

## Microsoft.MB-210.v2023-12-25.q166

|                                                                                                                                                               |                                                    |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------|
| Exam Code:                                                                                                                                                    | MB-210                                             |
| Exam Name:                                                                                                                                                    | Microsoft Dynamics 365 Sales Functional Consultant |
| Certification Provider:                                                                                                                                       | Microsoft                                          |
| Free Question Number:                                                                                                                                         | 166                                                |
| Version:                                                                                                                                                      | v2023-12-25                                        |
| # of views:                                                                                                                                                   | 342                                                |
| # of Questions views:                                                                                                                                         | 10197                                              |
| <a href="https://www.freecram.net/torrent/Microsoft.MB-210.v2023-12-25.q166.html">https://www.freecram.net/torrent/Microsoft.MB-210.v2023-12-25.q166.html</a> |                                                    |

### NEW QUESTION: 1

Note: This question is part of a series of questions that present the same scenario. Each question in the series contains a unique solution. Determine whether the solution meets the stated goals. Some question sets might have more than one correct solution, while others might not have a correct solution.

After you answer a question in this section, you will NOT be able to return to it. As a result, these questions will not appear in the review screen.

You configure forecasts for a clothing manufacturer.

A salesperson updates an opportunity and wants to refresh the forecast.

You need to show the salesperson how to refresh the forecast.

Proposed solution: Recalculate the opportunity.

Does the solution meet the goal?

A. Yes

B. No

Answer: ([SHOW ANSWER](#))

Reference:

<https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/keep-forecast-data-up-to-date>

### NEW QUESTION: 2

Note: This question is part of a series of questions that present the same scenario. Each question in the series contains a unique solution that might meet the stated goals. Some question sets might have more than one correct solution, while others might not have a correct solution.

After you answer a question in this section, you will NOT be able to return to it. As a result, these questions will not appear in the review screen.

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

- \* Utah to California is the West territory
- \* Illinois to Colorado is the Central territory.

\* Maine to Indiana is the East territory.

The company wants the territories set up as follows:

- \* Salespersons 1 and 2 sell in the West territory.
- \* Salespersons 5 and 6 sell in the Central territory.
- \* Salespersons 3 and 4 sell in the East territory.
- \* Postal code for each state used as the location.

You need to set up the territories.

Solution:

- \* Create the West territory, add the manager.
- \* Add members for each territory and save.
- \* Repeat for the Central and East territories.
- \* Add connections to each territory.

Does the solution meet the goal?

A. Yes

B. No

**Answer:** ([SHOW ANSWER](#))

Reference:

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

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

### NEW QUESTION: 3

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: 4

The product development team for a toy company creates a new remote-control toy.

You need to create the necessary records and record relationships to sell the product.

Which five records and/or components should you configure in sequence? To answer, move the appropriate records and/or components from the list of records and components to the answer area and arrange them in the correct order.

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

| Records and Components | Answer Area                                                                                                                                                                    |
|------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| units                  | <div> <div> <div>⏪</div> <div>⏩</div> </div> <div> <div>⏴</div> <div>⏵</div> </div> </div>  |
| products               |                                                                                                                                                                                |
| price lists            |                                                                                                                                                                                |
| product families       |                                                                                                                                                                                |
| price list items       |                                                                                                                                                                                |
| discount lists         |                                                                                                                                                                                |
| unit groups            |                                                                                                                                                                                |

Answer:

| Records and Components | Answer Area                                                                                                                                                                                                            |
|------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| units                  | <div> <div> <div>⏪</div> <div>⏩</div> </div> <div> <div>⏴</div> <div>⏵</div> </div> </div> <div> <div>unit groups</div> <div>units</div> <div>products</div> <div>price list items</div> <div>price lists</div> </div> |
| products               |                                                                                                                                                                                                                        |
| price lists            |                                                                                                                                                                                                                        |
| product families       |                                                                                                                                                                                                                        |
| price list items       |                                                                                                                                                                                                                        |
| discount lists         |                                                                                                                                                                                                                        |
| unit groups            |                                                                                                                                                                                                                        |

Explanation

unit groups

units

products

price list items

price lists

#### NEW QUESTION: 5

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

What should you do?

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

**Answer:** ([SHOW ANSWER](#))

Explanation

Note: There are several versions of this questions with two different correct answers. The other possible correct answer is:

- \* Share the record with User2.

Other incorrect answers you may see in the exam include the following:

- \* Grant User2 the security role
- \* Instruct User2 to follow the record
- \* Add User2 to the Sales team

### NEW QUESTION: 6

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: B ([LEAVE A REPLY](#))

### NEW QUESTION: 7

A sales team uses the out-of-the-box Kanban board to view the All Opportunities list. A read-only grid is displayed for all other views. You must display the same Kanban board when sales team members view the My Open Opportunities list. You need to configure the view for the sales team members. What should you add to the view?

A. Custom control

B. Business rule

C. JavaScript

D. PCF control

Answer: ([SHOW ANSWER](#))

### NEW QUESTION: 8

A company manufactures widgets. Widgets can be sold in the following ways:

| Unit   | Base unit | Description        |
|--------|-----------|--------------------|
| Box    |           | Contains 2 widgets |
| Case   | Box       | Contains 12 boxes  |
| Pallet | Case      | Contains 12 cases  |

The company discovers that customers want to buy widgets individually.

You need to add a unit named Each.

A. Create the unit Each with Box as the base unit.

B. Update the unit Box with Each as the base unit.

C. Set Each as the primary unit.

D. Make Each the base unit for all units.

Answer: ([SHOW ANSWER](#))

Reference:

<https://docs.microsoft.com/en-us/dynamics365/sales-professional/create-unit-group-add-units>

### NEW QUESTION: 9

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.

**Answer:**

**Explanation**

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

**NEW QUESTION: 10**

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: 11

You implemented Dynamics 365 Sales for a company.

Users experience the following issues:

- \* Salespeople can display a view of all accounts. The account phone number column, which is the last column, displays only the header with no data.
- \* The company creates a system view named Salesperson customer for last 90 days. This view is unavailable for the salespeople.

You need to resolve the issues.

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

NOTE: Each correct selection is worth one point.

**Answer Area**

| Issue                   | Solution                                                                                                                                                                                                                                                    |
|-------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Column has missing data | <div><div>Add users to field-level security.</div><div>Move the column to the first column.</div><div>Add permission to the security role.</div><div>Add users to field-level security.</div><div>Add the column to the main form.</div></div>              |
| View is unavailable     | <div><div>Add the view to a form as a subgrid.</div><div>Remove the Power Apps component framework (PCF) control.</div><div>Remove field-level security.</div><div>Add the view to a form as a subgrid.</div><div>Add the view to the site map.</div></div> |

**Answer:**

**Answer Area**

**Issue**  
Column has missing data

**Solution**

- Add users to field-level security.
- Move the column to the first column.
- Add permission to the security role.
- Add users to field-level security.
- Add the column to the main form.

View is unavailable

- Add the view to a form as a subgrid.
- Remove the Power Apps component framework (PCF) control.
- Remove field-level security.
- Add the view to a form as a subgrid.
- Add the view to the site map.

### Explanation

**Answer Area**

**Issue**  
Column has missing data  
View is unavailable

**Solution**

- Add users to field-level security.
- Add the view to a form as a subgrid.

### NEW QUESTION: 12

You are a Dynamics 365 Sales administrator for an organization.

The organization is no longer going to sell a product in the product catalog.

You need to ensure that the product is no longer available for selection by sales staff.

What should you do?

- A. Delete the product
- B. Edit the name
- C. Retire the product

**Answer: (SHOW ANSWER)**

Reference:

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

### NEW QUESTION: 13

A company uses Dynamics 365 Sales.

You need to configure the Sales Insights sales accelerator.

What should you create?

- A. Communication frequency
- B. Leads
- C. Insight cards
- D. Sequences

**Answer: (SHOW ANSWER)**

### NEW QUESTION: 14

A company uses Dynamics 365 Sales.

A sales manager wants to send an email to all contacts who live in a specific city. The manager does not want to create an email template or reuse the list of contacts. The email must be created and sent automatically.

You need to configure the system to send the email.

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

NOTE: Each correct selection is worth one point.

| Actions                                                                | Answer area |
|------------------------------------------------------------------------|-------------|
| Set up email activities so they do not close.                          |             |
| Set up email activities to close.                                      |             |
| Filter the Contacts view to show only contacts from the specific city. |             |
| Create a quick campaign.                                               |             |
| Create a direct email.                                                 |             |

**Answer:**

| Actions                                                                | Answer area |
|------------------------------------------------------------------------|-------------|
| Set up email activities so they do not close.                          |             |
| Set up email activities to close.                                      |             |
| Filter the Contacts view to show only contacts from the specific city. |             |
| Create a quick campaign.                                               |             |
| Create a direct email.                                                 |             |

**Explanation**

| Actions                                       | Answer area                                                              |
|-----------------------------------------------|--------------------------------------------------------------------------|
| Set up email activities so they do not close. | 1 Filter the Contacts view to show only contacts from the specific city. |
| Set up email activities to close.             | 2 Create a quick campaign.                                               |
|                                               | 3 Create a direct email.                                                 |

### NEW QUESTION: 15

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.

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

**Answer:**

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

**Explanation**



### NEW QUESTION: 16

A company uses Dynamics 365 Sales.

You need to email a quote to a customer.

When user interface option should you use?

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

Answer: ([SHOW ANSWER](#))

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### NEW QUESTION: 17

A company uses Dynamics 365 for Sales to analyze their competitive wins and losses data.

Sales staff close lost opportunities and enter the Actual Revenue, Closed Date, Competitor, and the reason for the loss.

You need to create a dashboard that provides information related to the last 30 days of opportunities closed as lost.

Which entity should you use?

- A. Competitor
- B. Opportunity Line
- C. Opportunity Close
- D. Opportunity

Answer: ([SHOW ANSWER](#))

### NEW QUESTION: 18

You need to process CompanyB's order.

What should you do?

- A. Submit the order for CompanyB.

- B. Create an order from each quote per country.
- C. Activate the quotes.
- D. Create an invoice for CompanyB.

**Answer:** ([SHOW ANSWER](#))

Reference:

<https://docs.microsoft.com/en-us/dynamics365/sales-professional/create-quotes-sales-professional>

### NEW QUESTION: 19

You need to help the salespeople prioritize their tasks

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

NOTE: Each correct selection is worth one point.

**Answer Area**

**Requirement**

Add required functionality to the system.

Allow salespeople to view the required component.

**Action**

- Implement Sales Insights.
- Add productivity tools.
- Implement Sales Insights.
- Enable the sales accelerator.
- Add the Up Next widget to the custom form.
- Add the Up Next widget to the custom form.
- Add the Up Next widget to the Information form.
- Add the Up Next widget to the Sales Insights form.

**Answer:**

**Answer Area**

**Requirement**

Add required functionality to the system.

Allow salespeople to view the required component.

**Action**

- Implement Sales Insights.
- Add productivity tools.
- Implement Sales Insights.
- Enable the sales accelerator.
- Add the Up Next widget to the custom form.
- Add the Up Next widget to the custom form.
- Add the Up Next widget to the Information form.
- Add the Up Next widget to the Sales Insights form.

**Explanation**

**Answer Area**

**Requirement**

Add required functionality to the system.

Allow salespeople to view the required component.

**Action**

- Implement Sales Insights.
- Add the Up Next widget to the custom form.

### NEW QUESTION: 20

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 | Audience       | List type |
|------------------------|-------------|----------------|-----------|
| Static Segment         |             | Tradeshow lead |           |
| Dynamic Segment        |             | Website lead   |           |
| Static Marketing List  |             |                |           |
| Dynamic Marketing List |             |                |           |

**Answer:**

| List types             | Answer Area | Audience       | List type              |
|------------------------|-------------|----------------|------------------------|
| Static Segment         |             | Tradeshow lead | Dynamic Marketing List |
| Dynamic Segment        |             | Website lead   | Static Marketing List  |
| Static Marketing List  |             |                |                        |
| Dynamic Marketing List |             |                |                        |

**Explanation**

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

| List types             | Answer Area | Audience       | List type              |
|------------------------|-------------|----------------|------------------------|
| Static Segment         |             | Tradeshow lead | Dynamic Marketing List |
| Dynamic Segment        |             | Website lead   | Static Marketing List  |
| Static Marketing List  |             |                |                        |
| Dynamic Marketing List |             |                |                        |

### NEW QUESTION: 21

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

**Answer:** ([SHOW ANSWER](#))

### NEW QUESTION: 22

You need to configure accounting options.

Which options should you use? To answer, drag the appropriate options to the correct tasks.

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



Fiscal Year settings

Display As

Name Based On

Fiscal Period template

## Answer Area

### Task

Configure the accounting period.

Automatically configure accounting period names according to date.

Configure fiscal year abbreviations.

Configure how accounting years are divided.

### Option

option

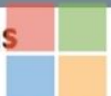
option

option

option

Answer:

## Options



Fiscal Year settings

Display As

Name Based On

Fiscal Period template

## Answer Area

### Task

Configure the accounting period.

Automatically configure accounting period names according to date.

Configure fiscal year abbreviations.

Configure how accounting years are divided.

### Option

Fiscal Year settings

Name Based On

Display As

Fiscal Period template

Explanation



## Task

Configure the accounting period.

Automatically configure accounting period names according to date.

Configure fiscal year abbreviations.

Configure how accounting years are divided.

## Option

Fiscal Year settings

Name Based On

Display As

Fiscal Period template

Reference:

<https://docs.microsoft.com/en-us/power-platform/admin/work-fiscal-year-settings>

NEW QUESTION: 23

You need to resolve the issue for PreferredCustomerA, What should you create?

- A. a product catalog for each country
- B. a discount list for Preferred Customers
- C. a price list for the currency of each country
- D. a product bundle for each country
- E. a playbook category

**Answer:** ([SHOW ANSWER](#))

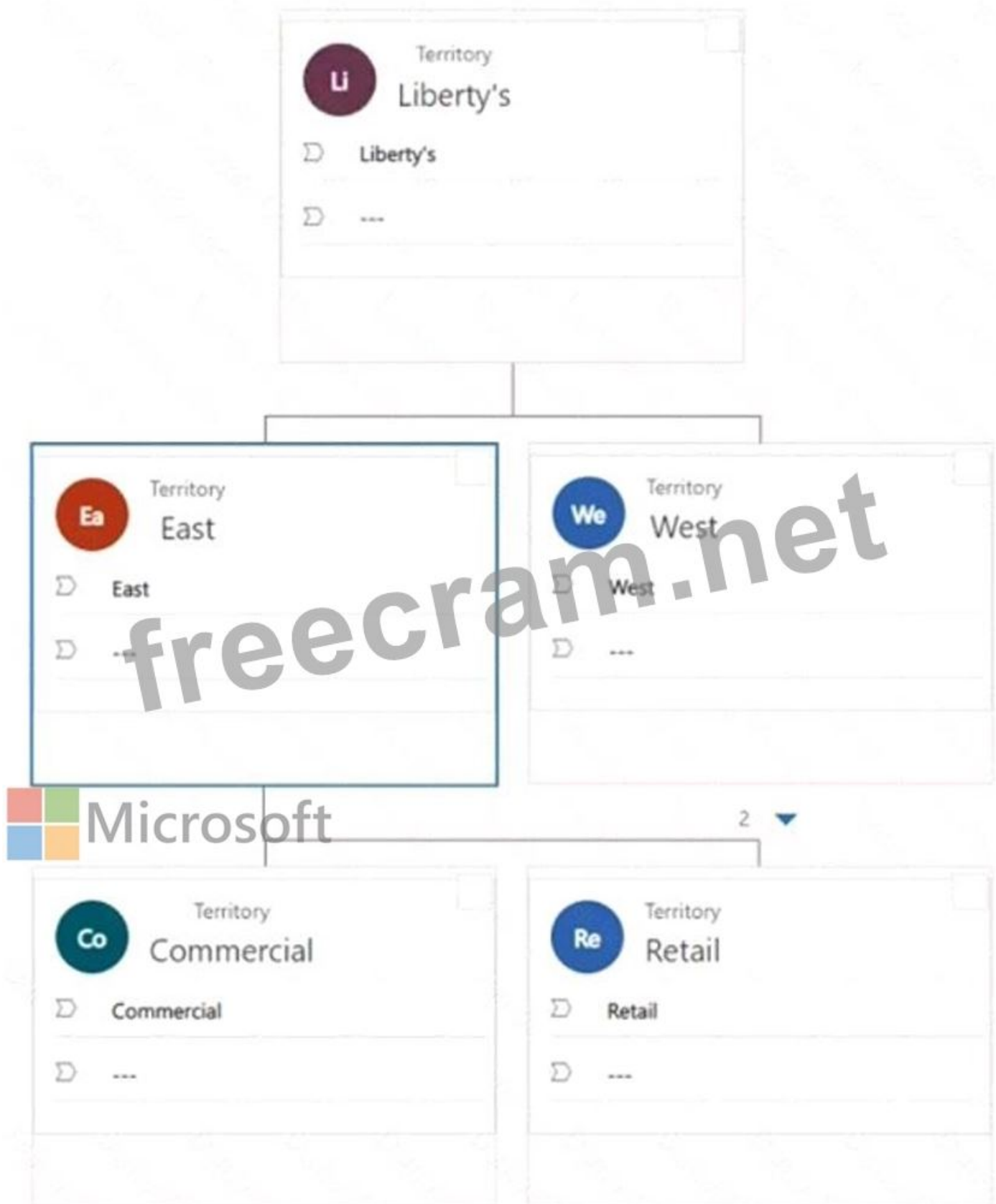
Reference:

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

Topic 5, Liberty's Delightful Sinful Bakery & Cafe

Liberty's Delightful Sinful Bakery & Cafe (Liberty's) sells baked goods to only commercial customers for resale from its East and West territories. The bakery acquired a company that it will incorporate as its retail line of business. Each territory will contain a Retail and Commercial territory.

Liberty's has two territories, each divided as shown below.



Configuration:

- \* The Commercial territory has a different price list than the Retail territory.
- \* The criteria used to measure the probability of a sale will be different for retail and commercial.
- \* All loaves cost the same and all buns cost the same.

- \* Auto-create records for newly qualified leads is turned on to simplify the lead qualification process.
- \* Liberty's logs all phone calls, appointments, and emails in Dynamics 365 Sales.
- \* Accounts were imported for the Retail territory.
- \* Liberty's finds that the information on their accounts and contacts are often outdated.
- \* Liberty's must use Microsoft Relationship Sales.

#### Discounts

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

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

#### Job roles

##### EmployeeA:

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

##### EmployeeC:

- \* Serves as a Liberty's executive
- \* Requires read-only access to Contacts and Accounts tables in Dynamics 365 Sales

##### EmployeeC:

- \* Serves as an operations manager, responsible for managing orders and deliveries General
- \* With the acquisition of the retail company, new bread types must be added. These bread types must apply to loaves and buns.
- \* A lead must be generated from an activity record.
- \* Liberty's wants to improve accuracy about Accounts and Contacts but does not want to track messages generated outside of the system.
- \* With the addition of the retail branch. Liberty's must create a forecasting model to estimate the revenue for the next quarter.
- \* If a phone call is received from a new potential customer, a lead must be generated from the activity record.
- \* Liberty's must automatically maintain current account and contact information.
- \* The system must be able to rate the health of an opportunity based on the following scale:
  - o 1 = Good
  - o 2 = Fair
  - o 3 = Poor
- \* The health rating must include all conversations and interactions, including those on social media.

#### Issues

- \* A duplicate detection rule is set up, and the flag to check for duplicates is turned on; however, duplicates still exist.
- \* EmployeeB and other employees notice that all their opportunities are rated as Good, but when reviewing the activities, they see that the rating should be Poor.
- \* User1 complains that the user's message responses to leads in LinkedIn are missing.
- \* TesterA cannot find the model-driven app to test.
- \* Liberty's receives an email with a customer order. When the customer calls to pay with a credit card over the phone, Liberty's cannot find the customer order.

### NEW QUESTION: 24

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

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

NOTE: Each correct selection is worth one point.

| Report type                      | Option                                                                             |
|----------------------------------|------------------------------------------------------------------------------------|
| Orders                           | <div>SQL Server Reporting Services</div> <div>Fetch-based Reporting Services</div> |
| Discounts by Number of Employees | <div>SQL Server Reporting Services</div> <div>Fetch-based Reporting Services</div> |

Answer:

| Report type                      | Option                                                                             |
|----------------------------------|------------------------------------------------------------------------------------|
| Orders                           | <div>SQL Server Reporting Services</div> <div>Fetch-based Reporting Services</div> |
| Discounts by Number of Employees | <div>SQL Server Reporting Services</div> <div>Fetch-based Reporting Services</div> |

Explanation

## Report type

Orders

Discounts by Number of  
Employees



## Option

SQL Server Reporting Services  
Fetch-based Reporting Services

SQL Server Reporting Services  
Fetch-based Reporting Services

### NEW QUESTION: 25

Please wait while the virtual machine loads. Once loaded, you may proceed to the lab section. This may take a few minutes, and the wait time will not be deducted from your overall test time. When the Next button is available, click it to access the lab section. In this section, you will perform a set of tasks in a live environment. While most functionality will be available to you as it would be in a live environment, some functionality (e.g., copy and paste, ability to navigate to external websites) will not be possible by design.

Scoring is based on the outcome of performing the tasks stated in the lab. In other words, it doesn't matter how you accomplish the task, if you successfully perform it, you will earn credit for that task.

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

Please note that once you submit your work by clicking the Next button within a lab, you will NOT be able to return to the lab.

You need to update an opportunity to have a topic of Home Entertainment and to list that the opportunity plans to purchase from your competitor named Carter Electronics.

To complete this task, sign in to the Dynamics 365 portal.

### Answer:

See explanation below.

- \* In the site map, select Opportunities.
- \* Open the opportunity record.
- \* Type Home Entertainment into the Topic field.
- \* Save the changes.
- \* In the opportunity record, click Close as Lost.

\* In the Close Opportunity dialog box, click on the Competitor field then search for and select Carter Electronics.

\* Click OK.

Reference:

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

### **NEW QUESTION: 26**

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

- A. Exchange data
- B. Communication frequency
- C. Activity influence
- D. Health score grading

**Answer:** ([SHOW ANSWER](#))

### **NEW QUESTION: 27**

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: 28**

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**  
Products are associated with a quote record

**Action**

|                                              |   |
|----------------------------------------------|---|
|                                              | ▼ |
| 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  | <table border="1"> <tr> <td></td> <td>▼</td> </tr> <tr> <td colspan="2">Manually add the products to the opportunity</td> </tr> <tr> <td colspan="2">Use the Get Products option</td> </tr> <tr> <td colspan="2">Associate the quote with the opportunity</td> </tr> </table> |  | ▼ | Manually add the products to the opportunity |  | Use the Get Products option |  | Associate the quote with the opportunity |  |
|                                              | ▼                                                                                                                                                                                                                                                                             |  |   |                                              |  |                             |  |                                          |  |
| 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      | <table border="1"> <tr> <td></td> <td>▼</td> </tr> <tr> <td colspan="2">Add a write-in product</td> </tr> <tr> <td colspan="2">Add an existing product</td> </tr> <tr> <td colspan="2">Add the product bundle price list</td> </tr> </table>                                  |  | ▼ | Add a write-in product                       |  | Add an existing product     |  | Add the product bundle price list        |  |
|                                              | ▼                                                                                                                                                                                                                                                                             |  |   |                                              |  |                             |  |                                          |  |
| 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  | <table border="1"> <tr> <td></td> <td>▼</td> </tr> <tr> <td colspan="2">Manually add the products to the opportunity</td> </tr> <tr> <td colspan="2">Use the Get Products option</td> </tr> <tr> <td colspan="2">Associate the quote with the opportunity</td> </tr> </table> |  | ▼ | Manually add the products to the opportunity |  | Use the Get Products option |  | Associate the quote with the opportunity |  |
|                                              | ▼                                                                                                                                                                                                                                                                             |  |   |                                              |  |                             |  |                                          |  |
| 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      | <table border="1"> <tr> <td></td> <td>▼</td> </tr> <tr> <td colspan="2">Add a write-in product</td> </tr> <tr> <td colspan="2">Add an existing product</td> </tr> <tr> <td colspan="2">Add the product bundle price list</td> </tr> </table>                                  |  | ▼ | Add a write-in product                       |  | Add an existing product     |  | Add the product bundle price list        |  |
|                                              | ▼                                                                                                                                                                                                                                                                             |  |   |                                              |  |                             |  |                                          |  |
| Add a write-in product                       |                                                                                                                                                                                                                                                                               |  |   |                                              |  |                             |  |                                          |  |
| Add an existing product                      |                                                                                                                                                                                                                                                                               |  |   |                                              |  |                             |  |                                          |  |
| Add the product bundle price list            |                                                                                                                                                                                                                                                                               |  |   |                                              |  |                             |  |                                          |  |

**NEW QUESTION: 29**

You are creating a pricing list in Dynamics 365 Sales.

All prices must end in \$.98.

You need to select the function that establishes this pricing requirement.

What should you use?

- A. Rounding Policy
- B. Rounding Amount
- C. Pricing Method
- D. Percentage

**Answer:** ([SHOW ANSWER](#))

### NEW QUESTION: 30

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

Answer: ([SHOW ANSWER](#))

### NEW QUESTION: 31

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

- \* Utah to California is the West territory.
- \* Illinois to Colorado is the Central territory.
- \* Maine to Indiana is the East territory.

The company wants the territories set up as follows:

- \* Salespersons 1 and 2 sell in the West territory
- \* Salespersons 5 and 6 sell in the Central territory.
- \* Salespersons 3 and 4 sell in the East territory.
- \* Postal code for each state used as the location.

You need to set up the territories.

Solution:

- \* Create the West territory and add the manager.
- \* Add members and save.
- \* Repeat for the Central and East territories.

Does the solution meet the goal?

- A. Yes
- B. No

Answer: ([SHOW ANSWER](#))

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### NEW QUESTION: 32

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

|                                 |
|---------------------------------|
| Select a Business Process Flow. |
| Navigate to Processes.          |
| Edit the Process name.          |



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

### NEW QUESTION: 33

You are implementing Dynamics 365 Sales for a company that has salespeople in the following cities in the state of Florida: Jacksonville, Miami, and Tampa. The manager in Florida oversees the salespeople for all three cities.

You must set up territories by states. Each state must be a parent territory and have a different manager.

Sales information must be shown by city and then by state.

You need to set up territories for Florida.

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

Requirement Setting

### Requirement

Determine the number of territories.

Determine how many territories in which the Jacksonville salespeople should be members.

Determine how many territories the Florida sales manager should manage

### Setting

Four territories and zero sub-territories  
Two territories and two sub-territories  
One territory and three sub-territories  
One territory and four sub-territories

One territory and one sub-territory: Florida and Jacksonville  
One sub-territory: Jacksonville  
Two territories: Florida and Jacksonville  
One territory: Florida

One territory and zero sub-territory: Florida  
One territory and three sub-territories: Florida, Jacksonville, Miami, and Tampa  
Four territories: Florida, Jacksonville, Miami, and Tampa  
Zero territories and three sub-territories: Jacksonville, Miami, and Tampa

### Answer:

#### Requirement

Determine the number of territories.

Determine how many territories in which the Jacksonville salespeople should be members.

Determine how many territories the Florida sales manager should manage

#### Setting

Four territories and zero sub-territories  
Two territories and two sub-territories  
One territory and three sub-territories  
One territory and four sub-territories

One territory and one sub-territory: Florida and Jacksonville  
One sub-territory: Jacksonville  
Two territories: Florida and Jacksonville  
One territory: Florida

One territory and zero sub-territory: Florida  
One territory and three sub-territories: Florida, Jacksonville, Miami, and Tampa  
Four territories: Florida, Jacksonville, Miami, and Tampa  
Zero territories and three sub-territories: Jacksonville, Miami, and Tampa

### Explanation

#### Requirement

Determine the number of territories.

#### Setting

Four territories and zero sub-territories  
Two territories and two sub-territories  
One territory and three sub-territories  
One territory and four sub-territories

Determine how many territories in which the Jacksonville salespeople should be members.

One territory and one sub-territory: Florida and Jacksonville  
One sub-territory: Jacksonville  
Two territories: Florida and Jacksonville  
One territory: Florida

Determine how many territories the Florida sales manager should manage

One territory and zero sub-territory: Florida  
One territory and three sub-territories: Florida, Jacksonville, Miami, and Tampa  
Four territories: Florida, Jacksonville, Miami, and Tampa  
Zero territories and three sub-territories: Jacksonville, Miami, and Tampa

### Reference:

https://docs.microsoft.com/en-us/power-platform/admin/set-up-sales-territories-organize-business-markets-geogr

**NEW QUESTION: 34**

You manage a Dynamics 365 Sales environment. Many activities are associated with opportunities.

Managers must be able to determine how the relationship with customers is trending for each opportunity.

You need to implement a solution.

Which solution should you implement?

- A. Sales Insights
- B. Relationship Assistant
- C. Dynamics 365 for Sales content pack for Microsoft Power BI
- D. LinkedIn Sales Navigator
- E. Social Selling Assistant

**Answer:** ([SHOW ANSWER](#))

**NEW QUESTION: 35**

You need to configure the RFQ process flow.

What should you create to meet each requirement? To answer, select the appropriate options in the answer area.

NOTE: Each correct selection is worth one point.

| Requirement                                                                  | Configuration                                                                                                                                                                                              |
|------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Verify that the credit and reference checks are completed for new customers. | <div>▼</div> <div><div>Data step and set as required</div><div>Stage with a branching rule</div><div>Action step</div></div>                                                                               |
| Require a sales manager review.                                              | <div>▼</div> <div><div>Branching rule based on the management review step</div><div>Branching rule based on the lead qualification step</div><div>Branching rule based on the opportunity step</div></div> |
| Track RFQ management approval.                                               | <div>▼</div> <div><div>Stage</div><div>Approval flow</div><div>Branch rule</div></div>                                                                                                                     |

**Answer:**

| Requirement                                                                  | Configuration                                                                                                                                                              |
|------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Verify that the credit and reference checks are completed for new customers. | <div> Data step and set as required<br/> Stage with a branching rule<br/> Action step </div>                                                                               |
| Require a sales manager review.                                              | <div> Branching rule based on the management review step<br/> Branching rule based on the lead qualification step<br/> Branching rule based on the opportunity step </div> |
| Track RFQ management approval.                                               | <div> Stage<br/> Approval flow<br/> Branch rule </div>                                                                                                                     |

Explanation

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

| Requirement                                                                  | Configuration                                                                                                                                                              |
|------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Verify that the credit and reference checks are completed for new customers. | <div> Data step and set as required<br/> Stage with a branching rule<br/> Action step </div>                                                                               |
| Require a sales manager review.                                              | <div> Branching rule based on the management review step<br/> Branching rule based on the lead qualification step<br/> Branching rule based on the opportunity step </div> |
| Track RFQ management approval.                                               | <div> Stage<br/> Approval flow<br/> Branch rule </div>                                                                                                                     |

Reference:

<https://docs.microsoft.com/en-us/dynamics365/customerengagement/on-premises/customize/business-process-flow>

### NEW QUESTION: 36

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. Create a personal view.
- B. Update personalization settings.
- C. Update system settings.
- D. Create a public view.

Answer: ([SHOW ANSWER](#))

### NEW QUESTION: 37

You are a Dynamics 365 Sales administrator for a company. All sales representatives at the company have smart phones.

You need to recommend a solution that allows sales representatives to take photos of the opportunity notes and use the photo as input for new opportunities in Dynamics 365.

Which two options will achieve the goal? Each correct answer presents a complete solution.

NOTE: Each correct answer is worth one point.

- A. AI Builder with Power Automate instant flow
- B. Dynamics 365 for phones only
- C. Canvas App with a flow button
- D. AI Builder with Dynamics 365 for phones

Answer: A,C ([LEAVE A REPLY](#))

### NEW QUESTION: 38

A sales manager needs to add a new business closure.

You need to configure a new business closure schedule.

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

| Action                                               | Answer Area |
|------------------------------------------------------|-------------|
| Open <b>Scheduling</b> from the Customer Service Hub |             |
| Select <b>New</b>                                    |             |
| Modify the Closure dialog pop-up                     |             |
| Select Business Closures from Settings               |             |

Answer:

| Action                                               | Answer Area |
|------------------------------------------------------|-------------|
| Open <b>Scheduling</b> from the Customer Service Hub |             |
| Select <b>New</b>                                    |             |
| Modify the Closure dialog pop-up                     |             |
| Select Business Closures from Settings               |             |

Explanation

| Action                                               | Answer Area |
|------------------------------------------------------|-------------|
| Open <b>Scheduling</b> from the Customer Service Hub |             |
| Select Business Closures from Settings               |             |
| Modify the Closure dialog pop-up                     |             |
| Select <b>New</b>                                    |             |

## Schedule a new business closure

Make sure that you have the required security role or equivalent permissions.

More information: Manage security roles in service scheduling

- \* In the Customer Service Hub sitemap, go to Scheduling.

- \* From the list of entity records, select Settings > Business Closures.

- \* The Business Closures view is displayed. You can switch between various system views using the drop-down menu.

- \* Select any existing record to see additional options in the command bar

- \* On the command bar, select New to schedule a new business closure.

You can also select New from the business closure grid to create a new business closure record.

## Schedule business closure

The screenshot shows the Dynamics 365 Customer Service Hub interface. The top navigation bar includes 'Dynamics 365', 'Customer Service Hub', and 'Resource Scheduling > Business Closures'. The main area displays the 'Business Closures' view with a table containing two records: 'Team Holiday' (9/19/2018 5:30 AM to 9/20/2018 5:30 AM) and 'Team Offsite' (9/26/2018 5:30 AM to 9/27/2018 5:30 AM). A 'New' button is highlighted in the command bar. On the right, the 'Schedule a Business Closure' dialog box is open, showing fields for Name, All Day Event (checked), Start Time (9/19/2018 12:00 AM), End Time (9/20/2018 12:00 AM), and Duration (1 day). The dialog box also includes OK, Cancel, and Help buttons.

A quick create dialog box is displayed.

- \* In the Schedule a Business Closure dialog box, type or modify information in the text boxes:

- \* In the Name box, type a name that describes the purpose of the closure.

The first 12 characters of the name appear on each day of the closure on the calendar view of the affected resource's Work Hours.

- \* If the closure is an all-day event, select the All-Day Event check box. The application automatically enters the duration of 1 day.

- \* In the Start Time and End Time boxes, enter the start and end date and time for the closure.

- \* If you want to enter duration instead of an end time, select the length of the closure in the Duration box. The application automatically calculates the end time for you.

If you want to enter a specific time period, clear the All Day Event check box. You can then specify the hours during which your organization will be closed.

- \* To save this business closure, select OK.

<https://docs.microsoft.com/en-us/dynamics365/customer-service/set-when-business-closed-csh>

## NEW QUESTION: 39

You need to create orders for large quantity purchases.

What are two possible ways to achieve this goal? Each correct answer presents a complete solution NOTE: Each correct selection is worth one point.

- A. Create an invoice from the order record.
- B. Make a copy of the quote and save it as won.
- C. Select Won when prompted.
- D. Select a Create order from the Quote record.
- E. Select Convert to work order from the Opportunity record.

**Answer: B,D (LEAVE A REPLY)**

Reference:

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

#### NEW QUESTION: 40

A company uses Dynamics 365 Sales Professional.

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

You need to create the new sales team.

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

NOTE: Each correct selection is worth one point.

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

**Answer: (SHOW ANSWER)**

Reference:

<https://docs.microsoft.com/en-us/dynamics365/sales-professional/manage-teams>

#### NEW QUESTION: 41

A company sells products and services. The company sales team uses the leads form to track all prospects. The team uses The following columns on the form:

| Form column   | Column type            |
|---------------|------------------------|
| Timeframe     | Choice                 |
| Type          | Choice                 |
| Product       | Choices (multi-select) |
| Other Product | Text                   |

The company wants to avoid custom development where possible.

The sales team requires only the following functionality to appear:

\* Type when Timeframe Equals Less than 6 months

- \* Product when Type Equals Products
- \* Other Product when Product contains the product Other

You need to update the form.

What should you configure for each scenario? To answer, drag the appropriate views to the correct scenarios.

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

NOTE: Each correct selection is worth one point.

| Views              | Answer Area                                                                                                                                                                                                                                  |          |      |           |  |              |  |                    |  |
|--------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------|------|-----------|--|--------------|--|--------------------|--|
| JavaScript         | <table border="1"> <thead> <tr> <th>Scenario</th> <th>View</th> </tr> </thead> <tbody> <tr> <td>Show Type</td> <td></td> </tr> <tr> <td>Show Product</td> <td></td> </tr> <tr> <td>Show Other Product</td> <td></td> </tr> </tbody> </table> | Scenario | View | Show Type |  | Show Product |  | Show Other Product |  |
| Scenario           |                                                                                                                                                                                                                                              | View     |      |           |  |              |  |                    |  |
| Show Type          |                                                                                                                                                                                                                                              |          |      |           |  |              |  |                    |  |
| Show Product       |                                                                                                                                                                                                                                              |          |      |           |  |              |  |                    |  |
| Show Other Product |                                                                                                                                                                                                                                              |          |      |           |  |              |  |                    |  |
| column component   |                                                                                                                                                                                                                                              |          |      |           |  |              |  |                    |  |
| form control       |                                                                                                                                                                                                                                              |          |      |           |  |              |  |                    |  |
| business rule      |                                                                                                                                                                                                                                              |          |      |           |  |              |  |                    |  |

**Answer:**

| Views              | Answer Area                                                                                                                                                                                                                                                                           |                  |      |           |              |              |                  |                    |               |
|--------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------|------|-----------|--------------|--------------|------------------|--------------------|---------------|
| JavaScript         | <table border="1"> <thead> <tr> <th>Scenario</th> <th>View</th> </tr> </thead> <tbody> <tr> <td>Show Type</td> <td>form control</td> </tr> <tr> <td>Show Product</td> <td>column component</td> </tr> <tr> <td>Show Other Product</td> <td>business rule</td> </tr> </tbody> </table> | Scenario         | View | Show Type | form control | Show Product | column component | Show Other Product | business rule |
| Scenario           |                                                                                                                                                                                                                                                                                       | View             |      |           |              |              |                  |                    |               |
| Show Type          |                                                                                                                                                                                                                                                                                       | form control     |      |           |              |              |                  |                    |               |
| Show Product       |                                                                                                                                                                                                                                                                                       | column component |      |           |              |              |                  |                    |               |
| Show Other Product | business rule                                                                                                                                                                                                                                                                         |                  |      |           |              |              |                  |                    |               |
| column component   |                                                                                                                                                                                                                                                                                       |                  |      |           |              |              |                  |                    |               |
| form control       |                                                                                                                                                                                                                                                                                       |                  |      |           |              |              |                  |                    |               |
| business rule      |                                                                                                                                                                                                                                                                                       |                  |      |           |              |              |                  |                    |               |

**Explanation**

| Views              | Answer Area                                                                                                                                                                                                                                                                           |                  |      |           |              |              |                  |                    |               |
|--------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------|------|-----------|--------------|--------------|------------------|--------------------|---------------|
| JavaScript         | <table border="1"> <thead> <tr> <th>Scenario</th> <th>View</th> </tr> </thead> <tbody> <tr> <td>Show Type</td> <td>form control</td> </tr> <tr> <td>Show Product</td> <td>column component</td> </tr> <tr> <td>Show Other Product</td> <td>business rule</td> </tr> </tbody> </table> | Scenario         | View | Show Type | form control | Show Product | column component | Show Other Product | business rule |
| Scenario           |                                                                                                                                                                                                                                                                                       | View             |      |           |              |              |                  |                    |               |
| Show Type          |                                                                                                                                                                                                                                                                                       | form control     |      |           |              |              |                  |                    |               |
| Show Product       |                                                                                                                                                                                                                                                                                       | column component |      |           |              |              |                  |                    |               |
| Show Other Product | business rule                                                                                                                                                                                                                                                                         |                  |      |           |              |              |                  |                    |               |
| column component   |                                                                                                                                                                                                                                                                                       |                  |      |           |              |              |                  |                    |               |
| form control       |                                                                                                                                                                                                                                                                                       |                  |      |           |              |              |                  |                    |               |
| business rule      |                                                                                                                                                                                                                                                                                       |                  |      |           |              |              |                  |                    |               |

## NEW QUESTION: 42

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**

|                                                  |
|--------------------------------------------------|
| 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 Area**

Revise the quote.

Add existing products from the products subgrid.

Activate the quote.

**Explanation**

Graphical user interface, application Description automatically generated

| Actions                                  | Answer area                                        |
|------------------------------------------|----------------------------------------------------|
| Close the quote as Cancelled.            | 1 Revise the quote.                                |
| Add existing products from Get Products. | 2 Add existing products from the products subgrid. |
|                                          | 3 Activate the quote.                              |

**NEW QUESTION: 43**

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. In the Office 365 Admin center, assign Application proxy permissions to the user.
- B. in the Power Apps Admin center, assign Environment Maker permissions to the user.
- C. Assign the Common Data Service User role to the user.
- D. Assign the Dynamics 365 System Customizer role to the user.

**Answer:** ([SHOW ANSWER](#))

**NEW QUESTION: 44**

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

**Answer:**

| 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 |             |                                                 |                |

**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: 45

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

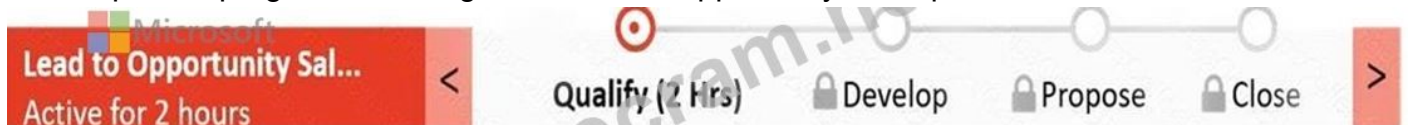
**Answer: C** ([LEAVE A REPLY](#))

Reference:

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

### NEW QUESTION: 46

A salesperson progresses through the Lead to Opportunity sales process.



You need to identify what needs to be completed to enter the next stage.

Which action should you perform to advance the business process to each subsequent stage? To answer, drag the appropriate actions to the correct stages. 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

Qualify the lead

Associate a quote to the lead

Associate an opportunity to the lead

Complete all required fields in the stage

Answer Area

| Current stage | Action |
|---------------|--------|
| Qualify       |        |
| Develop       |        |
| Propose       |        |

Answer:

Actions

Qualify the lead

Associate a quote to the lead

Associate an opportunity to the lead

Complete all required fields in the stage

Answer Area

| Current stage | Action                               |
|---------------|--------------------------------------|
| Qualify       | Qualify the lead                     |
| Develop       | Associate an opportunity to the lead |
| Propose       | Associate a quote to the lead        |

Explanation

Graphical user interface, text, application Description automatically generated

| Current stage | Action                               |
|---------------|--------------------------------------|
| Qualify       | Qualify the lead                     |
| Develop       | Associate an opportunity to the lead |
| Propose       | Associate a quote to the lead        |

Reference:

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

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#### NEW QUESTION: 47

Please wait while the virtual machine loads. Once loaded, you may proceed to the lab section. This may take a few minutes, and the wait time will not be deducted from your overall test time. When the Next button is available, click it to access the lab section. In this section, you will perform a set of tasks in a live environment. While most functionality will be available to you as it would be in a live environment, some functionality (e.g., copy and paste, ability to navigate to external websites) will not be possible by design.

Scoring is based on the outcome of performing the tasks stated in the lab. In other words, it doesn't matter how you accomplish the task, if you successfully perform it, you will earn credit for that task.

Labs are not timed separately, and this exam may have more than one lab that you must complete. You can use as much time as you would like to complete each lab. But, you should

manage your time appropriately to ensure that you are able to complete the lab(s) and all other sections of the exam in the time provided.

Please note that once you submit your work by clicking the Next button within a lab, you will NOT be able to return to the lab.

You need to create a new opportunity record that contains the following information:

- \* Topic: New window installation
- \* Contact: Jay Orth
- \* Account: Fabrikam West
- \* Purchase timeframe: This quarter
- \* Estimated budget: \$6,400.00

To complete this task, sign in to the Dynamics 365 portal.

**Answer:**

See explanation below.

- \* In the site map, select Opportunities.
- \* Click New.
- \* In the Topic field, enter New window installation
- \* In the Contact field, select Jay Orth.
- \* In the Account field, select Fabrikam West
- \* In the Purchase Timeframe field, select This quarter.
- \* In the Budget Amount field, enter \$6,400.00
- \* Click Save to save the opportunity record.

Reference:

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

**NEW QUESTION: 48**

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

**Answer:** ([SHOW ANSWER](#))

**NEW QUESTION: 49**

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>

### NEW QUESTION: 50

You manage a Dynamics 365 for Sales environment.

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

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

#### Actions

|                                                      |
|------------------------------------------------------|
| Open Settings                                        |
| Open Data Management                                 |
| Open Business Management                             |
| Open Service Management                              |
| Configure Automatic Record Creation and Update Rules |

#### Answer Area

|   |   |
|---|---|
| ⬅ | ⬆ |
| ➡ | ⬇ |

**Answer:**

| Actions                                              | Answer Area                                          |
|------------------------------------------------------|------------------------------------------------------|
| Open Settings                                        | Open Settings                                        |
| Open Data Management                                 | Open Service Management                              |
| Open Business Management                             | Configure Automatic Record Creation and Update Rules |
| Open Service Management                              |                                                      |
| Configure Automatic Record Creation and Update Rules |                                                      |

Explanation



References:

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

### NEW QUESTION: 51

You need to implement sales lost to competitors.

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

NOTE: Each correct selection is worth one point.

| Requirement                      | Action                                                                                                                                                                                                                                                                        |
|----------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Add the type of loss.            | <input type="checkbox"/> Modify the Status Reason option set.<br><input type="checkbox"/> Modify the Forecast category option set.<br><input type="checkbox"/> Modify the Close Opportunity option set.<br><input type="checkbox"/> Modify the Opportunity Status option set. |
| Record the loss for forecasting. | <input type="checkbox"/> Modify the Opportunity Forecast Category Mapping Process workflow.<br><input type="checkbox"/> Modify the Opportunity Sales Process business process flow.<br><input type="checkbox"/> Modify the Opportunity Close form.                            |

Answer:

| Requirement                      | Action                                                                                                                                                                                                                                                                        |
|----------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Add the type of loss.            | <input type="checkbox"/> Modify the Status Reason option set.<br><input type="checkbox"/> Modify the Forecast category option set.<br><input type="checkbox"/> Modify the Close Opportunity option set.<br><input type="checkbox"/> Modify the Opportunity Status option set. |
| Record the loss for forecasting. | <input type="checkbox"/> Modify the Opportunity Forecast Category Mapping Process workflow.<br><input type="checkbox"/> Modify the Opportunity Sales Process business process flow.<br><input type="checkbox"/> Modify the Opportunity Close form.                            |

Explanation

Text Description automatically generated with low confidence

| Requirement                      | Action                                                                                                                                                                                                                |
|----------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Add the type of loss.            | <div> <div></div> <div> Modify the Status Reason option set.<br/> Modify the Forecast category option set.<br/> Modify the Close Opportunity option set.<br/> Modify the Opportunity Status option set. </div> </div> |
| Record the loss for forecasting. | <div> <div></div> <div> Modify the Opportunity Forecast Category Mapping Process workflow.<br/> Modify the Opportunity Sales Process business process flow.<br/> Modify the Opportunity Close form. </div> </div>     |

Reference:

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

### NEW QUESTION: 52

You need to implement dashboards.

Which URL should you use?

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

Answer: ([SHOW ANSWER](#))

### NEW QUESTION: 53

You are Dynamics 365 for Sales administrator.

Sales representatives must enter estimated revenue only as an exception.

You need to ensure that estimated revenue for opportunities is automatically calculated.

What should you do?

- A. In Personalization settings for each user, change the default revenue type to System Calculated
- B. In 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 the System Settings sales tab, change the default revenue type to System Calculated

Answer: ([SHOW ANSWER](#))

### NEW QUESTION: 54

You manage Dynamics 365 environments for client organizations.

A client suspects they are losing business. The client must be able to capture reasons each time an opportunity is lost.

You need to configure Dynamics 365 to ensure that you can capture the required information.

Which field should you configure?

- A. Opportunity close status
- B. Opportunity status reason

- C. Opportunity close status reason
- D. Opportunity status

**Answer:** ([SHOW ANSWER](#))

#### **NEW QUESTION: 55**

You are using a forecast template.

You must configure the forecast by territory.

You need to configure the forecast parameters.

Which parameter should you configure?

- A. Hierarchy relationship
- B. Rollup entity
- C. Hierarchy entity
- D. Top of hierarchy

**Answer:** ([SHOW ANSWER](#))

#### **NEW QUESTION: 56**

A customer creates a custom events table. The Events table has an N:1 relationship with the Accounts table.

The events team tracks activities against events.

The account manager wants to see all activities related to accounts in the timeline.

You need to allow event activities to appear in the account timeline.

What should you update?

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

**Answer:** ([SHOW ANSWER](#))

Reference:

<https://docs.microsoft.com/en-us/dynamics365/customerengagement/on-premises/customize/define-rollup-fields>

<https://blog.magnetismsolutions.com/blog/satyvirjasra/2017/10/08/introduction-to-rollup-views-in-microsoft-dyn>

#### **NEW QUESTION: 57**

A company uses Dynamics 365 Sales.

You need to implement the Microsoft Relationship Sales solution.

Which add-on should you install?

- A. Customer Insights
- B. Sales Insights
- C. Sales Navigator
- D. Sales accelerator

Answer: ([SHOW ANSWER](#))

**NEW QUESTION: 58**

An organization uses Dynamics 365 Sales to manage customer relationships.

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

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

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

NOTE Each correct selection is worth one point.

Answer Area

| Requirement                      | Action                                                                                                                               |
|----------------------------------|--------------------------------------------------------------------------------------------------------------------------------------|
| Ensure an auto response is sent. | <input type="checkbox"/> Configure a record creation and update rule.<br><input type="checkbox"/> Configure a business process flow. |
| Create a lead.                   | <input type="checkbox"/> Specify auto-response settings.<br><input type="checkbox"/> Specify conditions for record creation.         |

Answer:

Answer Area

| Requirement                      | Action                                                                                                                               |
|----------------------------------|--------------------------------------------------------------------------------------------------------------------------------------|
| Ensure an auto response is sent. | <input type="checkbox"/> Configure a record creation and update rule.<br><input type="checkbox"/> Configure a business process flow. |
| Create a lead.                   | <input type="checkbox"/> Specify auto-response settings.<br><input type="checkbox"/> Specify conditions for record creation.         |

Explanation

| Requirement                      | Action                                                                                                                             |
|----------------------------------|------------------------------------------------------------------------------------------------------------------------------------|
| Ensure an auto response is sent. | <input type="checkbox"/> Configure a record creation and update rule<br><input type="checkbox"/> Configure a business process flow |
| Create a lead                    | <input type="checkbox"/> Specify auto-response settings<br><input type="checkbox"/> Specify conditions for record creation         |

**NEW QUESTION: 59**

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                  | <div>▼</div> <div>Column</div> <div>Pie</div> <div>Funnel</div>                                                                                                                                |
| Horizontal Category Axis label | <div>  <div>Actual Close Date</div> <div>Status</div> <div>Created on</div> <div>Est. Close Date</div> </div> |
| Won data series value          | <div>▼</div> <div>Actual Revenue</div> <div>Est. Revenue</div> <div>Predictive Score</div> <div>Goal target</div>                                                                              |
| Lost data series value         | <div>▼</div> <div>Actual Revenue</div> <div>Est. Revenue</div> <div>Predictive Score</div> <div>Goal target</div>                                                                              |

**Answer:**

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

Microsoft

Explanation

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

| Chart requirement                                                                                  | Configuration                                                                                                     |
|----------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------|
| Type of chart<br> | <div>▼</div> <div>Column</div> <div>Pie</div> <div>Funnel</div>                                                   |
| Horizontal Category Axis label                                                                     | <div>▼</div> <div>Actual Close Date</div> <div>Status</div> <div>Created on</div> <div>Est. Close Date</div>      |
| Won data series value                                                                              | <div>▼</div> <div>Actual Revenue</div> <div>Est. Revenue</div> <div>Predictive Score</div> <div>Goal target</div> |
| Lost data series value                                                                             | <div>▼</div> <div>Actual Revenue</div> <div>Est. Revenue</div> <div>Predictive Score</div> <div>Goal target</div> |

#### NEW QUESTION: 60

You need to create the required number of orders for Client A.  
How many orders should you create?

- A. 1
- B. 2
- C. 3
- D. 7

Answer: A ([LEAVE A REPLY](#))

#### NEW QUESTION: 61

You manage a Dynamics 365 environment. You plan to implement business process flows from AppSource.

You need to ensure that a user can install the business process flows.

What should you do?

- A. Assign the Dynamics 365 System Customizer role to the user
- B. Assign the Common Data Service User role to the user
- C. In the Power Apps Admin center, assign Environment Maker permissions to the user
- D. In the Office 365 Admin center, assign Application proxy permissions to the user

**Answer:** ([SHOW ANSWER](#))

Reference:

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

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#### **NEW QUESTION: 62**

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 Add Line Items on the Opportunity entity
- D. Select Get Products from the command bar in the Quote entity

**Answer:** ([SHOW ANSWER](#))

#### **NEW QUESTION: 63**

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: 64**

You are a salesperson using Dynamics 365 Sales.

You need to add a product line item in an opportunity.

What should you do first in the opportunity?

- A. Configure units.
- B. Add a price list.
- C. Add a product name.
- D. Specify revenue.

**Answer: (SHOW ANSWER)**

Reference:

<https://docs.microsoft.com/en-us/dynamics365/sales-professional/add-products-opportunity-sp>

**NEW QUESTION: 65**

A company uses Dynamics 365 Sales with no third-party products to design visual outputs for salespeople and managers You must create the following visualizations:

- \* A bar chart with leads and opportunities from Dynamics 365 Sales, as well as invoices from an ERP system.
- \* A Tag chart by month for the fiscal year.
- \* Weekly scheduled reports for management.

You need to select the tools to use.

Which tool should you use? To answer, drag the appropriate tools to the correct visualizations. 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.

Tools

|                          |
|--------------------------|
| Power BI                 |
| Dynamics 365 Sales chart |
| SSRS report              |
| Product bundle           |

Answer Area

Visualization

|                                   |      |
|-----------------------------------|------|
| Bar chart with sales and ERP data | Tool |
| Tag chart                         |      |
| Sales Insights                    |      |

**Answer:**

Tools

|                          |
|--------------------------|
| Power BI                 |
| Dynamics 365 Sales chart |
| SSRS report              |
| Product bundle           |

Answer Area

Visualization

|                                   |                          |
|-----------------------------------|--------------------------|
| Bar chart with sales and ERP data | Tool                     |
| Tag chart                         | SSRS report              |
| Sales Insights                    | Power BI                 |
|                                   | Dynamics 365 Sales chart |

## Explanation

### Tools

|                          |
|--------------------------|
| Power BI                 |
| Dynamics 365 Sales chart |
| SSRS report              |
| Product bundle           |

### Answer Area

### Visualization

Bar chart with sales and ERP data  
Tag chart  
Sales Insights

### Tool

|                          |
|--------------------------|
| SSRS report              |
| Power BI                 |
| Dynamics 365 Sales chart |



## NEW QUESTION: 66

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.

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

## Answer:

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

## 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: 67

A company uses Dynamics 365 Sales.

The company wants to rate the overall performance of a contact.

You need to add a star rating to the contact record.

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 JavaScript.                                    |             |
| Create a whole number column in the Contact table. |             |
| Create a choice column in the Contact table.       |             |
| Add a column component.                            |             |
| Add the column to the form.                        |             |

**Answer:**

| Actions                                            | Answer area                                  |
|----------------------------------------------------|----------------------------------------------|
| Add JavaScript.                                    | Create a choice column in the Contact table. |
| Create a whole number column in the Contact table. | Add a column component.                      |
| Create a choice column in the Contact table.       | Add the column to the form.                  |
| Add a column component.                            |                                              |
| Add the column to the form.                        |                                              |

**Explanation**

| Actions                                            | Answer area                                    |
|----------------------------------------------------|------------------------------------------------|
| Add JavaScript.                                    | 1 Create a choice column in the Contact table. |
| Create a whole number column in the Contact table. | 2 Add a column component.                      |
|                                                    | 3 Add the column to the form.                  |

### NEW QUESTION: 68

You are a sales representative and use Dynamics 365 Sales.

You are working with the following lead record:

+ New   Delete   Refresh   Quality   Process   Disqualify   Assign   Share   Email a

Lead: Lead   Lead Source  
 JG Jim Glynn   ...

Lead to Opportunity Sale...  
 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 ---

Quality (1 Min)  
 Active for 1 minute

☒ Existing Contact? Jim Glynn (san...

Existing Account? ---

Purchase Timeframe ---

Estimated Budget ---

Purchase Process ---

☒ Identify Decision Maker ☒ completed

Capture Summary ---

Next Stage >

Company

Company \* ---

 Microsoft

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**

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

Answer:

**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

Explanation

| Question                                                   | Answer Choice                                                                                                                                                                                                                    |
|------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| You need to move to the Develop stage. What should you do? | <input type="text"/> <ul style="list-style-type: none"> <li>Qualify the Lead</li> <li>Select Next Stage</li> <li>Select Develop</li> </ul>                                                                                       |
| Which new record or records are created?                   | <input type="text"/> <ul style="list-style-type: none"> <li>only an Opportunity</li> <li>only an Account and a Contact</li> <li>only an Account and an Opportunity</li> <li>an Account, a Contact, and an Opportunity</li> </ul> |

#### NEW QUESTION: 69

You are implementing Dynamics 365 Sales Insights for a company. Sales team members must be able to view information about customers that have made purchases before and who will most likely purchase products again. You need to set up this functionality. What should you configure?

- A. Relationship analytics
- B. Customer Insights
- C. Sales accelerator
- D. Power Automate

**Answer:** ([SHOW ANSWER](#))

Reference:

<https://docs.microsoft.com/en-us/dynamics365/ai/sales/relationship-analytics>

#### NEW QUESTION: 70

You are a Dynamics 365 administrator for a dental office. You need to create a process in Sales Hub to ensure that team members perform the following actions: Call patients to remind them about upcoming appointments. Update patient contact information. What should you create?

- A. a task flow
- B. a business rule
- C. a calendar
- D. an on-demand workflow

**Answer:** ([SHOW ANSWER](#))

#### NEW QUESTION: 71

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

You are a Dynamics 365 Sales system administrator.

The sales team wants to use automated conversation starters.

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

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

Does the solution meet the goal?

A. Yes

B. No

Answer: ([SHOW ANSWER](#))

#### NEW QUESTION: 72

You need to enter information about VendorZ into the system.

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

NOTE: Each correct selection is worth one point.

A. Update the contact preference for VendorZ.

B. Create a sub-contact record for the vendor for Company

C. Create an account record for VendorZ.

D. Update the contact preference for Company

E. Create a new connection type.

Answer: ([SHOW ANSWER](#))

#### NEW QUESTION: 73

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.                | <div>  Microsoft </div> <div> Create a quote for each country.<br/> Create a quote for each opportunity.<br/> Create a quote for each product bundle. </div> |
| Update the quotes with discontinued products. | <div> Revise the quote and activate it.<br/> Revise the product catalog and activate the quote.<br/> Convert the quote to an order. </div>                                                                                                    |
| Update the quote for CompanyC.                | <div> Create a new quote.<br/> Revise the quote and change the currency to CAD.<br/> Convert the quote to an order. </div>                                                                                                                    |

Answer:

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

Explanation

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

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

Reference:

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

**NEW QUESTION: 74**

You are a Dynamics 365 for Sales system customizer.

You need to set up LinkedIn Sales Navigator Lead (member profile) on the Lead form.

Solution: Use Unified Interface apps.

Does the solution meet the goal?

A. Yes

B. No

**Answer:** ([SHOW ANSWER](#))

Explanation

References:

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

**NEW QUESTION: 75**

You work for a company using Dynamics 365 for Sales.

When customers call the company, they must provide their quote number. Customers report that quote numbers are too long.

You need to shorten quote numbers to the minimum possible length.

What should you do?

A. Reduce the auto number prefix to one character

B. Reduce the auto number prefix to two characters

C. Reduce the suffix length to four characters

D. Ensure that the prefix setting is read-only

**Answer:** ([SHOW ANSWER](#))

Reference:

<https://docs.microsoft.com/en-us/dynamics365/customer-engagement/admin/change-auto-number-prefix-contrac>

**NEW QUESTION: 76**

A company uses Microsoft SharePoint document management in Dynamics 365 Sales to store contracts.

The company wants only the contracts team to have access to the documents. The contracts team has a custom security role.

You need to restrict privileges to secure the documents.

What should you do?

A. Create a new security role in Dynamics 365 Sales.

B. Update the users list in the SharePoint site.

C. Create a new group in the SharePoint site.

D. Update privileges in the Dynamics 365 Sales security role of the contract team.

**Answer:** ([SHOW ANSWER](#))

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#### **NEW QUESTION: 77**

You manage Dynamics 365 Sales.

A sales representative must identify and track internal support resources. The resources may assume different roles for each opportunity.

You need to display the support resources with the appropriate role in the opportunity.

What should you do?

- A.** Add a new access team.
- B.** On the System Settings sales tab, add the new custom roles in the Sales Team Roles list.
- C.** Add a new relationship role.
- D.** On the Opportunity form, select the sales team subgrid, open the properties, and add the new custom roles.
- E.** Add a new connection role.

**Answer: B** ([LEAVE A REPLY](#))

#### **NEW QUESTION: 78**

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.** No
- B.** Yes

**Answer: (**[SHOW ANSWER](#)**)**

#### **NEW QUESTION: 79**

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: 80

A customer uses opportunities as part of a sales cycle.

The sales team wants to close opportunities. The team requires the following:

- \* an additional status reason when the opportunity is lost
  - \* the ability to view details in Advanced Find when the opportunity is lost
- You need to configure the system.

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

NOTE: Each correct selection is worth one point.

Answer Area

| Requirement                    | Action                                                                                                                                                                                                                                                                                                                                                                                 |
|--------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Add the new status reason.     | <div><div>Update statuscode on Opportunity and opportunitystatuscode on Opportunity Close.</div><div>Update statuscode on Opportunity only.</div><div>Update opportunitystatuscode on Opportunity Close only.</div><div>Update statuscode on Opportunity and Opportunity Close.</div><div>Update statuscode on Opportunity and opportunitystatuscode on Opportunity Close.</div></div> |
| View details in Advanced Find. | <div><div>Select Activities.</div><div>Select Activities.</div><div>Select Opportunity.</div><div>Select Opportunity Close.</div><div>Select Opportunity Sales Process.</div></div>                                                                                                                                                                                                    |

Answer:

| Requirement                    | Action                                                                                                                                                                                                                                                                                                                                                                                 |
|--------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Add the new status reason.     | <div><div>Update statuscode on Opportunity and opportunitystatuscode on Opportunity Close.</div><div>Update statuscode on Opportunity only.</div><div>Update opportunitystatuscode on Opportunity Close only.</div><div>Update statuscode on Opportunity and Opportunity Close.</div><div>Update statuscode on Opportunity and opportunitystatuscode on Opportunity Close.</div></div> |
| View details in Advanced Find. | <div><div>Select Activities.</div><div>Select Activities.</div><div>Select Opportunity.</div><div>Select Opportunity Close.</div><div>Select Opportunity Sales Process.</div></div>                                                                                                                                                                                                    |

Explanation

| Requirement                    | Action                                                                             |
|--------------------------------|------------------------------------------------------------------------------------|
| Add the new status reason.     | Update statuscode on Opportunity and opportunitystatuscode on Opportunity Close. ▼ |
| View details in Advanced Find. | Select Activities. ▼                                                               |

### NEW QUESTION: 81

You need to ensure that sales numbers reflect the accounting calendar.

What should you configure?

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

**Answer:** ([SHOW ANSWER](#))

Topic 1, Humongous insurance 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

Humongous insurance provides fleet automotive insurance. The company's accounting year is July 1st-June

31st.

They have experienced rapid growth by acquiring brokerages that have locations in Canada, the United States, and the United Kingdom.

The company is making a big push for the Start of their second quarter on October 1st.

Current environment

\* United States salespeople are located in either the north, east south, west or national territory.

- \* Only national territory sales team members can send quotes and Invoices across multiple territories.
- \* Sales managers route leads based on territory.
- \* Salesperson1 and Salesperson2 are part of the south region and the national account respectively.
- \* Salespeople cannot accurately report progression of sales and whether they are closed or still in process.
- \* Manager and underwriter approval is communicated by email.
- \* Many salespeople use different quote layouts.

## Requirements

### Territories

- \* Each territory must be set up as a Business Unit for security.
- \* Each territory must have the ability to qualify its own leads.

### Security

- \* National sales team members must have privileges in order to see sales and account Information managed by the regional sales teams.
- \* Configure appropriate security for national and each regional sales.

### Goals

- \* Salespeople's goals must roll up to their manager's goal.
- \* Goal metrices need to automatically calculate every 12 hours.

### Quotes

- \* Set up version traceability for quotes.
- \* Quotes must be marked with the word "Final" when approved.
- \* Quotes and orders must be generated in their clients' currency.
- \* Quotes and invoices must be able to be viewed across a variety of devices.
- \* Pricing must be standardized for insurance products while supporting tiered pricing across national and regional accounts.

### Opportunities

- \* Closed opportunities that are won or lost must capture competitor information. The company wants a visualization built for the categories related to why the opportunities closed a certain way.
- \* When an opportunity is nearing time to quote, products should be added to the opportunity.

### Other Requirements

- \* Simplify data entry and reduce dual data entry.
- \* Help salespeople and their managers keep track of where they are in the sales process.
- \* Use out-of-the-box reports where possible.
- \* Generate invoice numbers automatically.
- \* Begin invoice numbers with the letters INV.
- \* Allow managers to be able to view a diagram and drill down to leads converted in the last 30 days.

### Issues

- \* Salespeople cannot identify the sales process stage process for each customer.

- \* Updated products are not easily updated within the product groups.
- \* There is no pricing tool.
- \* Salespeople must research each product every time they have to Quote a customer on a product
- \* UserA is unable to qualify leads.
- \* The manager follows the process on an approved quote but an error occurs.
- \* ClientA purchases products from multiple regions for a single order.
- \* Not all products are available in regional pricelists or national pricelists.

## **NEW QUESTION: 82**

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: 83

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<br>SalespersonD |
| West      | ManagerA | SalespersonA<br>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.

The screenshot shows the Dynamics 365 interface with a list of actions on the left and an empty answer area on the right. The actions list includes: 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., and Add members to the territory. The answer area is empty and contains a Microsoft logo.

Answer:

The screenshot shows the Dynamics 365 interface with the correct sequence of actions in the answer area. The actions are: Navigate to the App Settings area., Select Sales Territories and create a new territory., Add the manager., Select Related., and Add members to the territory. The actions are arranged in the correct order and are highlighted with a red dashed border.

Explanation

Graphical user interface, application Description automatically generated

The screenshot shows the Dynamics 365 interface with the correct sequence of actions in the answer area. The actions are: Navigate to the App Settings area., Select Sales Territories and create a new territory., Add the manager., Select Related., and Add members to the territory. The actions are arranged in the correct order and are highlighted with a red dashed border.

### NEW QUESTION: 84

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. Change the column type to calculated.
- B. Embed a Power BI report in the form.
- C. Create a business rule.
- D. Add a Power Apps component framework (PCF) control to the form.
- E. Add JavaScript.

**Answer:** ([SHOW ANSWER](#))

### NEW QUESTION: 85

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. No
- B. Yes

**Answer:** ([SHOW ANSWER](#))

### NEW QUESTION: 86

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        | <input type="text"/> |
| Contact      | Topic                           | <input type="text"/> |
| Opportunity  |                                 |                      |
| Quote        | Person's name and email address | <input type="text"/> |

**Answer:**



Explanation

Graphical user interface, text, application Description automatically generated



Reference:

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

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

### NEW QUESTION: 87

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. Ensure that the email recipient address is the same as the one in Dynamics 365 Sales.
- B. Ask an administrator to enable the automatic tracking setting.
- C. In the Dynamics 365 App for Outlook, set up tracking in personal options.
- D. Set up tasks in Outlook.

Answer: ([SHOW ANSWER](#))

### NEW QUESTION: 88

You need to create new leads from activities.

What should you do? To answer, drag the appropriate actions to the correct activity types. Each action may be used once, more than once, or not at all. You may need to drag the split bar between panes or scroll to view content.

NOTE: Each correct selection is worth one point.

| Activity type | Action |
|---------------|--------|
| Phone call    |        |
| Appointment   |        |
| Email         |        |

**Answer:**

| Activity type | Action                     |
|---------------|----------------------------|
| Phone call    | Use the Regarding field.   |
| Appointment   | Create a manual flow.      |
| Email         | Use the Convert To option. |

**Explanation**

| Activity type | Action                     |
|---------------|----------------------------|
| Phone call    | Use the Regarding field.   |
| Appointment   | Create a manual flow.      |
| Email         | Use the Convert To option. |

### NEW QUESTION: 89

You are running Dynamics 365 Sales for a pharmaceutical company. The hospitals are set up as accounts. The nurses are set up as contacts under each hospital name.

A nurse works for HospitalA and HospitalB part time. You add the nurse as a contact for HospitalA. You realize you can add the nurse as a contact to only one hospital.

You need to ensure that the nurse is associated with both hospitals in the system.

What should you do?

- A.** Create business units for HospitalA and HospitalB Open the contact record for the nurse and assign it to a user in HospitalB.
- B.** Create an access team that has the nurse as owner. Open the HospitalA account record and assign it to the new team account. Repeat this process for HospitalB.
- C.** Open the contact record for the nurse and create a connection to HospitalB.
- D.** Open the HospitalB record and assign the nurse to a task activity.

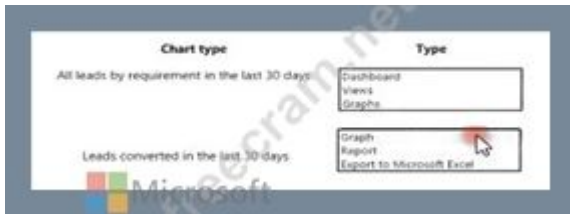
**Answer:** ([SHOW ANSWER](#))

### NEW QUESTION: 90

You need to create visualizations for managers.

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

NOTE: Each correct selection is worth one point.



**Answer:**



**Explanation**

Graphical user interface, application Description automatically generated with medium confidence



### NEW QUESTION: 91

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

- A. three price list items, no discount lists
- B. one price list item, three discount lists
- C. three price list items, one discount list
- D. one price list item, one discount list

**Answer: C** ([LEAVE A REPLY](#))

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### NEW QUESTION: 92

You manage a Dynamics 365 Sales environment.

You need to configure the default status for each lead.

Which status reason should you associate to each scenario? To answer, select the appropriate options in the answer area.

NOTE: Each correct selection is worth one point.

| Scenario                                  | Status reason                                                                                                                 |
|-------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------|
| A lead is created and contacted by phone. | <div><div></div><div>New-Contacted</div><div>Open-Contacted</div><div>Qualified-New</div><div>Qualified-Qualified</div></div> |
| A lead has no contact method available.   | <div><div></div><div>Open-Cannot Contact</div><div>Qualified-Cannot Contact</div><div>Disqualified-Cannot Contact</div></div> |
| A lead is ready to be an opportunity.     | <div><div></div><div>Qualified-New</div><div>Qualified-Qualified</div><div>Qualified-Closed</div></div>                       |



Answer:

| Scenario                                  | Status reason                                                                                                |
|-------------------------------------------|--------------------------------------------------------------------------------------------------------------|
| A lead is created and contacted by phone. | <div>▼</div> <div> New-Contacted<br/> Open-Contacted<br/> Qualified-New<br/> Qualified-Qualified </div>      |
| A lead has no contact method available.   | <div>▼</div> <div> Open-Cannot Contact<br/> Qualified-Cannot Contact<br/> Disqualified-Cannot Contact </div> |
| A lead is ready to be an opportunity.     | <div>▼</div> <div> Qualified-New<br/> Qualified-Qualified<br/> Qualified-Closed </div>                       |

Explanation

| Scenario                                  | Status reason                                                                                                |
|-------------------------------------------|--------------------------------------------------------------------------------------------------------------|
| A lead is created and contacted by phone. | <div>▼</div> <div> New-Contacted<br/> Open-Contacted<br/> Qualified-New<br/> Qualified-Qualified </div>      |
| A lead has no contact method available.   | <div>▼</div> <div> Open-Cannot Contact<br/> Qualified-Cannot Contact<br/> Disqualified-Cannot Contact </div> |
| A lead is ready to be an opportunity.     | <div>▼</div> <div> Qualified-New<br/> Qualified-Qualified<br/> Qualified-Closed </div>                       |

### NEW QUESTION: 93

A company uses Dynamics 365 Sales to manage sales orders.

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

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

NOTE: Each correct selection is worth one point.

| Task                   | Stage                                  |
|------------------------|----------------------------------------|
| Create a lead.         | Qualify<br>Develop<br>Propose<br>Close |
| Identify stakeholders. | Qualify<br>Develop<br>Propose<br>Close |
| Present the proposal.  | Qualify<br>Develop<br>Propose<br>Close |
| Process orders.        | Qualify<br>Develop<br>Propose<br>Close |

Answer:

| Task                   | Stage                                  |
|------------------------|----------------------------------------|
| Create a lead.         | Qualify<br>Develop<br>Propose<br>Close |
| Identify stakeholders. | Qualify<br>Develop<br>Propose<br>Close |
| Present the proposal.  | Qualify<br>Develop<br>Propose<br>Close |
| Process orders.        | Qualify<br>Develop<br>Propose<br>Close |

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: 94

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

| Preview   |       |         |           |           |      |         |          |     |
|-----------|-------|---------|-----------|-----------|------|---------|----------|-----|
| Territory | Quota | Manager | Best case | Committed | Lost | Omitted | Pipeline | Won |
| City      |       |         |           |           |      |         |          | 75% |
| South     |       |         |           |           |      |         |          | 75% |
| 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

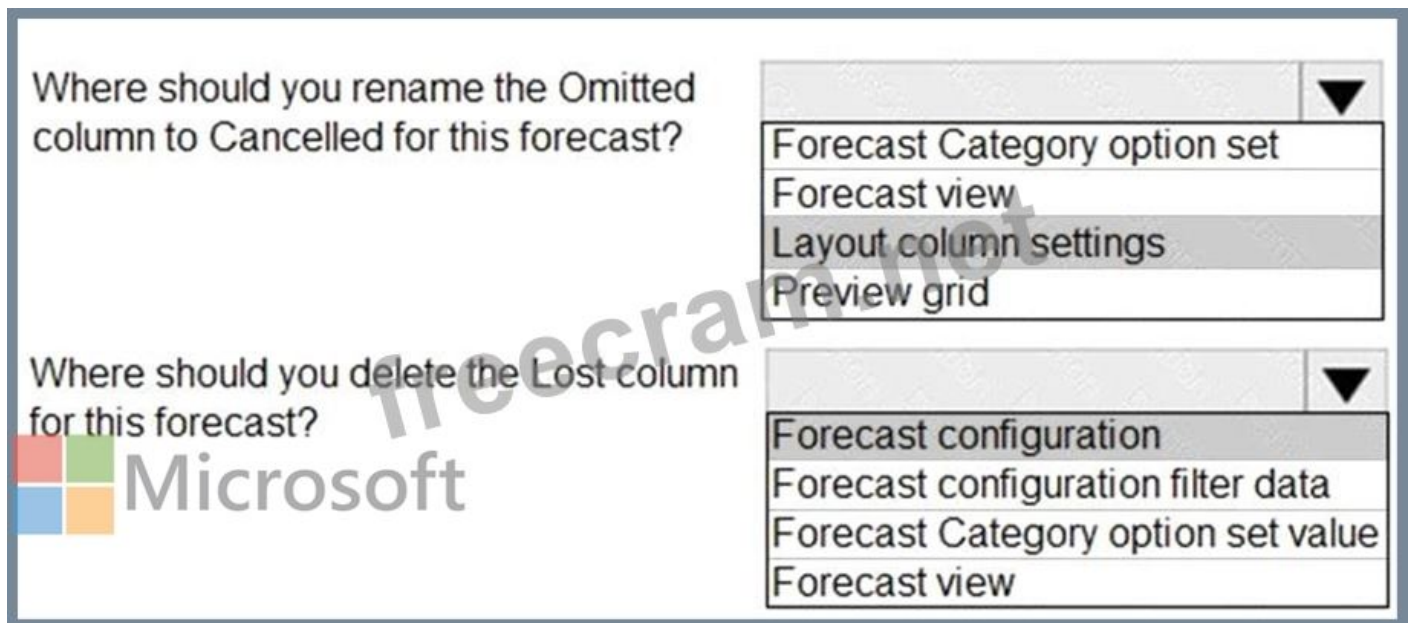
Where should you delete the Lost column for this forecast?

▼

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



Reference:

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

### NEW QUESTION: 95

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: 96

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

### Answer Area

Add members.

Replace the manager from  
SalesTerritoryA with another manager.

Change the name of SalesTerritoryA  
to SalesTerritoryB.

Associate the manager  
from SalesTerritoryA.

Create a new sales territory.



Microsoft



Answer:

### Actions

### Answer Area

Add members.

Replace the manager from  
SalesTerritoryA with another manager.

Change the name of SalesTerritoryA  
to SalesTerritoryB.

Associate the manager  
from SalesTerritoryA.

Create a new sales territory.

Replace the manager from  
SalesTerritoryA with another manager.

Create a new sales territory.

Associate the manager  
from SalesTerritoryA.

Add members.



## Explanation

Diagram Description automatically generated with medium confidence



Reference:

<https://docs.microsoft.com/en-us/power-platform/admin/set-up-sales-territories-organize-business-markets-geogr>

## NEW QUESTION: 97

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 Markup - Current Cost

C. Percent of List

Percent Margin - Standard Cost

**Answer:** ([SHOW ANSWER](#))

## NEW QUESTION: 98

You need to set up quotes to meet the requirements.

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

NOTE: Each correct selection is worth one point.

| Requirement                                     | Configuration                                                                                                                                          |
|-------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------|
| Send quotes in a read-only format               | <input type="checkbox"/> Use PDF<br><input type="checkbox"/> Use XML<br><input type="checkbox"/> Use RTE<br><input type="checkbox"/> Use CSV           |
| Create a standardized quote that can be re-used | <input type="checkbox"/> Create a Word template<br><input type="checkbox"/> Create a Fetch XML report<br><input type="checkbox"/> Create a PowerBI app |

**Answer:**

| Requirement                                     | Configuration                                                                                                                                          |
|-------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------|
| Send quotes in a read-only format               | <input type="checkbox"/> Use PDF<br><input type="checkbox"/> Use XML<br><input type="checkbox"/> Use RTE<br><input type="checkbox"/> Use CSV           |
| Create a standardized quote that can be re-used | <input type="checkbox"/> Create a Word template<br><input type="checkbox"/> Create a Fetch XML report<br><input type="checkbox"/> Create a PowerBI app |

Explanation

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

Reference:

<https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/create-quote-pdf>

### NEW QUESTION: 99

You need to make the appropriate change to the system to ensure that statistics are correct in time for each manager/salesperson meeting.

What should you do?

- A. Create a workflow for the Goals entity
- B. In the Goals section of App Settings, select Actuals
- C. In the Business Management section of Settings, configure Goal Metrics
- D. In the Goals Settings section of App Settings, select Rollup recurrence

**Answer:** (SHOW ANSWER)

Explanation

The number of tickets each salesperson sells must be totalled only at the end of the month, before the monthly meeting between the salesperson and their manager.

Salespeople must not be able to check the quantity sold in the system daily.

### NEW QUESTION: 100

You work for a company using Dynamics 365 for Sales.

When customers call the company, they must provide their quote number. Customers report that quote numbers are too long.

You need to shorten quote numbers to the minimum possible length.

What should you do?

- A. Change the field type from auto number to decimal number
- B. Reduce the auto number prefix to one character
- C. Reduce the suffix length to four characters
- D. Ensure that the prefix setting is read-only

**Answer:** B (LEAVE A REPLY)

Explanation

References:

<https://docs.microsoft.com/en-us/dynamics365/customer-engagement/admin/change-auto-number-prefixcontract case-article-quote-order-invoice-campaign-category-knowledge-articles>

### NEW QUESTION: 101

A company uses Dynamics 365 Sales Professional.

A new salesperson is unable to access the system with the current custom security roles for the Sales Hub.

You need to assign the appropriate default security role.

Which security role should you assign to the user?

- A. Sales Professional app access
- B. Sales Team Member
- C. Sales Professional
- D. Sales Professional Manager

**Answer:** ([SHOW ANSWER](#))

Reference:

<https://docs.microsoft.com/en-us/dynamics365/sales-professional/manage-users>

### NEW QUESTION: 102

You need to ensure that employees have the appropriate territory set up.

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

NOTE: Each correct selection is worth one point.

**Answer Area**

| Scenario                                                      | Action                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
|---------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Set up the territory EmployeeA belongs to next month.         | <div>Assign the Retail territory.</div> <div>Assign the East territory.</div> <div>Assign the West territory.</div> <div>Assign the Retail territory.</div> <div>Assign the Commercial territory.</div>                                                                                                                                                                                                                                                                                                                                                                                                         |
| Set up the default pricelist for opportunities for EmployeeB. | <div>Add EmployeeB as a member of the Retail territory; create a connection between the price list and territory.</div> <div>Add EmployeeB as a member of the Retail territory; create a connection between the price list and territory.</div> <div>Add EmployeeB as a member of the Retail territory; create a connection between salesperson and price list.</div> <div>Add EmployeeB as a member of the East territory; create a connection between the price list and territory.</div> <div>Add EmployeeB as a member of the East territory; create a connection between salesperson and price list.</div> |

**Answer:**

**Answer Area**

| Scenario                                                      | Action                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
|---------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Set up the territory EmployeeA belongs to next month.         | <div>Assign the Retail territory.</div> <div>Assign the East territory.</div> <div>Assign the West territory.</div> <div>Assign the Retail territory.</div> <div>Assign the Commercial territory.</div>                                                                                                                                                                                                                                                                                                                                                                                                         |
| Set up the default pricelist for opportunities for EmployeeB. | <div>Add EmployeeB as a member of the Retail territory; create a connection between the price list and territory.</div> <div>Add EmployeeB as a member of the Retail territory; create a connection between the price list and territory.</div> <div>Add EmployeeB as a member of the Retail territory; create a connection between salesperson and price list.</div> <div>Add EmployeeB as a member of the East territory; create a connection between the price list and territory.</div> <div>Add EmployeeB as a member of the East territory; create a connection between salesperson and price list.</div> |

Explanation

**Answer Area**

| Scenario                                                      | Action                                                                                                       |
|---------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------|
| Set up the territory EmployeeA belongs to next month.         | Assign the Retail territory.                                                                                 |
| Set up the default pricelist for opportunities for EmployeeB. | Add EmployeeB as a member of the Retail territory; create a connection between the price list and territory. |

Microsoft

### NEW QUESTION: 103

You need to configure opportunity status reasons to meet the requirements for existing customer sales.

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

NOTE: Each correct selection is worth one point.

| Scenario                                                                                                | Entity                                                                                                                                                            | Status reason                                                                                                                                            |
|---------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------|
| An existing customer is not renewing their private box rental.                                          | <input type="checkbox"/> Opportunity<br><input type="checkbox"/> Order<br><input type="checkbox"/> Phone Call Activity<br><input type="checkbox"/> Email Activity | <input type="checkbox"/> Other<br><input type="checkbox"/> Non Interested<br><input type="checkbox"/> Wrong Number<br><input type="checkbox"/> Connected |
| You need to complete the follow-up for a group sale inquiry following a call from an existing customer. | <input type="checkbox"/> Opportunity<br><input type="checkbox"/> Order<br><input type="checkbox"/> Phone Call Activity<br><input type="checkbox"/> Email Activity | <input type="checkbox"/> Other<br><input type="checkbox"/> Non Interested<br><input type="checkbox"/> Wrong Number<br><input type="checkbox"/> Connected |

**Answer:**

| Scenario                                                                                                | Entity                                                                                                                                                                                  | Status reason                                                                                                                                                       |
|---------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| An existing customer is not renewing their private box rental.                                          | <input checked="" type="checkbox"/> Opportunity<br><input type="checkbox"/> Order<br><input type="checkbox"/> Phone Call Activity<br><input type="checkbox"/> Email Activity            | <input type="checkbox"/> Other<br><input checked="" type="checkbox"/> Non Interested<br><input type="checkbox"/> Wrong Number<br><input type="checkbox"/> Connected |
| You need to complete the follow-up for a group sale inquiry following a call from an existing customer. | <input type="checkbox"/> Opportunity<br><input type="checkbox"/> Order<br><input checked="" type="checkbox"/> Phone Call Activity<br><input checked="" type="checkbox"/> Email Activity | <input type="checkbox"/> Other<br><input type="checkbox"/> Non Interested<br><input type="checkbox"/> Wrong Number<br><input checked="" type="checkbox"/> Connected |

Explanation

| Scenario                                                                                                | Entity                                                                                                        | Status reason                                                                                        |
|---------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------|
| An existing customer is not renewing their private box rental.                                          | <div>▼</div> <div>Opportunity</div> <div>Order</div> <div>Phone Call Activity</div> <div>Email Activity</div> | <div>▼</div> <div>Other</div> <div>Non Interested</div> <div>Wrong Number</div> <div>Connected</div> |
| You need to complete the follow-up for a group sale inquiry following a call from an existing customer. | <div>▼</div> <div>Opportunity</div> <div>Order</div> <div>Phone Call Activity</div> <div>Email Activity</div> | <div>▼</div> <div>Other</div> <div>Non Interested</div> <div>Wrong Number</div> <div>Connected</div> |

### NEW QUESTION: 104

A company uses Dynamics 365 Sales to manage product lines.

You need to set up a catalog of products.

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

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

**Answer:**

**Explanation**

### NEW QUESTION: 105

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. Yes

B. No

Answer: ([SHOW ANSWER](#))

#### NEW QUESTION: 106

A company is evaluating Dynamics 365 Sales to replace an existing customer relationship management (CRM).

An IT manager observes that the company requires 20 custom tables. The company wants the most cost-effective solution.

You need to recommend a license type to the company.

What should you recommend?

A. Microsoft Relationship Sales

B. Sales Premium

C. Sales Enterprise

D. Sales Professional

Answer: ([SHOW ANSWER](#))

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#### NEW QUESTION: 107

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. Yes

B. No

Answer: ([SHOW ANSWER](#))

### NEW QUESTION: 108

You are a system customizer in Dynamics 365 Sales.

You need to set up product families.

Which option is available?

- A. Create a maximum of 10 child product families.
- B. Set a product bundle as a parent of a product family.
- C. Add the product to only one product family.
- D. Set one product as a parent to another product.

Answer: ([SHOW ANSWER](#))

Reference:

<https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/change-product-parent>

### NEW QUESTION: 109

You are a Dynamics 365 Sales consultant for a food service company. The company caters for client companies.

The company wants to set up a product bundle so that the sales staff does not forget items when they create an opportunity.

The lunch bundle is created at \$200.00. It will include the following.

| Product  | Quantity | Unit Cost | Amount   | Configuration |
|----------|----------|-----------|----------|---------------|
| Sandwich | 50       | \$5.00    | \$250.00 | Required      |
| Napkins  | 50       | \$0.25    | \$12.50  | Optional      |
| Soda     | 50       | \$1.00    | \$50.00  | Optional      |

You need to explain how the sales staff should manage the product bundle in the opportunity.

What should they do for each scenario? To answer, select the appropriate options in the answer area.

NOTE: Each correct selection is worth one point.

| Scenario                                                                                        | Action                                                                                                                                                                                                                                                                                                        |
|-------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Determine the price of the product bundle.                                                      | Use the lunch bundle price.<br>Add the prices of the sandwiches, napkins, and sodas.<br>Add the lunch bundle price and the prices of the napkins and sodas.<br>Subtract the prices of the napkins and sodas from the lunch bundle price.                                                                      |
| Increase the number of sodas at no additional charge.                                           | Increase the quantity of sodas in the line item.<br>Add a new line item for sodas and override the price.<br>Add a new line item for sodas with the default price.<br>Delete the soda line item from the bundle and add a new line item for all the sodas with the default price.                             |
| Increase the number of sandwiches and charge the price list price for each additional sandwich. | Increase the quantity of sandwiches in the line item.<br>Add another line item for sandwiches and override the price.<br>Add another line item for sandwiches with the default price.<br>Delete the sandwich line item from the bundle and add a new line item for all the sandwiches with the default price. |

### Answer:

| Scenario                                                                                        | Action                                                                                                                                                                                                                                                                                                        |
|-------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Determine the price of the product bundle.                                                      | Use the lunch bundle price.<br>Add the prices of the sandwiches, napkins, and sodas.<br>Add the lunch bundle price and the prices of the napkins and sodas.<br>Subtract the prices of the napkins and sodas from the lunch bundle price.                                                                      |
| Increase the number of sodas at no additional charge.                                           | Increase the quantity of sodas in the line item.<br>Add a new line item for sodas and override the price.<br>Add a new line item for sodas with the default price.<br>Delete the soda line item from the bundle and add a new line item for all the sodas with the default price.                             |
| Increase the number of sandwiches and charge the price list price for each additional sandwich. | Increase the quantity of sandwiches in the line item.<br>Add another line item for sandwiches and override the price.<br>Add another line item for sandwiches with the default price.<br>Delete the sandwich line item from the bundle and add a new line item for all the sandwiches with the default price. |

### Explanation

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

| Scenario                                                                                        | Action                                                                                                                                                                                                                                                                                                            |
|-------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Determine the price of the product bundle.                                                      | <div> Use the lunch bundle price. Add the prices of the sandwiches, napkins, and sodas. Add the lunch bundle price and the prices of the napkins and sodas. Subtract the prices of the napkins and sodas from the lunch bundle price. </div>                                                                      |
| Increase the number of sodas at no additional charge.                                           | <div> Increase the quantity of sodas in the line item. Add a new line item for sodas and override the price. Add a new line item for sodas with the default price. Delete the soda line item from the bundle and add a new line item for all the sodas with the default price. </div>                             |
| Increase the number of sandwiches and charge the price list price for each additional sandwich. | <div> Increase the quantity of sandwiches in the line item. Add another line item for sandwiches and override the price. Add another line item for sandwiches with the default price. Delete the sandwich line item from the bundle and add a new line item for all the sandwiches with the default price. </div> |

Reference:

<https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/pricing-product-bundles>

### NEW QUESTION: 110

You are a salesperson for a company.

You experience the following issues when you open an opportunity:

- \* One of the stakeholders does not appear in the Stakeholders subgrid.
- \* The price does not calculate for one of the products added to the opportunity.

You need to resolve the issues.

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

NOTE: Each correct selection is worth one point.

| Answer Area                                     |                                                                                                                                                                                                                                                                                                                                   |
|-------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Issue                                           | Resolution                                                                                                                                                                                                                                                                                                                        |
| The stakeholder does not appear in the subgrid. | <div> Add a contact to the Stakeholder connection role. Add a user ID to the connection role. Add a user ID to the Stakeholder team. Add a contact to the Stakeholder team. Add a contact to the Stakeholder connection role. </div>                                                                                              |
| The price does not calculate.                   | <div> Ensure that the currency between the product default price list and product quote match. Set up a volume discount. Configure price list as mandatory. Ensure that the product list item has a product default price listed. Ensure that the currency between the product default price list and product quote match. </div> |

Answer:

#### Answer Area

| Issue                                           | Resolution                                                                                                                                                                                                                                                                                                                                                                  |
|-------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| The stakeholder does not appear in the subgrid. | <div>Add a contact to the Stakeholder connection role.</div> <div>Add a user ID to the connection role.</div> <div>Add a user ID to the Stakeholder team.</div> <div>Add a contact to the Stakeholder team.</div> <div>Add a contact to the Stakeholder connection role.</div>                                                                                              |
| The price does not calculate.                   | <div>Ensure that the currency between the product default price list and product quote match.</div> <div>Set up a volume discount.</div> <div>Configure price list as mandatory.</div> <div>Ensure that the product list item has a product default price listed.</div> <div>Ensure that the currency between the product default price list and product quote match.</div> |

#### Explanation

| Issue                                           | Resolution                                                                               |
|-------------------------------------------------|------------------------------------------------------------------------------------------|
| The stakeholder does not appear in the subgrid. | Add a contact to the Stakeholder connection role.                                        |
| The price does not calculate.                   | Ensure that the currency between the product default price list and product quote match. |

#### NEW QUESTION: 111

You need to configure the system for the contracts team.

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 |
|---------------------------------------------|-------------|
| Create a default Microsoft SharePoint site. | 1           |
| Disable the Based on entity functionality.  | 2           |
| Select the Lead table.                      | 3           |
| Select the Opportunity table.               |             |
| Enable the Based on entity functionality.   |             |
| Create a file type field.                   |             |

#### Answer:

| Actions                                     | Answer Area                                 |
|---------------------------------------------|---------------------------------------------|
| Create a default Microsoft SharePoint site. | 1 Select the Opportunity table.             |
| Disable the Based on entity functionality.  | 2 Enable the Based on entity functionality. |
| Select the Lead table.                      | 3 Create a file type field.                 |
| Select the Opportunity table.               |                                             |
| Enable the Based on entity functionality.   |                                             |
| Create a file type field.                   |                                             |

#### NEW QUESTION: 112

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 | <div>Track the email from Advanced Find</div> <div>Set the regarding field on the email from Dynamics 365 App for Outlook</div> |
| New email      | <div>Add an email from Lead Timeline</div> <div>Insert a Lead email template</div>                                              |

**Answer:**

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

**Explanation**

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

### NEW QUESTION: 113

A quote is accepted by a customer. A salesperson creates an order from the quote. The customer contacts the salesperson to request a repeat of the same order. The salesperson wants to create another order from the same quote. You need to create the order. What should you do?

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

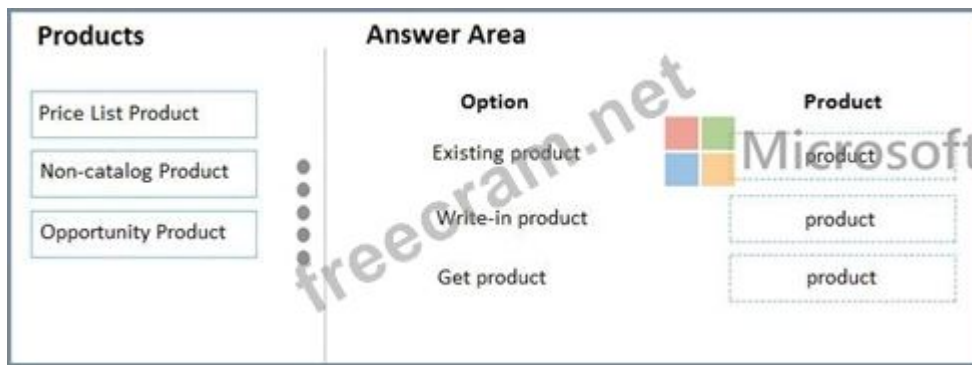
**Answer:** ([SHOW ANSWER](#))

### NEW QUESTION: 114

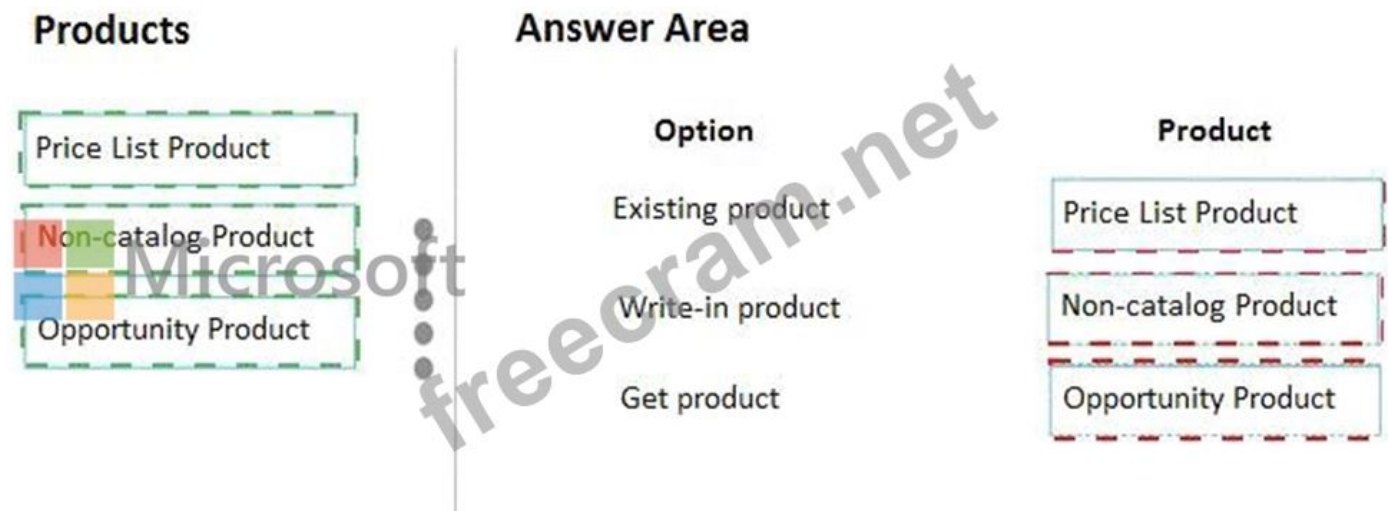
You need to create invoices for all customers.

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

NOTE: Each correct selection is worth one point.



**Answer:**



**Explanation**



### NEW QUESTION: 115

You use price lists in Dynamics 365 for Sales. Some price lists have expired.

Users need to be able to continue to manage their opportunities.

Which option is possible?

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

**Answer:** ([SHOW ANSWER](#))

**NEW QUESTION: 116**

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: 117**

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. Create a new relationship between sites.
- B. Assign the users to their new managers.
- C. Update the target goal amount for each user.
- D. Upload the new quota amounts for each user.
- E. Create and assign users to new resource groups for each manager.
- F. Adjust the forecast values directly.

**Answer: (**[SHOW ANSWER](#)**)**

**NEW QUESTION: 118**

You need to create a chart for the athletic director.

What should you do?

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

**Answer: (**[SHOW ANSWER](#)**)**

Explanation

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

**NEW QUESTION: 119**

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. Contact
- B. Resources
- C. Custom entity
- D. User

Answer: ([SHOW ANSWER](#))

### NEW QUESTION: 120

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

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

How should you configure the rule? To answer, drag the appropriate actions to the correct requirements. Each action may be used once, more than once, or not at all. You may need to drag the split bar between panes or scroll to view content.

NOTE: Each correct selection is worth one point.

| Actions                        | Requirement      | Action |
|--------------------------------|------------------|--------|
| Create a business process flow | Create an email. | Action |
| Create a child workflow        | Send the email.  | Action |
| Create a real-time workflow    |                  |        |

Answer:

| Actions                        | Requirement      | Action                      |
|--------------------------------|------------------|-----------------------------|
| Create a business process flow | Create an email. | Create a real-time workflow |
| Create a child workflow        | Send the email.  | Create a child workflow     |
| Create a real-time workflow    |                  |                             |

Explanation

## Requirement

## Action

Create an email.

Create a real-time workflow

Send the email.

Create a child workflow

### NEW QUESTION: 121

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>

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### NEW QUESTION: 122

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. template editor
- B. Report Wizard
- C. mail merge template
- D. Microsoft Word template

**Answer:** ([SHOW ANSWER](#))

#### **NEW QUESTION: 123**

You need to increase efficiency and consistency for ticket sales to meet company requirements.

What should you create?

- A. a Microsoft Flow workflow
- B. a playbook
- C. a Lifecycle Services (LCS) package

**Answer:** ([SHOW ANSWER](#))

Explanation

Enforce repeatable steps to promote and increase efficiency and consistency for ticket sales across all sports and venues.

Reference:

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

#### **NEW QUESTION: 124**

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. Vice President of Sales
- B. Sales Manager
- C. Sequence Manager
- D. Playbook Manager

**Answer:** ([SHOW ANSWER](#))

#### **NEW QUESTION: 125**

You are a Dynamics 365 Sales administrator for a venue. Customers book series of events in the venue. The series of events are children of a main event.

The sales manager wants to forecast the revenue for each customer's main event by rolling up the forecasts of the children of each main event.

You need to configure the forecast.

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

NOTE: Each correct selection is worth one point.

| Step                                 | Configuration                                                                                                                              |
|--------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------|
| Configure a relationship definition. | <div><div></div><div>account</div><div>opportunity</div><div>contact</div><div>product</div></div>                                         |
| Select the top of the hierarchy.     | <div><div></div><div>customer name</div><div>main event record</div><div>parent opportunity field</div><div>opportunity entity</div></div> |



Answer:

| Step                                 | Configuration                                                                                                                              |
|--------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------|
| Configure a relationship definition. | <div><div></div><div>account</div><div>opportunity</div><div>contact</div><div>product</div></div>                                         |
| Select the top of the hierarchy.     | <div><div></div><div>customer name</div><div>main event record</div><div>parent opportunity field</div><div>opportunity entity</div></div> |

Explanation

Table Description automatically generated

The screenshot shows a configuration window with a 'Step' column and a 'Configuration' column. The 'Step' column contains the text 'Configure a relationship definition.' and 'Select the top of the hierarchy.' The 'Configuration' column contains two dropdown menus. The first dropdown menu has four options: 'account', 'opportunity', 'contact', and 'product', with 'product' selected. The second dropdown menu has four options: 'customer name', 'main event record', 'parent opportunity field', and 'opportunity entity', with 'opportunity entity' selected.

| Step                                 | Configuration                                                                                                                                                         |
|--------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Configure a relationship definition. | <div>▼</div> <ul style="list-style-type: none"> <li>account</li> <li>opportunity</li> <li>contact</li> <li>product</li> </ul>                                         |
| Select the top of the hierarchy.     | <div>▼</div> <ul style="list-style-type: none"> <li>customer name</li> <li>main event record</li> <li>parent opportunity field</li> <li>opportunity entity</li> </ul> |

Reference:

<https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/configure-forecast-using-custom-rollup-entity>

#### NEW QUESTION: 126

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

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

What should you do?

- A. Set up fiscal year settings and create a view from the advanced find
- B. Use date ranges to create a view from the advanced find
- C. Set up fiscal year settings and create a view in the default solution
- D. Use date ranges to create a view in the default solution

Answer: ([SHOW ANSWER](#))

#### NEW QUESTION: 127

You need to implement the time study.

What should you create?

- A. business rule
- B. insight cards with Sales Insights
- C. custom activity type
- D. new data step in the business process flow

Answer: ([SHOW ANSWER](#))

Reference:

<https://docs.microsoft.com/en-us/dynamics365/customerengagement/on-premises/basics/work-with-activities?vie>

### NEW QUESTION: 128

A company implements Dynamics 365 Sales Insights.

You must implement predictive forecasting.

You need to confirm that fields are populated prior to deployment.

Which field must you populate? To answer, drag the appropriate fields to the correct requirements. Each field may be used once, more than once, or not at all. You may need to drag the split bar between panes or scroll to view content.

NOTE: Each correct selection is worth one point.

**Fields**

- Actual Value and Actual Close Date
- Estimated Value and Estimated Close Date
- Actual Value, Actual Close Date, Estimated Value, and Estimated Close Date

**Answer Area**

**Requirement**

- Closed opportunities
- Open opportunities

**Field**

- 
- 

### Answer:

**Fields**

- Actual Value and Actual Close Date
- Estimated Value and Estimated Close Date
- Actual Value, Actual Close Date, Estimated Value, and Estimated Close Date

**Answer Area**

**Requirement**

- Closed opportunities
- Open opportunities

**Field**

- Actual Value, Actual Close Date, Estimated Value, and Estimated Close Date
- Estimated Value and Estimated Close Date

### Explanation

**Fields**

- Actual Value and Actual Close Date
- Estimated Value and Estimated Close Date
- Actual Value, Actual Close Date, Estimated Value, and Estimated Close Date

**Answer Area**

**Requirement**

- Closed opportunities
- Open opportunities

**Field**

- Actual Value, Actual Close Date, Estimated Value, and Estimated Close Date
- Estimated Value and Estimated Close Date

### NEW QUESTION: 129

A company uses Dynamics 365 Sales. The company plans to use Microsoft SharePoint to organize documents.

All access to documents must be through Dynamics 365 Sales. You must limit document access to only salespeople.

You need to set up SharePoint for use.

What should you set up for each requirement? To answer, select the appropriate options in the answer area.

NOTE: Each correct selection is worth one point.

**Answer Area**

**Requirement**  
Document management through Dynamics 365 Sales

Access limited to salespeople

**Setup**

- Configure document management and SharePoint Online.
- Configure Exchange Online and SharePoint Online.
- Configure SharePoint Connector and SharePoint Online.
- Configure document management and SharePoint Online.
- Assign security roles in Dynamics 365 Sales only.
- Assign security in SharePoint only.
- Assign security roles in Dynamics 365 Sales only.
- Assign Microsoft Security Group permissions in SharePoint.
- Assign security in SharePoint and security roles in Dynamics 365 Sales.

**Answer:**

**Answer Area**

**Requirement**  
Document management through Dynamics 365 Sales

Access limited to salespeople

**Setup**

- Configure document management and SharePoint Online.
- Configure Exchange Online and SharePoint Online.
- Configure SharePoint Connector and SharePoint Online.
- Configure document management and SharePoint Online.
- Assign security roles in Dynamics 365 Sales only.
- Assign security in SharePoint only.
- Assign security roles in Dynamics 365 Sales only.
- Assign Microsoft Security Group permissions in SharePoint.
- Assign security in SharePoint and security roles in Dynamics 365 Sales.

**Explanation**

**Answer Area**

**Requirement**  
Document management through Dynamics 365 Sales  
Access limited to salespeople

**Setup**

- Configure document management and SharePoint Online.
- Assign security roles in Dynamics 365 Sales only.

### NEW QUESTION: 130

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: 131

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

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

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: 132

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

You need to allow users to see the forecasts for every region.

What should you do?

- A. Grant users permission to view the Forecast Category field.
- B. Add the view privilege to each user's security role.
- C. Add each security role to the forecast configuration.
- D. Grant all security roles access in the forecast configuration.

**Answer:** ([SHOW ANSWER](#))

### NEW QUESTION: 133

Please wait while the virtual machine loads. Once loaded, you may proceed to the lab section.

This may take a few minutes, and the wait time will not be deducted from your overall test time.

When the Next button is available, click it to access the lab section. In this section, you will perform a set of tasks in a live environment. While most functionality will be available to you as it would be in a live environment, some functionality (e.g., copy and paste, ability to navigate to external websites) will not be possible by design.

Scoring is based on the outcome of performing the tasks stated in the lab. In other words, it doesn't matter how you accomplish the task, if you successfully perform it, you will earn credit for that task.

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

Please note that once you submit your work by clicking the Next button within a lab, you will NOT be able to return to the lab.

Your company plans to generate a report to provide reasons for the disqualification of leads.

You need to add a reason of Cannot meet timeline for delivery and then apply the reason to a Sales Lead named Brian LaMee.

To complete this task, sign in to the Dynamics 365 portal.

**Answer:**

See explanation below.

Navigate to Settings > Customization > Customize the System.

Expand the Entities menu.

Scroll down and expand Leads, then click on Fields.

Double click on the Status Reason field.

Change status to Disqualified.

Click Add.

Type in the new status reason: Cannot meet timeline for delivery

Click OK.

Click Publish All Customizations.

Open the lead named Brian LaMee.

From the command bar, click Disqualify and select the new status reason.

Reference:

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

### **NEW QUESTION: 134**

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: C** ([LEAVE A REPLY](#))

Reference:

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

### **NEW QUESTION: 135**

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                                                | Answer Area                                                    |
|--------------------------------------------------------|----------------------------------------------------------------|
|                                                        | Replace the manager from SalesTerritoryA with another manager. |
|                                                        | Create a new sales territory.                                  |
|                                                        | Add members.                                                   |
| Change the name of SalesTerritoryA to SalesTerritoryB. | Associate the manager from SalesTerritoryA.                    |

#### NEW QUESTION: 136

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. Account Timeline feed
- C. My Active Accounts view
- D. Contact Timeline feed
- E. Account Files tab

**Answer: A,C (LEAVE A REPLY)**

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### NEW QUESTION: 137

A company releases a new catalog.

The company requires salespeople to do the following:

- \* Contact customers about the new catalog.
- \* Set up appointments with the customers to deliver the catalog.

You need to set up playbooks to track the activities.

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

NOTE: Each correct selection is worth one point.

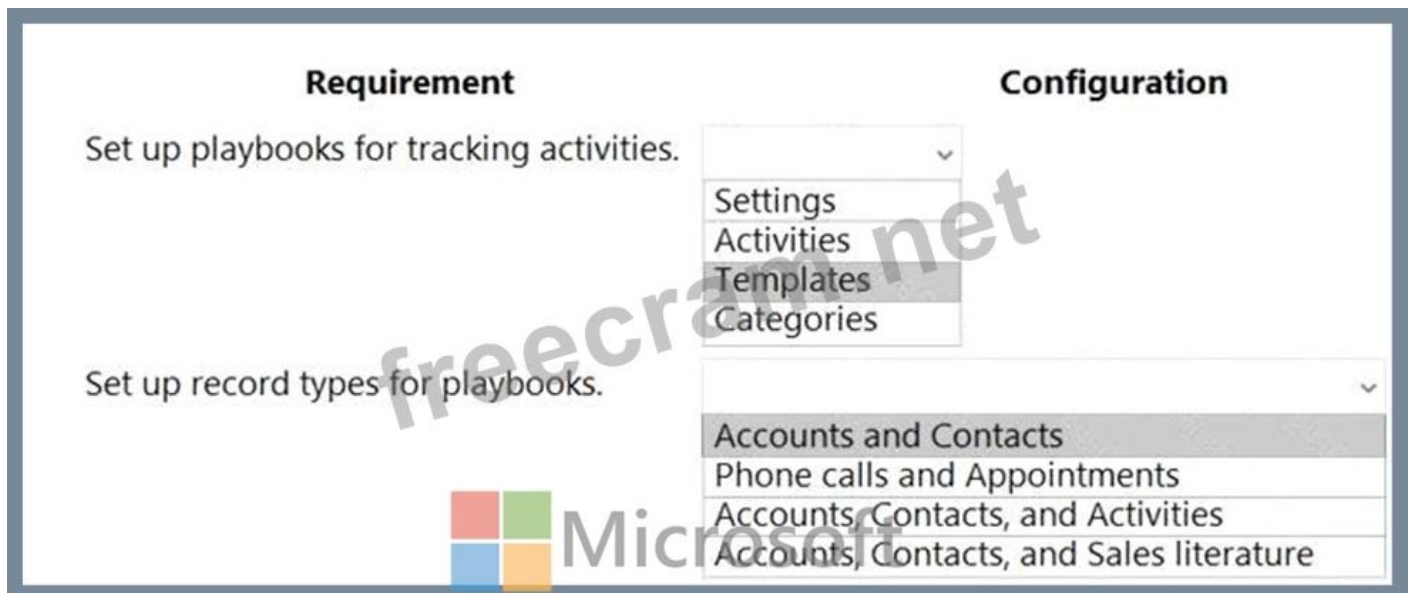
| Requirement                               | Configuration                                                                                                                                                              |
|-------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Set up playbooks for tracking activities. | <div>Settings</div> <div>Activities</div> <div>Templates</div> <div>Categories</div>                                                                                       |
| Set up record types for playbooks.        | <div>Accounts and Contacts</div> <div>Phone calls and Appointments</div> <div>Accounts, Contacts, and Activities</div> <div>Accounts, Contacts, and Sales literature</div> |

Answer:

| Requirement                               | Configuration                                                                                                                                                              |
|-------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Set up playbooks for tracking activities. | <div>Settings</div> <div>Activities</div> <div>Templates</div> <div>Categories</div>                                                                                       |
| Set up record types for playbooks.        | <div>Accounts and Contacts</div> <div>Phone calls and Appointments</div> <div>Accounts, Contacts, and Activities</div> <div>Accounts, Contacts, and Sales literature</div> |

Explanation

Graphical user interface, text, application Description automatically generated



Reference:

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

### NEW QUESTION: 138

A company uses Dynamics 365 for Sales. The company has not made changes to any of the default security roles.

You need to ensure that users can assign salespeople to sales territories.

Which security role can you use?

- A. Marketing Professional
- B. Sales Person
- C. Delegate
- D. CEO - Business Manager

**Answer: (SHOW ANSWER)**

Explanation

References:

<https://docs.microsoft.com/en-us/dynamics365/customer-engagement/admin/set-up-sales-territories-organize-bus>

### NEW QUESTION: 139

You close a lost opportunity. The company you lost the opportunity to is a competitor with whom you do business. The company is already set up with an account and competitor record in the system.

You want to track the lost opportunity without having to reopen the opportunity.

You need to track the company to the opportunity.

What should you do?

- A. Add the account to the opportunity.
- B. Add the competitor to the opportunity.
- C. Add the opportunity to the competitor.

D. Add the opportunity to the account.

**Answer:** ([SHOW ANSWER](#))

Reference:

<https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/create-edit-competitor-record-sales>

### NEW QUESTION: 140

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

When the Next button is available, click it to access the lab section. In this section, you will perform a set of tasks in a live environment. While most functionality will be available to you as it would be in a live environment, some functionality (e.g., copy and paste, ability to navigate to external websites) will not be possible by design.

Scoring is based on the outcome of performing the tasks stated in the lab. In other words, it doesn't matter how you accomplish the task, if you successfully perform it, you will earn credit for that task.

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

Please note that once you submit your work by clicking the Next button within a lab, you will NOT be able to return to the lab.

You need to create a new field for an opportunity to capture the Billing Contact. The field must be populated by using a contact record. You must set the field as required, and then add the field to the form at the bottom of the Summary section.

To complete this task, sign in to the Dynamics 365 portal.

**Answer:**

See explanation below.

Explanation

You need to create a customer lookup field then add it to the Opportunity entity.

- \* Go to Settings > Customizations.
- \* Select Customize the System.
- \* Under Components, expand Entities, and then select the Opportunity entity.
- \* Select Fields.
- \* Click New.
- \* Create the Billing Contact field.
- \* Set the Field Requirement to Business Required.
- \* Set the Data Type to Lookup.
- \* For the Target Record Type select Contact.
- \* Click Save and Close.
- \* Click Publish All Customizations.
- \* Open the Opportunities form.
- \* In the Field Explorer drag the new field into the form.
- \* Click Save
- \* Click Publish

**NEW QUESTION: 141**

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. Knowledge Manager
- B. Sales Manager
- C. Common Data Service
- D. System Customizer

**Answer:** ([SHOW ANSWER](#))

**NEW QUESTION: 142**

An order uses quote and order functionality in Dynamics 365 Sales. Multiple quotes may be provided to customers at one time. Quotes are revised often. Which two opportunities can you close as won? Each correct answer presents a complete solution. NOTE: Each correct selection is worth one point.

- A. an opportunity that has quotes in the active status.
- B. an opportunity that has quotes in the revised status reason.
- C. an opportunity that has quotes in the won status.
- D. an opportunity that has quotes in the draft status.

**Answer:** ([SHOW ANSWER](#))

**NEW QUESTION: 143**

Please wait while the virtual machine loads. Once loaded, you may proceed to the lab section. This may take a few minutes, and the wait time will not be deducted from your overall test time. When the Next button is available, click it to access the lab section. In this section, you will perform a set of tasks in a live environment. While most functionality will be available to you as it would be in a live environment, some functionality (e.g., copy and paste, ability to navigate to external websites) will not be possible by design.

Scoring is based on the outcome of performing the tasks stated in the lab. In other words, it doesn't matter how you accomplish the task, if you successfully perform it, you will earn credit for that task.

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

Please note that once you submit your work by clicking the Next button within a lab, you will NOT be able to return to the lab.

You need to create a copy of Sales Dashboard and name the dashboard Sales Dashboard 2. The new dashboard must NOT include a view that displays the activities widgets.

To complete this task, sign in to the Dynamics 365 portal.

**Answer:**

See explanation below.

- \* Navigate to Dashboards.
- \* Open the Sales Dashboard.
- \* Click Save As and enter the name Sales Dashboard 2 to save a copy of the dashboard.
- \* Click Edit.
- \* Select the view that displays the activities widgets.
- \* Click Remove
- \* Click Save.

**NEW QUESTION: 144**

A sales manager asks you to add a reason named DealLost to mark opportunities closed as lost. You need to modify entity fields.

Which two entity fields should you modify? Each correct answer presents part of the solution.

NOTE: Each correct selection is worth one point.

- A. Opportunity Line
- B. Opportunity Sales Process
- C. Opportunity
- D. Opportunity Relationship
- E. Opportunity Close

**Answer: (SHOW ANSWER)**

Reference:

<https://community.dynamics.com/365/sales/f/dynamics-365-for-sales-forum/377163/customize-opportunity-clos>

<https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/customize-opportunity-close-experience>

**NEW QUESTION: 145**

A company uses Dynamics 365 Sales to create and manage opportunities, quotes and orders. You need to ensure that the Actual Revenue field in an opportunity is automatically updated with the total amount from the quote.

What should you do?

- A. Convert the quote to an order. Set the value of the Calculate actual revenue from quotes option to Yes.
- B. Close the opportunity as won.
- C. Convert the quote to an order. Set the value of the Close Opportunity option to Yes.
- D. Convert the quote to an order. Set the value of the Close Opportunity option to No.

**Answer: (SHOW ANSWER)**

Reference:

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

**NEW QUESTION: 146**

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: 147**

A company deploys Dynamics 365 Sales Enterprise.

Users must be able to view account and contact records but not edit or add information to those records.

You need to set up user access.

What should you do?

- A. Purchase a Dynamics 365 Team Members license and assign the license to users.
- B. Create a Dynamics 365 business unit.
- C. Purchase a Dynamics 365 Sales Professional license and assign the license to users.
- D. Configure data loss prevention (DLP).

**Answer:** ([SHOW ANSWER](#))

**NEW QUESTION: 148**

You need to configure the credit and reference screening playbook 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                                                                                       | Configuration                                                                                                                                                                                                                    |
|---------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Ensure that the finance manager performs the credit screening.                                    | Add a Task activity to the playbook.<br>Add the credit screening to the playbook.<br>Add the finance manager as the publisher of the playbook.<br>Add a custom activity for Perform Credit Check and add it to the playbook.     |
| Ensure that the finance manager has the latest version of the unfavorable screening phone script. | Add the script to the phone call activity.<br>Add a phone script to the playbook template.<br>Add the phone script to the Task activity.                                                                                         |
| Ensure that playbooks can be initiated from all RFQs.                                             | Associate the playbook with the Lead entity only.<br>Associate the playbook with the Opportunity entity only.<br>Associate the playbook with the Lead and Opportunity entities.<br>Associate the playbook with the Quote entity. |
| Ensure proper tracking for all tasks associated with playbooks.                                   | Set Track Progress to No.<br>Set Track Progress to Yes.<br>Set the estimated duration of the playbook template.<br>Set the estimated duration of the activity.                                                                   |

**Answer:**

| Requirement                                                                                       | Configuration                                                                                                                                                                                                                    |
|---------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Ensure that the finance manager performs the credit screening.                                    | Add a Task activity to the playbook.<br>Add the credit screening to the playbook.<br>Add the finance manager as the publisher of the playbook.<br>Add a custom activity for Perform Credit Check and add it to the playbook.     |
| Ensure that the finance manager has the latest version of the unfavorable screening phone script. | Add the script to the phone call activity.<br>Add a phone script to the playbook template.<br>Add the phone script to the Task activity.                                                                                         |
| Ensure that playbooks can be initiated from all RFQs.                                             | Associate the playbook with the Lead entity only.<br>Associate the playbook with the Opportunity entity only.<br>Associate the playbook with the Lead and Opportunity entities.<br>Associate the playbook with the Quote entity. |
| Ensure proper tracking for all tasks associated with playbooks.                                   | Set Track Progress to No.<br>Set Track Progress to Yes.<br>Set the estimated duration of the playbook template.<br>Set the estimated duration of the activity.                                                                   |

**Explanation**

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

| Requirement                                                                                       | Configuration                                                                                                                                                                                                                    |
|---------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Ensure that the finance manager performs the credit screening.                                    | Add a Task activity to the playbook.<br>Add the credit screening to the playbook.<br>Add the finance manager as the publisher of the playbook.<br>Add a custom activity for Perform Credit Check and add it to the playbook.     |
| Ensure that the finance manager has the latest version of the unfavorable screening phone script. | Add the script to the phone call activity.<br>Add a phone script to the playbook template.<br>Add the phone script to the Task activity.                                                                                         |
| Ensure that playbooks can be initiated from all RFQs.                                             | Associate the playbook with the Lead entity only.<br>Associate the playbook with the Opportunity entity only.<br>Associate the playbook with the Lead and Opportunity entities.<br>Associate the playbook with the Quote entity. |
| Ensure proper tracking for all tasks associated with playbooks.                                   | Set Track Progress to No.<br>Set Track Progress to Yes.<br>Set the estimated duration of the playbook template.<br>Set the estimated duration of the activity.                                                                   |

Reference:

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

### NEW QUESTION: 149

You are a salesperson working with Dynamics 365. Your role includes working with opportunities. You need to close opportunities.

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

NOTE: Each correct selection is worth one point.

| Question                                           | Action                                                                                          |
|----------------------------------------------------|-------------------------------------------------------------------------------------------------|
| What must you do when you close a successful sale? | <div>▼</div> Close a qualified<br>Close as won                                                  |
| What must you do to close the opportunity?         | <div>▼</div> Fill out the competitor<br>Fill out the actual revenue<br>Fill out the description |

Answer:

| Question                                           | Action                                                                                                                     |
|----------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------|
| What must you do when you close a successful sale? | <div>▼</div> <div>Close a qualified</div> <div>Close as won</div>                                                          |
| What must you do to close the opportunity?         | <div>▼</div> <div>Fill out the competitor</div> <div>Fill out the actual revenue</div> <div>Fill out the description</div> |

Explanation

| Question                                           | Action                                                                                                                     |
|----------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------|
| What must you do when you close a successful sale? | <div>▼</div> <div>Close a qualified</div> <div>Close as won</div>                                                          |
| What must you do to close the opportunity?         | <div>▼</div> <div>Fill out the competitor</div> <div>Fill out the actual revenue</div> <div>Fill out the description</div> |

### NEW QUESTION: 150

A customer plans to track external individuals who influence an opportunity.

The sales manager wants to add a new role named influencer to identify these individuals.

You need to create the role.

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

NOTE: Each correct selection is worth one point.

## Answer Area

Microsoft

Criterion

Role type

Role category

Setup

Connection role

Resource role

Connection role

Relationship role

Sales

Sales

Business

Sales team

Stakeholder

## Answer:

Answer Area

Microsoft

Criterion

Role type

Role category

Setup

Connection role

Resource role

Connection role

Relationship role

Sales

Sales

Business

Sales team

Stakeholder

## Explanation

### Answer Area

Microsoft

Criterion

Role type

Role category

Setup

Connection role

Sales

## NEW QUESTION: 151

You need to improve lead assignments.

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

NOTE: Each correct selection is worth one point.



Microsoft

### Requirement

Streamline lead distribution.

Set the lead distribution type.

### Action

- Implement assignment rules.
- Assign the leads.
- Add business rules.
- Implement assignment rules.**
- Configure business process flows.

- Select load balancing.
- Select round robin.
- Select load balancing.**

Answer:

Answer Area

Microsoft

Requirement

Streamline lead distribution.

Set the lead distribution type.

Action

- Implement assignment rules.
- Assign the leads.
- Add business rules.
- Implement assignment rules.**
- Configure business process flows.

- Select load balancing.
- Select round robin.
- Select load balancing.**

Explanation

Answer Area

Microsoft

Requirement

Streamline lead distribution.

Set the lead distribution type.

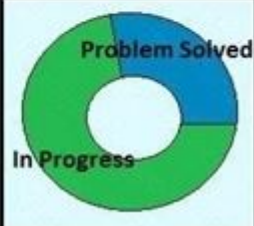
Action

- Implement assignment rules.
- Select load balancing.

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**NEW QUESTION: 152**

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 |                                      |        |      |          |       |  |  |  |       |  |  |   |
| <b>Basic Profile</b><br>Parent Account:<br>Relationship:<br>Industry:<br>Location: Renton, Tx<br>Category:<br>Website: http://www.fourthcoffee.com/<br>Ownership:<br>Ticker Symbol:                                        |        | <b>Opportunity Summary</b><br><a href="#">Active opportunities by probability</a> <a href="#">All opportunities by current state</a><br>No Data   No Data<br><br><table border="1"> <thead> <tr> <th><a href="#">Active Opportunities</a></th> <th>Amount</th> <th>Prob</th> <th>Weighted</th> </tr> </thead> <tbody> <tr> <td>Other</td> <td></td> <td></td> <td></td> </tr> <tr> <td>Total</td> <td></td> <td></td> <td>0</td> </tr> </tbody> </table> |          |          | <a href="#">Active Opportunities</a> | Amount | Prob | Weighted | Other |  |  |  | Total |  |  | 0 |
| <a href="#">Active Opportunities</a>                                                                                                                                                                                       | Amount | Prob                                                                                                                                                                                                                                                                                                                                                                                                                                                     | Weighted |          |                                      |        |      |          |       |  |  |  |       |  |  |   |
| Other                                                                                                                                                                                                                      |        |                                                                                                                                                                                                                                                                                                                                                                                                                                                          |          |          |                                      |        |      |          |       |  |  |  |       |  |  |   |
| Total                                                                                                                                                                                                                      |        |                                                                                                                                                                                                                                                                                                                                                                                                                                                          | 0        |          |                                      |        |      |          |       |  |  |  |       |  |  |   |
| <b>Primary Contact</b><br><b>Yvonne McKay (sample)</b><br>Title: Purchasing Manager<br>Location: Redmond, WA<br>Business Phone: 555-0100<br>Mobile Phone:<br>Home Phone:<br>Fax:<br>Pager:<br>Email: someone_a@example.com |        | <b>Service Summary</b><br><a href="#">Satisfaction (all closed cases)</a> <a href="#">Status Reason (all cases)</a><br><div>  </div>                                                                                                                                                                                                                                   |          |          |                                      |        |      |          |       |  |  |  |       |  |  |   |
| <b>Additional Contacts</b><br>Yvonne McKay (sample) - Purchasing Manager - (555-0100)                                                                                                                                      |        |                                                                                                                                                                                                                                                                                                                                                                                                                                                          |          |          |                                      |        |      |          |       |  |  |  |       |  |  |   |

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

NOTE: Each correct selection is worth one point.

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

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                                           | Answer choice                                                                                                                                                                                                                                                     |   |                           |                                                 |                               |                                                    |
|----------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---|---------------------------|-------------------------------------------------|-------------------------------|----------------------------------------------------|
| Why is the satisfaction area blank?                | <table><tr><td>▼</td></tr><tr><td>There are no closed cases</td></tr><tr><td>Users are not completing the satisfaction field</td></tr><tr><td>The Reporting Service is down</td></tr><tr><td>Cases with the problem solved have not been closed</td></tr></table> | ▼ | 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 |
| ▼                                                  |                                                                                                                                                                                                                                                                   |   |                           |                                                 |                               |                                                    |
| 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?            | <table><tr><td>▼</td></tr><tr><td>Active</td></tr><tr><td>Parent Account</td></tr><tr><td>Inactive</td></tr><tr><td>Child Account</td></tr></table>                                                                                                               | ▼ | Active                    | Parent Account                                  | Inactive                      | Child Account                                      |
| ▼                                                  |                                                                                                                                                                                                                                                                   |   |                           |                                                 |                               |                                                    |
| Active                                             |                                                                                                                                                                                                                                                                   |   |                           |                                                 |                               |                                                    |
| Parent Account                                     |                                                                                                                                                                                                                                                                   |   |                           |                                                 |                               |                                                    |
| Inactive                                           |                                                                                                                                                                                                                                                                   |   |                           |                                                 |                               |                                                    |
| Child Account                                      |                                                                                                                                                                                                                                                                   |   |                           |                                                 |                               |                                                    |

### NEW QUESTION: 153

You need to choose where to enter the other show names in the system. Where should you add the shows?

- A. Accounts
- B. Contacts
- C. Competitor
- D. Product

Answer: ([SHOW ANSWER](#))

### NEW QUESTION: 154

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. Create a tab for LinkedIn Sales Navigator and make it visible.
- B. install LinkedIn Sales Navigator and enable it.
- C. Enable CRM sync and activity writeback.

- D. Configure the connection graph.
- E. Configure LinkedIn Sales Navigator Lead lookup control.

**Answer: C,D,E ([LEAVE A REPLY](#))**

#### **NEW QUESTION: 155**

A battery manufacturer wants to sell their batteries in boxes of 12 and cases of 24 boxes. You need to set up a unit group so that the manufacturer can sell different quantities. What should you create first?

- A. related unit
- B. unit of measure
- C. primary unit
- D. base unit

**Answer: ([SHOW ANSWER](#))**

Reference:

<https://docs.microsoft.com/en-us/dynamics365/sales-professional/create-unit-group-add-units>

#### **NEW QUESTION: 156**

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: C ([LEAVE A REPLY](#))**

Reference:

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

#### **NEW QUESTION: 157**

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

- A. Status and Contact
- B. Status and Stakeholders
- C. Status Reason and Description
- D. Status Reason and Competitor

**Answer: ([SHOW ANSWER](#))**

#### **NEW QUESTION: 158**

A company sells telephones. The company has a list of telephone colors that customers can choose.

For one month, the company wants to sell a red phone at a special price.

You need to set up the red phone for the sales team.

How should you configure the product and price list items? To answer, select the appropriate options in the answer area.

NOTE: Each correct selection is worth one point.

| Requirement                                                       | Configuration                                                                                                                                                                                                                                                                     |
|-------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Allow the sales team to select the red phone.                     | <div><div></div><div>Create a red phone product.<br/>Revise the telephone product.<br/>Override the properties of the telephone.<br/>Overwrite the properties of the telephone.</div></div>                                                                                       |
| Allow the sales team to select special pricing for the red phone. | <div><div></div><div>Create a price list item for the telephone.<br/>Create a price list item for the red phone product.<br/>Update the existing price list item for the telephone.<br/>Update the telephone default price list to a price list that lasts one month.</div></div> |

Answer:

| Requirement                                                       | Configuration                                                                                                                                                                                                                                                                     |
|-------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Allow the sales team to select the red phone.                     | <div><div></div><div>Create a red phone product.<br/>Revise the telephone product.<br/>Override the properties of the telephone.<br/>Overwrite the properties of the telephone.</div></div>                                                                                       |
| Allow the sales team to select special pricing for the red phone. | <div><div></div><div>Create a price list item for the telephone.<br/>Create a price list item for the red phone product.<br/>Update the existing price list item for the telephone.<br/>Update the telephone default price list to a price list that lasts one month.</div></div> |

Explanation

Table Description automatically generated

| Requirement                                                       | Configuration                                                                                                                                                                                                                                                                     |
|-------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Allow the sales team to select the red phone.                     | <div><div></div><div>Create a red phone product.<br/>Revise the telephone product.<br/>Override the properties of the telephone.<br/>Overwrite the properties of the telephone.</div></div>                                                                                       |
| Allow the sales team to select special pricing for the red phone. | <div><div></div><div>Create a price list item for the telephone.<br/>Create a price list item for the red phone product.<br/>Update the existing price list item for the telephone.<br/>Update the telephone default price list to a price list that lasts one month.</div></div> |

Reference:

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

### NEW QUESTION: 159

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 the Dynamics 365 configuration interface. On the left, under the 'Features' header, there is a list of four features: 'Auto capture', 'Notes analysis', 'App for Outlook', and 'Email engagement'. On the right, under the 'Requirement' header, there are two requirements: 'Email correspondence on timeline' and 'When customer opens email'. To the right of the requirements is a 'Feature' column with a Microsoft logo and a box containing the text 'Microsoft'. The 'Answer Area' is currently empty.

**Answer:**

The screenshot shows the Dynamics 365 configuration interface with the correct answer. In the 'Features' list on the left, 'Auto capture', 'Notes analysis', 'App for Outlook', and 'Email engagement' are all highlighted with green dashed borders. In the 'Feature' column on the right, 'Auto capture' and 'Email engagement' are listed, indicating they are the correct selections for the requirements.

**Explanation**

The screenshot shows the Dynamics 365 configuration interface with the correct answer. In the 'Features' list on the left, 'Auto capture', 'Notes analysis', 'App for Outlook', and 'Email engagement' are all highlighted with green dashed borders. In the 'Feature' column on the right, 'Auto capture' and 'Email engagement' are listed, indicating they are the correct selections for the requirements.

### NEW QUESTION: 160

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

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

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

You need to perform the following actions on leads:

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

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

NOTE: Each correct selection is worth one point.

| Scenario                    | Privilege                                                                                                                                                                                                                                                                   |
|-----------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Add notes to leads          | <div><input type="checkbox"/> Leads owned by people in your business unit only</div> <div><input type="checkbox"/> Leads owned by you only</div> <div><input type="checkbox"/> Leads owned by anyone in your organization</div>                                             |
| Assign leads to other users | <div><input type="checkbox"/> Leads owned by your business unit and its child business units only</div> <div><input type="checkbox"/> Leads owned by people in your business unit only</div> <div><input type="checkbox"/> Leads owned by anyone in your organization</div> |

Answer:

| Scenario                    | Privilege                                                                                                                                                                                                                                                                                                    |
|-----------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Add notes to leads          | <div><input checked="" type="checkbox"/> Leads owned by people in your business unit only</div> <div><input checked="" type="checkbox"/> Leads owned by you only</div> <div><input checked="" type="checkbox"/> Leads owned by anyone in your organization</div>                                             |
| Assign leads to other users | <div><input checked="" type="checkbox"/> Leads owned by your business unit and its child business units only</div> <div><input checked="" type="checkbox"/> Leads owned by people in your business unit only</div> <div><input checked="" type="checkbox"/> Leads owned by anyone in your organization</div> |

Explanation

Table Description automatically generated

| Scenario                    | Privilege                                                                                                                                                                                                                                                                                                    |
|-----------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Add notes to leads          | <div><input checked="" type="checkbox"/> Leads owned by people in your business unit only</div> <div><input checked="" type="checkbox"/> Leads owned by you only</div> <div><input checked="" type="checkbox"/> Leads owned by anyone in your organization</div>                                             |
| Assign leads to other users | <div><input checked="" type="checkbox"/> Leads owned by your business unit and its child business units only</div> <div><input checked="" type="checkbox"/> Leads owned by people in your business unit only</div> <div><input checked="" type="checkbox"/> Leads owned by anyone in your organization</div> |

Reference:

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

<https://dynamics-chronicles.com/article/deep-dive-security-roles-dynamics-365>

### NEW QUESTION: 161

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

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

NOTE: Each correct selection is worth one point.

| Requirement                                             | Action                                                                                                                                                                                                                                                                        |
|---------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Create leads from incoming emails                       | <div>▼</div> <ul style="list-style-type: none"> <li>Create a Queue and Record Creation Rule</li> <li>Create a Workflow for incoming emails</li> <li>Create an Action to trigger a plug-in</li> </ul>                                                                          |
| Do not create contacts from emails from unknown senders | <div>▼</div> <ul style="list-style-type: none"> <li>Disable Create records for emails from unknown senders</li> <li>Enable duplicate detection rules for emails</li> <li>Disable duplicate detection rules for leads</li> <li>Enable Create Lead in email tracking</li> </ul> |

Answer:

| Requirement                                             | Action                                                                                                                                                                                                                                                                        |
|---------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Create leads from incoming emails                       | <div>▼</div> <ul style="list-style-type: none"> <li>Create a Queue and Record Creation Rule</li> <li>Create a Workflow for incoming emails</li> <li>Create an Action to trigger a plug-in</li> </ul>                                                                          |
| Do not create contacts from emails from unknown senders | <div>▼</div> <ul style="list-style-type: none"> <li>Disable Create records for emails from unknown senders</li> <li>Enable duplicate detection rules for emails</li> <li>Disable duplicate detection rules for leads</li> <li>Enable Create Lead in email tracking</li> </ul> |

Explanation

| Requirement                                             | Action                                                                                                                                                                                                                                                                        |
|---------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Create leads from incoming emails                       | <div>▼</div> <ul style="list-style-type: none"> <li>Create a Queue and Record Creation Rule</li> <li>Create a Workflow for incoming emails</li> <li>Create an Action to trigger a plug-in</li> </ul>                                                                          |
| Do not create contacts from emails from unknown senders | <div>▼</div> <ul style="list-style-type: none"> <li>Disable Create records for emails from unknown senders</li> <li>Enable duplicate detection rules for emails</li> <li>Disable duplicate detection rules for leads</li> <li>Enable Create Lead in email tracking</li> </ul> |

Reference:

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

## NEW QUESTION: 162

You are a Dynamics 365 Sales administrator.

You need to review an interactive dashboard for Accounts in the Sales Hub.

For each scenario, which filter type should you use? To answer, drag the appropriate filter type to the correct scenario. Each source 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

| Scenario                                       | Filter Type      |
|------------------------------------------------|------------------|
| View accounts based on case priority           | Visual filter    |
| View accounts created in the last three months | Timeframe filter |
| View accounts by Created On dates              | Global filter    |

### NEW QUESTION: 163

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<br>Write-In Product<br>Get Products |
| Add a product from a price list.                          | Existing Product<br>Write-In Product<br>Get Products |
| Add a product that does not exist in the product catalog. | Existing Product<br>Write-In Product<br>Get Products |

**Answer:**

| Scenario                                                  | Option                                               |
|-----------------------------------------------------------|------------------------------------------------------|
| Add a product from an opportunity.                        | Existing Product<br>Write-In Product<br>Get Products |
| Add a product from a price list.                          | Existing Product<br>Write-In Product<br>Get Products |
| Add a product that does not exist in the product catalog. | Existing Product<br>Write-In Product<br>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: 164

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.

| Actions                                               | Answer Area |
|-------------------------------------------------------|-------------|
| Open System Jobs.                                     |             |
| Open Settings.                                        |             |
| Open Data Management.                                 |             |
| Configure Automatic Record Creation and Update Rules. |             |
| Open Business Management.                             |             |

Answer:

| Actions                                               | Answer Area                                           |
|-------------------------------------------------------|-------------------------------------------------------|
| Open System Jobs.                                     |                                                       |
| Open Settings.                                        | Open Settings.                                        |
| Open Data Management.                                 | Open Business Management.                             |
| Configure Automatic Record Creation and Update Rules. | Configure Automatic Record Creation and Update Rules. |
| Open Business Management.                             |                                                       |

Explanation

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

 Microsoft

Open Settings.

Open Business Management.

Configure Automatic Record Creation and Update Rules.

**NEW QUESTION: 165**

You are a Dynamics 365 Sales system customizer.

You need to create Product Bundles and Product Families.

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

NOTE: Each correct selection is worth one point.

| Requirement                                                            | Option                                                           |
|------------------------------------------------------------------------|------------------------------------------------------------------|
| View individual products in a grouping when you create an opportunity. | <div>▼</div> <div>Product Family</div> <div>Product Bundle</div> |
| Sell products from a grouping individually.                            | <div>▼</div> <div>Product Family</div> <div>Product Bundle</div> |
| Create a grouping within a grouping.                                   | <div>▼</div> <div>Product Family</div> <div>Product Bundle</div> |

**Answer:**

| Requirement                                                            | Option                                                           |
|------------------------------------------------------------------------|------------------------------------------------------------------|
| View individual products in a grouping when you create an opportunity. | <div>▼</div> <div>Product Family</div> <div>Product Bundle</div> |
| Sell products from a grouping individually.                            | <div>▼</div> <div>Product Family</div> <div>Product Bundle</div> |
| Create a grouping within a grouping.                                   | <div>▼</div> <div>Product Family</div> <div>Product Bundle</div> |

Explanation

| Requirement                                                            | Option                                                           |
|------------------------------------------------------------------------|------------------------------------------------------------------|
| View individual products in a grouping when you create an opportunity. | <div>▼</div> <div>Product Family</div> <div>Product Bundle</div> |
| Sell products from a grouping individually.                            | <div>▼</div> <div>Product Family</div> <div>Product Bundle</div> |
| Create a grouping within a grouping.                                   | <div>▼</div> <div>Product Family</div> <div>Product Bundle</div> |

Reference:

<https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/create-product-bundles-sell-multiple-items-together>

### NEW QUESTION: 166

A company is using Dynamics 365 Sales without any customizations.

A customer orders four products to be delivered to three locations. Two of the locations are in the United States and one is in Canada. You must ensure that the order is tracked properly.

You need to create the minimum number of orders to deliver to the locations.

How many orders should you create?

A. four

B. one

C. three

D. two

Answer: ([SHOW ANSWER](#))

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