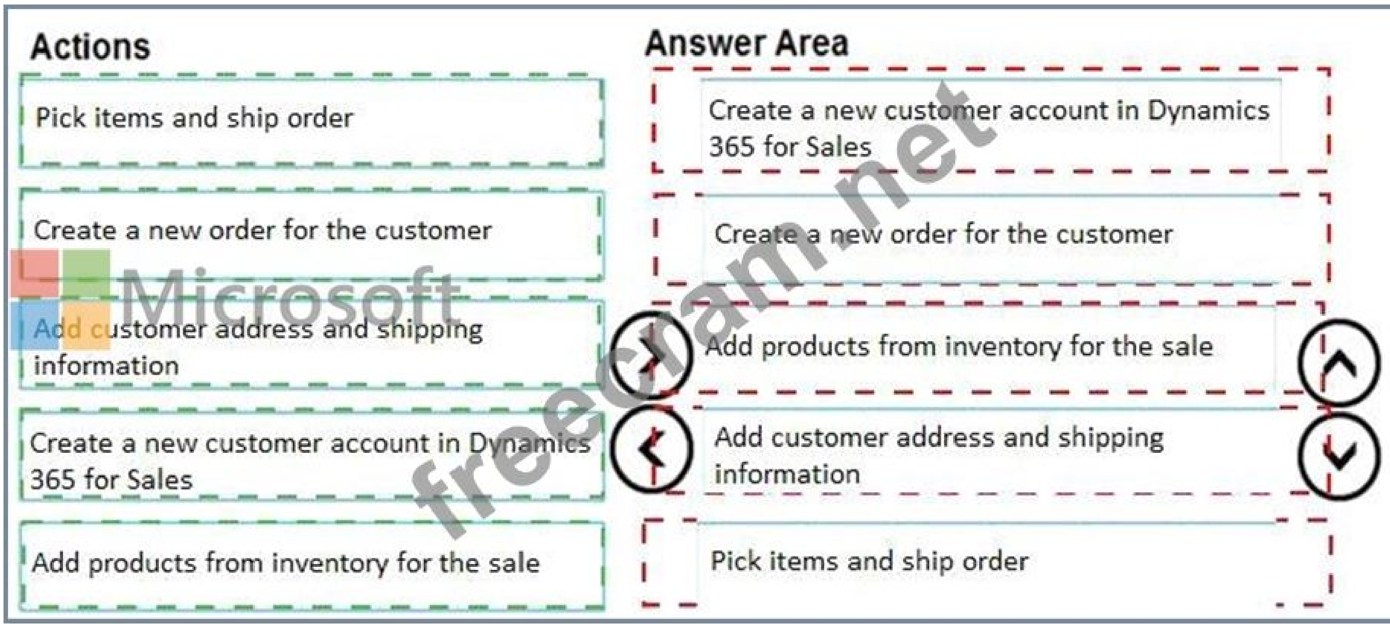
If a customer's credit and reference review is unfavorable, the finance manager must follow up with the customer and the sales representative by phone.
The customer's credit report must be added to the RFQ as a permanent record and for audit purposes.
The solution must provide both a sample script that 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: 115
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: 116
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:



Explanation

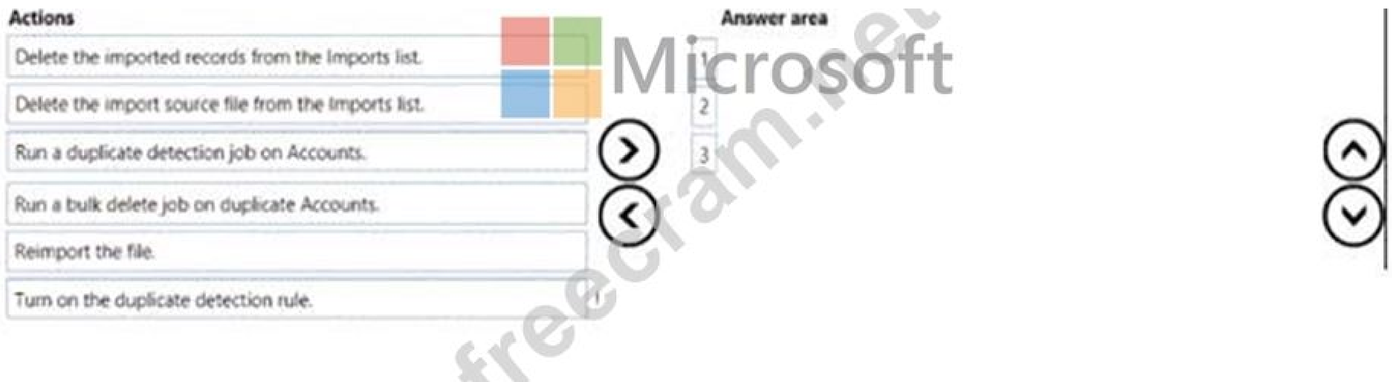
Reference:
https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/create-edit-order-sales#create-an-order

NEW QUESTION: 117

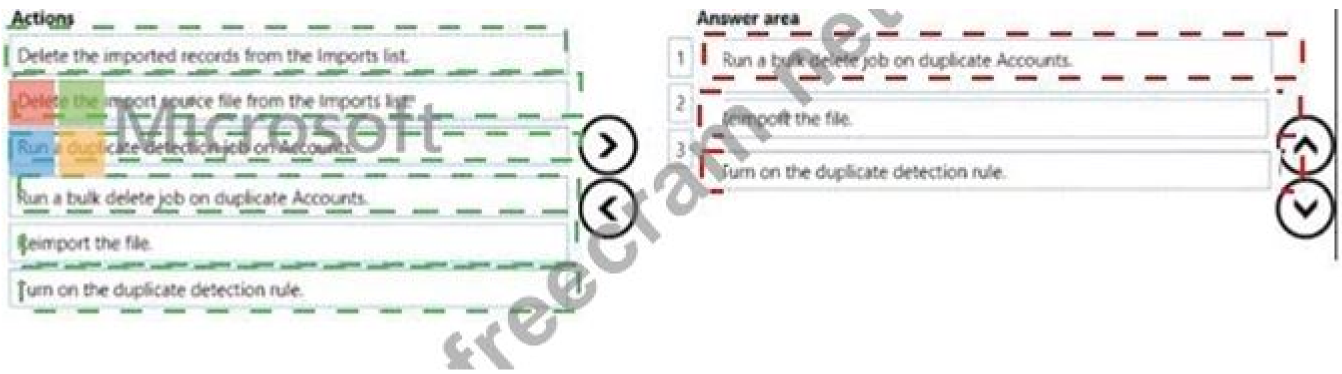
You need to ensure that the Accounts table data does not contain duplicates.

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

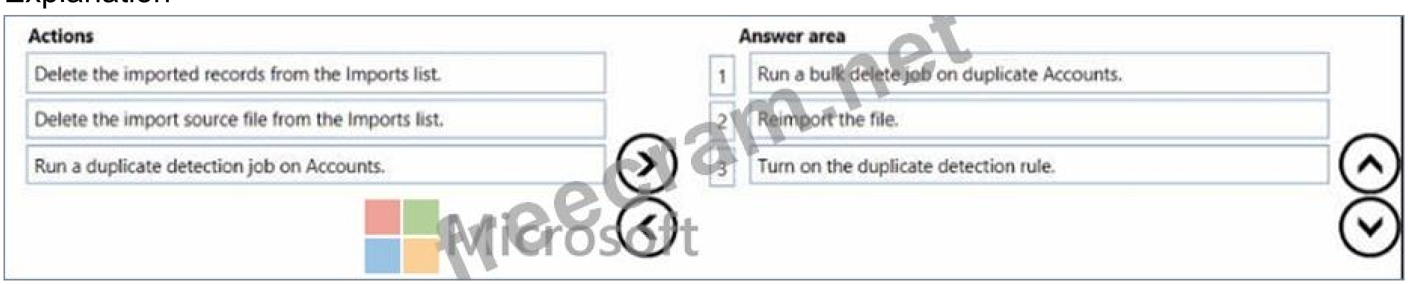
NOTE: More than one order of answer choices is correct. You will receive credit for any of the correct orders you select.



Answer:



Explanation



NEW QUESTION: 118

A company uses Dynamics 365 Sales Insights to follow up on leads and opportunities.

The company requires a customized workspace and guidance with the following functionality:

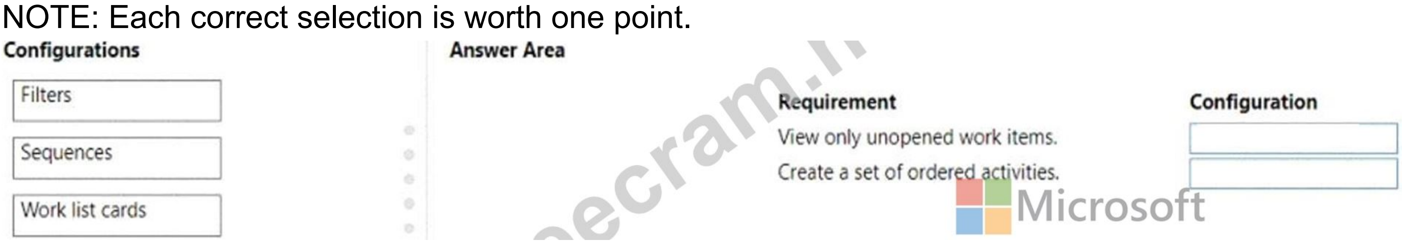
* View only unopened work items.

* Create a set of ordered activities when a new lead comes in.

You need to configure the system.

Which feature needs to be configured? To answer, drag the appropriate configurations to the correct requirements. Each configuration may be used once, more than once, or not at all. You may need to drag the split bar between panes or scroll to view content.

NOTE: Each correct selection is worth one point.



Answer:

Explanation

NEW QUESTION: 119

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. Order

B. Lead

C. Quote

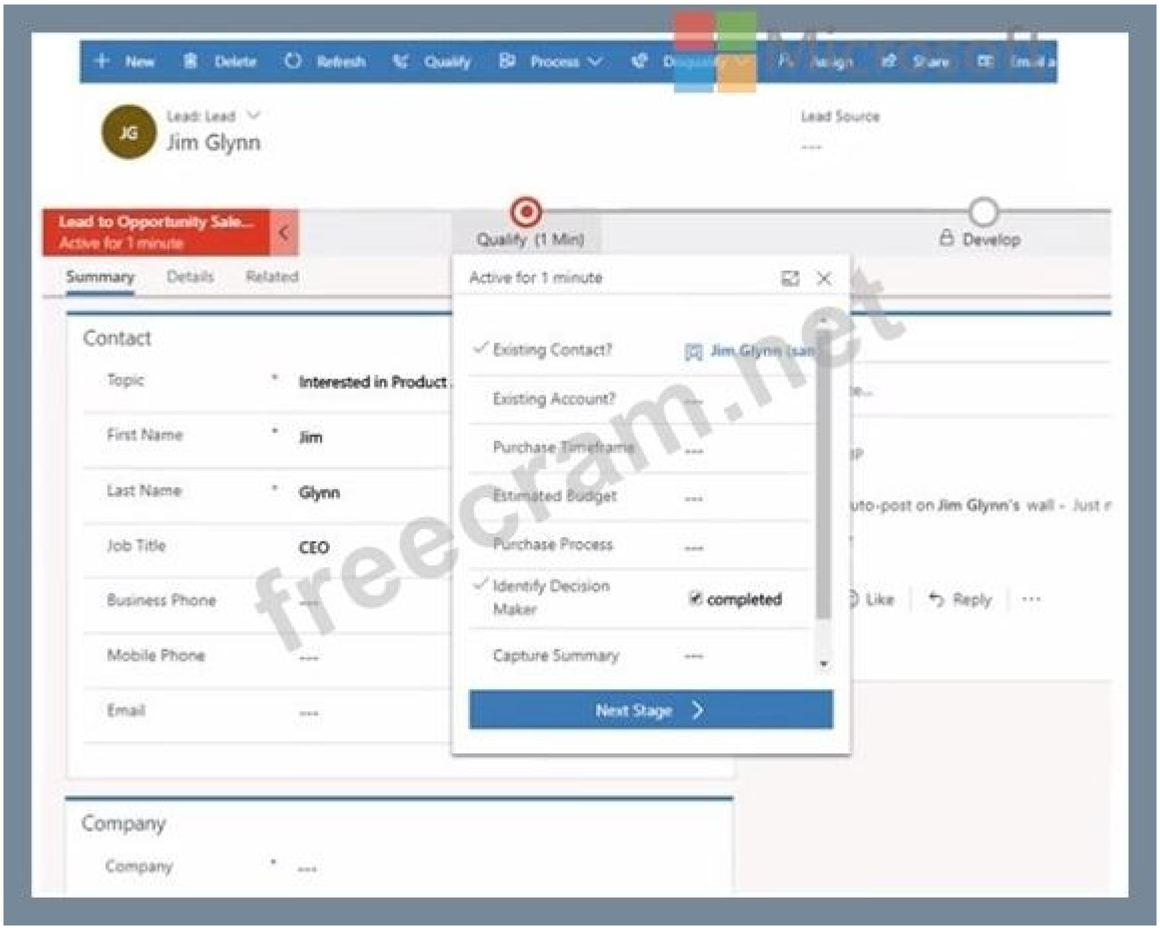
D. Opportunity

Answer: (SHOW ANSWER)

NEW QUESTION: 120

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.

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

Answer:

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

Explanation

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

NEW QUESTION: 121

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.

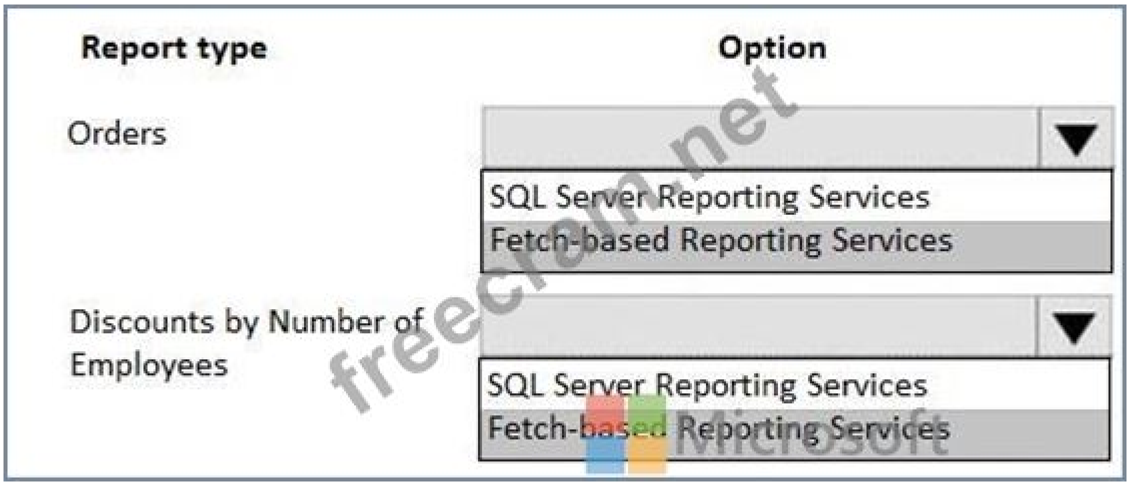
NOTE: Each correct selection is worth one point.

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:

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

Explanation



NEW QUESTION: 122

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.

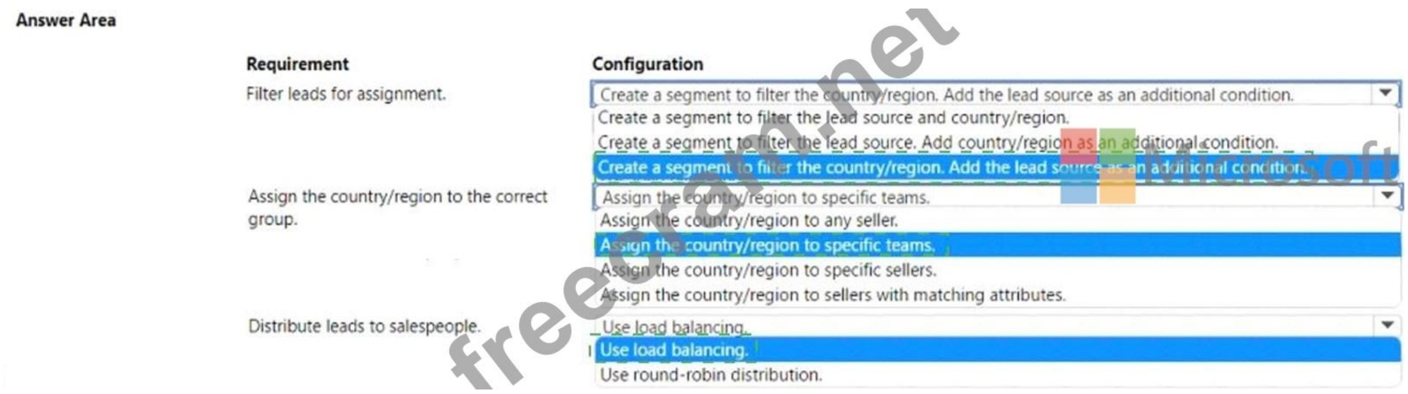
You create a country/region attribute for the process. You must simplify the process. You plan to use segments when possible.

You need to create a lead assignment rule for each country/region.

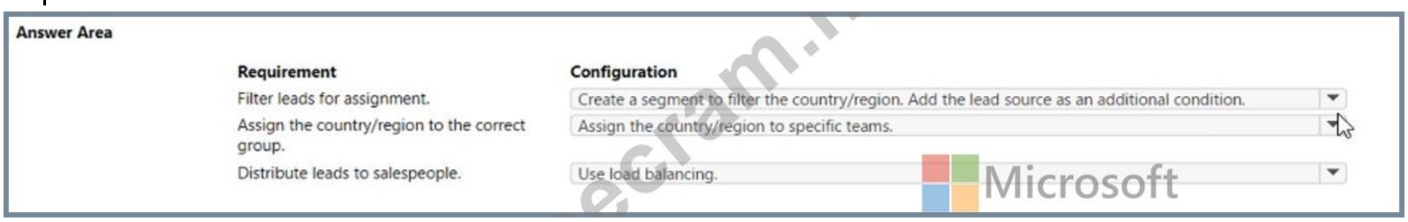
Which configurations should you use? To answer, select the appropriate options in the answer area.

NOTE: Each correct selection is worth one point.

Answer:



Explanation



NEW QUESTION: 123

A company has three business units. User privileges are set to ensure that users can see only records owned by their own business unit.

If a contact is needed for all business units, one contact record must be created for each business unit. A contact is considered a duplicate if the First Name, Last Name, Email or Preferred Phone, and Business Unit fields match.

You must ensure that duplicate records are not created for contacts.

You need to create the duplicate detection rules.

Which two filters should you configure? Each correct answer is part of the complete solution.

NOTE: Each correct selection is worth one point.

A. First Name and Last Name and Email

B. First Name and Last Name and Preferred Phone

C. First Name and Last Name and Email and Business Unit

D. First Name and Last Name and Preferred Phone and Business Unit

E. First Name and Last Name and Owner

Answer: (SHOW ANSWER)

Reference:

https://docs.microsoft.com/en-us/power-platform/admin/set-up-duplicate-detection-rules-keep-data-clean

NEW QUESTION: 124

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.

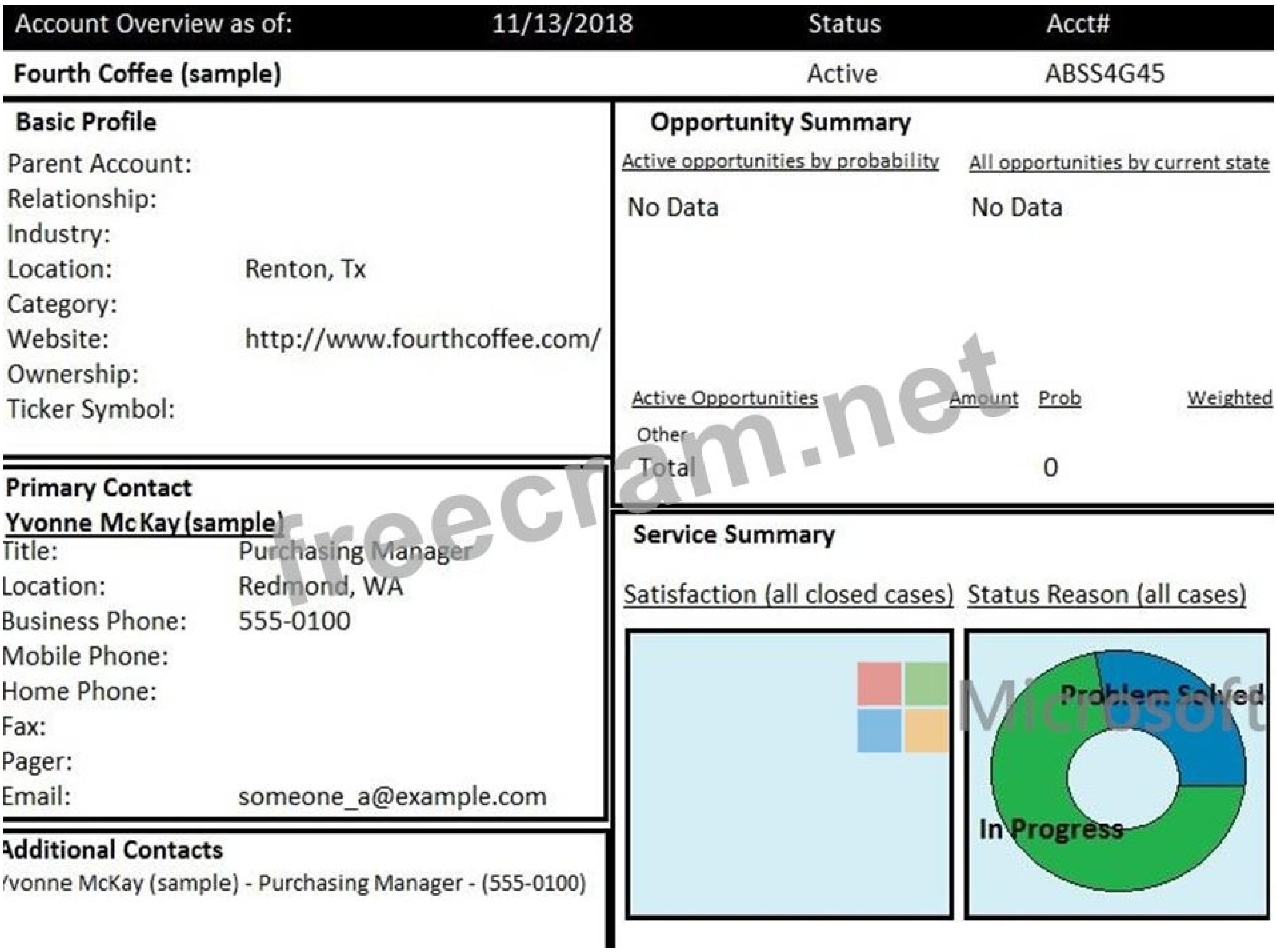
What should you do?

A. Use date ranges to create a view in the default solution

B. Use date ranges to create a view from the advanced find
C. Set up fiscal year settings and create a view from the advanced find
D. Set up fiscal year settings and create a view in the default solution
Answer: (SHOW ANSWER)

NEW QUESTION: 125

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.

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

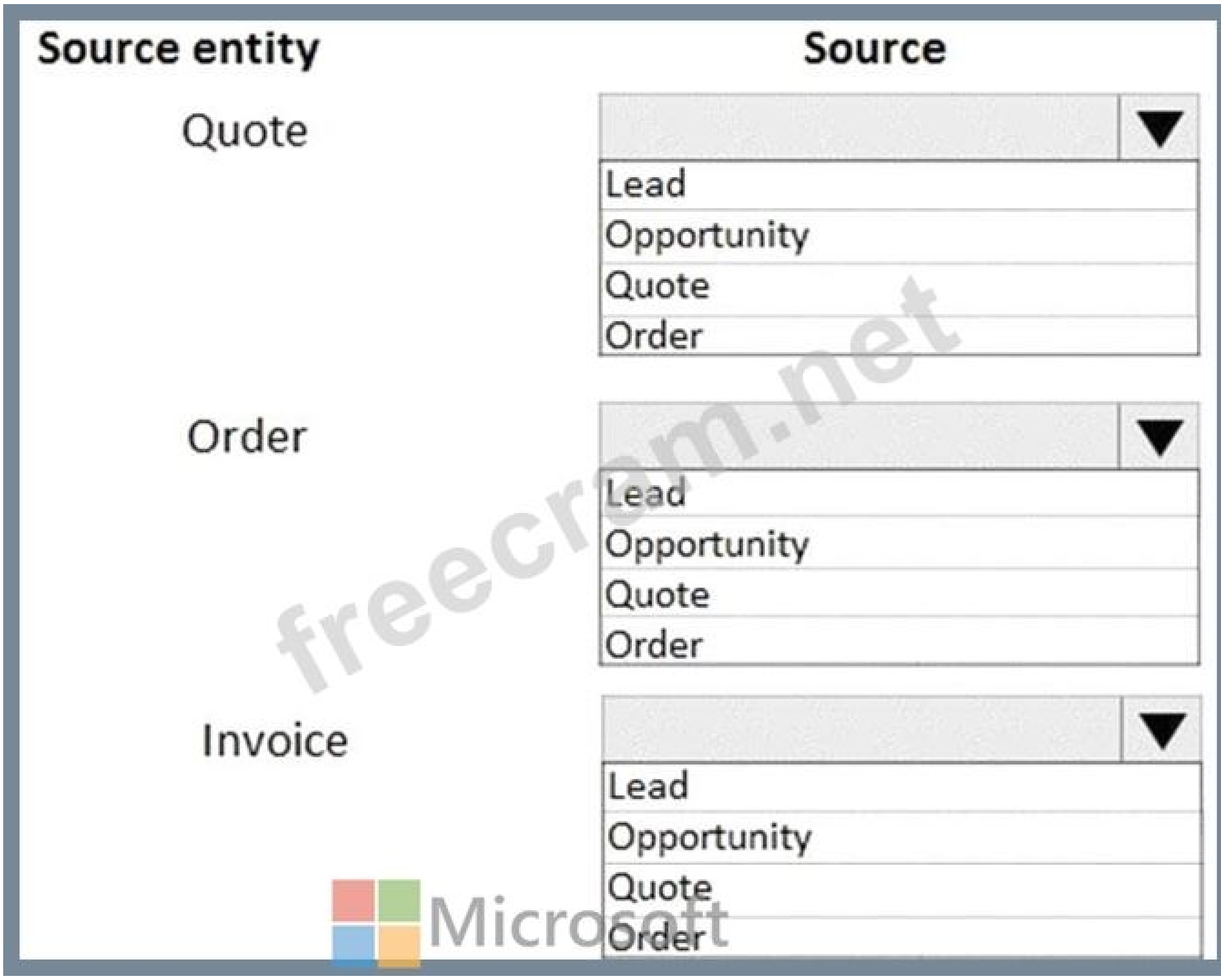
Question	Answer choice
Why is the satisfaction area blank?	There are no closed cases Users are not completing the satisfaction field The Reporting Service is down Cases with the problem solved have not been closed
Which type of account is Fourth Coffee?	Active Parent Account Inactive Child Account

NEW QUESTION: 126

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

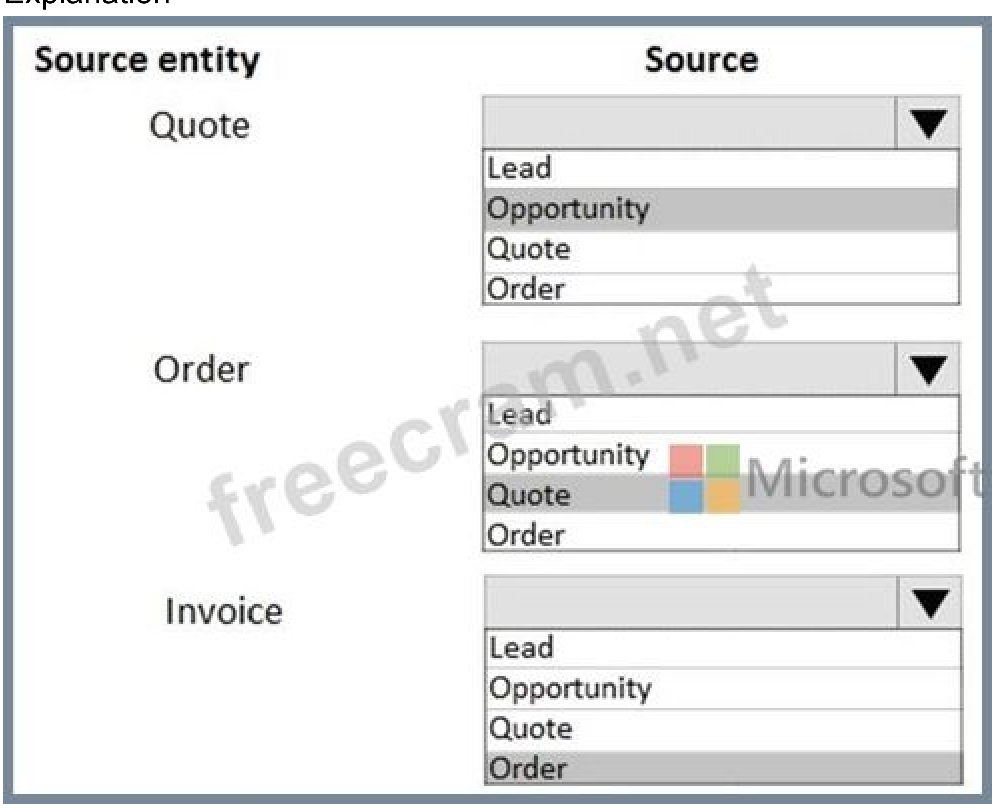
You need to add products from the previous order to the new order.

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.



Answer:

Explanation



NEW QUESTION: 127

You manage a Dynamics 365 environment for Sales. You create the following rule items to respond to inbound emails from potential customers:

Emails that contain the words support or help must create a new high-priority case.

Emails that contain the words buy or purchase must create a warm-lead record. The words buy and purchase are more important than support or help.

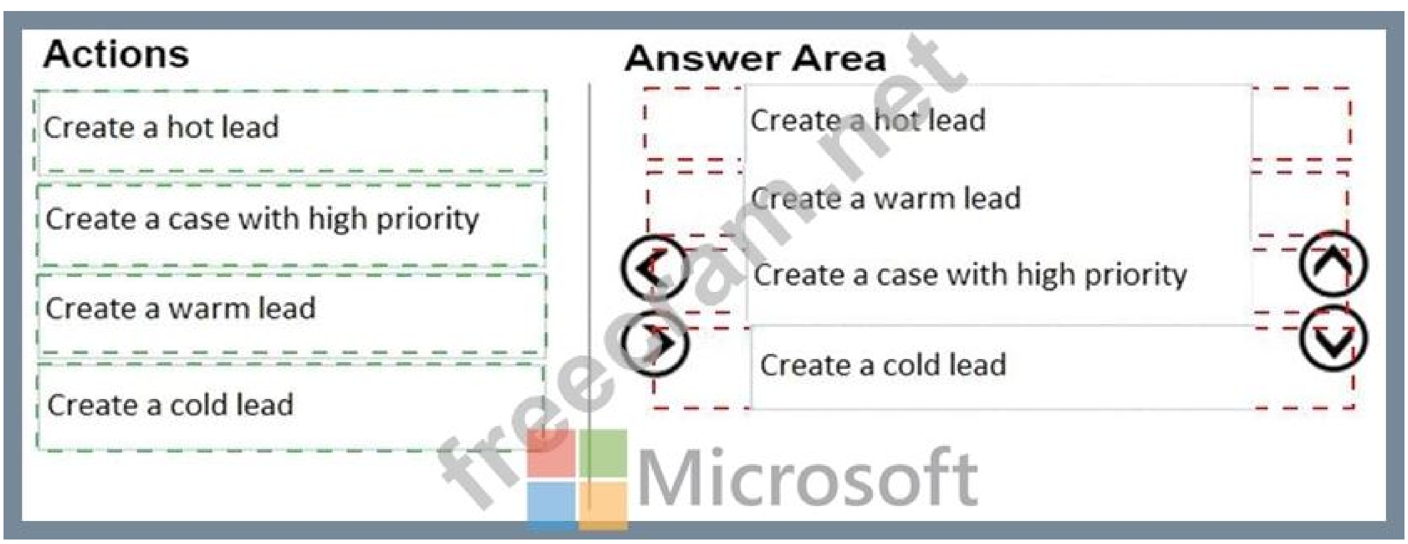
Emails that specifically mention ProductA must always create a hot lead for that product regardless of other words mentioned.

If none of the targeted words are present in an email, a cold lead must be created.

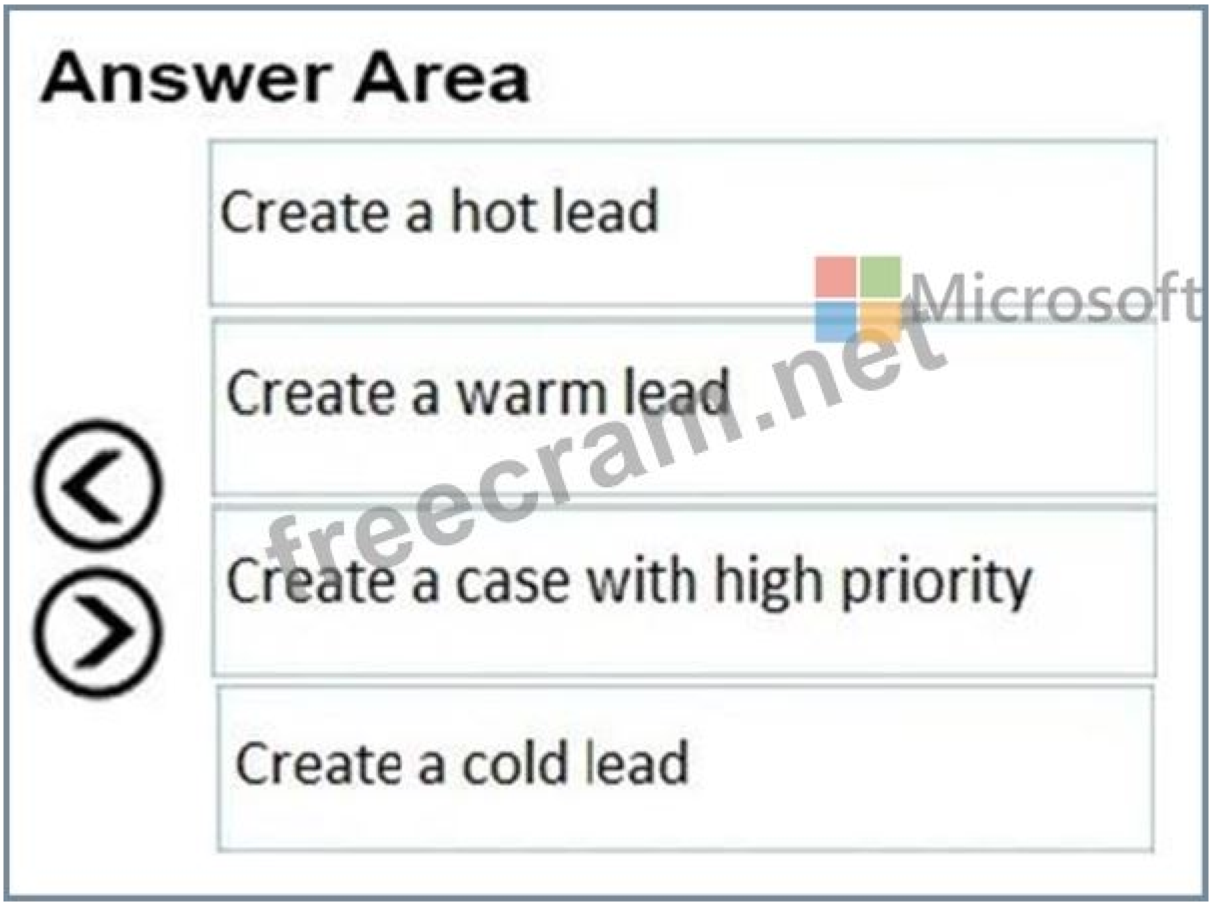
You need to configure the order in which rule items are processed.

In which order should you run the rule items? To answer, move all actions from the list of actions to the answer area and arrange them in the correct order.

Answer:



Explanation



NEW QUESTION: 128

A customer recently visited one of your retail outlets. You created an opportunity for the customer for a large purchase.

The customer is now ready to complete the purchase.

You need to create a quote from the opportunity.

Solution: Qualify the opportunity.

Does the solution meet the goal?

A. Yes

B. No

Answer: (SHOW ANSWER)

Explanation

References:

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

NEW QUESTION: 129

An order uses quote and order functionality in Dynamics 365 for Sales. Multiple quotes may be provided to customers at one time. Quotes are revised often.

You need to create a process that meets the following requirements:

* Create an order from a quote.

* Close the associated opportunity as won.

* Update the actual values to reflect values from the quote.
Which two opportunities can you close as won? Each correct answer presents a complete solution.
NOTE: Each correct selection is worth one point.

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

Answer: (SHOW ANSWER)

Explanation
- If there is any draft or active quote associated with opportunity and you close the opportunity as won then the below error message is display in alert: "Opportunity cannot be closed There are still active or draft quotes associated with this opportunity. These must be closed before the opportunity can be closed. If you contact support, please provide the technical details.

NEW QUESTION: 130

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-p

NEW QUESTION: 131

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

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

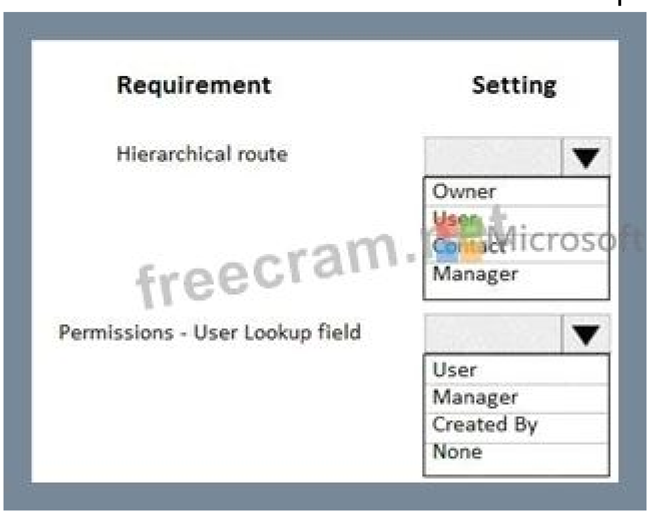
Answer: A (LEAVE A REPLY)

Explanation
References:

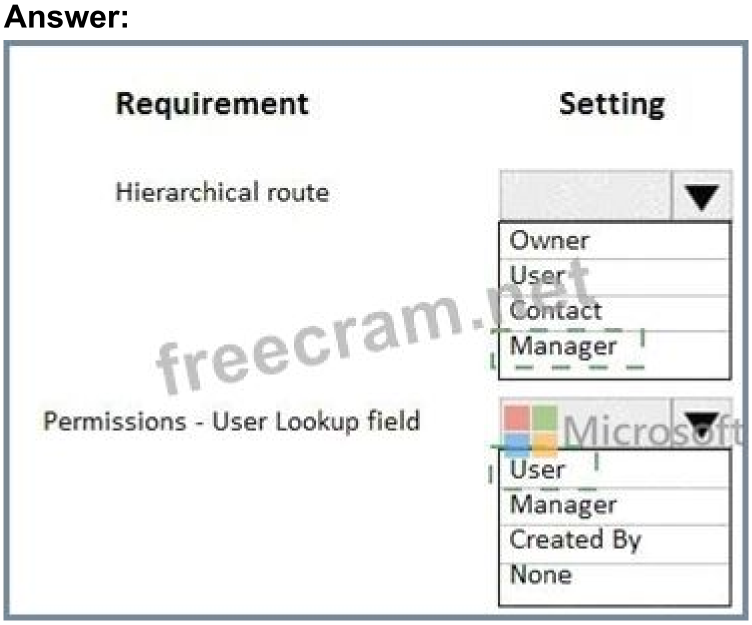
https://docs.microsoft.com/en-us/dynamics365/customer-engagement/sales-enterprise/define-relatedproducts-inc

NEW QUESTION: 132

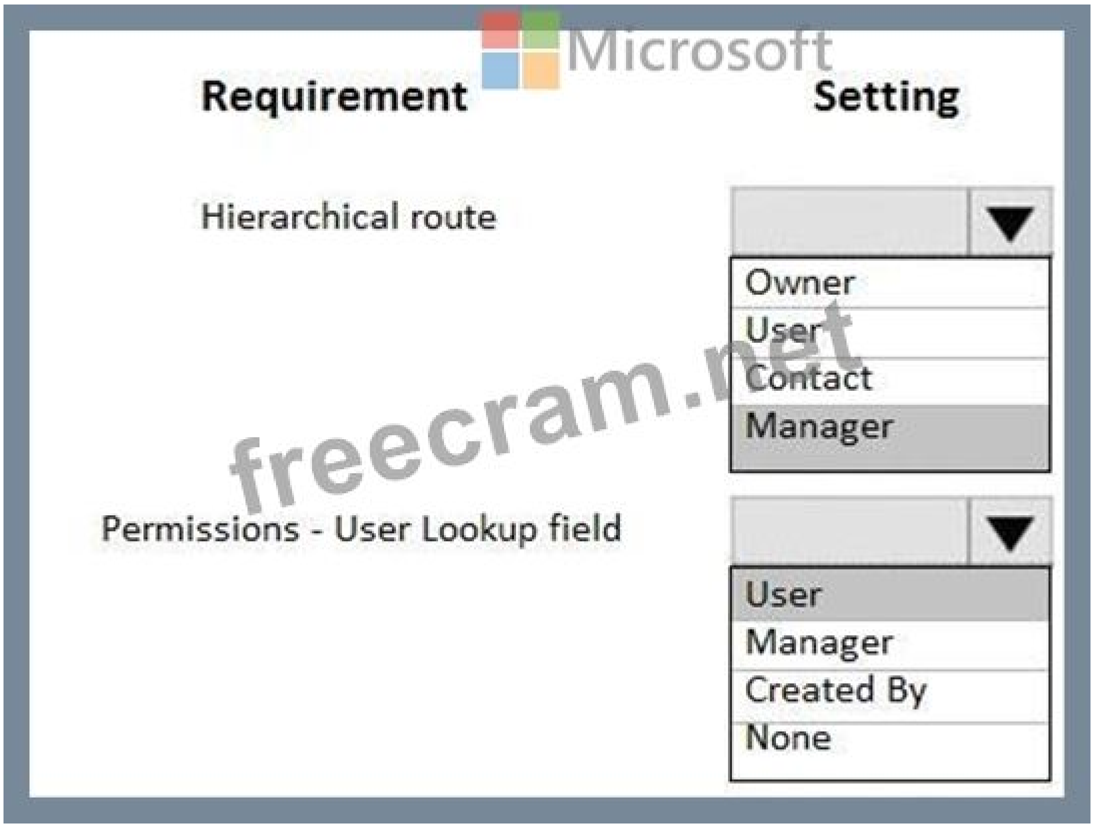
A company wants to implement the Forecast Management feature in Dynamics 365 Sales.
The company plans to use the Opportunity Status Reason field to indicate that sales have closed.
They want to use settings based on the organizational reporting structure. Salespeople must only see their own forecasts.
You need to select the appropriate settings to meet the company's requirements.
Which settings should you select? To answer, select the appropriate options in the answer area.
NOTE: Each correct selection is worth one point.



Answer:



Explanation



Reference:
https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/select-template-forecast
https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/provide-permissions-forecast

NEW QUESTION: 133
A company is implementing Dynamics 365 Sales.
You need to determine which tool or service to recommend for the company's requirements.
Which tool or service should you recommend to meet each requirement? To answer, select the appropriate options in the answer area.
NOTE: Each correct selection is worth one point.

Requirement	Tool or service
Provide basic self-service customer support for frequently asked questions.	AI Builder Power Virtual Agents Sales Insights Assistant Relationship Sales
Provide actionable list of follow-up tasks for a customer based on prior buying history.	AI Builder Power Virtual Agents Sales Insights
Provide routing of new product inquiries to product sales experts or product team members.	AI Builder Power Virtual Agents Sales Insights

Answer:

Requirement	Tool or service
Provide basic self-service customer support for frequently asked questions.	AI Builder Power Virtual Agents Sales Insights Assistant Relationship Sales
Provide actionable list of follow-up tasks for a customer based on prior buying history.	AI Builder Power Virtual Agents Sales Insights
Provide routing of new product inquiries to product sales experts or product team members.	AI Builder Power Virtual Agents Sales Insights

Explanation

Graphical user interface, text, application, email Description automatically generated

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

NEW QUESTION: 134

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, and save.
* Add members for each territory.
* Repeat for the Central and East territories.
Does the solution meet the goal?
A. No
B. Yes

Answer: (SHOW ANSWER)

NEW QUESTION: 135

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. In the Office 365 Admin center, assign Application proxy permissions to the user.

C. Assign the Common Data Service User role to the user.

D. in the Power Apps Admin center, assign Environment Maker permissions to the user.

Answer: (SHOW ANSWER)

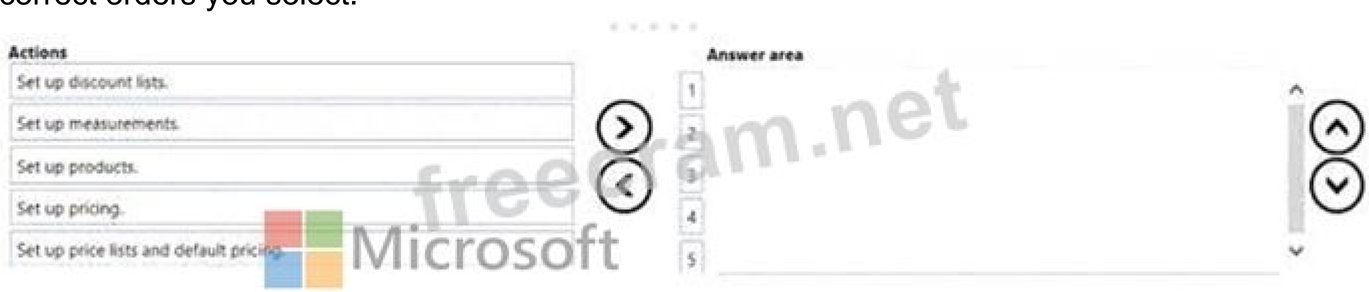
NEW QUESTION: 136

A company uses Dynamics 365 Sales to manage product lines.

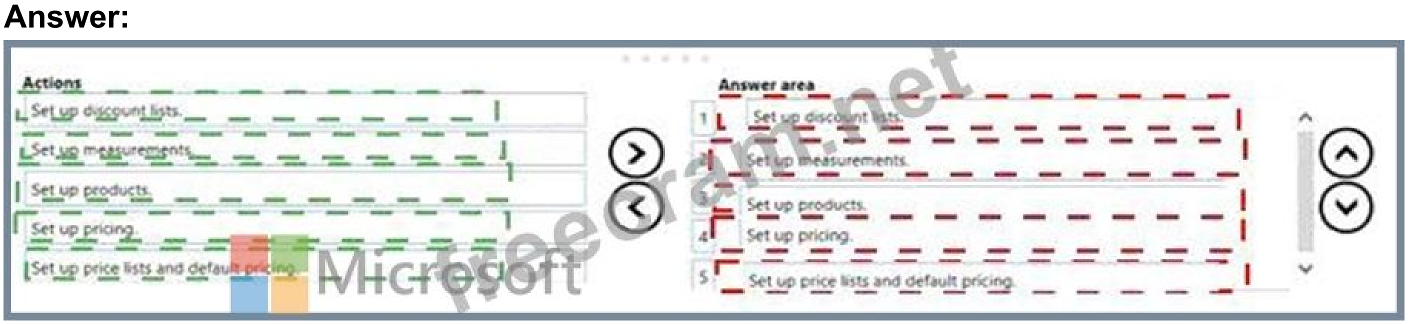
You need to set up a catalog of products.

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:



Explanation

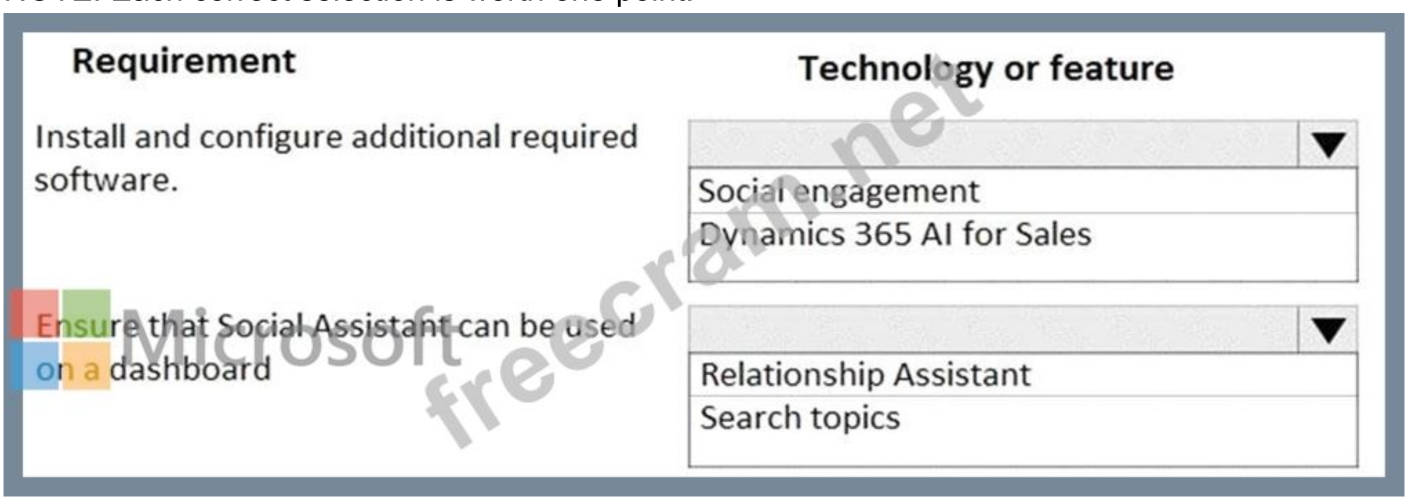
NEW QUESTION: 137

You are a Dynamics 365 for Sales environment.

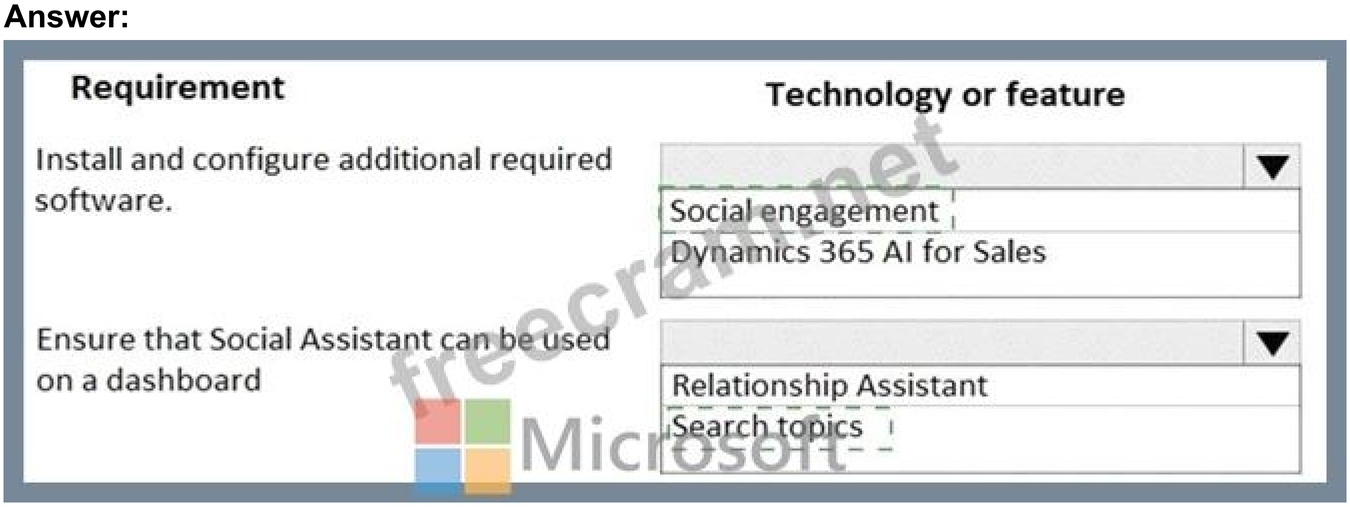
You need to implement the Social Selling Assistant.

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

NOTE: Each correct selection is worth one point.



Answer:



Explanation

NEW QUESTION: 138
You need to purchase a license for the sales manager. Which license should you purchase?
A. Dynamics 365 Team member
B. Dynamics 365 Sales Enterprise
C. Dynamics 365 Sales Professional
D. Dynamics 365 Sales Premium
Answer: (SHOW ANSWER)

NEW QUESTION: 139
Note: This question is part of a series of questions that present the same scenario. Each question in the series contains a unique solution that might meet the stated goals. Some question sets might have more than one correct solution, while others might not have a correct solution.
After you answer a question, you will NOT be able to return to it. As a result, these questions will not appear in the review screen.
A customer recently visited one of your retail outlets. You created an opportunity for the customer for a large purchase.
The customer is now ready to complete the purchase.
You need to create a quote from the opportunity.
Solution: On the Quotes tab of the opportunity, select Add New Quote.
Does the solution meet the goal?
A. Yes
B. No
Answer: (SHOW ANSWER)
Explanation
References:
https://docs.microsoft.com/en-us/dynamics365/customer-engagement/sales-enterprise/create-edit-quote-sales

NEW QUESTION: 140

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: 141

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: (SHOW ANSWER)

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

NEW QUESTION: 142

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

A. Percent of List

B. Percent Markup - Current Cost

C. Percent Margin - Standard Cost

D. Currency Amount

Answer: D (LEAVE A REPLY)

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

NEW QUESTION: 143

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:

Explanation

NEW QUESTION: 144

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.

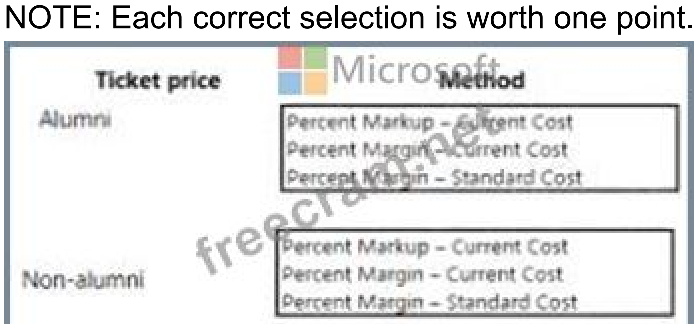
Labs are not timed separately, and this exam may have more than one lab that you must complete. You can use as much time as you would like to complete each lab. But, you should manage your time appropriately to ensure that you are able to complete the lab(s) and all other sections of the exam in the 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.
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:

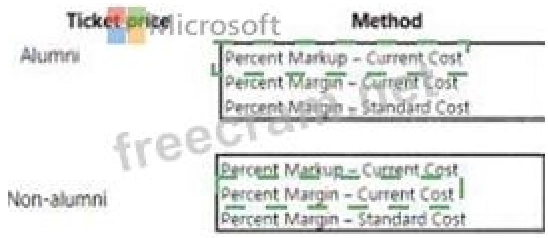
See explanation below.
Explanation
Go to Settings > Customizations.
Select Customize the System.
Under Components, expand Entities, and then select the Lead entity.
Select Fields.
Select the Rating field and click Edit.
Set the Default Value to Cold.
Click Save and Close.
Click Publish All Customizations.
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: 145

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.



Answer:



Explanation

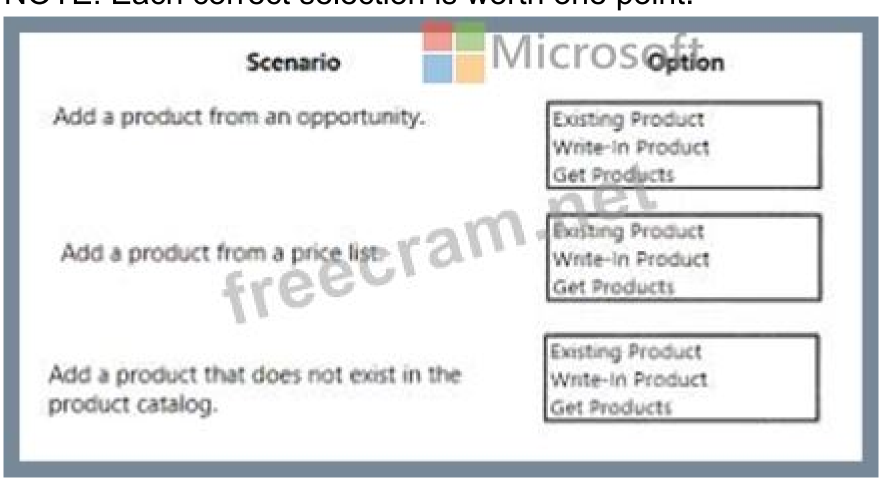
NEW QUESTION: 146

You use Dynamics 365 Sales.

You need to add products to an invoice.

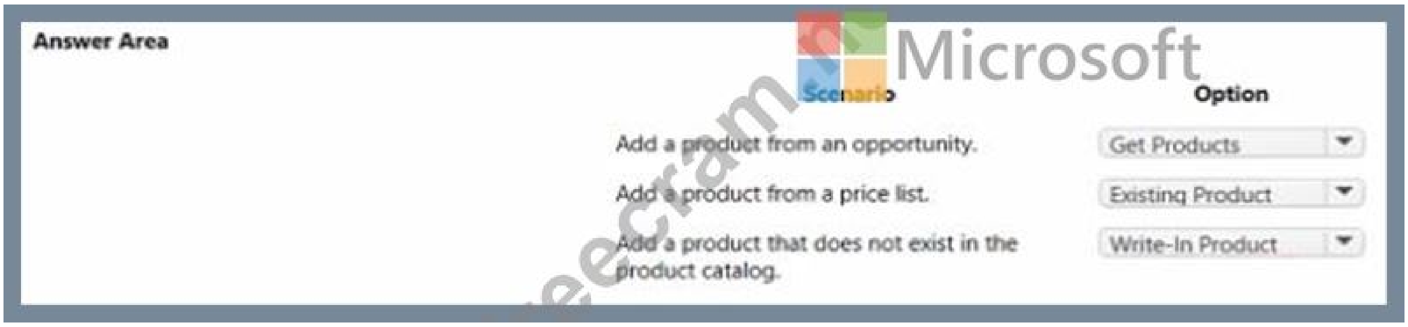
Which options should you use? To answer, select the appropriate options in the answer area.

NOTE: Each correct selection is worth one point.



Answer:

Explanation



NEW QUESTION: 147

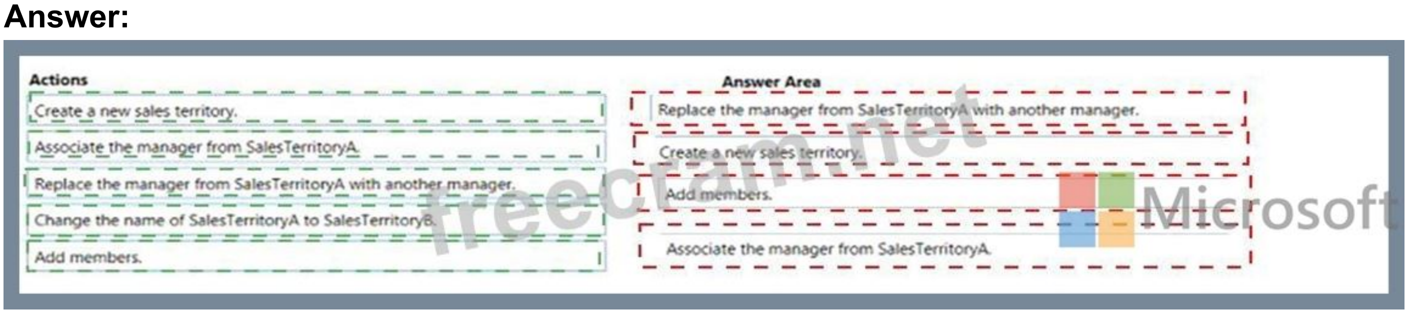
You manage Dynamics 365 Sales. You have a sales territory named SalesTerritoryA which has an associated manager.

You need to create a new sales territory named SalesTerritoyB and assign the SalesTerritoryA manager to SalesTerritoryB.

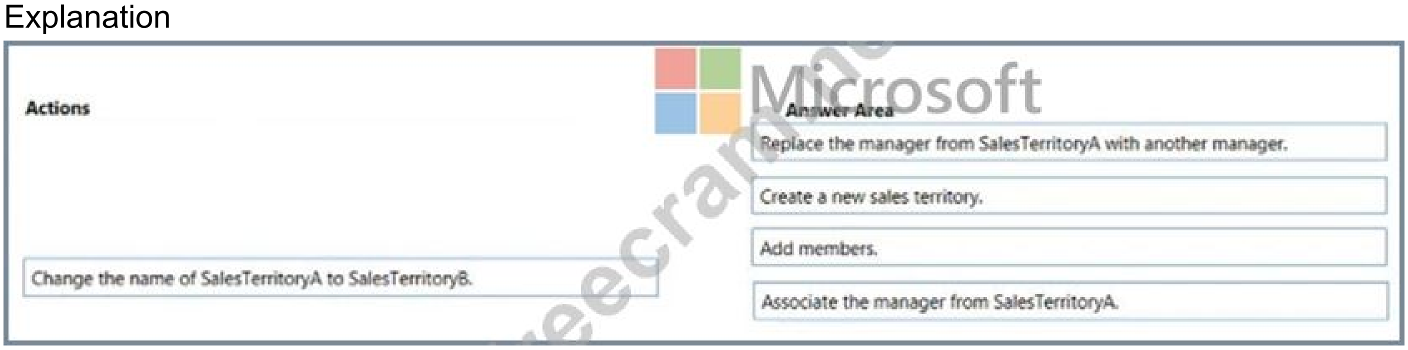
Which four actions should you perform in sequence? To answer, move the appropriate actions from the list of actions to the answer area and arrange them in the correct order.

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

Answer:



Explanation

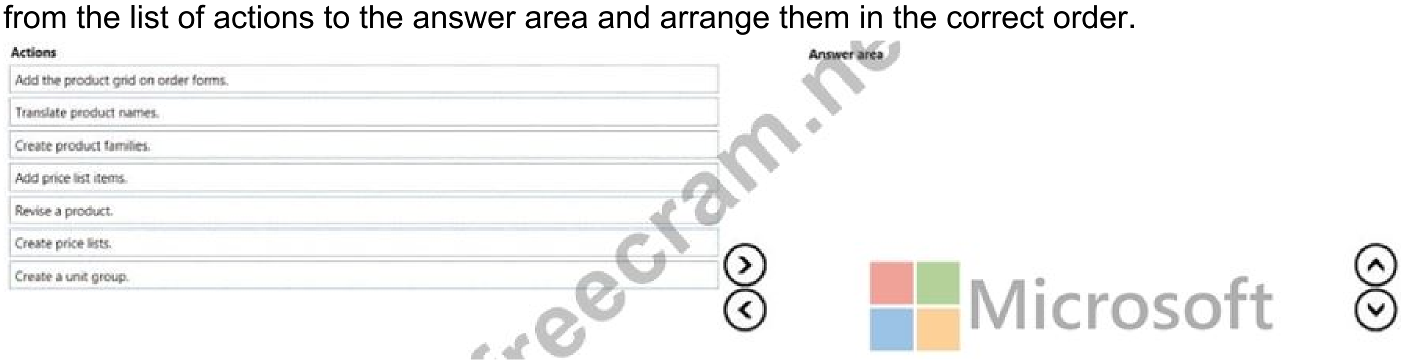


NEW QUESTION: 148

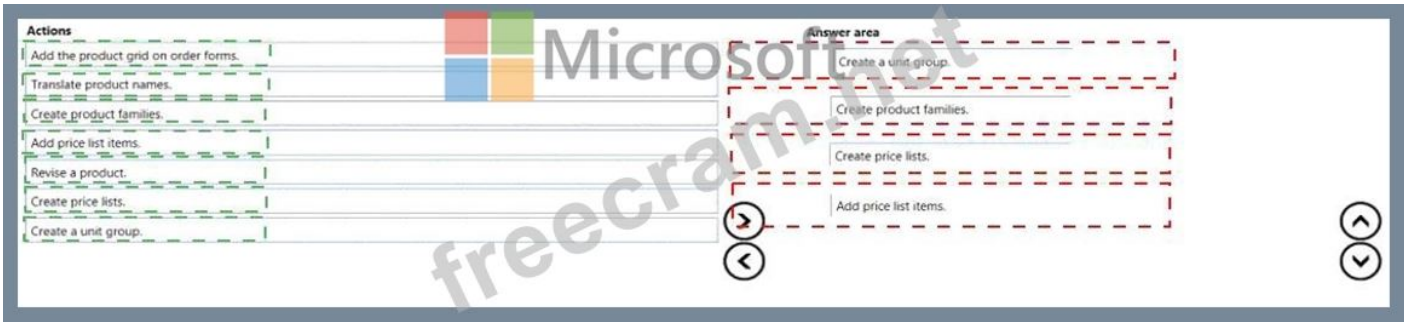
You are a Dynamics 365 Sales administrator. You configure a forecast template that uses the Forecast category as a starting point for a layout for the sales team.

The sales manager wants the value of the Lost column to come from the Total Detail Amount instead of the default value because the revenue is always driven by the items.
You need to make the change.
What should you do?
A. Edit the existing forecast, remove the Lost column, and add a new calculated column.
B. Create a new forecast and update the Amount field in the layout.
C. Create a new forecast, remove the Lost column, and add a new calculated column.
D. Edit the existing forecast and update the Amount field in the layout.
Answer: (SHOW ANSWER)
Reference:
https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/choose-layout-and-columns-forecast

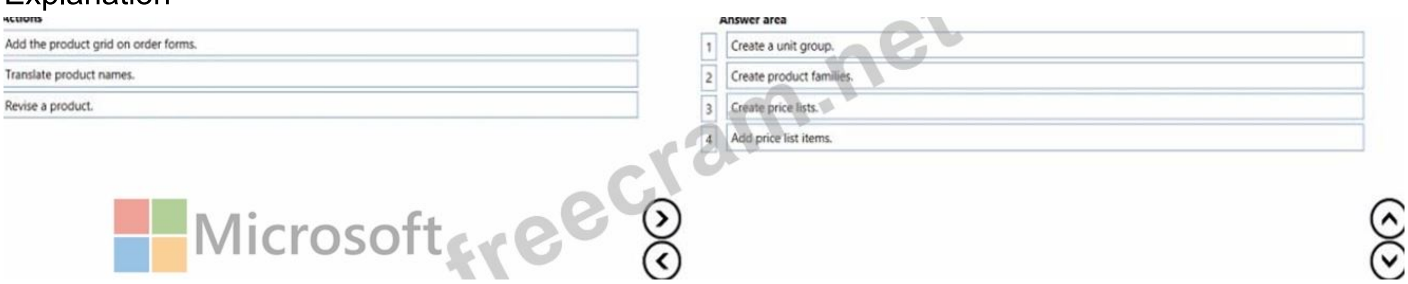
NEW QUESTION: 149
A company plans to move their headquarters from the United States to Europe.
You need to round all currency values to four decimal places and display the correct currency symbol.
Solution: Change the currency decimal precision and currency display options.
Does the solution meet the goal?
A. No
B. Yes
Answer: (SHOW ANSWER)

NEW QUESTION: 150
You are a sales manager at an international company using Dynamics 365 Sales.
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.


Answer:



Explanation



NEW QUESTION: 151

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. Yes

B. No

Answer: (SHOW ANSWER)

NEW QUESTION: 152

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

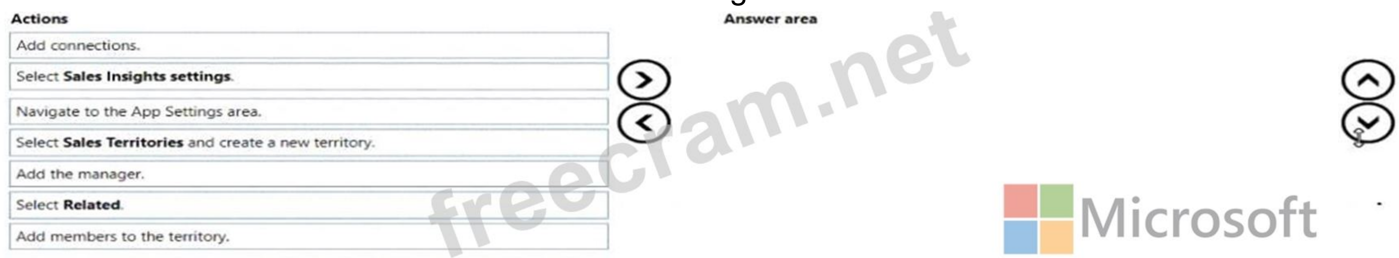
* West territory: California to Texas
* East territory; Missouri to Maine

The sales territories should be configured as follows:

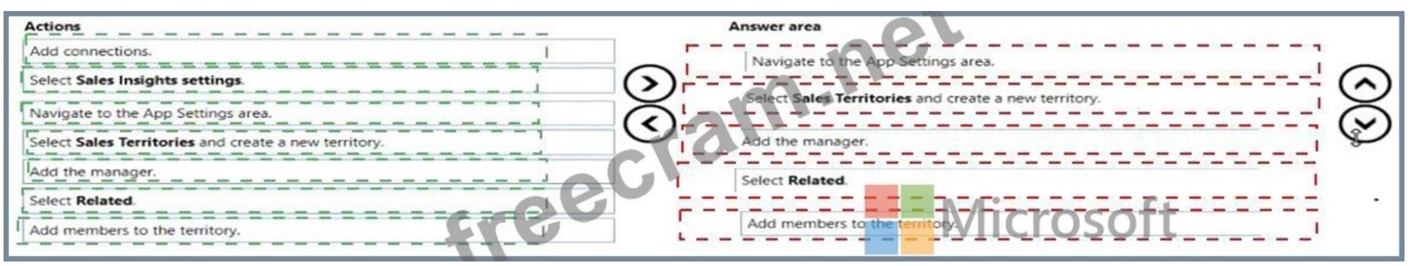
Territory	Manager	Salespeople
East	ManagerB	SalespersonC SalespersonD
West	ManagerA	SalespersonA SalespersonB

You need to set up the sales territories.

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

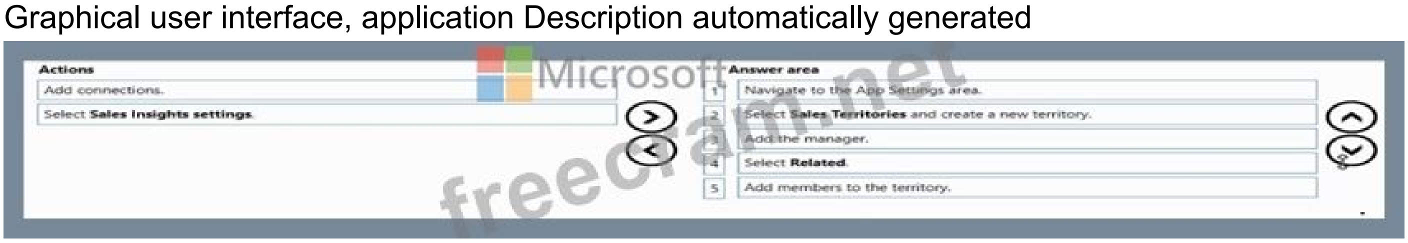


Answer:



Explanation

Graphical user interface, application Description automatically generated



NEW QUESTION: 153

A company is implementing Dynamics 365 Sales.

The solution must support a new standardized sales process. The process must be the same for both new and existing customers.

Sales representatives must follow up on email inquiries about products within 24 hours.

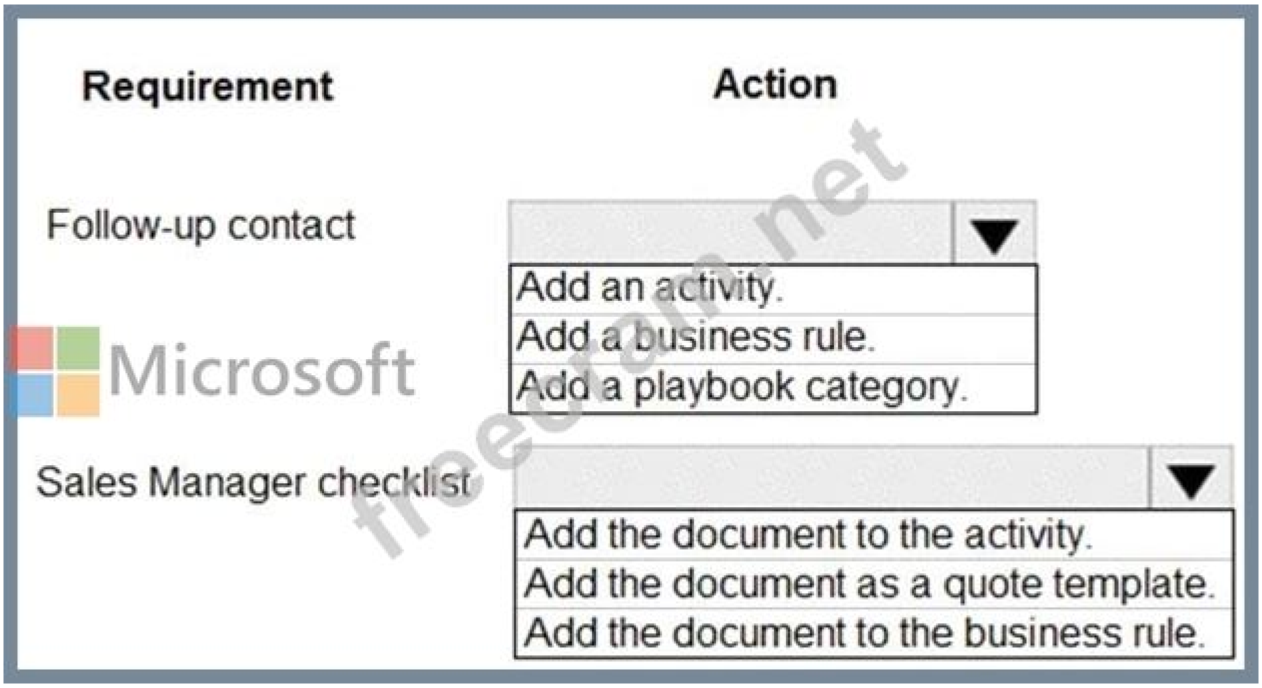
The time it takes for sales representatives to follow up on inquiries must be reportable.

All quotes for new customers must be reviewed and approved by the sales manager for specific criteria.

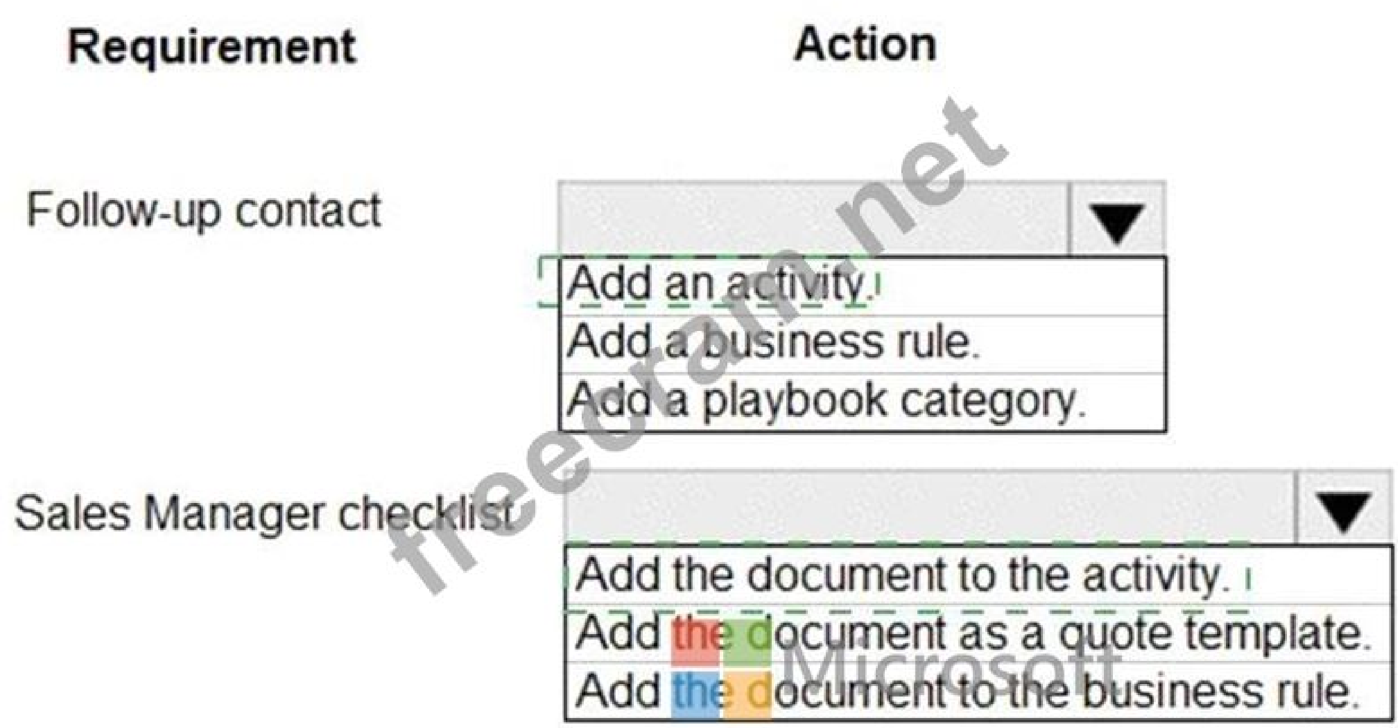
You need to configure playbooks to meet the requirements.

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

NOTE: Each correct selection is worth one point.

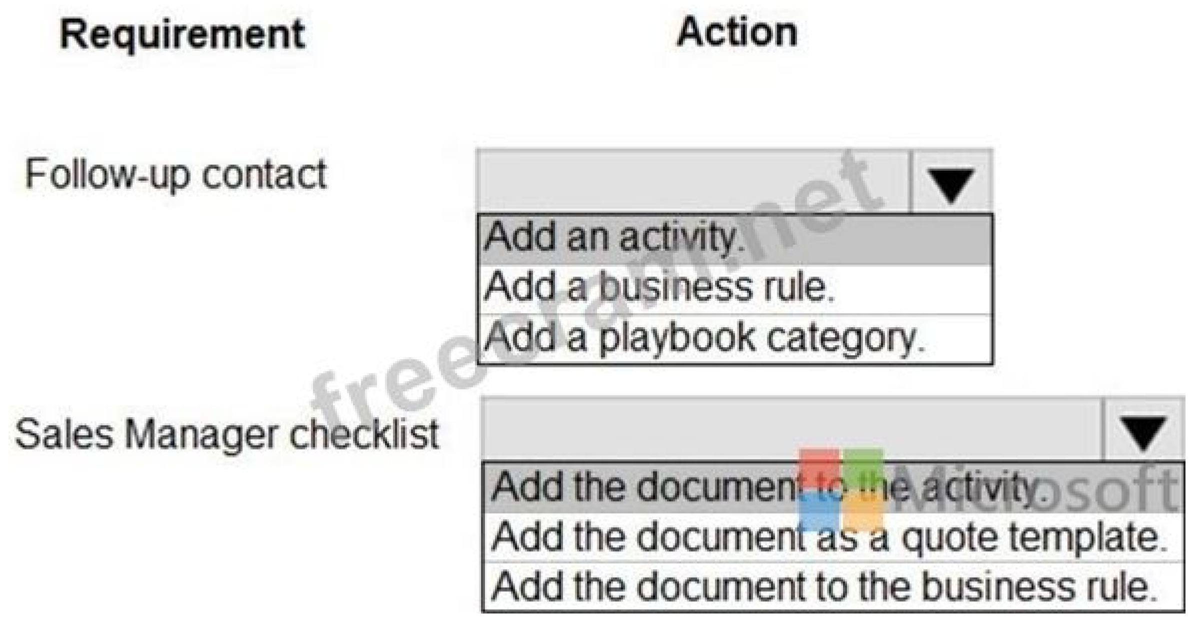


Answer:



Explanation

Text, table Description automatically generated



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

NEW QUESTION: 154

A customer recently visited one of your retail outlets. You created an opportunity for the customer for a large purchase.

The customer is now ready to complete the purchase.

You need to create a quote from the opportunity.

Solution: Convert the Opportunity to a quote.

Does the solution meet the goal?

A. Yes

B. No

Answer: (SHOW ANSWER)

Explanation

References:

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

NEW QUESTION: 155

A company uses Dynamics 365 for Sales.

You create a new quote and associate an opportunity to the quote.

You need to display all your items from the opportunity in the quote.

What should you do?

A. Activate the quote

B. Select Recalculate from the command bar on the Opportunity entity

C. Select Get Products from the command bar in the Quote entity

D. Select Add Line Items on the Opportunity entity

Answer: (SHOW ANSWER)

NEW QUESTION: 156

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:

Explanation

NEW QUESTION: 157

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: (SHOW ANSWER)

Explanation

Activity tracking is enabled in the Playbook template.

Reference:

https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/track-playbook-activities