MB-210[Q&As]

Microsoft Dynamics 365 Sales

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QUESTION 1

HOTSPOT

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.

Hot Area:

Answer Area

Requirement	Action
Create leads from incoming emails	Create a Queue and Record Creation Rule Create a Workflow for incoming emails Create an Action to trigger a plug-in
Do not create contacts from emails from unknown senders	Disable Create records for emails from unknown senders Enable duplicate detection rules for emails Disable duplicate detection rules for leads Enable Create Lead in email tracking

Correct Answer:

Answer Area

Requirement	Action
Create leads from incoming emails	Create a Queue and Record Creation Rule Create a Workflow for incoming emails Create an Action to trigger a plug-in
Do not create contacts from emails from unknown senders	Disable Create records for emails from unknown senders Enable duplicate detection rules for emails Disable duplicate detection rules for leads Enable Create Lead in email tracking

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

QUESTION 2

DRAG DROP

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

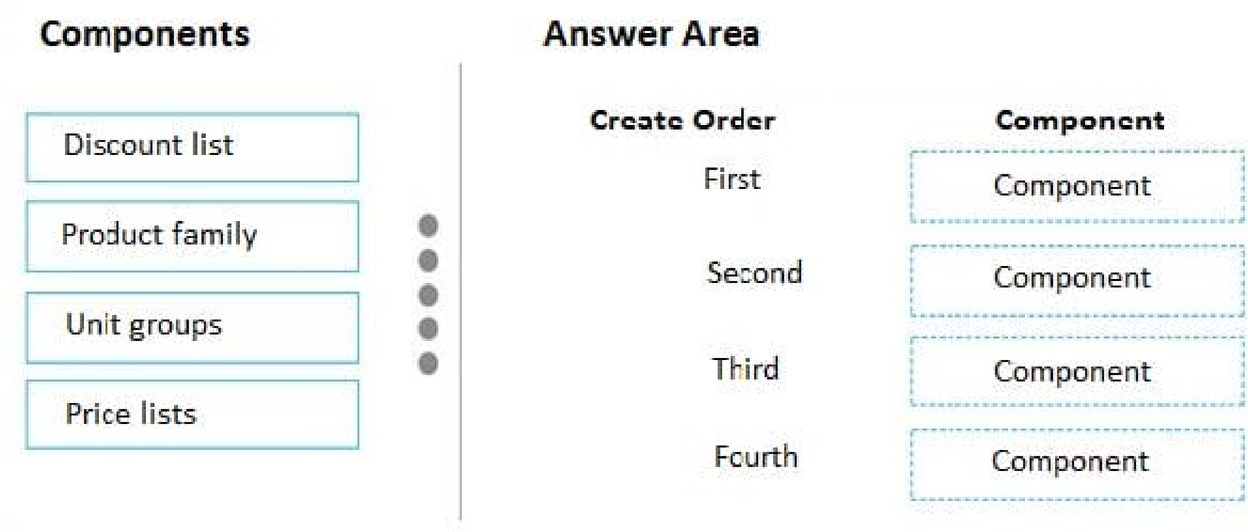
You need to set up the catalog using the least amount of effort.

In which order should you set up the catalog? To answer, drag the appropriate components to the correct order position. Each component may be used once, more than once, or not at all. You may need to drag the split bar between panes or

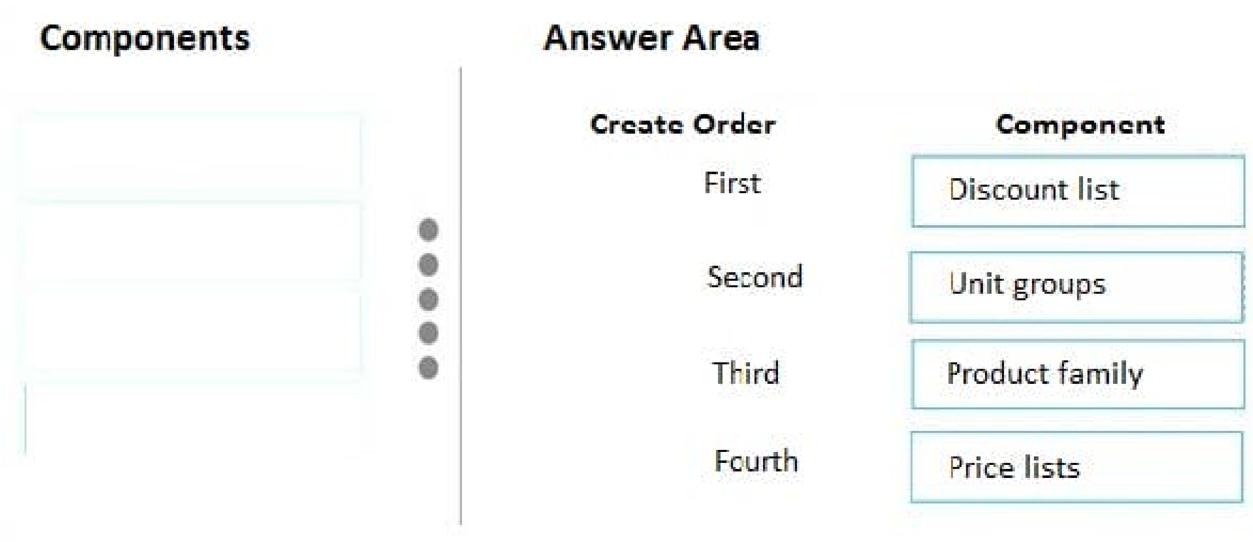
scroll to view content.

NOTE: Each correct selection is worth one point.

Select and Place:



Correct Answer:



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

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QUESTION 3

You are a Dynamics 365 Sales administrator for a company that has locations in five regions.

The company\\'s owner wants regional managers to update their own forecasts. The owner wants full transparency for all forecasts to all current and future employees.

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

What should you do?

A. Add each security role to the forecast configuration.

B. Grant all security roles access in the forecast configuration.

C. Add the view privilege to each user\\'s security role.

D. Grant users permission to view the Forecast Category field.

Correct Answer: A

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

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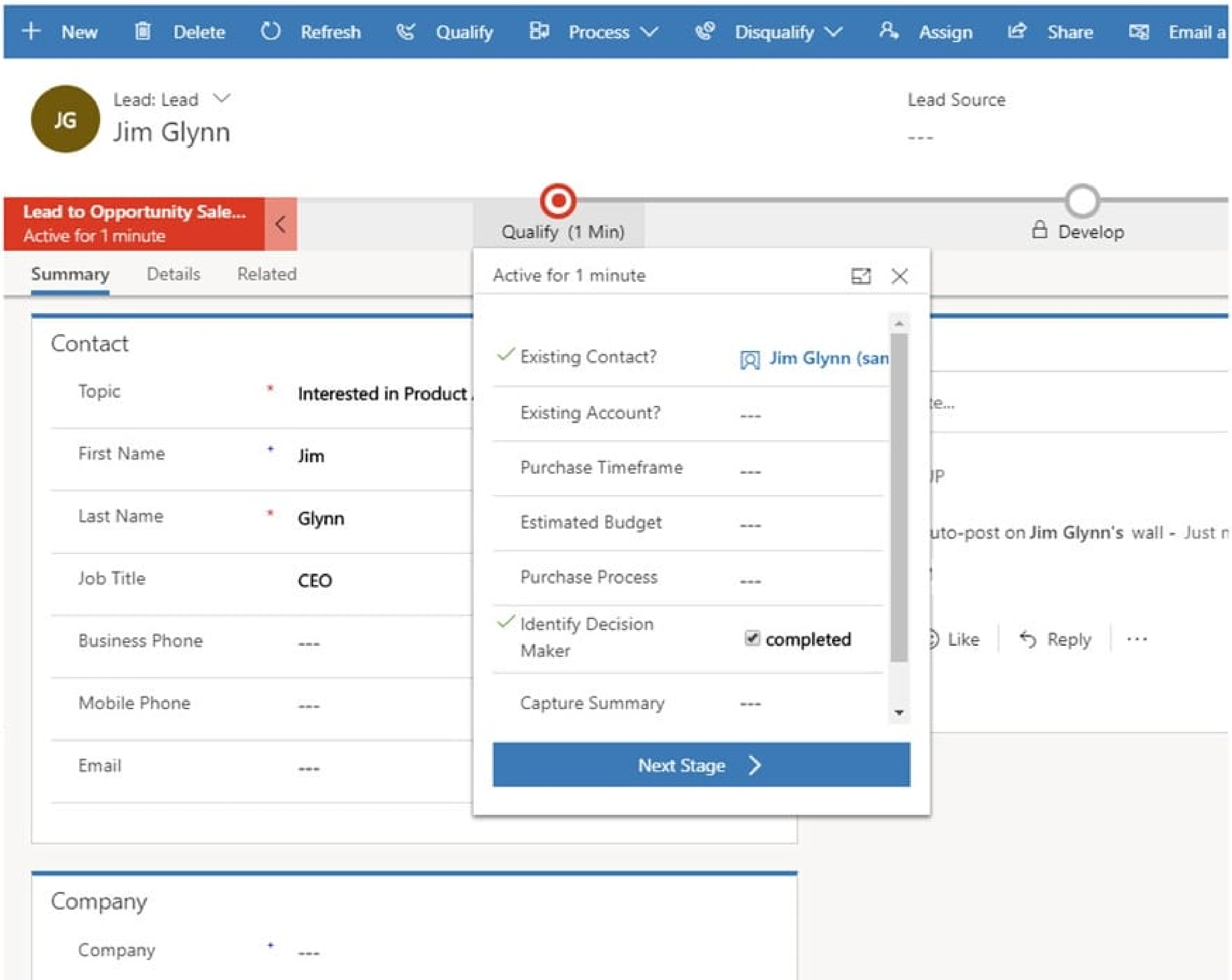
QUESTION 4

HOTSPOT

You are a sales representative and use Dynamics 365 Sales.

You are working with the following lead record:



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

NOTE: Each correct selection is worth one point.

Hot Area:

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

- Qualify the Lead
- Select Next Stage
- Select Develop

Which new record or records are created?

- Only an Opportunity
- Only an Account and a Contact
- Only an Account and an Opportunity
- an Account, a Contact, and an Opportunity

Correct Answer:

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

- Qualify the Lead
- Select Next Stage
- Select Develop

Which new record or records are created?

- Only an Opportunity
- Only an Account and a Contact
- Only an Account and an Opportunity
- an Account, a Contact, and an Opportunity

Box 2: The Contact already exists so only an Account and Opportunity will be created.

Reference: https://docs.microsoft.com/en-us/dynamics365/sales-professional/manage-leads-sales-professional

QUESTION 5

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. mail merge template

C. Microsoft Word template

D. Report Wizard

Correct Answer: C

QUESTION 6

You manage a Dynamics 365 Sales environment.

You need to ensure that all possible activities are automatically converted to leads by using the record creation rule.

Which three activities can you convert to leads? Each correct answer presents a complete solution.

NOTE: Each correct selection is worth one point.

A. Service activity

B. Email

C. Phone call

D. Task

E. Custom activity

Correct Answer: ABE

QUESTION 7

A company uses Dynamics 365 Sales.

You need to email a quote to a customer.

When user interface option should you use?

A. Assign

B. Form Editor

C. Print Quote for Customer

D. Share

Correct Answer: C

QUESTION 8

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. Assign the record to User2.

B. Grant User2 the stakeholder role.

C. Add User2 to the Owner team.

D. Add User2 to an Access team.

Correct Answer: D

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:

1.

Grant User2 the security role

2.

Instruct User2 to follow the record

3.

Add User2 to the Sales team

QUESTION 9

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.

Correct Answer: BD

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

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QUESTION 10

HOTSPOT

You need to configure the RFQ Won/Loss chart.

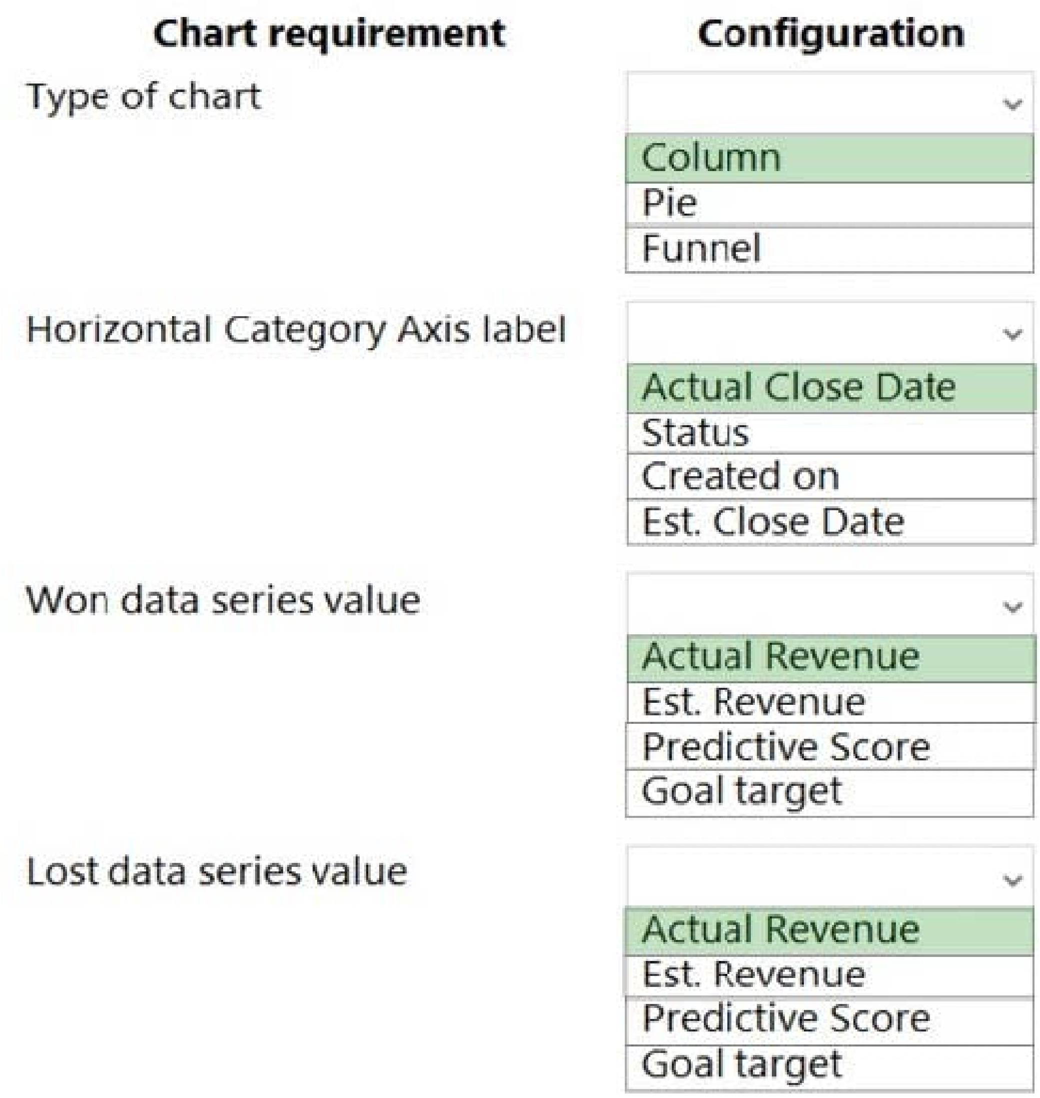
How should you configure the chart? To answer, select the appropriate options in the answer area.

NOTE: Each correct selection is worth one point.

Hot Area:

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

Correct Answer:



QUESTION 11

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

You need to find all opportunities that include the product.

What should you use?

A. Quick Find

B. Relevance Search

C. Categorized Search

D. Advanced find

Correct Answer: A

QUESTION 12

DRAG DROP

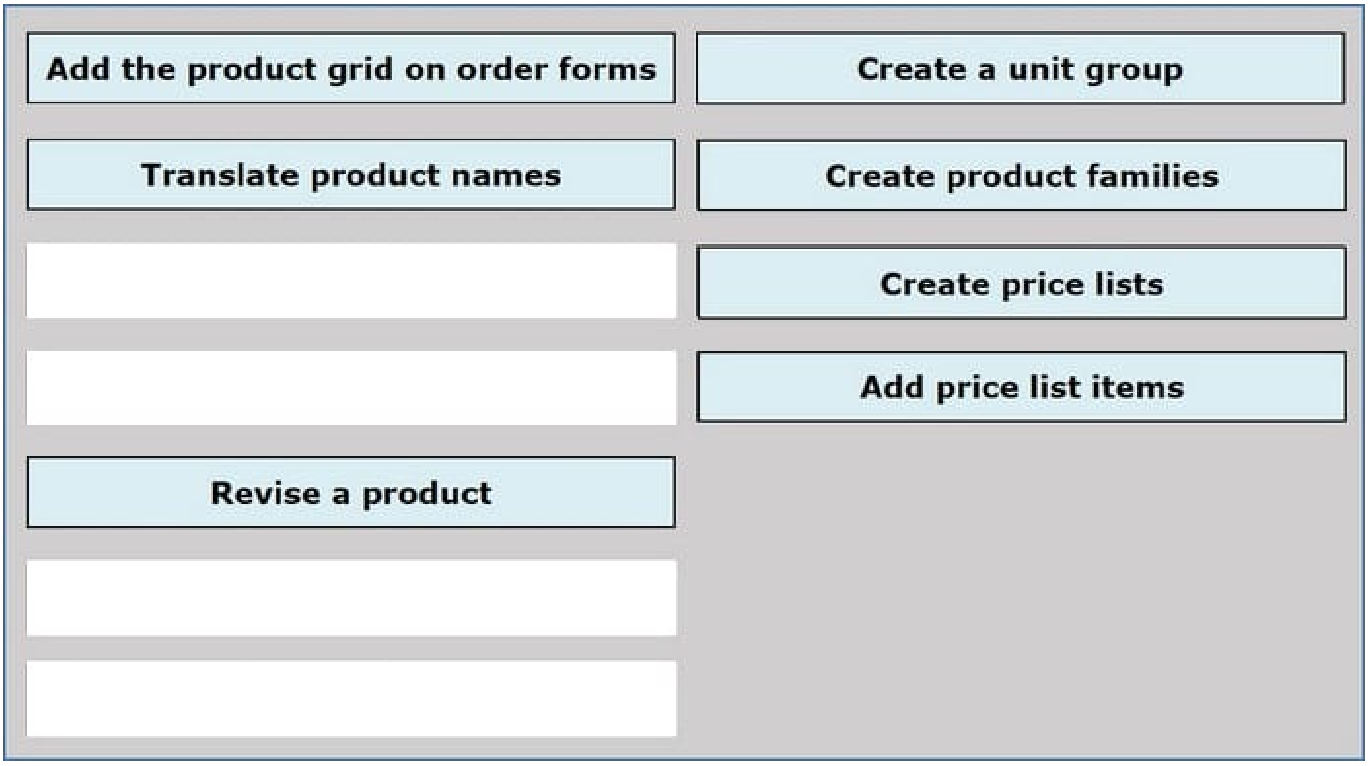
You are a sales manager at an international company using Dynamics 365 Sales.

You need to set up the product catalog.

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

Select and Place:

Correct Answer:



QUESTION 13

HOTSPOT

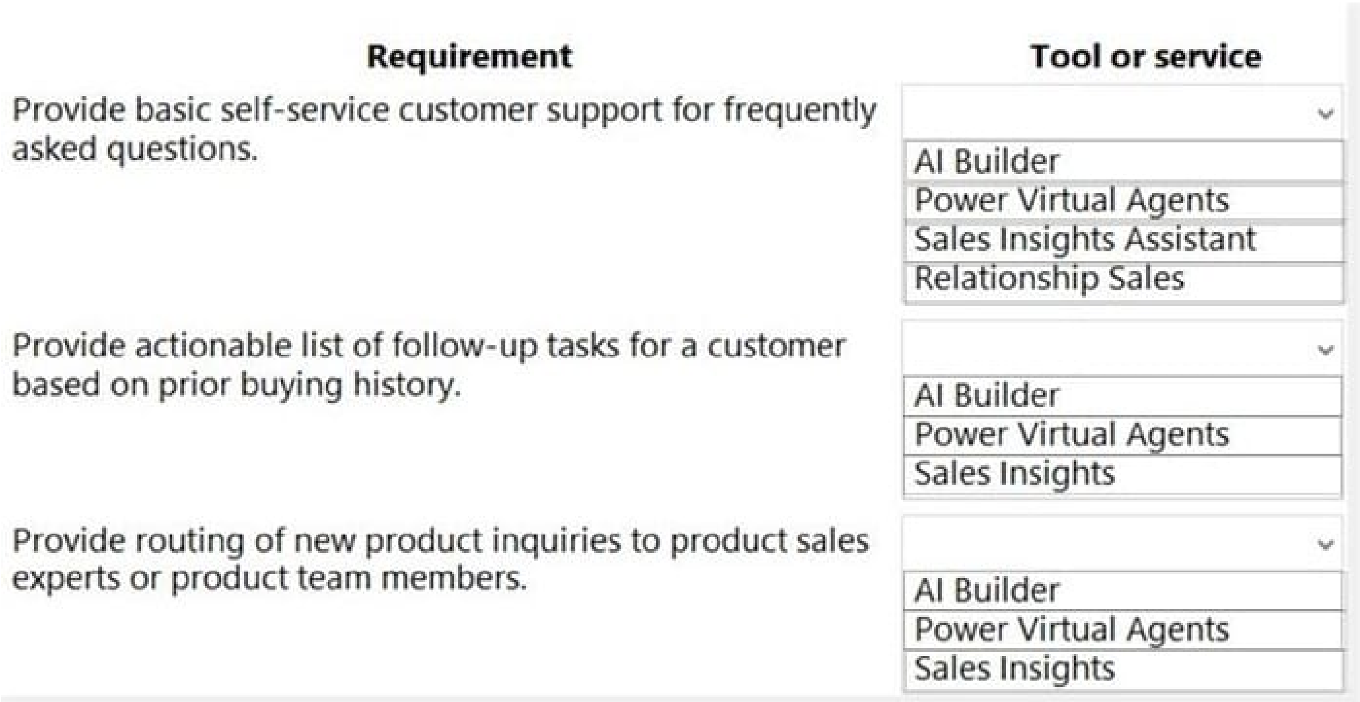
A company is implementing Dynamics 365 Sales.

You need to determine which tool or service to recommend for the company\\'s requirements.

Which tool or service should you recommend to meet each requirement? To answer, select the appropriate options in the answer area.

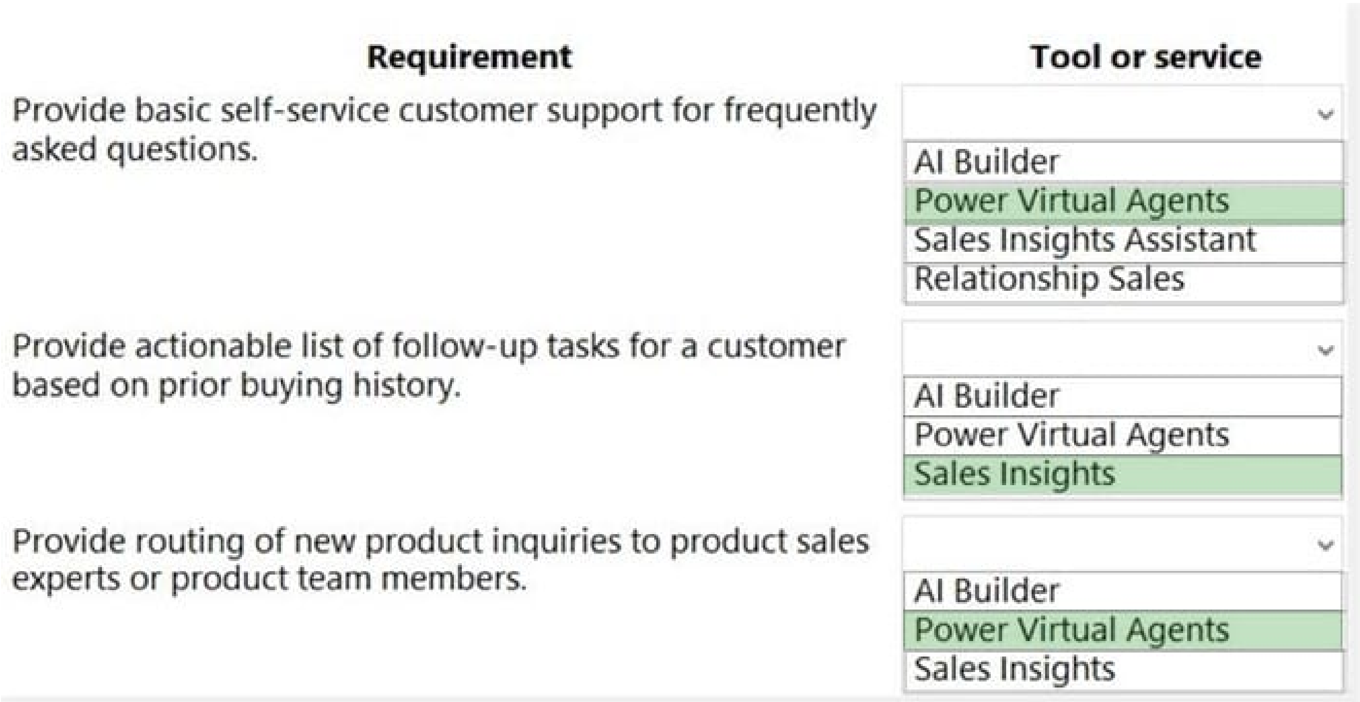
NOTE: Each correct selection is worth one point.

Hot Area:



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

Correct Answer:



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

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

QUESTION 14

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:

1.

Call patients to remind them about upcoming appointments.

2.

Update patient contact information. What should you create?

A. a task flow

B. a business rule

C. a calendar

D. an on-demand workflow

Correct Answer: A

QUESTION 15

HOTSPOT

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.

Hot Area:

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

Correct Answer:

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

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

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