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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.

Features
Unit group
Discount list
Product family
Product bundle

Requirement
Free mug with purchases of single can of soda
Adjusted price for purchase of 12 cases of soda
Price based on six-pack of soda

Feature

Answer:

Features
Unit group
Discount list
Product family
Product bundle

Requirement
Free mug with purchases of single can of soda
Adjusted price for purchase of 12 cases of soda
Price based on six-pack of soda

Feature
Product bundle
Discount list
Unit group

Explanation

Features	Answer Area	Requirement	Feature
Unit group		Free mug with purchases of single can of soda	Product bundle
Discount list		Adjusted price for purchase of 12 cases of soda	Discount list
Product family		Price based on six-pack of soda	Unit group
Product bundle			

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.

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

Answer:

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

Explanation

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

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.

Features	Requirement	Feature
Adaptive sequence	Quote over a million dollars sent	
Research activity	View LinkedIn profile and add info	
Connect sequence	Sequence added to existing quotes	

Answer:

Features	Requirement	Feature
Adaptive sequence	Quote over a million dollars sent	Research activity
Research activity	View LinkedIn profile and add info	Connect sequence
Connect sequence	Sequence added to existing quotes	Adaptive sequence

Explanation

Features	Requirement	Feature
Adaptive sequence	Quote over a million dollars sent	Research activity
Research activity	View LinkedIn profile and add info	Connect sequence
Connect sequence	Sequence added to existing quotes	Adaptive sequence

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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.

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

Answer:

Scenario

Microsoft

Option

Add a product from an opportunity.

	▼
Existing Product	
Write-In Product	
Get Products	

Add a product from a price list.

	▼
Existing Product	
Write-In Product	
Get Products	

Add a product that does not exist in the product catalog.

	▼
Existing Product	
Write-In Product	
Get Products	

Explanation

Scenario

Microsoft

Option

Add a product from an opportunity.

	▼
Existing Product	
Write-In Product	
Get Products	

Add a product from a price list.

	▼
Existing Product	
Write-In Product	
Get Products	

Add a product that does not exist in the product catalog.

	▼
Existing Product	
Write-In Product	
Get Products	

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.

Scenario

Configuration

Tickets dashboard

	▼
Permissions	
View on dashboard	
Dashboard type	
Chart type	

Age groups chart

	▼
Chart type	
Dashboard type	
Series	
Field in view	

Groups of tickets chart

	▼
Field to view	
Dashboard type	
Series	
Chart type	

Answer:

Scenario

Configuration

Tickets dashboard

	▼
Permissions	
View on dashboard	
Dashboard type	
Chart type	

Age groups chart

	▼
Chart type	
Dashboard type	
Series	
Field in view	

Groups of tickets chart

	▼
Field to view	
Dashboard type	
Series	
Chart type	

Explanation

Scenario



Tickets dashboard

	▼
Permissions	
View on dashboard	
Dashboard type	
Chart type	

Age groups chart

	▼
Chart type	
Dashboard type	
Series	
Field in view	

Groups of tickets chart

	▼
Field to view	
Dashboard type	
Series	
Chart type	

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

Answer:

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
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.

Reference:

<https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/capture-forecast-category-opportunity>

<https://rocketcrm.co.uk/sales-forecasting-dynamics-365-new-feature/>

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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.

Scenario

Action

Products are associated with a quote record

	▼
Manually add the products to the opportunity	
Use the Get Products option	
Associate the quote with the opportunity	

Add a product bundle to the opportunity

	▼
Add a write-in product	
Add an existing product	
Add the product bundle price list	

Answer:

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

Explanation

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

NEW QUESTION: 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 qualify the lead with the new status.	

Answer:

Requirement	Action										
Set up Kanban.	<table><tr><td></td><td>▼</td></tr><tr><td colspan="2">In App Settings, select the correct setting.</td></tr><tr><td colspan="2">On the View menu, select the correct view.</td></tr><tr><td colspan="2">In Advanced settings, select the correct setting.</td></tr><tr><td colspan="2">On the command bar, select Show As, and then select the correct setting.</td></tr></table>		▼	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.	
	▼										
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.	<table><tr><td></td><td>▼</td></tr><tr><td colspan="2">Change the Kanban type to Status.</td></tr><tr><td colspan="2">Change the view to All Opportunities.</td></tr><tr><td colspan="2">Change the view to Partner Opportunities.</td></tr><tr><td colspan="2">Change the Kanban type to a business process flow.</td></tr></table>		▼	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 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.	<table><tr><td></td><td>▼</td></tr><tr><td colspan="2">Drag the opportunity to another column.</td></tr><tr><td colspan="2">Create a new opportunity with the correct status.</td></tr><tr><td colspan="2">Drag the opportunity to the bottom of the column.</td></tr><tr><td colspan="2">Create a lead and qualify the lead with the new status.</td></tr></table>		▼	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 qualify the lead with the new status.	
	▼										
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 qualify the lead with the new status.											

Explanation

A picture containing graphical user interface Description automatically generated

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 qualify the lead with the new status.	

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.

Modifications

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

Answer Area

Addition

Add sales manager
Add lost reasons



Modification

Modification
Modification

Answer:

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

Explanation

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

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.

Requirement	Feature
Which activity type can users convert to leads?	▼ Task Email Phone Call Appointment
Which field carries over from the activity to the lead?	▼ Subject Regarding Start Date Existing Contact

Answer:

Requirement

Feature

Which activity type can users convert to leads?



	▼
Task	
Email	
Phone Call	
Appointment	

Which field carries over from the activity to the lead?

	▼
Subject	
Regarding	
Start Date	
Existing Contact	

Explanation

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

Requirement

Feature

Which activity type can users convert to leads?



	▼
Task	
Email	
Phone Call	
Appointment	

Which field carries over from the activity to the lead?

	▼
Subject	
Regarding	
Start Date	
Existing Contact	

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.

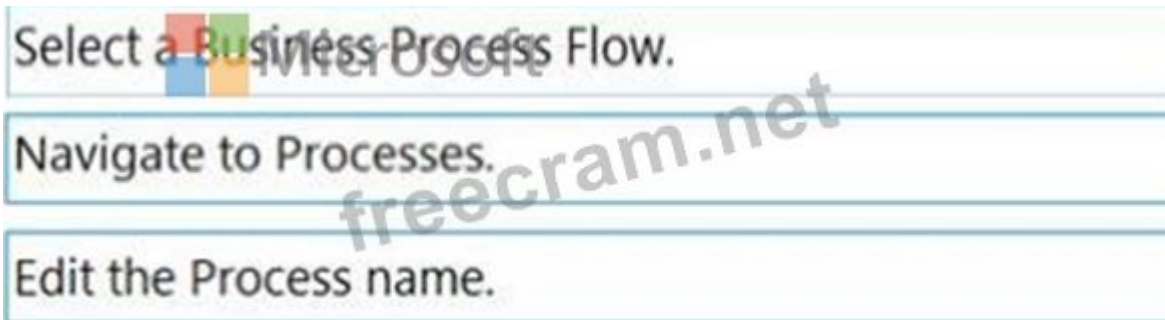
Actions	Answer Area
Navigate to Opportunities and select the Flow option.	
Select a Business Process Flow.	
Navigate to Processes.	
Edit the Process name.	

Answer:

Actions	Answer Area
Navigate to Opportunities and select the Flow option.	
Select a Business Process Flow.	
Navigate to Processes.	
Edit the Process name.	

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. Playbook 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 = \$100.00

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

- A. 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>

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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.

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.

Overview

Background

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

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

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

Sales team

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

Dynamics 365

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

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

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

Current processes

Ticket sales

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

30.

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

To facilitate timely follow-up (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. If Other is chosen, the sales representative must provide additional information in the provided text box.

Tickets

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

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

Reporting

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

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

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

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

Problem Statements

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

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

NEW QUESTION: 33

An organization uses Dynamics 365 for Sales.

You need to create a quote template in Microsoft Word for use in the organization.

What should you do?

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

Answer: ([SHOW ANSWER](#))

Explanation

References:

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

NEW QUESTION: 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.

Options	Information type	Option
Sub-grid	Account name and phone number	
Timeline	Related opportunities	
Assistant	Notes and activities	
Quick View form		

Answer:

Options	Information type	Option
Sub-grid	Account name and phone number	Sub-grid
Timeline	Related opportunities	Quick View form
Assistant	Notes and activities	Timeline
Quick View form		

Explanation

Graphical user interface, text, application Description automatically generated

Information type



Account name and phone number

Sub-grid

Related opportunities

Quick View form

Notes and activities

Timeline

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>

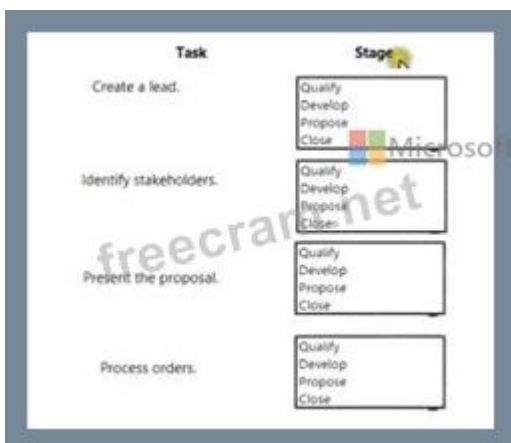
NEW QUESTION: 36

A company uses Dynamics 365 Sales to manage sales orders.

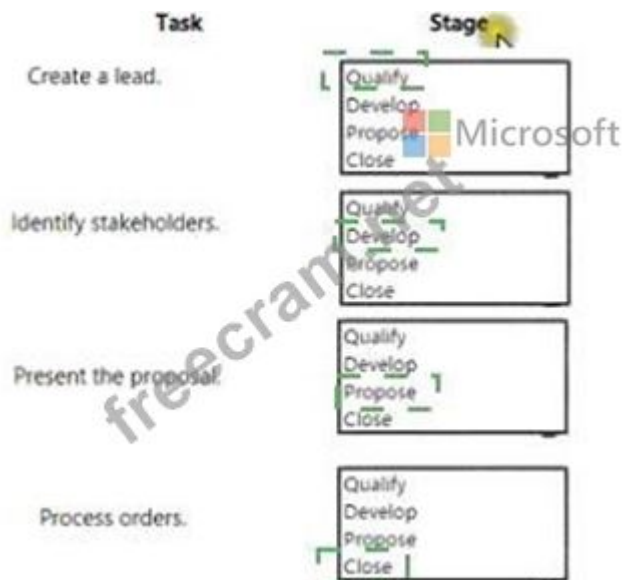
You need to demonstrate the process of going from a lead to an order.

Which stage applies to each task? To answer, select the appropriate options in the answer area.

NOTE: Each correct selection is worth one point.

The screenshot shows a Dynamics 365 Sales interface. On the left, under the heading "Task", there is a list of four tasks: "Create a lead.", "Identify stakeholders.", "Present the proposal.", and "Process orders.". On the right, under the heading "Stage", there are four dropdown menus, each corresponding to a task. Each dropdown menu contains four options: "Qualify", "Develop", "Propose", and "Close". The "Qualify" option is highlighted in yellow in the first dropdown menu.

Answer:



Explanation

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

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.

Scenario	Tool
Create automated activities for quotes.	
Allow emails to be automatically generated.	
Allow wait times before generating the activity.	

Answer:

Scenario	Tool
Create automated activities for quotes.	Playbooks
Allow emails to be automatically generated.	Timelines
Allow wait times before generating the activity.	Sequences

Explanation

Tools	Answer Area	Scenario	Tool
Timelines Playbooks		Create automated activities for quotes. Allow emails to be automatically generated. Allow wait times before generating the activity.	Playbooks Timelines Sequences

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.

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

Answer:

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

Explanation

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

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.

Element	Value
Type	Interactive Experience Dashboard Dashboard
Stream	Single stream Multi stream
Creation location	Home page Entity

Answer:

Element	Value
Type	Interactive Experience Dashboard Dashboard
Stream	Single stream Multi stream
Creation location	Home page Entity

Explanation

Element	Value
Type	▼ Interactive Experience Dashboard Dashboard
Stream	▼ Single stream Multi stream
Creation location	▼ Home page Entity

Reference:

<https://docs.microsoft.com/en-us/dynamics365/customerengagement/on-premises/customize/configure-interactive-experience-dashboard>

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:

Preview		Microsoft						
Territory	Quota	Manager	Best case	Committed	Lost	Omitted	Pipeline	Won
C City	—							75%
S South	—							75%
N North	—							75%

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

NOTE: Each correct selection is worth one point.

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 qualify 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.

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

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>

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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 fewer tab entries to get to required data entry areas.

You need to simplify data entry for the sales representatives.

What should you do?

- A. 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:

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

Explanation

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

Chart requirement	Configuration
Type of chart	Column Pie Funnel
Horizontal Category Axis label	Microsoft 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

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.

Actions

- Create a view of the business process flow entity and include duration and Active Stage Started On
- Add the owner field from the opportunity to the view
- Add the duration and active stage started on the view of the opportunity
- Create a chart on the business process flow entity and add the new view to include the needed fields
- Create a new of the opportunity entity and include the owner field
- Create a chart on the opportunity entity and use the new view to include the necessary fields

Answer Area

⏪
⏩

Answer:

Actions

- Create a view of the business process flow entity and include duration and Active Stage Started On
- Add the owner field from the opportunity to the view
- Add the duration and active stage started on the view of the opportunity
- Create a chart on the business process flow entity and add the new view to include the needed fields
- Create a new of the opportunity entity and include the owner field
- Create a chart on the opportunity entity and use the new view to include the necessary fields

Answer Area

⏪
⏩

- Create a view of the business process flow entity and include duration and Active Stage Started On
- Create a chart on the business process flow entity and add the new view to include the needed fields
- Add the owner field from the opportunity to the view

Explanation

Create a view of the business process flow entity and include duration and Active Stage Started On

Create a chart on the opportunity entity and use the new view to include the necessary fields

Add the owner field from the opportunity to the view

NEW QUESTION: 50

You manage a Dynamics 365 Sales environment.

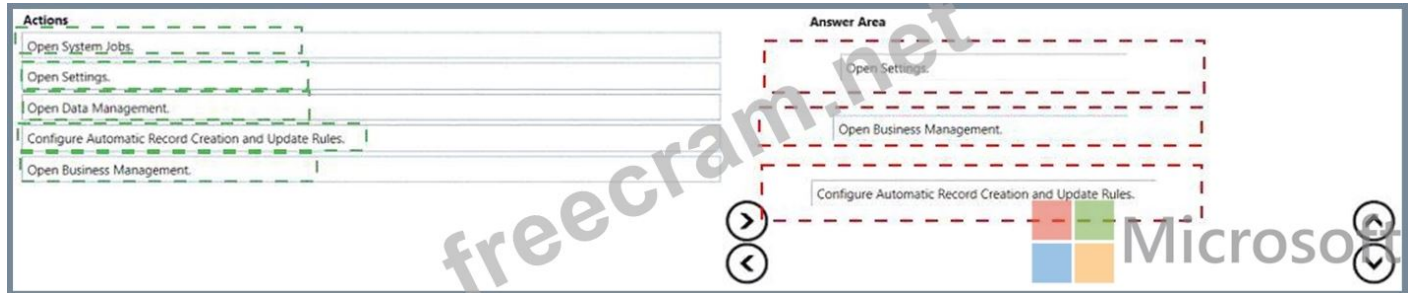
You need to email the sales manager when salespeople update their phone call activities.

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.

Open System Jobs.
 Open Settings.
 Open Data Management.
 Configure Automatic Record Creation and Update Rules.
 Open Business Management.



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 Area

Requirement	Action
Inside salespeople must enter data.	a form with business rules - a form with business rules - a Power Automate Desktop flow - two views
Customers outside New York must be displayed for outside salespeople.	views - views - forms - site maps - business process flows

Answer:

Answer Area

Requirement	Action
Inside salespeople must enter data.	a form with business rules - a form with business rules - a Power Automate Desktop flow - two views
Customers outside New York must be displayed for outside salespeople.	views - views - forms - site maps - business process flows

Explanation

Answer Area

Requirement	Action
Inside salespeople must enter data.	a form with business rules
Customers outside New York must be displayed for outside salespeople.	views

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.

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

Answer:

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

Explanation

Letter Description automatically generated with low confidence

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

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 split bar between panes or scroll to view content.

Answer:

Explanation

NEW QUESTION: 54

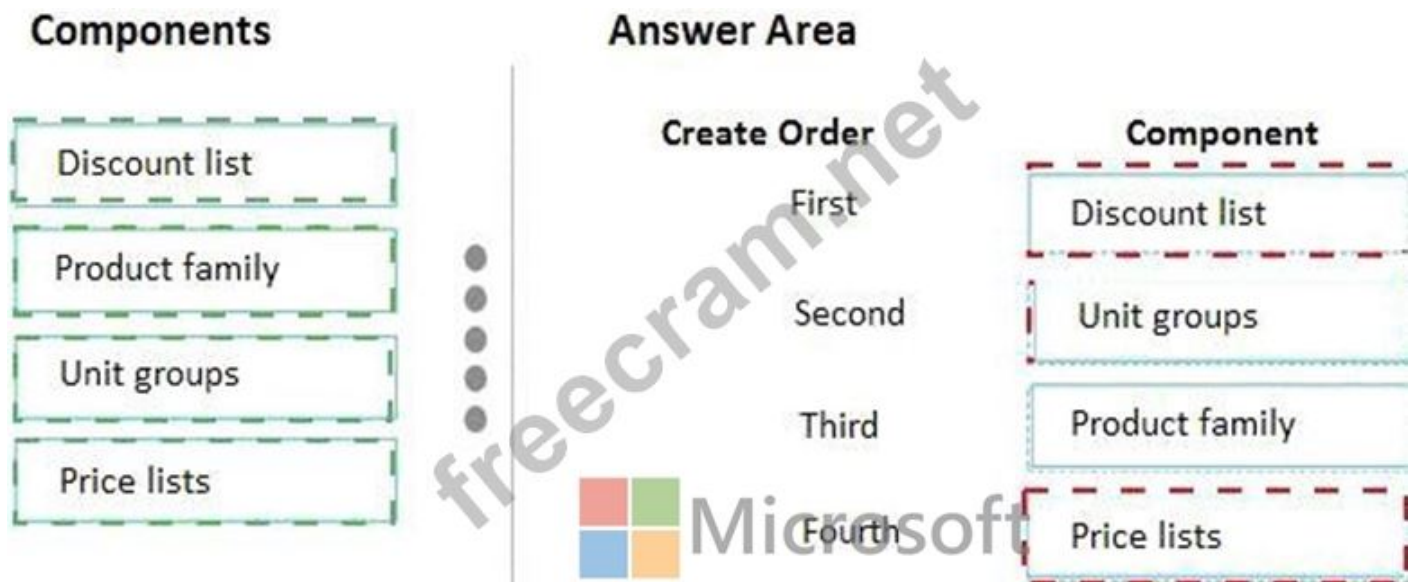
You are setting up a product catalog in Dynamics 365 Sales.

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 that exist in PriceListA and PriceListB to an opportunity.

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

NOTE: Each correct selection is worth one point.

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

Answer:

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

Explanation

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

NEW QUESTION: 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 distributed 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 tradeshow. 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 contacts in Dynamics 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.

Question	Response
You need to add the winning competitor to an opportunity. Where should you perform this action?	▼ the opportunity record the opportunity close record the competitor record
You need to track the team's performance against competitors? Which report should you run?	▼ Sales History Competitor Win/Loss

Answer:

Question	Response
You need to add the winning competitor to an opportunity. Where should you perform this action?	▼ the opportunity record the opportunity close record the competitor record
You need to track the team's performance against competitors? Which report should you run?	▼ Sales History Competitor Win/Loss

Explanation

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

Question	Response
You need to add the winning competitor to an opportunity. Where should you perform this action?	▼ the opportunity record the opportunity close record the competitor record
You need to track the team's performance against competitors? Which report should you run?	▼ Sales History Competitor Win/Loss

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 \$5.00
- * A dozen cans cost \$55.00.
- * Each case has four dozen cans and costs \$200.00.
- * A combination case includes a dozen cans of each flavor and costs \$160.00.
- * Purchases of four or more cases get an extra 10 percent off the price.

You need to set up the product catalog.

Which components should you use? To answer, drag the appropriate components to the correct entry descriptions. Each component may be used once, more Than once, or not at all. You may need to drag the split bar between panes or scroll to view content.

NOTE: Each correct selection is worth one point.

Components		Answer Area	
Products	Price Lists		
Discount Lists	Unit Groups		

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

Answer:

Components		Answer Area	
Products	Price Lists		
Discount Lists	Unit Groups		

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

Explanation

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

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](#))

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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.

Actions

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

Answer Area

Information	Action
Price lists	Action
Competitor list	Action

Microsoft

Answer:

Actions

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

Answer Area

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

Microsoft

Explanation

Information

- Price lists
- Competitor list

Action

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

Microsoft

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 = \$100.00

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

A. Amount

B. 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.

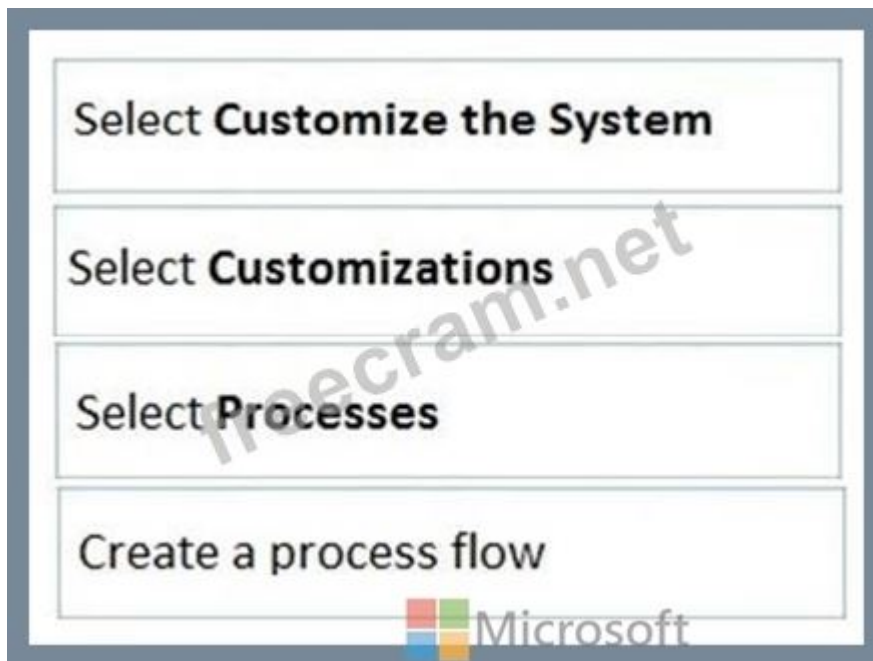
You need to ensure that salespeople can move through the sales process and view progress. Which four actions should you perform in sequence? To answer, move the appropriate actions from the list of actions to the answer area and arrange them in the correct order.

Actions	Answer Area
Select Customize the System	
Select Web Resources	
Create a dialog	
Create a process flow	
Select Customizations	
Select Processes	

Answer:

Actions	Answer Area
Select Customize the System	Select Customize the System
Select Web Resources	Select Customizations
Create a dialog	Select Processes
Create a process flow	Create a process flow
Select Customizations	
Select Processes	

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](#))

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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.

Configuration

Goal calculation

Goal type

Answer:

Configuration

Goal calculation

Goal type

Explanation

Graphical user interface, table Description automatically generated

Configuration

Goal calculation

Goal type

Scope

System

Manual Recalculate as needed

Business entity

Child

Parent

Stretch

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?view=>

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.

Actions

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

Answer Area

Navigation arrows: > < ^ v

Answer:

Actions

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

Answer Area

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

Microsoft

Explanation

Actions

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

Answer Area

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

Microsoft

NEW QUESTION: 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.

Actions	Answer Area
Add existing products from Get Products.	
Revise the quote.	
Add existing products from the products subgrid.	
Close the quote as Cancelled.	
Activate the quote.	

Answer:

Actions	Answer Area
Add existing products from Get Products.	Revise the quote.
Revise the quote.	Add existing products from the products subgrid.
Add existing products from the products subgrid.	Activate the quote.
Close the quote as Cancelled.	
Activate the quote.	

Explanation

Graphical user interface, application Description automatically generated

Actions	Answer Area
Close the quote as Cancelled.	Revise the quote.
Add existing products from Get Products.	Add existing products from the products subgrid.
	Activate the quote.

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 to 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.

Actions

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

Edit a product record.

Navigate to the Additional detail tab.

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

Navigate to the Quotes tab.

Edit an opportunity record.

Select **Get Products**.

Answer Area

⏪

⏩

⏪

⏩

Answer:

Actions

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

Edit a product record.

Navigate to the Additional detail tab.

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

Navigate to the Quotes tab.

Edit an opportunity record.

Select **Get Products**.

Answer Area

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

Edit an opportunity record.

Navigate to the Quotes tab.

Select **Get Products**.

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.

Question	Response
You need to add the winning competitor to an opportunity. Where should you perform this action?	☐ the opportunity record ☐ the opportunity close record ☐ the competitor record
You need to track the team's performance against competitors? Which report should you run?	☐ Sales History ☒ Competitor Win/Loss

Answer:

Question	Response
You need to add the winning competitor to an opportunity. Where should you perform this action?	☐ the opportunity record ☐ the opportunity close record ☐ the competitor record
You need to track the team's performance against competitors? Which report should you run?	☐ Sales History ☒ Competitor Win/Loss

Explanation

Answer Area

Question	Response
You need to add the winning competitor to an opportunity. Where should you perform this action?	the opportunity record
You need to track the team's performance against competitors? Which report should you run?	Competitor Win/Loss

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:

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ExamDiscuss.com now offer the **newest MB-210 exam dumps**, the ExamDiscuss.com MB-210 exam **questions have been updated** and **answers have been corrected** get the **newest** ExamDiscuss.com MB-210 dumps with Test Engine here:
<https://www.examdumps.com/Microsoft/exam/MB-210/premium/> (**376** Q&As Dumps, **35%OFF** Special Discount Code: **freecram**)

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.

Actions

Add custom views using Versium Predict solution

Authenticate Versium Predict

Install Versium Predict from the Dynamics 365 Administration Center

Install Versium Predict from Microsoft AppSource

Add custom views using web resources

Answer Area

Answer:

Actions

Add custom views using Versium Predict solution

Authenticate Versium Predict

Install Versium Predict from the Dynamics 365 Administration Center

Install Versium Predict from Microsoft AppSource

Add custom views using web resources

Answer Area

Install Versium Predict from Microsoft AppSource

Authenticate Versium Predict

Add custom views using web resources



Explanation

Install Versium Predict from
Microsoft AppSource

Authenticate Versium Predict

Add custom views using web
resources

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 Area

Scenario	Action
Incorporate bread types from retail.	Create a product family. Create a unit. Create a price list item. Create a product family. Create a product property.
An existing opportunity wants to change an order to one of the new bread types.	Select the new bread type in the opportunity product. Update the price list. Modify and publish the product. Delete the opportunity product and readd the item. Select the new bread type in the opportunity product.



Answer:

Answer Area

Scenario

Incorporate bread types from retail.

An existing opportunity wants to change an order to one of the new bread types.

Microsoft

Action

- Create a product family.
- Create a unit.
- Create a price list item.
- Create a product family.
- Create a product property.
- Select the new bread type in the opportunity product.
- Update the price list.
- Modify and publish the product.
- Delete the opportunity product and readd the item.
- Select the new bread type in the opportunity product.

Explanation

Answer Area

Scenario

Incorporate bread types from retail.

An existing opportunity wants to change an order to one of the new bread types.

Action

Create a product family.

Select the new bread type in the opportunity product.

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

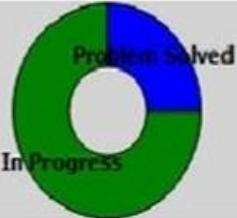
Answer: C (LEAVE A REPLY)

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:

Account Overview as of: 11/13/2018		Status	Acct#
Fourth Coffee (sample)		Active	ABSS4G45
Basic Profile Parent Account: — Relationship: Industry: Location: Renton, TX	Opportunity Summary Active opportunities by probability: No Data All opportunities by current state: No Data 		
Additional Contacts Yvonne McKay (sample) - Purchasing Manager - (555-0100)			

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

NOTE: Each correct selection is worth one point.

Question

Why is the satisfaction area blank?

Answer choice

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

Why is the satisfaction area blank?



Answer choice

- 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

View individual products in a grouping when you create an opportunity.

Sell products from a grouping individually.

Create a grouping within a grouping.

Option

- Kit
- Bundle
- Kit
- Bundle
- Kit
- Bundle

Answer:

Requirement

View individual products in a grouping when you create an opportunity.

Sell products from a grouping individually.

Create a grouping within a grouping.



Option

	▼
Kit	
Bundle	
	▼
Kit	
Bundle	
	▼
Kit	
Bundle	

Explanation

Requirement

View individual products in a grouping when you create an opportunity.

Sell products from a grouping individually.

Create a grouping within a grouping.



Option

	▼
Kit	
Bundle	
	▼
Kit	
Bundle	
	▼
Kit	
Bundle	

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 Area

Configuration

Authentication method

Privacy level

Option

OAuth2

Implicit

OAuth2

Key

Organizational

Public

Organizational

Private

Answer:

Answer Area

Configuration

Authentication method

Privacy level

Option

OAuth2

Implicit

OAuth2

Key

Organizational

Public

Organizational

Private

Explanation

Answer Area

Configuration

Authentication method

Privacy level

Option

OAuth2

Organizational

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>

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Special Discount Code: freecram)

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 is correctly converted.

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

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

Answer:

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

Explanation

Answer Area

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

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.

List types	Answer Area						
Static Segment	<table border="1"> <thead> <tr> <th>Audience</th> <th>List type</th> </tr> </thead> <tbody> <tr> <td>Tradeshow lead</td> <td></td> </tr> <tr> <td>Website lead</td> <td></td> </tr> </tbody> </table>	Audience	List type	Tradeshow lead		Website lead	
Audience		List type					
Tradeshow lead							
Website lead							
Dynamic Segment							
Static Marketing List							
Dynamic Marketing List							

Answer:

List types	Answer Area						
Static Segment	<table border="1"> <thead> <tr> <th>Audience</th> <th>List type</th> </tr> </thead> <tbody> <tr> <td>Tradeshow lead</td> <td>Dynamic Marketing List</td> </tr> <tr> <td>Website lead</td> <td>Static Marketing List</td> </tr> </tbody> </table>	Audience	List type	Tradeshow lead	Dynamic Marketing List	Website lead	Static Marketing List
Audience		List type					
Tradeshow lead		Dynamic Marketing List					
Website lead		Static Marketing List					
Dynamic Segment							
Static Marketing List							
Dynamic Marketing List							

Explanation

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

The screenshot shows a Microsoft Dynamics CRM interface. On the left, under 'List types', there are four buttons: 'Static Segment', 'Dynamic Segment', 'Static Marketing List', and 'Dynamic Marketing List'. On the right, under 'Audience', there are two buttons: 'Tradeshow lead' and 'Website lead'. Further right, under 'List type', there are two buttons: 'Dynamic Marketing List' and 'Static Marketing List'. A large watermark 'freecram.net' is visible across the center of the interface.

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.

Requirement	Value or action
Modification to make	▼ Use a filter Alter the existing chart Create a new chart
Value to use	▼ Status Status Reason Completed

Answer:

Requirement

Value or action

Modification to make

▼
Use a filter
Alter the existing chart
Create a new chart

Value to use

▼
Status
Status Reason
Completed

Explanation

Requirement	Value or action
Modification to make	▼ Use a filter Alter the existing chart Create a new chart
Value to use	▼ Status Status Reason Completed

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.

Actions	Scenario	Action
Abandon and then Switch	End the current process and start the correct business process flow.	Action
Finish and then Switch	Temporarily leave the current process for a different business process flow.	Action
Switch		

Answer:

Actions	Answer Area	
Abandon and then Switch	Scenario End the current process and start the correct business process flow. Temporarily leave the current process for a different business process flow.	Action
Finish and then Switch		Finish and then Switch
Switch		Switch

Explanation

Scenario	Action
End the current process and start the correct business process flow.	Finish and then Switch
Temporarily leave the current process for a different business process flow.	Switch

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 territory.

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.

Solutions	Analysis	Solution
Free Sales Insights only	Email messages	Solution
Advanced Sales Insights only	Relationship between accounts	Solution
Free Sales Insights or Advanced Sales Insights	Communication between customer and representative	Solution

Answer:

Solutions	Answer Area	Solution
Free Sales Insights only	Analysis	Free Sales Insights only
Advanced Sales Insights only	Email messages	Free Sales Insights or Advanced Sales Insights
Free Sales Insights or Advanced Sales Insights	Relationship between accounts	Advanced Sales Insights only
	Communication between customer and representative	

Explanation

Analysis	Solution
Email messages	Free Sales Insights only
Relationship between accounts	Free Sales Insights or Advanced Sales Insights
Communication between customer and representative	Advanced Sales Insights only

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.

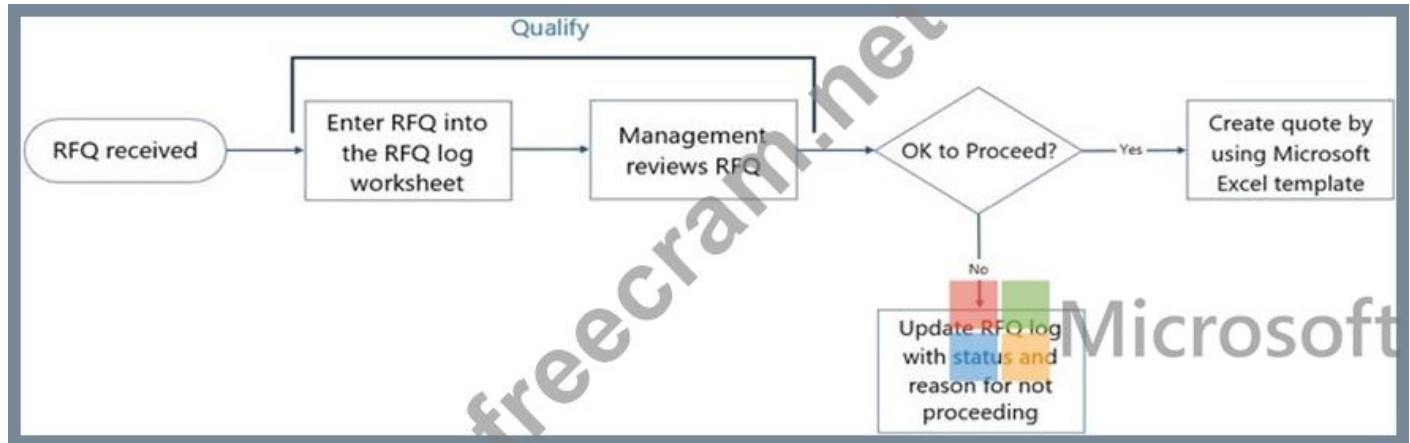
Each sales team maintains a spreadsheet in which they record customer requests for quotes (RFQs). The spreadsheets are stored on a network drive.

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.

Actions

Pick items and ship order

Create a new order for the customer

Add customer address and shipping information

Create a new customer account in Dynamics 365 for Sales

Add products from inventory for the sale

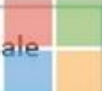
Answer Area

>

<

^

v

 Microsoft

Answer:

Actions

- Pick items and ship order
- Create a new order for the customer
- Add customer address and shipping information
- Create a new customer account in Dynamics 365 for Sales
- Add products from inventory for the sale

Answer Area

Create a new customer account in Dynamics 365 for Sales

Create a new order for the customer

Add products from inventory for the sale

Add customer address and shipping information

Pick items and ship order

Explanation

Create a new customer account in Dynamics 365 for Sales

Create a new order for the customer

Add products from inventory for the sale

Add customer address and shipping information

Pick items and ship order

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.

Actions

- Delete the imported records from the Imports list.
- Delete the import source file from the Imports list.
- Run a duplicate detection job on Accounts.
- Run a bulk delete job on duplicate Accounts.
- Reimport the file.
- Turn on the duplicate detection rule.

Answer area

-
-
-

Answer:

Actions

- Delete the imported records from the Imports list.
- Delete the import source file from the Imports list.
- Run a duplicate detection job on Accounts.
- Run a bulk delete job on duplicate Accounts.
- Reimport the file.
- Turn on the duplicate detection rule.

Answer area

- Run a bulk delete job on duplicate Accounts.
- Reimport the file.
- Turn on the duplicate detection rule.

Explanation

Actions

- Delete the imported records from the Imports list.
- Delete the import source file from the Imports list.
- Run a duplicate detection job on Accounts.

Answer area

- Run a bulk delete job on duplicate Accounts.
- Reimport the file.
- Turn on the duplicate detection rule.

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.

Configurations	Requirement	Configuration
Filters	View only unopened work items.	
Sequences	Create a set of ordered activities.	
Work list cards		

Answer:

Configurations	Answer Area	Requirement	Configuration
Filters		View only unopened work items.	Work list cards
Sequences		Create a set of ordered activities.	Sequences
Work list cards			

Explanation

Configurations	Answer Area	Requirement	Configuration
Filters		View only unopened work items.	Work list cards
Sequences		Create a set of ordered activities.	Sequences
Work list cards			

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:

Lead: Lead
Jim Glynn

Lead Source

Lead to Opportunity Sale...
Active for 1 minute

Qualify (1 Min)
Active for 1 minute

Summary Details Related

Contact

Topic * Interested in Product

First Name * Jim

Last Name * Glynn

Job Title CEO

Business Phone

Mobile Phone

Email

Company

Company *

Existing Contact? ☒ Jim Glynn (san)

Existing Account? ☐

Purchase Timeframe

Estimated Budget

Purchase Process

Identify Decision Maker ☒ completed

Capture Summary

Next Stage >

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

You need to move to the Develop stage. What should you do?

Answer Choice

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



Orders

Option

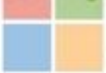
SQL Server Reporting Services
Fetch-based Reporting Services

Discounts by Number of
Employees

SQL Server Reporting Services
Fetch-based Reporting Services

Answer:

Report type



Orders

Option

SQL Server Reporting Services
Fetch-based Reporting Services

Discounts by Number of
Employees

SQL Server Reporting Services
Fetch-based Reporting Services

Explanation

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

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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 Area

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

Answer:

Answer Area

Requirement

Filter leads for assignment.

Assign the country/region to the correct group.

Distribute leads to salespeople.

Configuration

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

Create a segment to filter the lead source and country/region.

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

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

Assign the country/region to specific teams.

Assign the country/region to any seller.

Assign the country/region to specific teams.

Assign the country/region to specific sellers.

Assign the country/region to sellers with matching attributes.

Use load balancing.

Use load balancing.

Use round-robin distribution.

Explanation

Answer Area

Requirement

Filter leads for assignment.

Assign the country/region to the correct group.

Distribute leads to salespeople.

Configuration

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

Assign the country/region to specific teams.

Use load balancing.

Microsoft

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?

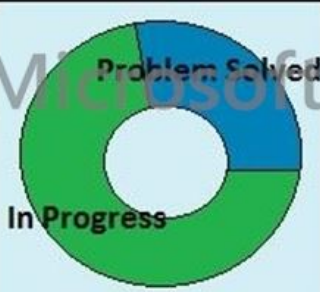
- A. Use date ranges to create a view in the default solution

- 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.

Account Overview as of:		11/13/2018	Status	Acct#												
Fourth Coffee (sample)			Active	ABSS4G45												
Basic Profile		Opportunity Summary														
Parent Account:		<u>Active opportunities by probability</u> <u>All opportunities by current state</u>														
Relationship:		No Data														
Industry:		No Data														
Location:		Renton, Tx														
Category:																
Website:		http://www.fourthcoffee.com/														
Ownership:																
Ticker Symbol:																
		<table><tr><td><u>Active Opportunities</u></td><td><u>Amount</u></td><td><u>Prob</u></td><td><u>Weighted</u></td></tr><tr><td>Other</td><td></td><td></td><td></td></tr><tr><td>Total</td><td></td><td>0</td><td></td></tr></table>			<u>Active Opportunities</u>	<u>Amount</u>	<u>Prob</u>	<u>Weighted</u>	Other				Total		0	
<u>Active Opportunities</u>	<u>Amount</u>	<u>Prob</u>	<u>Weighted</u>													
Other																
Total		0														
Primary Contact		Service Summary														
Yvonne McKay (sample)		<u>Satisfaction (all closed cases)</u> <u>Status Reason (all cases)</u>														
Title:																
Location:		Redmond, WA														
Business Phone:		555-0100														
Mobile Phone:																
Home Phone:																
Fax:																
Pager:																
Email:		someone_a@example.com														
Additional Contacts																
		Yvonne McKay (sample) - Purchasing Manager - (555-0100)														

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

NOTE: Each correct selection is worth one point.

Question

Why is the satisfaction area blank?

Answer choice

	▼
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

Why is the satisfaction area blank?

Answer choice

	▼
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

Why is the satisfaction area blank?

Answer choice

	▼
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.

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



Answer:

Source entity**Source**

Quote

	▼
Lead	
Opportunity	
Quote	
Order	

Order

	▼
Lead	
Opportunity	
Quote	
Order	

Invoice

	▼
Lead	
Opportunity	
Quote	
Order	

Explanation

Source entity	Source										
Quote	<table border="1"><tr><td></td><td>▼</td></tr><tr><td colspan="2">Lead</td></tr><tr><td colspan="2">Opportunity</td></tr><tr><td colspan="2">Quote</td></tr><tr><td colspan="2">Order</td></tr></table>		▼	Lead		Opportunity		Quote		Order	
	▼										
Lead											
Opportunity											
Quote											
Order											
Order	<table border="1"><tr><td></td><td>▼</td></tr><tr><td colspan="2">Lead</td></tr><tr><td colspan="2">Opportunity</td></tr><tr><td colspan="2">Quote</td></tr><tr><td colspan="2">Order</td></tr></table>		▼	Lead		Opportunity		Quote		Order	
	▼										
Lead											
Opportunity											
Quote											
Order											
Invoice	<table border="1"><tr><td></td><td>▼</td></tr><tr><td colspan="2">Lead</td></tr><tr><td colspan="2">Opportunity</td></tr><tr><td colspan="2">Quote</td></tr><tr><td colspan="2">Order</td></tr></table>		▼	Lead		Opportunity		Quote		Order	
	▼										
Lead											
Opportunity											
Quote											
Order											

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.

Actions

Create a hot lead
Create a case with high priority
Create a warm lead
Create a cold lead

Answer Area

⬅	⬆
➡	⬇

Answer:

Actions	Answer Area
Create a hot lead	Create a hot lead
Create a case with high priority	Create a warm lead
Create a warm lead	Create a case with high priority
Create a cold lead	Create a cold lead

Explanation

Answer Area

Create a hot lead

Create a warm lead

Create a case with high priority

Create a cold lead



Microsoft

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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 are 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.

Requirement	Setting
Hierarchical route	▼ Owner User Contact Manager
Permissions - User Lookup field	▼ User Manager Created By None

Answer:

Requirement	Setting
Hierarchical route	▼ Owner User Contact Manager
Permissions - User Lookup field	▼ User Manager Created By None

Explanation

Requirement Setting

Hierarchical route

Permissions - User Lookup field

Owner
User
Contact
Manager

User
Manager
Created By
None

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

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

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.

The screenshot shows a Dynamics 365 setup interface. On the left, under the heading "Actions", there is a list of five tasks: "Set up discount lists.", "Set up measurements.", "Set up products.", "Set up pricing.", and "Set up price lists and default pricing.". To the right of this list are two circular arrows, one pointing right and one pointing left. On the right side, under the heading "Answer area", there is a vertical list of five numbered slots (1 to 5) and a vertical scrollbar with up and down arrows.

Answer:

This screenshot shows the same Dynamics 365 setup interface as the previous one, but with the actions moved to the "Answer area" and ordered correctly. The "Actions" list on the left is now empty. The "Answer area" on the right contains the following order: 1. Set up discount lists., 2. Set up measurements., 3. Set up products., 4. Set up pricing., and 5. Set up price lists and default pricing. The actions are enclosed in dashed red boxes.

Explanation

This screenshot shows the Dynamics 365 setup interface with the "Actions" list on the left and the "Answer area" on the right. The "Answer area" contains the following order: 1. Set up discount lists., 2. Set up measurements., 3. Set up products., 4. Set up pricing., and 5. Set up price lists and default pricing.

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<https://www.examdiscuss.com/Microsoft/exam/MB-210/premium/> (376 Q&As Dumps, **35%OFF**
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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.

Requirement	Technology or feature
Install and configure additional required software.	Social engagement Dynamics 365 AI for Sales
Ensure that Social Assistant can be used on a dashboard	Relationship Assistant Search topics

Answer:

Requirement	Technology or feature
Install and configure additional required software.	Social engagement Dynamics 365 AI for Sales
Ensure that Social Assistant can be used on a dashboard	Relationship Assistant Search topics

Explanation

Requirement



Technology or feature

Install and configure additional required software.

Social engagement

Dynamics 365 AI for Sales

Ensure that Social Assistant can be used on a dashboard

Relationship Assistant

Search topics

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 move their headquarters from the United States to Europe.
You need to round all currency values to four decimal places and display the correct currency symbol.
Solution: Change the currency code and symbol so that both are displayed.
Does the solution meet the goal?

- A. No
- B. Yes

Answer: ([SHOW ANSWER](#))

NEW QUESTION: 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 Area

Requirement	Action
Display only TaskB in the work list.	☐ Filter the work items. ☐ Sort the work items. ☒ Filter the work items. ☐ Change the due date of TaskA to be before TaskB. ☐ Change the due date of TaskB to be before TaskA.
View the task on the customer record.	☒ Add the Up next widget. ☒ Add the Up next widget. ☐ Add the Timeline control. ☐ Add the assistant widget.

Answer:

Answer Area

Requirement	Action
Display only TaskB in the work list.	☐ Filter the work items. ☐ Sort the work items. ☒ Filter the work items. ☐ Change the due date of TaskA to be before TaskB. ☐ Change the due date of TaskB to be before TaskA.
View the task on the customer record.	☒ Add the Up next widget. ☒ Add the Up next widget. ☐ Add the Timeline control. ☐ Add the assistant widget.

Explanation

Answer Area

Requirement	Action
Display only TaskB in the work list.	☐ Filter the work items. ☐ Sort the work items. ☒ Filter the work items. ☐ Change the due date of TaskA to be before TaskB. ☐ Change the due date of TaskB to be before TaskA.
View the task on the customer record.	☒ Add the Up next widget. ☒ Add the Up next widget. ☐ Add the Timeline control. ☐ Add the assistant widget.

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.

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

Answer:

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

Explanation

Answer Area

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

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.

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

Answer:

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

Explanation

Answer Area

Scenario

Option

Add a product from an opportunity. Get Products

Add a product from a price list. Existing Product

Add a product that does not exist in the product catalog. Write-In Product

NEW QUESTION: 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 SalesTerritoryB and assign the SalesTerritoryA manager to SalesTerritoryB.

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

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

Actions

Create a new sales territory.

Associate the manager from SalesTerritoryA.

Replace the manager from SalesTerritoryA with another manager.

Change the name of SalesTerritoryA to SalesTerritoryB.

Add members.

Answer Area

Answer:

Actions

Create a new sales territory.

Associate the manager from SalesTerritoryA.

Replace the manager from SalesTerritoryA with another manager.

Change the name of SalesTerritoryA to SalesTerritoryB.

Add members.

Answer Area

Replace the manager from SalesTerritoryA with another manager.

Create a new sales territory.

Add members.

Associate the manager from SalesTerritoryA.

Explanation

Actions

Change the name of SalesTerritoryA to SalesTerritoryB.

Answer Area

Replace the manager from SalesTerritoryA with another manager.

Create a new sales territory.

Add members.

Associate the manager from SalesTerritoryA.

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.

Actions

Add the product grid on order forms.

Translate product names.

Create product families.

Add price list items.

Revise a product.

Create price lists.

Create a unit group.

Answer area

>

<



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 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: Disable JavaScript and disable pop-up blockers.

Does the solution meet the goal?

A. Yes

B. No

Answer: ([SHOW ANSWER](#))

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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.

Actions

- Add connections.
- Select **Sales Insights settings**.
- Navigate to the App Settings area.
- Select **Sales Territories** and create a new territory.
- Add the manager.
- Select **Related**.
- Add members to the territory.

Answer area

Microsoft

Answer:

Actions

- Add connections.
- Select **Sales Insights settings**.
- Navigate to the App Settings area.
- Select **Sales Territories** and create a new territory.
- Add the manager.
- Select **Related**.
- Add members to the territory.

Answer area

- Navigate to the App Settings area.
- Select **Sales Territories** and create a new territory.
- Add the manager.
- Select **Related**.
- Add members to the territory.

Microsoft

Explanation

Graphical user interface, application Description automatically generated

Actions

- Add connections.
- Select **Sales Insights settings**.

Answer area

- Navigate to the App Settings area.
- Select **Sales Territories** and create a new territory.
- Add the manager.
- Select **Related**.
- Add members to the territory.

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.

Requirement	Action
Follow-up contact	▼ Add an activity. Add a business rule. Add a playbook category.
Sales Manager checklist	▼ Add the document to the activity. Add the document as a quote template. Add the document to the business rule.

Answer:

Requirement	Action
Follow-up contact	▼ Add an activity. Add a business rule. Add a playbook category.
Sales Manager checklist	▼ Add the document to the activity. Add the document as a quote template. Add the document to the business rule.

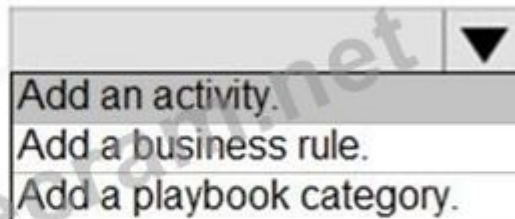
Explanation

Text, table Description automatically generated

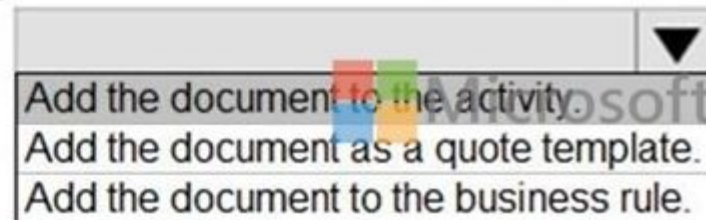
Requirement

Action

Follow-up contact



Sales Manager checklist



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.

The screenshot shows a configuration interface with three main sections: 'Features', 'Answer Area', and 'Requirement'. The 'Features' section on the left contains four items: 'Auto capture', 'Notes analysis', 'App for Outlook', and 'Email engagement'. The 'Requirement' section in the middle lists two requirements: 'Email correspondence on timeline' and 'When customer opens email'. The 'Feature' section on the right is empty, with two input boxes for selecting features. A large 'freecram' watermark is visible across the center.

Answer:

This screenshot shows the same configuration interface as above, but with the correct features assigned to the requirements. In the 'Feature' section on the right, 'Auto capture' and 'Email engagement' are selected and listed. The 'Answer Area' in the center is empty. A large 'freecram' watermark is visible across the center.

Explanation

This screenshot is identical to the one above, showing the correct configuration for Question 156. The 'Feature' section on the right contains 'Auto capture' and 'Email engagement'. A large 'freecram' watermark is visible across the center.

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>

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